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ANALYTICAL ESSAY

"The More, the Merrier": Three Ways of Case Universe Extension—Reflections on Bringing Shia into Islamism Studies

Morten Valbjørn
Aarhus University, Denmark

AND

Jeroen Gunning
King's College London, United Kingdom
Aarhus University, Denmark
London School of Economics and Political Science, United Kingdom

One of the fundamental questions of social science concerns the subject of scope conditions. A field of study can grow around a set of empirical puzzles, making generalized assertions without reflecting on whether the field covers all possible instances. This becomes particularly acute when sociopolitical changes have led to a diversification of cases. This paper takes the case of Islamism studies, which has suffered from a major blind spot: a (mostly) unacknowledged Sunni-centrism in the way broader claims about Islamism are often drawn from a (narrow) Sunni case universe. Although calls for bringing in the "other Islamists" have increased, so far there has been limited discussion of why and how an inclusion of Shia can enrich our overall understanding of Islamism and politico-religious actors more broadly. Drawing on experiences from other fields that have witnessed an expansion of their case universe, such as democratization, social movement, and international studies, the paper shows how an agreement in principle to expand the case universe does not necessarily translate into a consensus on why and how case expansion can strengthen and expand the field. Based on a novel typology for the rationales, methods, and outcomes for case extension, the paper proposes three different ideal-typical ways inclusion of Shia Islamists can enrich the field of Islamism studies, with important implications for how we think about case extension and knowledge production more broadly. In addition to case extension offering new case material to test classic hypotheses about Islamism (*theory-testing*), the paper shows that broadening the case universe and greater dialogue between the research communities—in this case around Sunni and Shia Islamism—can generate novel research puzzles (*theory-development*) or give

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rise to more fundamental (self-)reflections on the study of the subject—here Islamism—as such (*meta-theorizing*).

Resumen Una de las preguntas fundamentales de la ciencia social se refiere a la cuestión de las condiciones de alcance. Un campo de estudio puede crecer en torno a un conjunto de enigmas empíricos, haciendo afirmaciones generalizadas sin llegar a reflexionar con respecto a si el campo cubre todos los casos posibles. Esta situación se agudiza, especialmente, cuando los cambios sociopolíticos han llevado a una diversificación de los casos. Este artículo utiliza el caso de los estudios sobre el islamismo, que ha adolecido de un importante punto ciego: un centrismo sunita, el cual (en su mayoría) no ha sido reconocido en la forma en que las afirmaciones más amplias sobre el islamismo se extraen principalmente de un (estrecho) universo de casos suníes. Aunque han aumentado los llamamientos para incorporar a los ≪otros islamistas≫, hasta ahora el debate con respecto a por qué y cómo la inclusión de los chiitas puede enriquecer nuestra comprensión general sobre el islamismo y los actores político-religiosos en general ha sido limitado El artículo se basa en experiencias vividas en otros campos, que han sido testigos de una expansión de su universo de casos, como los estudios internacionales, la democratización y los movimientos sociales, y demuestra cómo, en principio, un acuerdo para expandir el universo de casos no se traduce necesariamente en un consenso sobre por qué y cómo la expansión de casos puede fortalecer y expandir el campo. El artículo parte de la base de una tipología novedosa para los fundamentos, métodos y resultados de la extensión de casos, y propone tres formas ideales-típicas diferentes en que la inclusión de los islamistas chiitas puede enriquecer el campo de los estudios sobre el islamismo. Esto tiene implicaciones importantes con relación a la forma en que pensamos sobre la extensión de casos y la producción de conocimiento en general. El artículo ofrece nuevo material de caso con el fin de poner a prueba hipótesis clásicas sobre el islamismo (prueba de teorías) y, además, demuestra que la ampliación del universo de casos y un mayor diálogo entre las comunidades de investigación (en este caso en torno al islamismo suní y chiita) pueden generar nuevos dilemas de investigación (desarrollo de teorías) o dar lugar a (auto)reflexiones más fundamentales sobre el estudio del tema (en este caso, el islamismo) como tal (meta-teorización).

Résumé En sciences sociales, l'une des questions les plus fondamentales porte sur les conditions du champ d'étude. Un champ d'étude peut naître autour d'un ensemble d'énigmes empiriques, en émettant des affirmations généralisées sans se préoccuper du fait que le champ couvre ou non tous les cas possibles. Cette situation devient tout à fait saillante quand les transformations sociopolitiques ont engendré une diversification des cas. Cet article s'intéresse au cas des études islamistes, qui comporte un angle mort non négligeable : un sunnicentrisme (majoritairement) inavoué. En effet, les affirmations plus générales quant à l'islamisme procèdent principalement d'une constellation (étroite) de cas sunnites. Bien que l'on en appelle de plus en plus à prendre en compte les ≪ autres islamistes ≫, jusqu'ici, l'on a peu discuté des raisons et de la manière qu'une inclusion des chiites pourrait enrichir notre compréhension globale de l'islamisme et des acteurs politico-religieux au sens large. Se fondant sur des expériences issues d'autres domaines qui ont connu une expansion de la constellation des cas, comme les études internationales, de la démocratisation et des mouvements sociaux, l'article montre qu'un accord de principe sur l'élargissement de la constellation de cas ne se traduit pas nécessairement par un consensus quant aux raisons et à la manière dons l'élargissement des cas peut renforcer un champ d'étude et l'élargir. À partir d'une typologie inédite des logiques, méthodes et issues de l'élargissement des cas, l'article propose trois manières typiques/idéales dont l'inclusion des chiites peut enrichir le domaine des études de l'islamisme, celles-ci

s'accompagnant d'implications importantes par rapport à la façon dont on envisage l'élargissement des cas et la production des connaissances au sens large. Outre le fait que l'élargissement des cas propose de nouveaux supports afin d'évaluer les hypothèses classiques à propos de l'islamisme (évaluation de théories), l'article montre qu'un élargissement de la constellation des cas et un renforcement du dialogue entre les communautés de recherche—dans ce cas, à propos des sunnites et des chiites—peut générer de nouvelles énigmes pour la recherche (élaboration de théories) ou donner lieu à des (auto)réflexions plus fondamentales quant à l'étude de l'objet—ici, l'islamisme—en tant que tel (métathéorisation).

Keywords: case extension, Islamism studies, Shia Islamists
Palabras clave: Extensión de caso, Estudios islamistas, islamistas chiitas
Mots clés: élargissement des cas, études de l'islamisme, islamistes chiites

Introduction

One of the fundamental questions of social science concerns the subject of scope conditions. Fields of study can grow around a series of empirical puzzles and well-studied cases, without necessarily reflecting on whether general claims made based on a specific subset of puzzles and cases cover all possible instances. This becomes particularly acute when sociopolitical changes have led to a diversification of puzzles and cases. Drawing on insights from case extensions in democratization, social movement, and international studies, this paper takes the case of Islamism studies, which straddles multiple fields, including international studies, and offers a systematic reflection on when, why, and how expanding the case universe, currently dominated by Sunni Islamists, to include Shia can strengthen and deepen Islamism studies. The framework we develop will be relevant to case extension in social science more broadly.

Islamist movements have not only been one of the core interests of Middle Eastern Studies for decades but have also increasingly become the subject of broader literatures. Islamist movements have come to feature centrally in international studies, whether on global politics, international security, the state, democratization, protest, revolution, or civil war. They have similarly taken center stage in studies on religion and politics, for instance, in the inclusion-moderation debate, which originated in studies of the evolution of Communist and Catholic parties in Western democracies. However, the Islamist movements that feature in these debates are predominantly Sunni. Shia Islamists have mostly been ignored in these debates while studies on Shia Islamists have largely run on parallel tracks, with little engagement with core debates among those studying Islamism. There have been growing calls for "bringing the Other Islamists" into Islamism studies—and by extension, into broader debates that include a focus on Islamism (Valbjørn 2017a; Lynch 2017c; Patel 2019; Valbjørn and Gunning 2021). But there has been little discussion on why or how they should be brought in, and what outcomes should be envisaged. This paper belongs in the realm of meta-studies, providing a critical overview of the field of Islamism studies and suggesting future research agendas based on current blind spots (Zhao 1991). It contributes to scholarship on Islamism in international and Middle Eastern studies and in broader debates on, e.g., religion and politics or political parties, which are increasingly interested in Islamism. But its findings will also be relevant for how scholars think about scope conditions in knowledge production more generally. The paper proposes a novel framework for thinking about case universe expansion and examines three different ways in which bringing in Shia Islamists can enrich and potentially transform the existing study of Islamism—

with important implications for broader thematic studies on religion and politics and knowledge production more generally.

The first part of the article provides a brief overview of how the study of Islamism has evolved, focusing mostly on the Middle East (West Asia and North Africa) as one of the main areas of interest for Islamism studies and Shia studies more narrowly. It shows how this field, despite having become multifaceted over the years, has grown relatively narrow in its focus on Sunni Islamists, and how this bias has become increasingly untenable as Shia Islamists and Shia/Sunni distinctions have become more visible and increasingly difficult to neglect over the past two decades.

