



# **Etan Kohlberg's Historical Approach to Taqīyya (Dissimulation): Criticism and Examination of Incorrect Interpretations**

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## **Abstract**

Among the favorite topics between Orientalists is the controversial issue of Taqīyya between Shi'a and Sunni. Etan Kohlberg, a renowned scholar who research about Shi'a, has addressed this important topic in two articles. His discussion includes a range of narrative and historical issues, such as the position of Taqīyya among the fundamentals of belief in the Imamiyya School and the impact of this doctrine on Shi'a hadiths, such as the concealment of teachings and contradiction of narrations. Kohlberg, by introducing the claim of the inception of Taqīyya from the era of the Šādiqayn (AS), two in favor and opposing currents have emerged among the

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Imamiyya, analyzes that the sanctity of employing Taqīyya in some religious practices stems from the Shi'a Imams' sense of discrimination seeking. This descriptive-analytical article aims to focus on Etan Kohlberg's first article while incorporating some content from his second article to provide a comprehensive discussion on the topic of Taqīyya. Firstly, criticisms of Kohlberg's descriptive approach from opponents are reviewed and subsequently challenged. Overall, it is concluded that, contrary to Kohlberg's opinion, there is no contradiction in the Imamiyya approach to the principle of Taqīyya. Compliance or non-compliance with Taqīyya is dependent on the circumstances and is contingent upon the benefits and harms, which Kohlberg has overlooked.

**Keywords:** Imami Shi'a, Islamic Theology, Taqīyya, Preserving Religion, Preservation of Life, Etan Kohlberg

## Introduction

The exploration of differences among Islamic sects has always intrigued Orientalists, providing a platform for historical investigation as evident in numerous Oriental studies. Ta qīyya, a topic extensively examined by Muslims (For a list of works cf. Safari, 2002 AD/1381 SH: 28-34), has also been approached externally by Orientalists.<sup>1</sup> Etan Kohlberg stands out as one of the most productive Orientalists in this regard. His first work, "Some Imāmī Shi'i Views on Taqīyya," was published in 1975. After 45 years, Kohlberg's research on Taqīyya remains ongoing, and the result of his findings and analyses is reflected in an article titled "Taqīyya in Shi'i Theology and Religion," where Taqīyya is examined from various perspectives.

Kohlberg's interest in Taqīyya may stem from his view of Taqīyya as one of the distinguishing features of Imamiyya Shi'a from other

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1. For example, cf. Clarke, 2005: 46-63; also, for a list of works, cf. Akhlaqi, 2018 AD/1388 SH: the entire work.

Islamic sects, considering it a fundamental principle among the beliefs of the Imamiyya (Kohlberg, 1975: 395). Although Kohlberg used the term Taqīyya in his article, he used the combination of "Precautionary Dissimulation" for the English translation, while some researchers have used the combination of "Prudential Concealment" to refer to this meaning (Sachedina, 2010; also cf. Sözer, 2014: 57).

In summary, while Kohlberg has extensively collected opinions on Taqīyya in his two publications, his analyses have been prone to errors due to limited insight into various aspects of the topic. This paper mainly focuses on Kohlberg's first publication and highlights some of his fundamental errors. Additionally, some content from his second publication is also utilized to supplement the discussion. However, a comprehensive critique of his second publication would require an independent study due to its substantial volume.

## 1. Background

It should be noted that a critique of Kohlberg's first article has been published in issue 69 of the Journal of Hadith Sciences by the authors of this paper (Ma'aref et al., 2013 AD/1392 SH). The present study is enriched by adding new criticisms and changes, especially with the consideration of his second article on the subject.

## 2. Method

The present study critically evaluates Etan Kohlberg's viewpoint on Taqīyya, using a library-based descriptive-analytical method. It presents evidence from ancient hadith and theological texts, as well as attention to historical reports and the narration issuance context. The study aims to provide answers to these issues.

### 3. Discussion

The most critical criticisms of Etan Kohlberg's viewpoint can be categorized into six areas, which are discussed below:

#### 3.1. Expressing Criticisms of Shia Opponents about Taqīyyah

Kohlberg has quoted critics of Shi'a opponents who criticize Taqīyya in one section of his article (Kohlberg, 1975: 395). These criticisms can be summarized in three areas:

1) Imamiyya does not acknowledge the fundamental and undeniable facts that play a role in the construction of the first three caliphs; hence, when faced with irrefutable evidence of the legitimacy of Abū Bakr's caliphate from the Prophet, they resort to audacious arguments and attribute the Prophet's words to Taqīyya;

2) When Shi'as faces the fact that the laws and commandments of Abū Bakr, 'Umar, and 'Uthmān were accepted by Ali (AS), they attribute 'Alī's behavior to Taqīyya, while Ali (AS) was known for his courage and having many followers. If he felt that his rights had been violated, he would undoubtedly have fought against them;

3) One of the misuses of Taqīyya by Shi'as is to justify the marriage of Ummi Kulthūm, daughter of Ali with 'Umar. They don't want to accept the friendly relationship between Ali (AS) and 'Umar, which established after the marriage of Ummi Kulthūm. Therefore, Shi'as claim that Ali (AS) married off his daughter to 'Umar out of Taqīyya, whereas this marriage was not valid according to Islamic law, and Ummi Kulthūm did illegal matter while her knowledge of her father awareness. Kohlberg did not comment on these statements, but

the criticisms listed have no basis for the following reasons:

A) There is no reliable source in Shi'a or Sunni literature to support the legitimacy of Abū Bakr's caliphate from the Prophet.

