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Religion and Resistance: The Role of Islamic Doctrine in Hamas and Hezbollah

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Religion and Resistance: The Role of Islamic Doctrine in Hamas and Hezbollah

By

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A thesis submitted in partial fulfillment
of the requirements for the degree of
Master of Arts
Department of Government and International Affairs
College of Arts and Sciences
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Matthew Lawson

ABSTRACT

The recent conflict in Gaza between the state of Israel and Palestinians led by Hamas has again brought the question of Palestinian statehood to the attention of the international community. Religion has often been mentioned as a cause for the conflict between the two, as well as a reason for the perceived instability of the Middle East. It is within this frame of reference that this study takes place. This study attempts to use this emergence in current events as the starting point for the interaction between religion and resistance movements, examining the incorporation of Islamic doctrine into the actions towards Israel of the resistance movements Hamas and Hezbollah.

In an attempt to determine the incorporation of Islam into resistance movements, this study will undertake case studies on two leading Islamic resistance movements, Hamas and Hezbollah. The Islamic doctrine to be investigated in these studies is that of the Umma, the worldwide community of Muslim believers. These case studies will examine how the doctrine of umma affects the two resistance movements, as well as variations in its interpretation in the two movements. This will allow for both an understanding of religious influence in resistance movements, but will also examine the differentiation of understanding of doctrine in Islam, as Hamas is primarily a Sunni organization, while Hezbollah is primarily Shiite. In this, a greater understanding of each of these concepts and their interaction will be gained.

MIDDLE EAST



Map from www.cia.gov



From www.cnn.com

Timeline

- 1917** Balfour Declaration expresses intention for a national home for Jewish people in Palestine.
- 1920** France designates territory of Lebanon.
- 1928** Muslim Brotherhood founded in Egypt by Hasan al-Banna.
- 1943** Lebanon granted independence from France.
- 1947-1948** United Nations approves the partition of British mandate of Palestine; Israel declares independence.
- 1967** Six Days War: War between Israeli and Arab forces, Israel captures Sinai Peninsula, Gaza, West Bank, Jerusalem, and Golan Heights; Israeli victory signals demise of Arab Nationalism.
- 1975-1982** Lebanese Civil War
- 1978** Musa al-Sadr, leader of Shia movement in Lebanon (founder of Amal) disappears.
- 1979** Islamic Revolution in Iran brings Ayatollah Khomeini to power.
- 1982** Operation Peace for Galilee: Israeli invasion of Lebanon that sparked the formation of Hezbollah.
- 1985** Hezbollah publishes Open Letter, which expresses the movement's ideology and aims.
- 1987** Formation of Hamas, publishing of the Charter of Hamas
- 1987-1993** First Intifada: Popular uprising of Palestinians in response to Israeli occupation of Gaza and the West Bank; ended with signing of the Oslo Accords.
- 1988** Conflict between Hezbollah and Amal, victory of Hezbollah grants organization recognition as Lebanese force.
- 1992** Hasan Nasrallah comes to power as secretary general of Hezbollah; first time Hezbollah participates in Lebanese national elections.
- 1993** Israeli Operation Accountability – invasion of Lebanon by Israel.

- 1996** Israel invades Lebanon in Operation Grapes of Wrath.
- 2000-2005** Ariel Sharon visits Haram al-Sharif in Jerusalem sparking the Second Intifada (al-Aqsa Intifada). Nearly five years of fighting follow.
- 2006** Hamas wins majority in Palestinian Parliamentary elections. War between Israel and Hezbollah, Israel's first defeat by Arab forces.
- 2007** Power sharing agreement between Hamas and Palestinian Authority (PA) collapses, PA forms government in West Bank, Hamas in Gaza.
- 2008** Hezbollah gains veto authority on Lebanese cabinet decisions.
- 2008-2009** War between Israel and Hamas, no clear victor in the conflict.

Chapter One

Introduction

On December 27, 2008, Israel launched an offensive military offensive into the Gaza Strip in response to rockets which had been fired into its territory. The rocket attacks had been directed by Hamas, the Palestinian political organization elected to power in the Palestinian Authority in 2006, as well as an organization designated as a terrorist group by the United States government. This conflict has again brought global attention to the Israeli-Palestinian conflict, as well as reigniting discussions regarding Palestinian statehood and the issue of sovereignty in the area. These issues are far from being a new phenomenon, which may be seen through a brief examination of history.

In 1917 while controlling the territory of Greater Palestine (currently Israel, parts of Jordan, the Gaza Strip, and West Bank), as a mandate, the British government stated support for the creation of a Jewish state in Palestine. Known as the Balfour Declaration, this document states the British would “use their best endeavours to facilitate the achievement of this object, it being clearly understood that nothing shall be done which may prejudice the civil and religious rights of existing non-Jewish communities in Palestine” (Balfour Declaration, http://avalon.law.yale.edu/20th_century/balfour.asp). Thirty years later, the United Nations moved forward with this issue, approving Resolution 181 (II), which proposed the creation of two states, one Arab and one Jewish, in Palestine. With this partition, the city of Jerusalem would exist as a separate entity from both of those states in order “to protect and to preserve the unique spiritual and religious interests located in the city of the three great monotheistic faiths throughout the

world, Christian, Jewish, and Moslem” (Resolution 181 (II) p147)¹. Neither group was fully satisfied with the proposal, but the Jewish delegate approved, while the Palestinian Arabs rejected the plan (Tharoor p10). With those actions, a Jewish state was created in Palestine, while the equivalent Palestinian state has still yet to be acknowledged by the United Nations as such (being identified as an entity rather than a state). This inequity in statehood has set the stage for conflict and resistance to the Israeli state and its interaction with the Palestinians.