Based on the observation that there has been no systematic reflection on why and how inclusion of (insights from the research on) Shia Islamists can contribute to Islamism studies, the second part of the article identifies three ways through which a broadening of the case universe can enrich the study of Islamism, drawing on insights from other fields that have undergone case expansion, principally international, democratization, and social movement studies. In addition to offering new empirical case material to test classic hypotheses and settle well-known disputes on Islamism (*theory-testing*), a broadening of the case universe and a greater dialogue between the research communities around Sunni and Shia Islamism may also generate completely novel research puzzles or new "twists" to well-known theoretical disputes (*theory-developing*). Finally, it can give rise to meta-theoretical (self-) reflections on fundamental assumptions regarding the study of Islamism as such (*meta-theorizing*).

The study of Islamism is highly contested, including regarding the basic question of how to define Islamism and its relation to related concepts such as jihadism, Salafism, (neo)fundamentalism, or post-Islamism. In many ways, the term qualifies as what W.B. Gallie (1956) once coined an "essentially contested concept": well-known, considered of general importance and moral or political significance, and most will have an intuitive understanding of its meaning. However, the term will have multiple interpretations and be mired in endless controversy over its proper use on the part of its users. These controversies, following Gallie, cannot be settled by simple appeal to empirical evidence or logic alone, as the concept's meaning will remain perpetually open to interpretation and debate. For this reason, recognition of a concept as essentially contested implies acknowledgement of rival interpretations as not only logically possible but also of permanent critical value to one's own interpretation of the concept.

For this reason, we refrain from providing a concise, settled definition of Islamism in this paper. Since one of our goals is precisely to examine different understandings of what characterizes Islamism and their implications for its study, we consciously start from a broad and fluid understanding of what might be associated with Islamism, including any movement or literature described as Islamist or as pertaining to Islamists. As a rough initial delineation, we conceptualize Islamism as a modern political ideology associated with social, political, or armed activism concerned with the implementation of an ideological vision of Islam in the state or in society. This broad conceptualization encompasses widely different forms of Islamist groups, some participating in formal politics, some using violence, and others rejecting formal politics or violence or both. It also allows us to include both Shia movements, whose degree of "Islamistness" may be contested by scholars writing outside Islamism studies (Haddad 2022), and jihadi and Salafi groups, which some contrast to Islamism as separate categories while others treat them as subcategories of Islamism (Roy 1994; Wagemakers 2021a). Like many others, we recognize the need for subcategorization, but instead of starting with a certain existing typology—most of which are derived from the study of *Sunni* Islamism and may therefore not necessarily apply to *Shia* Islamists—the article discusses different bids for typologies and identifies some of the challenges such typologizations face.

A Multifaceted Yet Narrow Debate

Islamism and the relationship between religion and politics have for the past 50 years had a prominent place in Middle Eastern studies and international studies more broadly—and even more so in the last decade as scholars have debated how Islamists have influenced and been influenced by the various dramatic events unfolding in the wake of the Arab uprisings.

Although much has been written about Islamism, there is no agreement on how best to understand and study Islamism. Even the basic question of what Islamism actually is remains highly contested (for overviews, see Barzegar and Martin 2009; Volpi 2010). There is no agreement on whether one should refer to Islamism, political Islam, Islamic fundamentalism, or, as Schwedler has recently suggested, degrees of "Islamistness" (Schwedler 2018; Cesari 2021). How Islamism relates to other phenomena such as post-Islamism, neo-fundamentalism, and jihadism also remains disputed (Roy 1994; Kepel 2000; Bayat 2013b; Wagemakers 2021a). There is even disagreement on whether Islamism actually exists "out there," or whether it was "invented" by Western scholars just as Orientalists, following Said, created the notion of the "Orient" (Volpi 2010, 8; Roy 2012; see also Said 1978).

However, if one agrees with Geertz (1973, 29) that "progress is marked less by perfection of consensus than by refinement of debate," this lack of agreement does not mean that Islamism research has not made progress. Regarding the question of what role Islam plays in Islamism, the debate has moved beyond both Orientalist essentialism, where Islamism is reduced to a supposed Islamic essence, and instrumentalism, where religion is perceived as a pure epiphenomenon. The current debate is marked by an interest in exploring how Islam plays a role for Islamists without essentializing it or ignoring the significance of contextual factors (Meijer 2005; Cottee 2017; Gunning 2021).

This nuance can also be found in the evolution of the so-called "lumper/splitter" problematique (Lynch 2017b). Rather than lumping all Islamists together into a unified monolith, most scholars today recognize both that Islamism comes in various shapes—ranging from Ennahda to al-Qaeda (AQ)—and that Islamists change across time and space. For instance, the Egyptian Muslim Brotherhood's participation in elections since the 1980s and the creation of the Freedom and Justice Party after Hosni Mubarak's fall in 2011, mark a departure from the original skepticism of the Brotherhood's founder, Hassan al-Banna, toward political parties and electoral politics (Wagemakers 2022). Similarly, it is recognized that Islamists do not all share the same goals, engage in widely differing forms of activism, and have divergent views on the relationship between Islam and democracy/nationalism/violence, etc., just as they do not necessarily react in the same way to inclusion or exclusion from formal politics. Attention to the "many faces of Islamism" has given rise to a debate among the "splitters" on how best to divide the Islamist scene. Simplistic distinctions between "radicals" versus "moderates" have been replaced by various more sophisticated typologies (e.g., ICG 2005; Hegghammer 2009; Ayoob and Lussier 2020), which have been revised in the wake of the Arab uprisings (e.g., Hafez 2020; Stenersen 2020; Wagemakers 2021a).

While the Islamism debate has become increasingly nuanced and multifaceted, it has a major blind spot: It is mainly Sunni-centric, paying limited attention to Shia Islamists in their various variants. Just as few Sunni Islamists have traditionally emphasized that they are Sunni, having perceived themselves as Islamists *as such*, the prevalent Sunni bias among Islamism scholars is also rarely explicitly acknowledged. When reviewing Islamism research, it quickly becomes apparent that it has predominantly concerned the various branches of the Muslim Brotherhood and related "Ikhwanist" movements,[1] different (quietist, political, militant) forms of Salafism, or AQ and Islamic State (IS)—all Islamist movements that, despite great differences, have in common that they are Sunni (Valbjørn and Gunning 2021).

[1] "Ikhwanism" refers to Muslim Brotherhood-inspired as well as Brotherhood movements (Mandaville 2020).

A similar Sunni-centrism emerges in the major theoretical debates on Islamism. This applies, for example, to discussions about whether Islamists have an "electoral advantage," what happens if they come to power through the ballot box, or whether and how Islamists change if they participate in formal politics (Schwedler 2011; Cammett and Luong 2014; Wuthrich and Ciftci 2020). These issues have received renewed attention since the Arab uprisings. Yet, as Patel (2019) has noted, the focus has been predominantly on Sunni Islamist parties, especially in Tunisia, Egypt, and Morocco, rather than, for instance, the many Shia Islamist parties in Iraq. In their discussion of Hegghammer's (2020) book on "the rise of global jihad," El-Jaichi and Sheikh (2020, 6) have similarly observed a "narrow Sunni-centric view," which ignores the role transnational Shia "revivalists" played at the time of the Iranian revolution in the construction of pan-Islamist "sensibilities and subjectivities."

The "lumper/splitter" debate has similarly focused predominantly on divisions within Sunni Islamism. Where specific Shia Islamist groups are included, there is limited interest in examining whether—and how—the Shia/Sunni distinction could be relevant. Hizbullah has generally been categorized either as "radical"/"militant" and lumped together with both AQ and Hamas, or—in more nuanced typologies—as an example of "Islamist national resistance" or "third worldist Islamism" similar to Hamas (but very different from AQ) (e.g., Ayoob and Lussier 2020; also Strindberg and Wärn 2005; Fettweis 2009). By doing so, differences between the two movements are downplayed, with little attention paid to whether their Shia/Sunni-ness plays a role, if any, in their differences (Daher 2018; Gunning 2021). Moreover, to the extent that doctrinal and ideological differences have been considered in the typology debate, they have typically concerned the Salafi versus Ikhwani distinction (e.g., Utvik 2014).