Among the narrations that support the superiority of Abū Bakr in the Sunni communities, there are only two narrations that have some appearance of legitimacy for his caliphate, which we briefly address in the critique section:

The first narration, "Iqtadū billadhīna min Ba'dī, Abī Bakr wa 'Umar," (Tirmidhī, 1982 AD/ 1403 AH: 5, 271) has been criticized documentary by prominent Sunni scholars such as Ibn Ḥazm Āndulusī (Ibn Ḥazm Āndulusī, (n.d.): 6, 809), Daruqtunī, and Ibn Manda (Dhahabī, (n.d.): 3, 611). On the other hand, how can one judge the authenticity of this narration when Abū Bakr and Umar had many disagreements in many situations (Mīlānī, (n.d.): 25-29).

The second narration is "No people are worthy of having Abū Bakr among them, and someone other than him being in charge of the Imamate," (Tirmidhī, 1982 AD/ 1403 AH: 5, 276) which is mentioned in the collections of fabricated narrations (Ibn Jawzī, 2007 AD/ 1386 SH: 1, 318), so arguing based on it is invalid. Regardless of the fact that these narrations are fabricated and weak, it should be noted that the Shi'a belief that these statements were made out of Taqīyya. According to Imamiyya, the element of necessity in a command is essential in realizing Taqīyya. However, in the aforementioned claim, there is no concept of compulsion from the Prophet (PBUH) that requires the practice of Taqīyya.

B) From the Shia perspective, the way of the two shaykhs was never approved by Amir al-Mu'minin (AS). The most compelling evidence

supporting this claim is the rejection of their caliphate by those who followed their way after ‘Umar ibn Khaṭṭāb. The reason for this rejection was their non-compliance with the way of the Prophet and Imams (Ya‘qūbī, (n.d.): 2, 162). It is vital to note that all cases of Taqīyya are not solely motivated by fear and terror. There are other reasons, such as preserving the lives of allies, building goodwill among other Muslims, and other comparable factors (Ṣafarī, 2002 AD/ 1381 SH: 178).

C) Regarding the misconception that Shias justify ‘Umar's marriage to Ummi Kulthūm through Taqīyya, it must be clarified that the foundation of this marriage is ambiguous and questionable (cf. Ḥillī, 1987 AD/ 1408 AH: 242; Mufīd, 1992 AD/ 1413 AH, (G): 90; Mīlānī, 2000 AD/ 1421 AH: 11-17). Therefore, opponents cannot use it as evidence. Based on the acceptance of the principle of this marital contract, even marriage with the misguided is permissible, based on the principle of Taqīyya, which is an emergency and secondary judgment, even marrying with the misguided individuals is permissible (Mufīd, 1992 AD/ 1413 AH, (G): 91).

### **3.2. The Claim of Taqīyah Beginning from the Era of Ṣādiqayn (AS)**

Kohlberg traces the origin of Taqīyya back to the first half of the second century AH, during the Imamate of the Ṣādiqayn (AS). According to him, "The earliest explicit statements about this issue in Imamiyya sources date back to the time of Muḥammad al-Bāqir and Ja‘far al-Ṣādiq, a period when an independent group within the Shia sect, later known as the Imamiyya, emerged. It was also a time when Shias were ruthlessly persecuted and tortured by Umayyad and Abbasid authorities, and these two Imams exercised their discretion

and refrained from interfering in the horrific political events of the time as much as possible." (Kohlberg, 1975: 396)

While Kohlberg's opinion about the overall policy of the Ṣādiqayn (AS) during their encounter with Taqīyya is correct, this part of his statement is open to critique and examination from two perspectives:

A) 'How can the first statements regarding this issue be attributed to the time of the Imams al-Bāqir and al-Ṣādiq, while Taqīyya is a fundamental Quranic principle that is indicated by at least two verses of the Holy Quran': "Lā Yattakhidhil Mu'minūnal Kāfirīna Aulīyā'a min Dūnil Mu'minīna wa man Yaf'al Dhālika Falaysa minallāhi fī Shay'in Illā an Tattaqū minhum Tuqāh.<sup>1</sup>" (Āli 'Imrān:28) And also: "Man Kafara Billāhi min ba'di Īmānihī Illā man Akraha wa Qalbuḥū Muṭma'innun bil Īmān."<sup>2</sup> (al-Naḥl: 106)

In the practical way of the Prophet (PBUH), several examples of practicing Taqīyya can be found as well (Ṣaffarī, 2002 AD/ 1381 SH: 72-74). In Nahj al-Balāghah, Wisdom No. 1, and parts of Letter 54, and Sermons 32, 56, and 102 have been associated with Taqīyya ('Aṭārudī, 1995 AD/ 1414 AH: 654). Even in a narration from Imam Ali (AS), the word Taqīyya has been used explicitly and practicing Taqīyya against the disbelievers has been described as a divine license and mercy to the believers (Ḥurr 'Āmilī, 1981 AD/ 1409 AH: 1, 108). All of these demonstrate the understanding and application of this

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1. To view the commentaries, cf. Jaṣṣās, 1984 AD/1405 AH: 2, 290; Abū Ḥayyān Āndulusī, 1999 AD/1420 AH: 3, 93-94.

2. To view the commentaries, cf. Zamakhsharī, 1986 AD/1407 AH: 2, 636-637; Ibn 'Aṭīyyah Āndulusī, 2001 AD/1422 AH: 3, 423.

principle before the time of Imam Bāqir (AS).

B) Kohlberg justifies the beginning of Taqīyya by referring to the era of the Ṣādiqayn, where Shias were subjected to ruthless persecution and torture by the Umayyad and Abbasid authorities. This is notable, considering that Shias also experienced oppression during the era of Imam Ḥusayn and Imam Sajjād (AS). Therefore, it raises the question of ‘Why Taqīyya did not start during that period?’ In fact, during a part of the era of the Ṣādiqayn, due to the weakness of the Umayyad government and the establishment of the new Abbasid government, a relatively free space was provided for Shias.