The Other Islamists

Islamism studies did not always neglect Shia Islamism or possible Sunni/Shia distinctions. After the Iranian revolution, there was considerable interest in Shia Islam(ism) and whether it should be considered more or less political, quietist, revolutionary, or militant than Sunni Islam(ism) (for overview, see Kalantari 2021; also Keddie 1983; McEoin 1984; Cole and Keddie 1986; Kramer 1987). To the extent that Shia Islam(ism) had received attention before 1979, the typical assumption was that Sunni Muslims were more activist, political, and revolutionary than the supposedly quietist Shia, who were presumed to be waiting for the return of the twelfth Imam, considering all existing rulers as illegitimate. Shia clergy were similarly considered apolitical. Unsurprisingly, this reading changed dramatically after 1979. Shia Islam was now perceived as a "protest religion," revolutionary by nature. Ruhollah Khomeini's theory of *velayat-e faqih* (guardianship of the jurisprudent) was seen as a product of a distinctly Shia debate about the ideal form of government in the absence of the twelfth Imam. The story of the martyrdom of the Prophet's grandson Hussein at the Battle of Karbala in 680 was considered a key motivator for fighting injustice and martyrdom. As Kramer (1987) put it in the introduction to *Shi'ism, Resistance and Revolution*, "when they could, Shi'is often rebelled; Islamic history is strewn with Shi'i uprisings."

In the broader debate on Islamism, however, interest in Shia Islam(ism) soon waned. To the extent that Shia Islamists were studied, the focus was mainly on Hizbullah or Iran, whereas other Shia Islamists, in places like Kuwait, Bahrain, Saudi Arabia, Afghanistan, or Pakistan, became what Fuller and Francke (1999), referring to the Arab Shia, once described as "the forgotten Muslims." Shia Islamists continued to be studied within the field of Shia studies, which is much smaller and more recent than the broader scholarship on Islam and Islamism. The birth of Shia Studies as a distinct (Western-language) academic discipline is sometimes only dated to 1968, when the Strasbourg colloquium "Le Shi'ism Imamate" took place; ac-

cording to Newman (2013, 2), before the Iranian revolution, "one row of a very small-sized bookshelf easily held all the Western-language works related to Shiism," which moreover were mainly devoted to medieval Islamic philosophy or the Iranian Safavid dynasty. In the decades after the Iranian revolution, scholars within Shia Studies have produced a range of sophisticated works on contemporary Shiism, including the various forms of Shia Islamism, but insights from these studies have not been given much attention in the broader Islamism debate. As Lynch (2017a) noted, the two literatures have often moved along different methodological and analytical tracks, with "studies of Shi'a Islamism and of Iran typically featur[ing] far more intricate intellectual histories and exegesis of religious texts than do most studies of Sunni Islamism." With the exception of Hamas/Hizbullah, comparative studies of Shia and Sunni Islamist movements have moreover been rare (exceptions include Yadav 2013; Dingel 2016). Against this background, it is hardly surprising that a 2005 report calling on Islamism scholars not only to pay more attention to Shia but also to investigate whether and, if so, how different forms of Sunni and Shia Islamism might differ gained little traction (ICG 2005).

The Sunni focus among Islamism scholars is partly understandable. Demographically, Sunnis make up a much larger proportion of Muslims globally as well as regionally—10–13 percent globally and 11–14 percent in West Asia and North Africa, according to Pew (2009)[2]—so it is natural to expect there to be far more Sunni than Shia Islamists, making it less surprising that the former have been given more attention. In addition, it is important to recall that in the early days of modern Islamism, the dividing line between religious and secular forces played a far more prominent role than possible sectarian differences. Thus, the distinction between these two branches of Islam was rarely addressed by the precursors and early figures of modern Islamism, such as Jamal al-Din al-Afghani or al-Banna (Hamid 2021). Further, from 1980 till 2003, one of the main states with a large Shia population (Iraq) completely closed down political space for Shia Islamists, while Shia Islamists were to varying degrees suppressed in much of the Gulf, especially during the late 1980s, limiting potential case material for mainstream Islamism scholars even further.

There are also examples of Shia and Sunni Islamists throughout history having been mutually influenced, thus encouraging scholars to look for commonalities. Al-Afghani, who according to some had a Shia background and education (though this is disputed) (Moazzam 1984; Keddie 2014), planted the seeds for some of the ideas that subsequently inspired the (Sunni) Muslim Brotherhood (although Afghani's relationship to Islamism is contested, he is often presented as its precursor; e.g., Rahnema 2005; Mandaville 2020). Khomeini translated Sunni political theorist Abul Ala Mawdudi into Farsi, and Muhammad Baqir al-Sadr and the (predominantly Shia) Hizb al-Dawa in Iraq were inspired by the Muslim Brotherhood's founder, al-Banna (Bohdan 2020; Louër 2020). While Sunni Islamism inspired some of the ideological currents culminating in the Iranian revolution, Khomeini's revolutionary message also resonated among the region's Sunni Islamists (Ataie 2021; Ataie, Lefèvre, and Matthiesen 2021; Hamid 2021). Comparing Hamas and Hizbullah, one also finds many common features, not least through their shared emphasis on resistance, which is why some group them together as "Islamist national resistance" (Ayoob and Lussier 2020; for a critique, see Daher 2018). It is likewise useful to recall that, at the time of the 2006 war with Israel, Hassan Nasrallah, Hizbullah's then Secretary-General, enjoyed great popularity regionally in the Sunni Arab world (Valbjørn and Bank 2012).

There are thus various reasons for scholarship on Islamism to mainly focus on Sunnis and, where Shia are included, on what unites rather than what divides them. Yet, Sunni and Shia Islamist groups not only have predominantly Sunni and

[2]Exact figures for Shia and Sunni Muslims are contested; the Pew report (2009) cites other estimates of Shia making up to 20 percent of the global Muslim population.

Shia memberships, respectively. In certain periods and contexts, they also differ in other regards. As we have discussed in greater length elsewhere, Shia Islamists have been observed to differ from their Sunni counterparts in terms of their origins (in 1950s Iraq versus 1920s Egypt), their evolution and spread (e.g., armed transnational Shia Islamists carry out attacks regionally, rather than globally, as Sunni jihadi-Salafis have done), their communal focus, the content and role of symbolism, and the structure and degree of external state support (Gunning et al. 2024; Valbjørn, Gunning, and Lefèvre 2024). When it comes to organizational structures, Shia and Sunni Islamists also typically differ, for instance, regarding the prominence of clerics, and political visions of governance, such as *velayat-e faqih*, are often distinctly Shia and would be unthinkable in this precise form within Sunni Islamism (Gunning et al. 2024). Shia and Sunni Islamists have also often reacted very differently to the post-2011 Arab uprisings. In Bahrain, Shia and Sunni Islamists were divided on whether they should support or oppose the protests; in Kuwait, Shia Islamists turned out to be the most loyalist members of the parliament, whereas Sunni Islamists were prominent in the opposition; and, during the Syrian civil war, Shia and Sunni armed Islamists fought on opposite sides (Matthiesen 2013; Albloshi 2016; Ruiz de Elvira and Belhadj 2018; Freer 2019).

In recent decades, the scholarly neglect of Shia Islamists and possible Shia/Sunni differences has become even more untenable. Although Shia constitute a minority among the world's Muslims, in West Asia they constitute a majority in Iran, Iraq, and Bahrain, and considerable sections of the population in places like Lebanon, Yemen, and Kuwait, and to a lesser extent Syria, Saudi Arabia, and Turkey. Beyond this area, Shia are also present in significant numbers in Afghanistan, Pakistan, India, Azerbaijan, Nigeria, and Tanzania (Pew 2009). There are furthermore usually Shia *Islamists* in these countries, some of whom have not only become increasingly visible in recent years but also more explicitly "Shia." In Iraq, Shia Islamists have, since Saddam Hussein's fall in 2003, played a leading role in elections and government—resulting in what Haddad (2020) has termed "Shia-centric state-building"—and Shia (and Sunni) Islamists have emphasized their sect-specific identities in both party politics and violent conflict (Anzalone 2016; Edwards 2018). Beyond Iraq, Shia Islamists have become more visible across the region, including Kuwait, Bahrain, Yemen, Saudi Arabia, and Lebanon (Matthiesen 2015; Brandt 2017; Daher 2019; Freer 2021). As the region became more sectarianized during the 2000s–2010s (Hashemi and Postel 2017), these movements have often made their Shia-ness more explicit, including among transnational armed Shia Islamists (Smyth 2015; Anzalone 2016). This also applies to some of their Sunni colleagues, most evidently in states where both Shia and Sunni Islamists are found, such as Bahrain, Syria, Yemen, Iraq, Kuwait, Lebanon, and Saudi Arabia, but also, paradoxically, in overwhelmingly Sunni states such as Jordan or Egypt, where Sunni Islamists have competed internally to be perceived as most anti-Shia (Saleh and Kraetzschmar 2015; Wagemakers 2021b). By the early 2020s, sectarianism may have become less prominent in regional politics, but this de-sectarianization has by no means made Shia Islamists irrelevant (Mabon 2019). For instance, in order to grasp the regional reactions to Hamas's October 7, 2023 attacks and Israel's war on Gaza, it is noteworthy that armed attacks in support of Hamas have been carried out almost exclusively by Shia Islamists in places like Lebanon, Iraq, or Yemen (Gunning and Valbjørn 2025; Matthiesen 2024; Valbjørn, Bank, and Darwich 2024).