C) Another argument presented in support of Taqīyya is that the Ṣādiqayn avoided involvement in political events and instead employed the strategy of Taqīyya in response to unjust governance. However, this argument lacks accuracy and presents a passive image of the Shia Imams by emphasizing their disengagement from political activities. It should be noted that while Imam Bāqir (AS) and Imam Ṣādiq (AS) did not take up arms against the government, they sought every opportunity to engage in political struggle, including efforts to establish the Imam's rightful position, as demonstrated by Imam Bāqir's reference to the necessity of identifying the Imam and the death of an ignorant person who does not recognize the Imam (Nu‘mānī, 2018 AD/ 1397 SH: 127). Narrations from both Imam Bāqir (AS) and Imam Ṣādiq (AS) urge caution among their followers regarding the proximity of the unjust ruler (Kulaynī, 1986 AD/ 1407 AH: 1, 376; ‘Ayyāshī, 2001:1, 138).



One of the most compelling examples of political action can be found in the statement made by Imam Bāqir (AS) when Hishām Ibn ‘Abdul-Malik, the Umayyad caliph, became aware that he was calling people to his Imamate. Hishām invited the Imam to Shām, but when faced with his argument and steadfastness, he imprisoned him (ibid, 2001 AD/ 1380 SH: 1, 471-472). Similarly, Imam Ṣādiq (AS) considered any obedience to the government as obedience to tyranny, which is condemned in the Quran as invalid (al-Nisā’: 60) (Kulaynī, 1986 AD/ 1407 AH: 1, 67). Witnessing the martyrdom of these two Imams at the hands of the ruling regime is further evidence that their political actions were not accepted by the government.

### 3.3. Taqīyyah as One of the Pillars of Religion

Kohlberg mentions Taqīyya as one of the distinguishing features and fundamental beliefs of the Imami Shi'a (Kohlberg, 1975: 395) and according to one narration, considers Taqīyya and secrecy an inseparable part of the past and future of the Shi'a religion, introducing it as a hidden religious concept in the divine will (Kohlberg, 2020: 272).

In other words, he presents the belief and practice based on Taqīyya as unique to a single sect among all Islamic sects and elevates Taqīyya to the rank of high-level beliefs. Of course, other Orientalists have also repeated this mistake (Lalani, 2003: 89). This statement can be criticized in three respects:

A) Kohlberg's statement is supported by a singular and transmitted narration that reads, "Wa min Ṣifātiddā’ī an Takūna Raghbatuhū fiddu‘ā’i fīssirri afdāla min Raghbatihī fiddu‘ā’i ‘allal Jahri ... ‘an

Şafwān al-Jammāl ‘an Abī ‘Abdillāhi Qāla: Inna Allāha Tabāraka wa Ta‘ālā Faraḍa Hādhal Amra ‘Alā Ahli Hādhihil ‘Işābati Sirran wa lan Yaqbalahū ‘Alānīyatan ...” (Ibn Ṭāwūs, 1985 AD/ 1406 AH: 36)

However, this narration is Single and Mursal and is not sufficient to prove the claim and is only mentioned in one book, "Falāḥ al-Sā’il wa Najāḥ al-Masā’il." The author of the book, Ibn Ṭāwūs, cited this hadith to emphasize the superiority of hidden prayer over prayer in public, and did not have the same interpretation as Kohlberg. Ḥājī Nūrī also included this hadith in a section of Mustadrak al-Wasā’il related to the desirability of secret prayer (cf. Nūrī, 1987 AD/ 1408 AH: 1, 119).

B) Another issue with Kohlberg's assertion is the exclusive attribution of Taqīyya to the Imami Shia, whereas prominent scholars of Sunni Islam have also discussed Taqīyya in their narrations and works regarding interpretation, history, and jurisprudence. For example, Bukhārī (d. 256 AH) included a narration from Ḥasan al-Başrī in his Şaḥīḥ collection, asserting the legitimacy of Taqīyya and stating that it will remain valid until the Day of Judgment (Bukhārī, 1980 AD/ 1401 AH: 8, 55). Other Sunni scholars like Sarakhsī, a Hanafī jurist from the fifth century (Sarakhsī, (n.d.): 24, 45), as well as Ibn Abī Shaybah (Ibn Abī Shaybah, 1409: J, 47), Bayhaqī (Bayhaqī, (n.d.): 8, 209), Ibn Abī Shaybah (Ibn Abī Shaybah, 1988 AD/ 1409 AH: 47), Biyhaqī (Biyhaqī, (n.d.): 8,209) and Suyūṭī (Suyūṭī, (n.d.): 2, 16), have also acknowledged the permissibility of Taqīyya in Islam. Contemporary Sunni scholars, such as Ālūsī (Ālūsī, 1994 AD/ 1415 AH: 2, 217; 11, 207) and Muhammad Rashīd Riḍā, have also accepted

the practice of Taqīyya (Rashīd Riḍā, (n.d.): 3, 281). Moreover, a book has been published that records the names of 74 companions and Successors who expressed their belief in or used Taqīyya until the end of the third century (Thāmir Hāshim, 1995 AD/ 1374 AH: 99-178).

In the history of Islamic sects, only the "Muḥakkimah" have been identified as a group that never accepted Taqīyya (ShahrIstānī, (n.d.): 1, 125). On the other hand, Taqīyya has also been highly regarded among other Shia minorities, such as the Ismā'īlis (Daftary, 1995: 3, 85). Based on the previously mentioned evidence, Taqīyya is a fundamental Islamic principle, and it is not unique to the Imami Shia. However, the Imami Shia has used it more frequently due to the oppressive and challenging conditions they have experienced.

C) Regarding the argument that Taqīyya is a fundamental belief, it is essential to note that the vast majority of Imami scholars have only mentioned "Tawḥīd, Ma'ād, Nabuwwah, Imamah, and 'Adl" as the principles of the Shi'a religion. They have not addressed the issue of Taqīyya (Lāhījī, 1996 AD/ 1375 AH: 125; Istarābādī, 2003 AD/ 1382 AH: 1, 42 and 70). Even those who have considered additional principles of religion have not explicitly mentioned Taqīyya. For instance, the ninth-century Shi'a theologian, Dīyā' al-Dīn al-Jurjānī, considered the principles of Shi'a religion to be eight: "Tawḥīd, Nabuwwah, Imamah, 'Adl, Tawallī, Tabarrī, Amr bil-Ma'rūf (commanding right), Nahy 'anil Munkar (forbidding wrong)." (Jurjānī, 1996 AD/ 1375 AH: 237)

Therefore, if Taqīyya were considered one of the principles of religion, it would have been mentioned alongside the other principles,

which is not the case (For example, cf. Sayyid Murtaḍā, 2006 AD/ 1405 AH: 1, 165-166; Kāshif al-Ghiṭā', 1992 AD/ 1413 AH: The entire book). Furthermore, none of the theological and belief-oriented books that have discussed Taqīyya have mentioned it as a fundamental belief within the framework of Imami beliefs (For example, cf. Ibn Bābwayh, 1995 AD/ 1414 AH: 107-109).

It is possible that Kohlberg has taken hadiths such as "Innal Taqīyyata min Dīnī wa Dīni Ābā'ī wa lā Dīna liman lā Taqīyyata lahū," (Kulaynī, 1986 AD/ 1407 AH: 2, 224; Barqī, 1992 AD/ 1371 SH: 1, 255) and similar statements as a criterion and has written such a statement accordingly. However, these hadiths are issued from the perspective of permissibility (Subḥānī, 2002 AD/ 1381 SH: 2, 327), and by doing so, the high importance of Taqīyya is emphasized for the audience. This approach can also be seen in other hadiths. For example, the hadith "Lā Ṣalāta li Jāril Maṣjid Illā fil Maṣjid" (Ḥurr 'Āmilī, 1988 AD/ 1409 AH: 5, 194) is also issued from the perspective of permissibility and emphasizes the importance of performing prayer in the mosque.

Looking at the composition of the "Principles of Religion," it is important to note that it encompasses matters that, in general, constitute the realization of Islam (Istarābādī, 2003 AD/ 1382 AH: 1, 69), while Taqīyya does not have such a specific status. One must question 'How Taqīyya can be considered a principle of religion?' When, in addition to being obligatory, it is subject to the other five legal rulings of prohibition, dislike, desirability, and permissibility (Mufīd, 2011 AD/ 1413 AH (B): 118). If Taqīyya were indeed part of

the principles of religion, it should always have been obligatory by default. Additionally, discussions on Taqīyya are mostly presented in Islamic jurisprudence and hadith books as a subsidiary matter under the section of commanding write and forbidding wrong (Ḥurr ‘Āmilī, 1988 AD/ 1409 AH: 16, 203-255), or as a jurisprudential rule (Miqdād Sīwarī, 2004 AD/ 1403 AH: 268-272), and not as one of the principles of religion in theological books. Therefore, given that Taqīyya is subsidiary in nature, it cannot be viewed as one of the primary beliefs of the Shi'a religion. It is important to emphasize that this misconception has been raised by other scholars in the past, including Ibn Taymīyyah, who referred to Taqīyya as one of the principles of the Imamiyya faith, stating: "The Rāfiḍites have included hypocrisy in their principles of faith and have called it Taqīyya, and have attributed unsavory behaviors to the Imams of the Ahlul Bayt in this regard." (Ibn Taymīyyah, 2002 AD/ 1421 AH: 1, 159)

This misconception has also been pursued by Wahhabism in contemporary times and is reflected in their works (Qifārī, 1994 AD/ 1415 AH: 2, 817; for more detailed information about this misconception and its responses, cf. Subḥānī, 2002 AD/ 1381 SH: 2, 326-327).

### **3.4. The Claim of Difference between Shias in Believing and Practicing Taqīyyah**

Kohlberg continues by making an extensive effort to portray the Shi'a as divided on the issue of Taqīyya by identifying two groups of pro- and anti-Taqīyya believers. He first refers to a spectrum of Shi'a who have believed in Taqīyya and utilized it in practice, citing evidence for

their position, including the following:

1) Some verses of the Quran, such as verse 28 of Surah Āl-e ‘Imrān and verse 106 of Surah al-Naḥl. Another verse that Kohlberg believes the Shi'a has used to prove Taqīyya is the verse "... Inna Akramakum ‘Indallāhi Atqākum ...," (al-Ḥujurāt: 13) in which the word "Atqākum" has been interpreted as a subsidiary meaning of Taqīyya and dissimulation, although its primary meaning is fear of Allah (Kohlberg, 1975: 396). Furthermore, in his second article, he has referred to the term "Kitmān" and especially to the verse "Wa Qāla Rajulun Mu’minun min Āli Fir‘awna Yaktumu Īmānahū," (Ghāfir: 28) and linked it to Taqīyya, considering it as the basis for the Shi'a permission of Taqīyya (Kohlberg, 2020: 272).