The sectarianization of regional politics in the 2010s has also left its mark on the broader fields of Middle Eastern and international studies. Both have experienced "sectarian waves" in the form of a wealth of publications discussing the nature, causes, and consequences of sectarianism, including Shia Islamists (for an overview, see Valbjørn 2021). However, within the field of Islamism scholarship, one still finds a strong Sunni bias. Thus, much of the scholarly debate on how Islamists have influenced and have been influenced by the Arab uprisings, as well as the var-

	Theory-testing 1st order change	Theory-developing 2nd order change	Meta-theorizing 3rd order change
Q&A	Old questions and old (but firmer) answers	New answers to old questions or new research puzzles	New meta-theoretical questions and answers
Why	Test existing competing hypotheses with new material, clarify scope conditions	Propose new hypotheses, variables, causes for existing or additional problematiques	Question, change or extend existing core concepts or assumptions
How	Add new cases as 'robustness check'	Revise/upgrade specific debates by reframing problems and practices	Trigger a meta-reflection on the schemata underlying the system
Role of new cases	Provide new 'raw' data	Bring attention to blind spots & introduce new perspectives	Challenge underlying core assumptions
Outcome	Leaves field of study basically the same	Changes *within* the field	Changes *of* the field

Figure 1. Three rationales for and levels of change

ious attempts to rethink the study of Islamism, have largely continued to be about Sunni Islamists (for instance, see Lynch 2014; Hamid and McCants 2017; al-Anani 2021).

Three Ways the Other Islamists Can Enrich the Islamism Debate

In recent years there has been a growing recognition that Islamism studies has been predominantly Sunni-centric, leading to calls for bringing in the Shia (Valbjørn 2017a; Lynch 2017c; Patel 2019; Valbjørn and Gunning 2021). However, so far there has been no systematic reflection on how a greater inclusion of (insights from the research on) Shia Islamists can enrich the study of Islamism—and broader thematic debates which include a focus on Islamism. This is important not just for learning more about Shia Islamism but for clarifying why/how expansion of the case universe will strengthen the field's theoretical and empirical basis, and deepen our overall understanding of Islamism, including Sunni Islamists.

An agreement in principle that it is time to expand Islamism studies' case universe and to devote more attention to the Shia/Sunni dimension does not necessarily mean that there is agreement on why—and how—greater exchange of insights on Sunni and Shia Islamism can contribute to Islamism studies or broader thematic debates. Why should the case universe be expanded? How should it be expanded? And what outcomes should be envisaged?

Drawing on other fields that have undergone dramatic case extension, such as democratization, international, and social movement studies, we suggest that there are at least three ideal-typical ways in which case universe expansion can contribute to field development, with different rationales, *modi operandi*, and levels of envisioned change (see Figure 1).

At its most basic level—what we call *theory-testing*—expansion allows a field to apply its questions to new cases to make its theories more robust. The questions

asked and answers sought remain broadly the same; they just gain a firmer basis for making generalizations beyond the original case universe or clarifying the theories' scope conditions (Valbjørn 2017b, 292). The envisioned outcome is, in the language of organizational theory, *first-order change*—"to do things better within the existing logic, which itself remains unchanged" (Termeer, Dewulf, and Biesbroek 2017, 561). To illustrate with an example from democratization studies (for brief illustrations of changes in international and social movement studies, see footnotes at the end of each paragraph), the inclusion of Eastern Europe, which is comparable in terms of size of expansion to including Shia in Islamism studies, helped to reconfirm that economic development increased the likelihood of democratic government while "poor economic performance increases the likelihood of authoritarian breakdown" (Geddes 1999).[3]

A second, more dynamic contribution—*theory-developing*—occurs when the inclusion of new cases leads to revising, nuancing, or extending the field's theories, research puzzles, and explanations without changing its fundamental assumptions. New research puzzles may be introduced, and the answers to existing questions may change, highlighting new actors, factors, or causal relations, possibly leading to a revision of the field's scope conditions (Valbjørn 2017b, 292). The envisioned outcome is *second-order change*, which "breaks through mind-sets and opens them up for discussion by reframing problems and practices and understanding them from a different perspective" (Termeer, Dewulf, and Biesbroek 2017, 561). Sticking with the example of democratization studies, the inclusion of new waves of democratization led to an expansion of the types of democratic transition under consideration, new categories of actors (e.g., military cliques) and mechanisms (e.g., mass mobilization), and an expansion of recognized causes (O'Donnell and Schmitter 1986; Geddes 1999; McFaul 2002).[4]

A third, more fundamental transformation—what we call *meta-theorizing*—occurs when the inclusion of new cases challenges not just the answers and questions asked but also the field's core concepts and foci. Here, case extension seeks a Gademerian "fusion of horizons" between the field and new case studies, transforming both the field and our understanding of the new cases (Ayyash 2010, 114; Valbjørn 2017b, 294). The effect is *third-order change*, triggering a reflection "on the schemata underlying the system" and pursuing change at "the meta level" (Termeer, Dewulf, and Biesbroek 2017, 561). In democratization studies, seeing democracy both advance and decline forced the field to question what constitutes democratization and what the focus of democratization research should be, with some expanding their focus to contestation in authoritarian regimes and beyond, others calling for reflection on the "quality" of democracy (Anderson 2006; Heller 2009; Valbjørn 2015; Stokke 2018).[5]

[3] In international studies, an example of first-order change is Stephen Walt's (1987) testing whether the balance-of-power hypothesis applies outside its original European context. Similarly, the inclusion of cases beyond the Global North in social movement studies confirmed that grievances alone cannot explain movement mobilization, as it is necessary to include both resource mobilization and political opportunities and both material needs and identity (Wickham 2004; Meijer 2005; Fadaee 2017).

[4] In international studies, Amitav Acharya's (2014, 652–3) comparison of the classical Mediterranean region, from which international studies have typically drawn inspiration, and the classical Indian Ocean highlights different kinds of power dynamics (a lesser role for hegemonic and material power, a greater role for local agency and localized ideas and institutions), raising new questions and puzzles. Inclusion of the Global South likewise led social movement scholars to consider a greater variety of movements, protest repertoires, and political systems, and to pay (more) attention to colonialism and its continuing legacies, kinship networks, the interplay between material needs and identity, and the importance of "threats" alongside "opportunities" as key drivers of contention (Goodwin 1997; Leenders and Heydemann 2012; Fadaee 2017).

[5] In international studies, Waters (2000) and Rosow (2003) argue that the inclusion of insights from (non-Western) area studies can fundamentally transform the Eurocentric field of IR and give rise to "New International Studies" or "anti-disciplinary global studies." Studies of social movements in the Global South similarly instigated a rethinking of what constitutes social movements and how to conceptualize the state, state-society relations, and civil society in a postcolonial context (Foweraker 1995; Tuğal 2009; Bayat 2013a; Fadaee 2017).

In the following, we will use these three ideal-typical ways of case universe expansion to reflect on how including the Shia into the broader Islamist debate can change Islamism studies.

Theory-Testing: New Empirical Input for Well-Known Disputes

The first and most modest contribution is that an expansion of the case universe to include Shia Islamists will provide new empirical case material. This can be valuable for testing or specifying the scope of well-known hypotheses or trying to settle classic controversies concerning aspects of specific forms of Islamism in electoral politics and armed conflicts.

An example is the classic question of whether inclusion leads to moderation, which, along with its twin thesis concerning exclusion-radicalization, has received much attention in the Islamism debate (for an overview, see Schwedler 2011). Over the years, the original thesis—that Islamists are "moderated" by being included, "radicalized" by being excluded—has been nuanced in countless ways. Scholars have explored whether moderation concerns attitudes or behavior, what moderation means, whether it is about acceptance of democracy or more broadly of the existing political system, whether different forms and degrees of repression have different effects, including possibly moderation, whether different types of Islamists react similarly to the same form of inclusion/exclusion, and how the possible causal mechanisms between inclusion and moderation actually work (Buehler 2013; Pahwa 2017; Freer 2018; Wuthrich and Ciftci 2020).

Over the past decade, the inclusion/moderation and, especially since 2013, the exclusion/radicalization thesis have received renewed attention (Schwedler 2017). This has been reflected in a large number of studies, especially of the "usual suspects" in the form of Tunisia's Ennahda and the Egyptian Muslim Brotherhood, but also Egypt's "politicized" Salafis, Jordan's Muslim Brotherhood, and the Moroccan PJD (e.g., Hamid and McCants 2017; al-Anani 2021). Shia Islamists, by contrast, have largely been overlooked in this debate, despite there being numerous important cases of political inclusion and exclusion. An exception is Lebanon's Hizbullah, which has been part of formal politics since 1992 and part of the government since 2005 (until recently). Yet appraisals of the effects of political inclusion have remained largely limited to scholarship on Hizbullah (and often without linking findings to the more recent versions of the inclusion-moderation debate in the broader Islamism scholarship) (Harik 2004; Alagha 2006; Berti 2011; exceptions include Yadav 2013). Iraq, with two decades of rich case material regarding how inclusion in "formal politics" has affected Shia (as well as Sunni) Islamists, has surprisingly also not been central to this debate (Patel 2019). Diverse Shia Islamist movements such as Hizb al-Dawa, SCIRI/ISCI, and the Sadrists, which, in their various forms, have experienced exclusion (pre-2003) as well as inclusion (post-2003), have over the years undergone enormous changes, providing powerful material that could confirm or challenge existing conclusions or set scope conditions (Robin-D'Cruz 2019; Kotinsly 2022; Saad 2022; Fantappie 2023).

Greater attention to Shia Islamist parties in not just Lebanon and Iraq but also Kuwait and Bahrain can also contribute to other well-known discussions about Islamism in formal politics. By including insights on Shia Islamists, it might be possible to substantiate or challenge some of the existing conclusions on a possible Islamist "electoral advantage" that are based mainly on studies from Egypt and Tunisia (Cammett and Luong 2014; Grewal et al. 2019).[6] A good example is Freer and Mahmood's (2024) revisiting this debate for Shia Islamists in Bahrain, Iraq, Kuwait, and Lebanon. Kuwait and Bahrain can furthermore contribute to the discussion on how Islamist parties act in (semi-)autocratic elections where "victory is not an option"

[6]Cammett and Luong have one footnote on Shia, referencing two articles on Hizbullah, but Hizbullah is not mentioned in the text.

(Brown 2012) and how this affects internal divisions—a debate that has largely revolved around Sunni cases. Two decades of experience with Iraqi and Lebanese Shia Islamist parties in government are equally relevant for the often quite speculative debate about what happens if Islamists gain power through the ballot box repeatedly. The case of (and literature on) Iran's Shia Islamists having been in power for decades and managing (tightly controlled) elections can extend this debate.

If one looks at the role of Islamists in conflicts, an expansion of the case universe will also offer relevant new material. The most comprehensive dataset of armed Sunni and Shia Islamist groups to date (Dataset of Armed Sunni and Shia Islamist Groups, or DASSIG) has added 88 Shia Islamist groups to the 11 groups in existing widely used datasets, bringing the total to 99, almost on a par with the 129 Sunni Islamist groups in existing datasets. Adding armed Shia Islamist groups thus almost doubles the case universe (Lefèvre, Gunning, and Valbjørn 2024a,b). Rich case material can be found in, for example, the conflicts in Syria, Yemen, and Iraq, where armed Shia Islamists would be relevant to include both in classic debates about religion and violence and the more recent discussion on whether there is a particular "Islamist (dis)advantage at war" (Lynch 2019; Valbjørn and Gunning 2021; Lynch, Gunning, and Valbjørn 2024). The same applies to discussions around the role of armed wings and resistance narratives in political and electoral contestation. This has traditionally been studied primarily through studies of Hamas and Hizbullah—though typically without reflecting much on their Sunni- and Shia-ness. The Iraqi scene has much to contribute to this debate (Calculli 2021), adding variations in, e.g., the relationship between party and armed wing, ideology, and transnational support versus a more national focus (Rudolf 2018; Lecocq 2020).

Theory-Development: Raising New Theoretical Puzzles and Twisting Old Ones

While adding Shia Islamists to existing debates can help to make theories more robust, they are also likely to bring up new research puzzles or give new twists to existing ones. For instance, adding Lebanon's, Iraq's, or Kuwait's Shia Islamist parties to the inclusion-moderation debate raises questions about the role of transnational networks and state sponsorship—two factors that have been mostly overlooked within the debate to date. To illustrate this second-order change, we give examples at three different levels of analysis: community, state, and transnational.

Regarding the first, the relationship between Islamism and sectarianism has not received much attention in the traditional Islamism debate, even while Middle Eastern and international studies experienced "sectarian waves." The sectarianization of Middle Eastern politics over the past two decades (Hashemi and Postel 2017) raises questions about whether and how Islamists have been influenced by, and themselves influenced, this development—and what this tells us about the role of religion, ideology, identity, and contextual factors such as social networks and political institutions for understanding both Islamism and sectarian politics. This is important for Shia Islamists who, because of Shia demographic distribution, have emerged exclusively in multisectarian contexts. But many Sunni Islamists similarly operate in multisectarian contexts. For instance, over half of the armed Sunni Islamist groups created between 1945 and 2021 have emerged in multisectarian states (Lefèvre, Gunning, and Valbjørn 2024a).

One key question the inclusion of Shia Islamists raises is under what conditions Islamists become more/less sectarian. During the 1960s and 1970s, Shia Islamist scholars such as Khomeini and Baqir al-Sadr drew on Sunni Islamists such as al-Banna and Mawdudi and promoted a pan-Islamic vision. During the 1980s, Iran inspired and supported many Sunni Islamist groups, and nearly three-quarters of all armed Islamist groups created during that decade cooperated across sect (Lefèvre, Gunning, and Valbjørn 2024a). Yet growing tensions between Iran and Saudi Arabia and Pakistan led to the latter sponsoring particularly anti-Shia Sunni Islamists (e.g.,

Salafi and Deobandi), and the more recent wars in Iraq, Syria, and Yemen have further fueled intersectarian conflict (Anzalone 2016; Hassan 2016). Islamist movements came to frame themselves and their opponents more often in sect-specific terms—instead of drawing on a more general Islamic symbolic universe. Shia and Sunni Islamists found themselves more often on opposing sides in conflicts—in Yemen, Syria, and Iraq, but also in Bahrain during the 2011 protests (Matthiesen 2013)—and actors previously widely perceived as "Arab" regionally, such as Hizbullah, came to be seen more as "Shia" actors (Valbjørn and Bank 2012; Saouli 2013).

These developments do not only raise the largely unexplored question of the extent to which, when, and why Islamist movements emphasize their "Shia/Sunniness" more than their "Islamistness." Considering that sectarianism draws on religion, it also poses the question of what (different) roles (different) Islamists have played in (de)sectarianization, how that compares to non-Islamist actors, and whether some Islamists have been more central than others. PEW's surveys on attitudes among the world's Muslims do not reveal any clear relation between attitudes toward Islamism and sectarianism. Furthermore, as Haddad (2020, 271–4) has pointed out, there are "secular sectarians" just as there are explicitly anti-sectarian Islamists, who in rhetoric and behavior work across sectarian boundaries. Moreover, sectarian dynamics may play out differently for Shia compared to Sunnis, given demographic differences and the way these have interacted with state formation and nation-building. Some, for example, link the greater communal focus among Shia Islamists to these demographic-political disparities (Jabar 2003; Moghadam 2011; Haddad 2021). Shia Islamists furthermore have displayed different levels of Shia-ness across time (Kotinsly 2022; Laval 2023). As for intra-Islamist differences, though one might expect to find stronger sectarian attitudes among more doctrinal variants of Islamism, the picture is more ambiguous. On the one hand, many Brotherhood variants have traditionally not focused on the Shia/Sunni distinction, whereas many Salafists, drawing on medieval Islamic scholar Ibn Taymiyyah and Wahhabism, deny that Shias are "real" Muslims. On the other, the Syrian Muslim Brotherhood became vociferously anti-Shia in the 1980s after Iran's alliance with the Assad regime; and, comparing IS and AQ, both of which are typically labeled "jihadi Salafists," the former is far more prominently anti-Shia, with AQ famously distancing itself from Abu Musab al-Zarqawi's attempts to provoke a sectarian civil war in Iraq (Steinberg 2009; Hafez 2020; Hamid 2021).

Turning to the second level, the state, Shia Islamists add new twists to the question of the relationship between Islamism and the state. A common argument within Islamism studies is that Islamism is a by-product of modernity, colonialism, and the postcolonial state (Zubaida 1989; Hallaq 2013; Burgat 2019). This argument holds true for Shia Islamists as well. However, there are at least two important twists to this argument when one adds Shia to the picture, as differences in demographics and in the relationship between the state and Shia and Sunni communities—and particularly their religious leadership—gave rise to different outcomes.