2) Continuing, the existence of numerous narrations in the Imamiyya narration communities accepting this principle by the impeccable Imams is considered an unequivocal endorsement of the concept of Taqīyyah according to Kohlberg. Criticisms of this section include:

A) One of the significant errors in Kohlberg's work is deriving the word "Taqīyyah" from "Ittaqī," meaning "Fear of God," and considering the technical meaning of "Taqīyyah" as secondary to this root. The root of "Taqīyyah" is "Waqaya," that it's "Wāw" sound has been transformed into "Tā'." (Farāhīdī, 1989 AD/ 1414 AH: 5, 239) The root's meaning is "Protection" and "Preservation," (Ibn Manzūr, 1993 AD/ 1414 AH: 15, 401) which is evident in all of the words that include these three letters. The Quran mentions words derived from the roots, such as: "Fa Waqāhullāhu Sayyi’āti mā Makarū ..." (Ghāfir:

45) and "... Wa man Yūqa Shuḥḥa Nafsihī fa Ulā'ika Humul Muflihūn." (al-Ḥashr: 9, al-Taghābun: 16)

Therefore, regarding fear as the central meaning in the word "Taqīyyah" is entirely incorrect. The term "Protection" is the intrinsic meaning, not its equivalent meaning with fear (Muṭahharī, 1990 AD/ 1369 SH: 16), as central in the technical definition of Taqīyyah (Rāghib Iṣfahānī, 1991 AD/ 1412 AH: 881).

B) The phrase "Atqākum" in verse 13 of Surah al-Ḥujurāt also means divine piety. Paying attention to the occasions of revelation (Qurṭubī, 1985 AD/ 1364 SH: 16, 340-341) and the interpretive hadiths of the verse (Ḥuwayzī, 1994 AD/ 1415 AH: 5, 96-100) indicates this fact. Therefore, mentioning Taqīyyah in narrations (Ṭūsī, 1993 AD/ 1414 AH: 661) is specific to the Ahlul Bayt, and not related to the literal meaning of the word, which may cause confusion among Shia Muslims (Gerami, 2004 AD/ 1383 SH: 46). So, some have considered this narration as the extension of the word's use in two meanings (Mazlumi, 1982 AD/ 1403 AH: 4, 159), and even in this case, there is no ambiguity in meaning.

C) Although verse 28 of Surah Ghāfir refers to the Taqīyyah of the believer from the family of Pharaoh, no such interpretation or recommendation has been reported from the impeccable Imams (AS) (cf. Baḥrānī, 1995 AD/ 1374 SH: under the verse). Moreover, the source cited by Kohlberg is Tafsir al-Jāmi' li Aḥkām al-Qurān by Muḥammad ibn Aḥmad Qurṭubī, which is a Sunni source. Even Qurṭubī did not attribute this view to Shia (cf. Qurṭubī, 1985 AD/ 1364 SH: 15, 306-309).

After listing the approaches of Taqīyyah supporters, Kohlberg also addresses opponents of this belief, either in general or in detail. Kohlberg considers the opposing views of Shia on Taqīyyah as being based on the principle that every individual expresses their beliefs openly and strives naturally towards their ideals, which is closely linked to the principle of Jihad in Islam. He believes that opponents of Taqīyyah justify the 25-year patience of Ali (AS) - which contradicts their view - by referring to the 13-year patience of the Prophet (PBUH) in Mecca, which is justified by finding suitable individuals for the struggle. Therefore, Amir al-Mu'minīn (AS) did not resort to Taqīyyah because of the absence of physical fighting conditions. Kohlberg further believes that Imam Ali (AS) used Taqīyyah in its broad sense, where he expressed his beliefs openly but avoided any action that could lead to unnecessary and ineffective bloodshed. However, Kohlberg opposes using this interpretation by this group of Shia as a reference.

In addition to the above reasons, Kohlberg also refers to two practical examples of opponents of Taqīyyah. One is the struggle of anti-Umayyad Shia, such as Ḥujr ibn 'Adī, 'Amr Khuza'ī, Miṭham Tammār, and Rashīd Ḥijrī, who have been praised by Imamiyya thinkers for their brave fighting against powers and martyrdom in the battlefield of right against wrong. Kohlberg concludes from the praise and admiration of these individuals by Imamiyya scholars that fighting for the goals and ideals of Shia, even when the possibility of survival does not exist, can be an admirable and praiseworthy act.



pain for one's beliefs holds more virtue than abandoning it openly.

Kohlberg also refers to Salmān Fārsī's abstention from declaring his allegiance to the Prophet (PBUH) despite being harassed and oppressed by the Jews. He then quotes Salmān's words in which he claims that Allāh has given him the option of Taqīyyah and did not make it obligatory for him (al-Tafsīr attributed to Imām al-Askarī, 1988 AD/ 1409 SH: 70). Kohlberg then mentions a narration about Imam Bāqir (AS) not resorting to Taqīyyah while drinking alcohol, to anoint over socks, or temporary marriage in Ḥajj (Kulaynī, 1986 AD/ 1407 SH: 3, 32). He then explains the justification of some Imami scholars, stating, "This narration raises questions for Imami scholars who subscribe to Taqīyyah without exception. They answered that performing these actions, according to the jurisprudence of Shia, does not naturally entail any danger for Shia, either because the apparent form of these actions does not differ fundamentally from the way Sunnis perform them, or because these actions are prevalent in Sunni schools as well." (Kohlberg, 1975: 399)

Kohlberg further presents his analysis of this narration as follows: "Since to some extent, the distinction between Shia and Sunni sects is emphasized in Shia culture, Taqīyyah in these three cases - where 'Umar is accused of innovating in the last two cases and the Ḥanafī sect allows the consumption of alcohol - has been strongly disapproved by Shia Imams." (Kohlberg, 1975: 399-400) Finally, the author, by placing Salmān's narration next to his analysis of the above narration, presents his third documented argument in this way: "Just as Salmān did not resort to Taqīyyah regarding his essential beliefs,

believers should not conceal acts of worship that are the basis and distinguishing feature of true faith." (Kohlberg, 1975: 400)

This section of the article is subject to criticism in several aspects:

A) Firstly, relying on the way of anti-government fighters such as Ḥujr bin ‘Adī to demonstrate an opposing approach to Taqīyyah is somewhat one-sided and neglects to consider all aspects of this issue. One must be attentive to the general rule that one of the criteria for the obligation or non-obligation of adhering to Taqīyyah in Imamiyya thought is "Preserving the Religion." (Mufīd, 1992 AD/ 1413 SH, (B): 118) Therefore, all historical evidence and narrative reports should be analyzed based on this principle. If there is a more significant benefit, such as not stopping the survival of religion on Taqīyyah, one has the choice to resort to Taqīyyah to save their life, or to risk their life and choose martyrdom in the way of God (Kulaynī, 1986 AD/ 1407 SH: 2, 219). Accordingly, in analyzing the way of fighters such as Ḥujr ibn ‘Adī, not only will there be no conflict in implementing the principle of Taqīyyah, but this matter can be easily reconciled with other foundations existing in Imamiyya thought. As some Imami scholars have considered the struggles and battles of these individuals obligatory, and Taqīyyah in those conditions as examples of sanctity (Kāshif al-Ghiṭā’, 1992 AD/ 1413 SH: 156). Therefore, it seems that any suspicion of contradiction between their actions and the principle of Taqīyyah is a basic misconception.

B) The narration of Salmān that the author used to prove their desired point is only cited in the Tafsīr attributed to Imam Ḥasan ‘Askarī (AS) among the Imami narrative collections. Regardless of the

singleness of the transmission and Sanad being Mursal, its implication is questionable. In this hadith, Taqīyyah is only mentioned as permission, and its discussion and analysis does not conflict with the principle of obliging Taqīyyah, as the author discussed earlier.

C) The hadith that forbids Taqīyyah in issues related to alcohol consumption, anointing over socks, and temporary marriage in Ḥajj does not relate to sectarian differences and the efforts of Shia Imams to emphasize them. Instead, its justification is based on other reasons, which have been referred to by great Shia scholars. The first person to analyze this narration was actually the narrator of the hadith himself. After quoting the narration with the phrase "I do not practice Taqīyyah," Zurārah has referred to the exclusive implementation of this command to the Imam (AS) (Kulaynī, 1986 AD/ 1407 AH: 3, 32). In other words, not resorting to Taqīyyah in these three actions has been considered exclusive to the Imams (AS). Shaykh Ṭūsī, as one possibility, believes that the Imam's hadith is exclusive to situations where there is no harm to Shia or where the difficulty in performing the action is very minimal (Ṭūsī, 1984 AD/ 1363 AH: 1, 77). Shahid Awwal, in his analysis, considers non-practice of Taqīyyah in these cases to be related to the significant similarity with most Muslims who consider drinking alcohol to be haram, and see no problem with anointing over socks and temporary marriage in Ḥajj, while some even see anointing over shoes as preferable; even some of them think anointing on the feet is better (‘Āmilī, 1998 AD/ 1419 AH: 2, 160). Therefore, the necessity of Taqīyyah is withdrawn in these three commandments. Allamah Majlisī considers the physical harm of

drinking wine, the ability to conceal one's intention in temporary marriage during Hajj, and the minor differences in its acts compared to other types of Hajj as possibilities exempt from Taqīyyah (Majlisī, 1983 AD/ 1404 AH: 9, 167). Therefore, this narration cannot be a basis for the idea of not practicing Taqīyyah.

Regarding Kohlberg's accusation of Shia Imams of exaggerating differences and sectarian distinctions without examining similar narrations, it should be noted that firstly, there are authoritative and general narrations that can interpret and limit this hadith to particular conditions. From this collection we can refer to narrations such as "Taqīyyah is necessary in every necessary matter" (Kulaynī, 1986 AD/ 1407 AH: 2, 220) and "Allāh has allowed Taqīyyah in all matters that a human may be compelled to." (Barqī, 1992 AD/ 1371 SH: 1, 259)

There are also narrations regarding anointing over socks that are allowed in cases such as snowfall and the presence of an enemy (Ṭūsī, 1364: 1, 362) which contradicts Kohlberg's analysis of exaggerating differences. For this reason, jurists have never felt a contradiction between these narrations, and thus they have opened a section in their jurisprudential books titled "The permission of anointing over socks in cases of necessity and Taqīyyah." (Ibn Ḥasan Ḥillī, 1986 AD/ 1407 AH: 1, 154; Ibn Yūsuf Ḥillī, 1992 AD/ 1413 AH: 1, 303)

Following the analysis presented by the author of the article regarding the respect for Taqīyyah in these three acts as "Distinguishing Factors between Shias and Sunnis," raise the question that 'Why this respect has only been assigned to these three areas while there is other challenging jurisprudential issues that could create

greater degrees of distinction, such as the prayers Qunūt, temporary marriage of women, the method of washing one's hands in Wuḍū, and so forth?’

D) The analysis and conclusion that Kohlberg presents at the end of this section, namely the general permission of Taqīyyah in matters of belief versus its respect in the distinguishing features of Shias from Sunnis, is only based on the author's personal taste and is not supported by any conclusive evidence. It should be noted that Taqīyyah of the type of hiding the principles and branches of religion in necessary situations is for a more critical purpose, such as hiding and protecting one's life and property. If drinking wine, anointing over socks, and temporary marriage during Hajj cause a distinction between Shias and Sunnis and are known to cause harm and suffering, then ‘How can they be expected to observe Taqīyyah in other religious practices?!’