One difference concerns the relationship between Islamists and formal religious institutions, which is impacted by the relationship between these institutions and the state. Islamism scholarship has predominantly characterized (Sunni) Islamism as critical of formal religious institutions or even anti-clerical (Roy 1994, 36; Denoeux 2002, 63; Bokhari and Senzai 2013, 135). In sharp contrast, Shia Islamists have historically had a close relationship with formal Shia religious institutions. Although there is variation among both Sunnis and Shia, this difference appears to be in part linked to differences in the way religious institutions were co-opted by the state. While colonial and postcolonial states often sought to co-opt Sunni religious institutions, especially in Arab states—though with different levels of success (Baskan 2011)—Shia religious institutions were broadly speaking not incorporated or incorporated much later, yet often treated as the state's interlocutors with Shia communities. This facilitated the emergence of an anti-status quo clergy who could

provide leadership for Shia Islamists protesting the status quo from the 1950s onward (Jabar 2003; Louër 2020, 49–55). The effects of processes of modernization, furthermore, helped to create a Shia clerical stratum less dependent on the landed elite and thus more available for anti-status quo leadership but also feeling threatened by the secular movements and typically secular state elites that had emerged (Abisaab and Abisaab 2014; Gunning 2021).

Sunni Islamists were also anti-secular—but the co-option of (part of) the Sunni clergy by the state complicated the relationship with oppositional Islamists, and the charge against secularism was mostly led by lay Islamists. Other factors, such as Sunni religious institutions not having a monopoly on religious scholarship and the boundary between "cleric" and "lay" being blurred for Sunnis, also played a part. For Shia, the spread of clerically-centered ideologies like *velayat-e faqih* was instrumental. But the relationship between state and religious structures has arguably contributed to creating conditions that facilitated or hindered the emergence of clerically-led Islamists (and ideologies), and this should be explored further for both Shia and Sunnis. Zeghal (1999), for instance, shows that the co-optation of al-Azhar University, Egypt's leading religious institution, and the modernization of its curriculum created conditions for the emergence of a (peripheral) Sunni Islamist clerical stratum in the 1980s. In South Asia, Zaman (2002) demonstrates that co-option of Sunni religious institutions was far less successful than in Arab states, but though he discusses various clerical Sunni Islamist leaders, it is not clear whether these two phenomena are causally linked and how other factors affected this relationship. Bringing in Shia Islamists thus adds new twists to classic debates about the relationship between Islamism and the state.

A related twist concerns the debate over whether Islamists are anti-status quo. Islamism studies have historically characterized Islamists as broadly anti-regime. There are exceptions, such as, historically, the Jordanian Brotherhood and, more recently, Islamist parties in government (Wagemakers 2022; Albloshi, Freer, and Valbjørn 2025). But most of the focus has been on Islamists as opposition parties or rebels (Lynch 2014; Kalyvas 2018; Lynch and Schwedler 2020; Robinson 2020). Shia Islamists, by contrast, have gone from being seen as quintessentially revolutionary following the 1979 Iranian revolution to becoming overwhelmingly pro-regime in the past two decades, most notably in Iraq, Syria, and Lebanon, but also in Kuwait. Historically, Kuwait's Sunni Islamists were closer to the regime compared to the Shia, among whom some even turned to armed opposition in the 1980s. However, Kuwait's Shia Islamists should not be considered oppositional to the Sunni regime per se. While Sunni Islamist groups have become reliably oppositional, from the late 2000s Shia Islamists in the Kuwaiti parliament have been among the most loyalist, even during the 2011 protests (Albloshi, Freer, and Valbjørn 2025). Similarly, looking at the subset of armed transnational Islamist groups, a recent study found that no Sunni groups started out as pro-regime while only 11 percent became so over time; by contrast, 52 percent of Shia began as pro-regime and 38 percent became so over time, bringing the total to 90 percent (Valbjørn, Gunning, and Lefèvre 2024). This difference is largely down to the proliferation of new pro-regime Shia Islamist groups in the 2010s, which can be explained by numerous contextual factors, including the capture of the Iraqi state by Shia Islamist parties following Saddam Hussein's overthrow, the increasing integration of Shia religious structures into the state, the threat of IS, the shift in Iranian foreign policy interests, and the alignment between the Syrian and Iranian regimes and Iraqi Shia Islamists in the war in Syria. But these differences and changes over time call for further comparative research.

Turning to debates in international studies on transnational dynamics, our third level of analysis, there are various discussions to which an analysis of Shia Islamists could provide new twists. One concerns the "foreign fighter" debate, which has become increasingly focused on Islamists (Malet 2013; Bakke 2014; Byman 2019). For Islamists, this debate dates the phenomenon back to the so-called "Afghan Arabs"

in the 1979–1989 war in Afghanistan, who subsequently played a key role in the emergence of AQ and the so-called "global jihad" (Hegghammer 2020). As such, it has overlooked historic cases of Shia foreign fighters, such as those in the Iran–Iraq war of the 1980s, but also recent examples, like the influx of Shia foreign fighters into Syria from Iraq, Lebanon, Afghanistan, and Pakistan, amongst others. Including Shia foreign fighters would challenge the debate in at least three ways: the central role played by Iran in supporting mobilization, the fact that many receive salaries, and the absence of the emergence of "global jihadi" groups comparable to AQ and IS following the return of foreign fighters (Lefèvre 2025 Forthcoming). In the existing literature, paid fighters enjoying state support are classified as mercenaries and excluded from the debate on the assumption that they are not primarily motivated by ideology and simply act on behalf of the sponsoring state (Hegghammer 2010). Yet IS reportedly paid its foreign fighters (Basit 2014), ideology appears to play a role for both Sunni and Shia, and Sunni foreign fighters in Syria and Afghanistan, amongst others, enjoyed (levels of) state support (Baylouny and Mullins 2017; Karlén and Rauta 2023). Thus, including Shia adds new twists to existing questions—for *both* Shia and Sunni Islamists—including about whether all foreign fighters are motivated and mobilized in the same way, how a unipolar versus multipolar state support structure affects mobilization (only Iran versus multiple Sunni states), and whether and why returning Sunni and Shia foreign fighters act differently (Gade, Hafez, and Gabbay 2019; Reiff 2020).

Including Shia Islamists also adds new twists to the debate on "global/transnational jihadism." While it has been observed that there is no Shia equivalent of AQ (Robinson 2020), that does not mean that armed Shia Islamists have not been transnational. Although armed transnational Shia Islamists, like their Sunni counterparts, can draw on global networks (Scharbrodt and Shanneik 2020), they have been much more regionally focused in their attacks than Sunni Islamists, who have attacked globally, bringing attention to the need for a more fine-grained distinction between global and subglobal forms of transnationalism (Valbjørn, Gunning, and Lefèvre 2024). Moreover, they have undergone a different kind of transnationalization. Louër, for instance, has argued that, whereas twentieth-century globalization played a large role in globalizing Sunni jihadis (Bergen 2002, 200; Roy 2010), Shia transnationalism expanded much earlier and with a more structured organization through the significant growth of transnational Shia religious networks in the mid-nineteenth century, giving Shia Islamists (armed and nonarmed) an advantage in building transnational organizations in the twentieth century (Louër 2008, 3, 297). The communal focus of many transnational Shia Islamists, meanwhile, and the importance of local dynamics in shaping their behavior (Moghadam 2011; Gunning and Valbjørn 2025; Gunning et al. 2024) show similarities with the interplay between local and transnational factors in shaping Sunni Islamists, e.g., in the Sahel (Campana and Jourde 2017; Thurston 2020), encouraging comparisons to delineate and explain similarities and differences. The central role played by Iranian support for transnational armed Shia Islamists further challenges the (partially erroneous) assumption that transnational Islamists lack state sponsorship, in contrast to, e.g., left-wing transnational revolutionaries (Kalyvas 2018; for critique and cases of state support for both Sunni and Shia Islamists, see San-Akca 2016; Ostovar 2018; Gade, Hafez, and Gabbay 2019; Valbjørn, Gunning, and Lefèvre 2024). Thus, including Shia Islamists raises new questions about the drivers, manifestations, and types of armed transnational Islamism for both Sunni and Shia.

Meta-Theorizing

In addition to making findings more robust or adding new puzzles, a third contribution of case universe expansion is to spark meta-theoretical (self-)reflections on basic assumptions regarding the study of Islamism as such. Three debates would

benefit especially: (i) an *ontological* debate on what constitutes Islamism if we include Shia; (ii) a *typological* debate on how we should distinguish between Islamism(s), and (iii) an *epistemological* debate on what role religion plays in comparison to other contextual factors when explaining the origins and evolution of Islamism.

The *first* contribution relates to the basic but still highly contested ontological question of what Islamism actually is: How to define Islamism in a way that, rather than being based on the "proto-typical modern Islamist movement" of the Egyptian Brotherhood (Mandaville 2020, 3), is attentive to what different varieties of Sunni and Shia Islamists have in common. How does one define Islamism so that, on the one hand, it covers the whole spectrum from (armed Sunni) AQ and (armed Shia) Asa'ib Ahl al-Haqq to (political Shia) al-Wefaq and (political Sunni) Ennahda, and, on the other, enables one to distinguish between Islamists and non-Islamists, especially in a context of "Muslim politics" (Eickelman and Piscatori 1996), where many political actors, including regimes, draw on Islamic frames of reference.

Here Ahmed's *What is Islam?* (2016, 72–84; italics in original) provides important pointers, both for how to deal with questions of unity and diversity and for how an in-depth reflection on a subgroup can inform our broader understanding. Rather than looking for "unity in the face of diversity," Ahmed calls for "conceptualizing unity in the face of *outright contradiction*," reconceptualizing Islam through "the *contradictory normative claims* made. . . by Muslims about *what is Islam*" to find "*a common paradigm*. . . by which Muslims (and others) imagined, conceptualized, valorized, articulated, and gave mutually communicable *meaning* to their lives in terms of Islam." Reconceptualizing Islam through an exploration of the contradictions found within what he terms the "Balkans-to-Bengal" subregion of Islam, Ahmed uses this reworked conceptualization to view "other periods and regions. . . in a new light and with the benefit of a new perspective, which will enable us to *see things that we have been unable to see before*." In the same way, reflecting on what is so Islamist about Shia Islamists can help shed light on what may constitute a common Islamist paradigm through the contradictions expressed, enabling us to see what "we have been unable to see before" in Islamism writ large.

Over time, there have been countless suggestions for how to define Islamism (e.g., Roy 1994; Kepel 2000; Denoeux 2002; Barzegar and Martin 2009; Wagemakers 2021a). Common features among these—in other regards very different—attempts at characterizing Islamists are the centrality of shari'ah law and the assumption of what Roy (1994, 58) called "Islamist anti-clericalism." Islamism is usually described as a modern lay movement led by doctors, teachers, and engineers (e.g., Hassan al-Banna, Sayyid Qutb, Ayman al-Zawahiri, Usama bin Laden), with clerics playing a marginal role and often perceived with skepticism. This conceptualization of Islamism might fit the Egyptian Brotherhood, on which many of the studies on the (allegedly) general evolution of Islamism are based—although even here clergy played a more central role than this conceptualization allows (Zeghal 1999), as was the case with other Ikhwani groups (e.g., for Hamas, see Gunning 2007; for Ennahda, e.g., Vericat 2016; Merone 2019; Gana and Sigillò 2023). But it does not fit the many Salafi groups built around key clerical leaders (Wagemakers 2016; Wehrey and Boukhars 2019) and is even less fitting for Shia Islamists. As Roy (1994, 2) acknowledges, while Shia Islamists "share many elements with the Muslim Brotherhood," they are "more clerical." Louër (2020, 49) even characterizes Shia Islamism as a "clerical ideology," arguing that they have been virtually "obsessed with the question of institutionalizing the ulama's role in government," most prominently in *velayat-e faqih*. Indeed, clerics such as Muhammed Baqir al-Sadr, Muhammad Sadiq al-Sadr, Musa al-Sadr, Mohammad Hussein Fadlallah, Ruhollah Khomeini, and Mohammad al-Shirazi have played prominent roles in Shia Islamist movements (as have clerics in Iran's postrevolutionary government). Yet some Shia Islamists, such as Iraq's Da'wa Party, have become less clerically-centered (Hasan 2019). Including

Shia thus raises questions for both Shia and Sunni Islamists about the role of clerics and why and how this varies.

As for shari'ah, calls for its implementation are not as central in Shia Islamist discourse as they are for their Sunni counterparts. In Lebanon and Iraq, for example, the rhetoric of Shia Islamist MPs has been markedly devoid of calls for shari'ah and religious references more broadly (el-Bizri 1999; Hasan 2021; Haddad 2022). Kuwait's Shia Islamists are, *in principle*, in favor of the implementation of shari'ah. However, *in practice*, they have not advocated for its implementation, since they acknowledge that, due to the sect-specific demographics of Kuwait, it would likely be a Sunni interpretation of shari'ah. Thus, they have rather focused on the protection of conservative Islamic values more broadly (Albloshi, Freer, and Valbjørn 2025). This raises the question of whether Shia Islamists are more Shia than Islamist in some contexts and/or more focused on other matters, such as resistance, inequality, or class, rather than the "usual" Islamist issues identified in Islamism studies (el-Bizri 1999; Thanassis and Jiyad 2022).

In short, by paying more attention to the Shia, it becomes necessary to reconsider what "Islamism" means and whether many of the existing definitions are better at capturing Sunni rather than Shia variants. Paraphrasing Ahmed, it also raises questions about how to conceptualize Islamism in the face of these contradictions—between Shia and Sunni Islamists but also among them, including contradictions among Sunnis that become more visible by including Shia—and what constitutes a common paradigm of *Islamist* life and thought that encompasses these contradictions for anyone actively pursuing the implementation of an ideologically delineated vision of Islam in the state or in society.

A *second* contribution would be to the typology debate, which is related to the "lumper/splitter" debate (Lynch 2017b). Today, most scholars agree that it is important to distinguish between different forms of Islamism, with a wealth of suggestions regarding what an Islamist typology might look like. However, most of these typologies, including post-2011 (Stenersen 2020), are based on Sunni Islamist movements, and neither the Shia/Sunni distinction nor variances between Shia Islamist movements—e.g., between those following *velayat-e faqih*, those with alternative transnational visions such as the Shirazis, or more nationally focused groups such as the Sadrists (Alami 2018; Louër 2020)—are generally given much attention.

There are various ways in which Shia can be integrated into the typology debate. One strategy would be to try to place Shia Islamists in existing Sunni-centric typologies. To the extent that Shia Islamist movements have been included at all, they have usually been grouped into preexisting typologies. Hizbullah's being grouped together with Hamas under "Islamist national resistance" is usually done without giving much attention to, and thus automatically downplaying, any possible sect-related differences between the two movements (e.g., Fettweis 2009; Ayoob and Lussier 2020). A further problem is that some categories, such as "takfiri," "Salafi," or "global," do not fit Shia Islamists well, and categories such as "nation-oriented" cannot distinguish those that focus primarily on a subnational community—a distinction that can be particularly significant in multisectarian contexts.

A second approach would be to add distinct "Shia" categories to existing Sunni-centric typologies. Among those who have paid more attention to the Shia/Sunni distinction, some have added one catch-all "Shia" category (Gambill 2007; Bonnefoy 2009). However, lumping all Shia Islamists together prevents recognition that Shia, like Sunni Islamists, come in many different shapes (Robin-D'Cruz 2023; Gunning et al. 2024). In Iraq, scholars have pointed to important differences between how the Sadrist movement and other Shia Islamists engage in electoral politics (Robin-D'Cruz 2023), and in Kuwait there is a notable difference between the followers of Khomeini's *velayat-e faqih* and the followers of Ayatollah al-Shirazi. A more promising approach would be to develop a typology distinguishing among Shia Islamists (Gunning et al. 2024; Valbjørn, Gunning, and Lefèvre 2024). But just adding

multiple Shia categories, without rethinking the original Sunni-centric ones, makes it difficult to acknowledge similarities between Shia and Sunni Islamists and risks reifying the Shia/Sunni distinction.

A third strategy is to engage in a fundamental rethink of existing typologies and develop a new way of typologizing that takes Shia Islamists into account without reifying presumed Shia/Sunni differences. This will also change how we typologize Sunni Islamists. For instance, if a distinction is made between *umma*-, nation-, and (subnational) community-oriented Islamists, Sunnis can also be found within the third category (e.g., Iraqi Kurdish or Iranian Baluchi Islamists), and not just among the existing *umma*- and nation-oriented categories (although much depends on how one defines "nation" in contested contexts). Similarly, if one distinguishes between armed groups carrying out attacks globally and those focusing their attacks regionally—global versus transnational—only the latter will (currently) include both Sunni and Shia Islamists (Valbjørn, Gunning, and Lefèvre 2024). A third example would be the distinction between clergy- and lay-led movements, with many Salafi movements falling under the former category and some Shia under the latter.

A *third* contribution of including Shia Islamists would be to the epistemological debate on what role religion plays in comparison to various contextual factors—or rather, which kind of "religious" and which kind of "contextual" factors one should be particularly attentive to when explaining the origins and evolution of Islamism. The basic question of how to approach Islamism as a phenomenon has sometimes been presented as a clash between essentialists (or Orientalists) versus contextualists (or materialists) (Yavuz 2003; Sayyid 2015). The former camp is depicted (caricature-like) as perceiving Islamists as like no other actor and arguing that they must be approached on their own distinct Islamic terms. Islam becomes a master explanatory variable, and the origins of Islamism are supposed to be found way back in history (Lewis 1976; Wood 2015). The latter camp, conversely, is depicted (again, caricature-like) as considering Islamists like any other actor and perceiving Islam mainly as a tool for modern rational actors maximizing their material or political interests (Baylouny and Mullins 2017; Walter 2017). They can accordingly be studied with general social science tools focusing on the socioeconomic context and the political opportunity structures within which Islamists are situated, and Islamism as a phenomenon—whether Shia or Sunni (where this distinction is considered)—is mainly seen as a by-product of modernity, colonialism, and the postcolonial state (Zubaida 1989; Hallaq 2013; Burgat 2019).