### **3.5. Confusion of Concealing Secrets with Taqīyyah**

Kohlberg believes that one of the effects of Taqīyyah on Shia hadith is the necessity of hiding specific narrations from aliens and even from some fellow believers. He refers to the necessity of concealing truths in the face of external enemies and highlights the concealment of Salmān's faith in Abūdhār (or Miqdād) as an example of internal Taqīyyah (Kohlberg, 1975: 398). Other Orientalists have also repeated this mistake and considered the concealment of secrets as Taqīyyah (Lalani, 2003: 88-89). In his second article, Kohlberg extensively discusses this issue and analyzes it based on the hierarchy of knowledge and expertise, with the Imam at the top of the hierarchy

and weak believers at the lowest level. In this perspective, every believer should hide topics such as the esoteric meaning of Quranic verses, the specific sayings of the Imam, or specific religious duties from other believers who do not have the same level of understanding, as the recipient of the information may not be able to tolerate its understanding, may misunderstand it, or even reject it. Therefore, the reason for concealing secrets from Abūdhar and Miqdād was that they were at a lower level of the hierarchy of knowledge, and the risk of others in the community being exposed to wrongly understood secrets of Salman (Kohlberg, 2020: 291).

It should be noted that according to the common definition of Taqīyyah in the Imamiyya, it is necessary to confront opponents (Mufīd, 1992 AD/ 1413 AH, (A): 137). Therefore, the concealment of faith by Salmān cannot be considered an example of Taqīyyah, as it is a necessity that is manifested in the face of external enemies, unbelievers or Sunnis. Therefore, the narration "If Abūdhar knew what was in Salman's heart, he would kill him" (Kulaynī, 1986 AD/ 1407 AH: 1, 401) considers as a category of hadith entitle "Hiding Faith" not Taqīyyah. Its inclusion in the section on the "Difficulty in understanding the Ahl al-Bayt Hadiths/ Anna Ḥadīthahum Ṣa‘bun Mustas‘ab" also indicates this (ibid, Majlisī, 1984 AD/ 1403 AH: 2, 190). However, if our definition of Taqīyyah is general enough to include concealing information from friends, there is no problem.

On the other hand, it should be noted that conveying concepts and teachings according to the level of understanding of the audience is a fundamental educational principle that is practiced everywhere and at

all times. In the case of religious teachings, this principle is doubly important. The Prophet Muhammad (PBUH) introduced this principle in a hadith: "We prophets are commanded to speak to people according to their understanding and comprehension." (Kulaynī, 1986 AD/ 1407 AH: 1, 23)

This principle is also observed in the words and practices of other Imams (AS). In a speech to Kumayl, Imam Ali (AS) said: "I have accumulated a wealth of knowledge here, pointing to his chest. I wish I had found someone who could learn it. I find intelligent people, but they are not trustworthy, they have put religion as a means to achieve worldly gain. Or a group that submits to the bearers of the truth but does not have the necessary depth of insight in recognizing the truth." (Sayyid Raḍī, 1993 AD/ 1414 AH, Wisdom 147)

Similarly, in this instruction, Imam Reza (AS) asks the narrator to convey this message to one of his companions: Tell him to refrain from talking about monotheism or anything else and to speak to people in a way that they understand. He should refrain from talking about things that people deny or do not know about. When they ask you about monotheism, say what God Himself said: "Qul Huwallāhu Aḥad Allāhuṣṣamad lam Yalid wa lam Yūlad wa lam Yakun Lahū Kufuwan Aḥad."

And when they ask you about the qualities and how of God, say what God Himself said: "Laysa Kamithlihī Shay'un." Speak to people about what they know and understand." (Ibn Babwayh, 2019 AD/ 1398 SH: 95) As it can be seen, the observance of the principle of "Consideration for the capacity and understanding of the audience" is

a fundamental and general educational principle in the teachings and practices of the Imams (AS) and has no relation to the issue of Taqīyyah.

In this regard, it should be noted that some of the quotations from the narrative which Kohlberg relies on mention Taqīyyah: "Dhukirat al-Taqīyyatu Yawman 'Inda 'Alī Ibn al-Ḥusayn (AS) faqāla: Wallāhi law 'Alima Abūdhār ..." (Şaffār, 1983 AD/ 1404 AH: 1, 25) Although the apparent meaning of this hadith may confirm Kohlberg's statement, it is possible that this hadith was issued based on the principle of priority. It is possible that Imam Sajjād (AS) mentioned Taqīyyah as an important practice in confronting opponents and, to demonstrate its importance, brought up the issue of Salmān's hiding of his faith from Abūdhār. In other words, when Salmān hid some secrets from Abūdhār, who was not able to tolerate them, Shias were obliged to follow the first way and hide their beliefs and practices from their enemies.

### **3.6. Failure to Mention All the Solutions to Overcome the Conflict of Hadiths that Induce Taqīyyah**

In his discussion of the effects of Taqīyyah on narrations, Kohlberg also refers to the emergence of conflicting and Muta'arīḍ narrations, and to determine the normal hadith from the narrations issued in the context of Taqīyyah, he refers to acting contrary to the narration of the Sunnis. He also refers to the debates between the Akhbārīs and the Uşūlīs, stating: "The Uşūlīs claim that the entire set of beliefs should be based on reason, not on a single hadith, by rejecting the possibility of distinguishing true narrations from narrations that induce Taqīyyah. On the other hand, Akhbārīs accept all Shia narrative collections as accepted sources of commandments, and in all cases, they do not see



the need to obtain the true intention of the impeccable Imam." (Kohlberg, 1975: 398)

In this section, it is worthy to note that although relying on the narration opponent to Sunnis to resolve Muta'arīḍ narrations has been issued by the Imams (AS), not mentioning other solutions is a big mistake. The fact is that this method of resolving Muta'arīḍ narrations is not the only solution, and from the very emergence of this phenomenon, measures have been taken by the impeccable Imams (AS) and scholars of the religion to minimize the losses caused by Muta'arīḍ narrations. These measures include consulting experts in the religion (e.g. Ṭūsī, 1985 AD/ 1364 SH: 3, 27), relying on more fair and knowledgeable narrators (Ḥurr 'Āmilī, 1988 AD/ 1409 AH: 27, 106), acting upon a more famous narration (Fiqh al-Riḍā, 1985 AD/ 1406 AH: 52), and so on (for more information cf. Ma'aref, 1997 AD/ 1376 SH: 280-283). Therefore, relying on and acting upon the narration of Sunni to resolve Muta'arīḍ narrations was one of the solutions to this issue, and it was a criterion that was adhered to in the absence of any other guidance (cf. Kulaynī, 1986 AD/ 1407 AH: 1, 68).