Much of the contemporary debate on Islamism has, however, moved beyond these two positions and instead perceives Islamists as similar but not necessarily identical to any other actor. Here, the aim is to acknowledge that Islam matters for Islamists without reducing religion to an ahistorical essence or ignoring socioeconomic and political factors (Eickelman and Piscatori 1996; Munson 2001; Yavuz 2003; Cottee 2017). This alternative position is sometimes labeled constructivist, but it is a broad and very diverse category, lacking consensus on how this ambition is best realized (Sheikh, Valbjørn, and Krause 2023). For instance, there have been intense debates on the relative importance of socioeconomic factors (and their psychological effect), religion/ideology, and political factors, including the legacy of colonialism; the (in)famous disagreements between Roy, Kepel, and Burgat—three French scholars of Islamism—constitute a prominent example (Kepel and Jardin 2017; Roy 2017; Burgat 2019; Gabon 2020). A case universe expansion that brings in the Shia can enrich in multiple ways this constructivist debate on which kind of religious *and* contextual factors one should be particularly attentive to when examining the origins and evolution of (different forms of) Islamism.

Just as the expansion of democratization studies to include first Catholic, then Orthodox, Muslim, Hindu, and Buddhist cases gave scholars an opportunity to reflect more deeply on the role of (different kinds of) religion(s) in democratization processes (Stepan 2000; Casanova 2001), the inclusion of groups to the Islamist case

universe that belong to a different religious subcommunity—with (often) different religious interpretations, networks, and institutional structures—offers an opportunity to disaggregate the traditional focus on the role of "religion" or "Islam" per se in shaping Islamists' behavior. Following Louër's (2020, 45) argument that Shia and Sunni Muslims have each produced their own versions of Islamism, with different sources, debates, and solutions, a comparison of Sunni and Shia Islamists can bring attention to possible differences in religious "content," asking whether it is "Islam" that matters, or a more specific version of "Sunni Islam" or "Shia Islam," and if so, how. Consider, for instance, the centrality of discussions about the "Rightly-Guided Caliphs" who ruled following Prophet Mohammed's death, or the views of medieval Sunni scholars Ibn Taymiyyah and al-Ghazali on authority (and Shia) among Sunni Islamists versus the centrality of discussions about the usurpation of the Prophet's family's politico-religious authority by the "Rightly-Guided Caliphs," Hussein's martyrdom at Karbala, the infallibility of the Imams, the occultation of the twelfth Imam, and what this means for contemporary political authority among Shia Islamists. Thus, it may be not just that religion matters, but which version of Islam matters. Adding Shia Islamists to this debate widens the pool of different versions of Islam from the "usual (Sunni) suspects" of Ikhwanis versus Salafis to include a wider variety of interpretations of Islam by different types of Shia Islamists.

Greater attention to such diversity within Islam—and Islamism—furthermore raises the question of the extent to which doctrinal and religious differences, though different in content, function in the same way, or whether they produce significantly different outcomes—and how much this has to do with context rather than content. Some observers have argued that differences in how *ijtihad*—the independent interpretation of Islamic revelation and legal tradition—is practiced among Shia and Sunni clerics constitute an important reason for why clerics have played a more prominent role in Shia Islamism and why this field allegedly has been less fragmented than its Sunni counterpart (ICG 2005) (although there is more fragmentation than this argument allows for; see Gunning et al. 2024; Valbjørn, Gunning, and Lefèvre 2024). Others argue that, although Shia Islamists often use a quite different vocabulary from that used in the Sunni Islamist field, they are the product of the same kind of socioeconomic and political grievances and underlying problems (Robinson 2020, 17). And still others point to how the importance of Shia/Sunni differences has varied over time. For instance, Iraq's Hizb al-Dawa, which in the 1980s and 1990s appeared as distinctly Shia, was originally inspired by al-Banna and grew in part out of encounters with Iraqi Muslim Brothers (Laval 2023).

Against this background, it would be relevant, for instance, to compare Shia and Sunni Islamist parties in *the same context* to explore whether any differences in behavior are caused by their Shia/Sunni-ness or by other factors. For instance, does a particular type of political system, e.g., consociationalism, produce more sect-specific political parties, including Islamists? While this might be a factor in places like Iraq and Lebanon—although there are significant differences between the two—this can, however, not explain why the Islamist scene in nonconsociationalist states like Kuwait and Bahrain has also become divided between Shia and Sunni Islamists. Similarly one could ask whether particular types of authority, for instance, what in Bourdieusian terms would be called "prophetic authority," emerge under similar circumstances, e.g., after profound social rupture through war or occupation? One could argue that this might be the case for the emergence of Ahmad Yassin as leader of the Palestinian Muslim Brotherhood in the aftermath of the 1967 war and Israel's occupation of Gaza and the West Bank, and Muqtada al-Sadr in the aftermath of the United States-led invasion of Iraq. But this does not explain why other Islamist movements in Iraq and Palestine did not witness the same type of leadership mode (Gunning and Robin-D'Cruz 2024).

Equally pertinent would be to compare Sunni and Shia Islamists *in different contexts*—such as Islamist movements in different types of states (e.g., consociational, authoritarian, monarchical) or political parties in electoral settings versus armed groups in wars. Such a comparison would not only be useful for examining differences and similarities between Shia and Sunni Islamists. It would also enable a better understanding of whether the Shia/Sunni distinction is more important in some contexts than in others, and whether, for instance, Shia and Sunni political parties share more similarities with each other than with their armed "brothers" in conflict contexts. Or one could compare the supporters of Shia and Sunni Islamist political parties in different (types of) states to determine whether Shia supporters are more (dis)similar to their Sunni compatriots than to Shia supporters in a different (type of) state and reflect on what this says about the structural context versus religion debate and how religion interacts with contextual factors (Leber et al. 2022).

Conclusion

This paper has explored an example of how the extension of a case universe can, in quite different ways, contribute to knowledge production within a field. We started by showing that Islamism studies, despite being rich and nuanced, has suffered from a major blind spot for the past 30 years: a (mostly) unacknowledged Sunni-centrism and limited attention to Shia Islamists. General claims about Islamists have typically been made based on a relatively narrow set of Sunni cases, without sufficient reflection on whether the same would hold for Shia Islamists. In many instances this may indeed be the case. But it is important to explore this, as potential differences in interpretations and historical narratives of Islam, ideologies, identities, religious and political and social structures, demographics, external state sponsorship, etc., may result in Shia Islamists following different trajectories. Although the most obvious difference between Sunni and Shia is religious, the political, social, and economic contexts in which Shia Islamists operate are often very different from those most of their Sunni counterparts inhabit, thus offering a rich canvass for testing, extending, or even completely revising existing hypotheses about the role of beliefs, identities, social networks, institutions, etc.

While there has been growing attention to this blind spot, so far there has been limited discussion of why and how Shia Islamists should be included and how an expansion of the case universe can enrich the Islamist debate. As a first step in this effort, drawing on the impact of case extension in other fields, we have developed a novel three-way framework for identifying different rationales for, and possible outcomes of, case expansion: theory-testing, theory-development, and meta-theorizing. Theory testing aims at first-order change by increasing the case universe to test existing theories, make them more robust, and clarify scope conditions. Theory development takes this one step further, aiming at second-order change through exploring new questions and answers derived from diverging trajectories. Meta-theorizing involves third-order change through a fundamental rethink of core concepts and assumptions because of the addition of Shia Islamists. Each of these three approaches embodies different rationales for case expansion, different methods, and different outcomes.

Each of the three proposed ways points to future research themes, and this paper is a call to explore these further. These themes will be of interest to those studying Shia Islamists in comparative perspective within the context of Islamism studies. But they are also relevant to those studying Islamism, or religion and politics, social movements, political parties, or (civil) wars more broadly, in international studies and other fields, or, at a meta level, those interested in case extension in the social sciences. For instance, questions raised by studying Shia Islamists about the relationship between Islamists, clergy, and the state are of relevance to those

studying clerically-led Salafis or Ikhwani movements that are closely aligned with the state and formal religious institutions (e.g., Bahrain, Morocco, Saudi Arabia). More broadly, the inclusion of Shia can contribute to the debate on transnational actors and bring attention to the importance of distinguishing between the global and the transnational. Similarly, comparisons between Catholic and Islamist political parties would benefit from the inclusion of Shia, as the latter more closely align with Catholic parties in terms of their (changing) relationship with formal religious institutions. Even broader, our three-way framework also speaks to the larger issue of the different reasons for why case expansion may be important, the different ways one could go about it and the different outcomes one might envisage. Whichever route scholars take, our framework encourages them to be more explicit about what they focus on and why they do so, with what rationales and what implications.

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