The discussion between the Uṣūlīs and the Akhbārīs regarding Muta'arīḍ narrations first surfaced in a source quoted by Kohlberg. It is said that he brought up this debate based on the work of another Orientalist named "Falaturi," and did not mention any Shia sources, either Uṣūlī or Akhbārī, (Kohlberg, 1975: 398) thus casting doubt on his work's scientific credibility. However, the more vital issue lies in the substance of his discourse, as his analysis on both Uṣūlī and Akhbārī is inaccurate. Throughout Shia Uṣūlī history, there has never been a thinker who considered all matters of belief to be solely based on reason and

disregarded the role of single hadiths; furthermore, we know that some beliefs, such as the stages and characteristics of the Ma'ād, cannot be attained through reason alone and must be clarified by narrations. The more accurate statement is that Shia Uṣūlīs have always believed in the role and importance of single hadiths in forming the framework of beliefs, but alongside narrations, they have also emphasized reason and intellectual faculties and regarded them as essential.

Regarding the Akhbārīs and their belief that discovering the true intention of the impeccable Imams is not necessary, it must be said that although, by referring to Akhbārīs statements, Kohlberg's belief is correct, it becomes apparent upon closer examination that the prominent Akhbārī theorist, Muhammad Amīn Astarābādī (d. 1033 AH), also acknowledges the problems arising from the introduction of Taqīyya narrations to Shia communities (Astarābādī, 2005 AD/ 1426 AH: 315 and 390). However, upon further examination of his other opinions, it can be noted that he also acknowledges the problems caused by the entry of Taqīyya narrations into Shi'i collections (ibid: 168 and 572) and has advised ceasing the practice of using this category of narrations (ibid: 161 and 573).

It can even be said that the Akhbārīs, due to their acceptance of narrations, especially their lack of documentary critique of the Four Books, have resorted to Taqīyya as the strongest refuge when facing Muta'arīḍ narrations (Saffari, 2002 AD/ 1381 SH: 250). However, this does not mean that they have accepted everything that they have encountered. Upon exploring books such as al-Wāfī, Wasā'il al-Shī'a, Biḥār al-Anwār, Mir'āt al-'Uqūl, al-Ḥadā'iq al-Nāzira, and others,

whose authors had an Akhbārī inclination; one can observe the use of Taqīyya as a solution to Muta‘arīḍ narrations. Therefore, the crux of this debate is not a delusion and is not a reliable standpoint.

## Conclusion

- 1) Taqīyya in Shia Imamiyya is one of the branches of jurisprudence that bears prescriptive and situational rulings. Therefore, Kohlberg's view that considers Taqīyya as one of the fundamental principles of Shia Imami religious thought is incorrect. Furthermore, the exclusive attribution of Taqīyya to Shia is not accurate either, as at least two Quranic verses allude to it and its principle has been accepted by many Shia minorities and various Sunni denominations. Many companions and successors also believed in Taqīyya or resorted to it in practice. Nevertheless, it is acknowledged that the Shia Imami have used Taqīyya more frequently due to living in precarious circumstances.
- 2) Contrary to the author's view, there is no general ruling on the permissibility of acting upon or abandoning Taqīyya in matters of belief or its sanctity in comparison to the distinguishing features of Shia Imami relation to other Sunni denominations in practices such as anointing over the socks or drinking non-alcoholic wine. This view is not only held by a minority of the Shia Imami believers, but it also contradicts the apparent meaning of Quranic verses, explicit narrations, and historical facts. The stronger reason for the legislation of Taqīyya is to conceal beliefs and religion to preserve a greater interest. Therefore, in matters of worship, inner disagreement may also become apparent and life or property may be endangered.

- The permissibility of acting upon Taqīyya in matters of belief is subject to the temporal and spatial conditions in which the obligated person lives, and its ruling is not generally permissible or prohibited.
- 3) Contrary to what Kohlberg proposes, the differences in the performance of Shia and the diversity of fatwas and writings of Imamiyya scholars on the topic of Taqīyya throughout different centuries are not due to their different approaches to the acceptance or rejection of Taqīyya. Rather, prescriptive rulings presented by jurists or different practices among Shia revolve around temporal and spatial conditions and the survival of the religion and its believers. Therefore, if an important interest, such as the survival of the religion, is at stake, an individual is free to choose between adhering to Taqīyya and preserving their own life or abandoning it and choosing martyrdom for the sake of God.
  - 4) Contrary to Kohlberg's view, the Akhbārīs School has acknowledged the problems arising from the introduction of Taqīyya narrations to Shia communities and has issued a ruling to stop acting upon this type of narration in certain cases instead of blindly following every narration that induce Taqīyya.
  - 5) Another criticism of Kohlberg is his sole emphasis on taking the viewpoint of those who oppose Taqīyya in dealing with Taqīyya narrations, while there are other solutions such as consulting experts in Islamic jurisprudence, obtaining narrations from more just and knowledgeable narrators, acting upon more well-known narrations, and so on, which the author has not mentioned.
  - 6) Mixing the concealment of secrets even from fellow believers with Taqīyya is another mistake made by Kohlberg. In the definition of

the term Taqīyya, it refers to concealing the truth from someone other than oneself or expressing something contrary to it for a greater interest that is more important than expressing the truth. Therefore, Taqīyya is distinct from concealing confidential matters and religious secrets even from fellow believers, which is a separate matter and not a part of the religious injunctions.

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