From 1987 to 1993, diverse Islamic groups were engaged in a period of resistance against the Israeli state that was known as the Intifada. It was near this time period that both Hamas and Hezbollah were formed, with Hamas active in resistance throughout the Palestinian territories and Hezbollah active north of Israel in southern Lebanon. Less than a decade after end of the First Intifada, a Second Intifada erupted in 2000 following a visit by Ariel Sharon to the Temple Mount complex in Jerusalem. While the First Intifada was primarily a secular, nationalist movement, the Second was ignited and sustained due to religious influences. Though religious tension had existed between Israel and both Palestinian and Arab forces throughout the Middle East, the Second Intifada once again thrust religion to the center of the conflict. While Palestinians resisted Israel during the Intifadas, Hezbollah struck at Israel from Lebanon through border raids, firing rockets into Israel and even was considered the victor of a 2006 war with Israel. Hezbollah may literally be translated as the “party of God” and its actions to counter Israel are seen as primarily based in religious differences. In both the cases of Hamas and Hezbollah, religion plays an integral role in framing the resistance to Israel.

¹ United Nations Resolutions accessed online - <http://daccess-dds-ny.un.org/doc/RESOLUTION/GEN/NR0/038/88/IMG/NR003888.pdf?OpenElement>

Question

With the connection between religion and resistance due to the Second Intifada as well as the conflict with Hezbollah in mind, there are questions that a study of this connection could explain and clarify. The main theme upon which all of these questions revolve is that of the relationship between religion and politics, which in this case is demonstrated through the role of religion in resistance. Therefore the central question of this study is as follows: What role, if any, does religious doctrine play in forming the policy and directing the action of resistance movements in the Islamic world? In considering this central question, I believe that the adoption of particular aspects of religious doctrines does play a role in resistance movements, and that how religious doctrines are perceived serves to create identity within resistance movements, meaning that the identity formed propels the movement to action.

In order to examine this question, it is necessary to study how religious doctrines have been incorporated into the policy and actions of specific resistance movements. For this study, I intend on focusing on resistance to Israel by Hamas and Hezbollah, in order to examine religious doctrine in resistance movements across the Sunni -Shiite divide. The religious doctrine to be examined is that of Umma, the universal community of Muslims (a concept that will be discussed in greater detail later). With this in mind, the question of this study becomes: How does the concept of Umma differ as a tool in the struggle against Israel between Sunni and Shiite groups, examining the majority Sunni group of Hamas and the majority Shiite group Hezbollah as models? At issue within this question is whether there is a difference between how the two view the concept of the umma, and how that is incorporated into their policies and actions. I believe that there is a

difference in the way Hezbollah and Hamas view the concept of umma. My view is that the difference between the two is a limit on the scope of the umma, with the Sunni group Hamas defining the umma more narrowly than the Shiite group Hezbollah. This slight difference between the Sunni and Shiite conception of umma would limit the action of the Sunni resistance movement. While both groups would be motivated to action due to the universal nature of umma, the understanding of umma will cause the groups to resist to different degrees and through different means.

Theoretical Perspective

The question of this study examines the role which religion plays in resistance movements, focusing on the non-state actors Hezbollah and Hamas. In the field of international relations, the relationship between politics and religion has been widely overlooked, especially in the West, due to the ideals separating church and state. Further, international relations theory is dominated by state centric thought, which combined with the neglect of religion, has created a gap in theory for the framing of this study. Thus, to address this topic, it is necessary to find a theoretical foundation from which a study of the relationship between religion and politics may be launched. I believe that constructivism is the theoretical framework that provides this foundation.

According to John Ruggie, “Constructivism is about human consciousness and its role in international life” (Ruggie p856), a fairly broad statement, but one which indicates that constructivism looks to individual thought as the starting point, rather than state action. Christian Reus-Smit expands upon this by explaining “Constructivism is characterized by an emphasis on the importance of normative as well as material structures on the role of identity in shaping political action and on the mutually

constitutive relationship between agents and structures” (Reus-Smit p188). This point is echoed by Alexander Wendt’s claim that the structures in constructivism are social rather than material and the structures influence individuals more deeply than just in their actions (Wendt 1995, p71-72). In all three of these statements on constructivism it is clear that this theoretical perspective is focused on how individual and corporate thought and identity shape both political culture and action.

While a very basic overview of constructivism has been provided, it is more inclusive than this, and serves not as a theory but as an analytical framework (Reus-Smit p 202). Constructivism, as defined by Wendt has three core claims, which are as follows: “(1) states are the principal units of analysis for international political theory; (2) the key structures in the states system are inter-subjective, rather than material; and (3) state identities and interests are an important part constructed by these social structures, rather than given exogenously to the system by human nature or domestic politics” (Wendt 1994, p385).

While these three principles are fairly uniform throughout constructivist scholarship, there are three primary schools of scholarship: systemic, unit level, and holistic (Reus-Smit p189). The systemic school is the school explained by Wendt, and is focused on the international level. Unit level constructivists “concentrate on the relationship between domestic, social, and legal norms, and the identities and interests of states”(Reus-Smit p200). The holistic school of constructivism holds the “view that the building blocks of international reality are ideational as well as material; that ideational factors have normative as well as instrumental dimensions; that they express not only individual but also collective intentionality” (Ruggie p879). In focusing on both the

international reality and the individual and collective intentions, this holistic perspective of constructivism “treats the domestic and the international as two faces of a single social and political order” (Reus-Smit p201).

All of this is based on the argument that “actors are inherently social, that their identities and interests are socially constructed, the products of inter-subjective social structures” (Reus-Smit p193). With this in mind, we see that constructivism is a field of thought in international relations which examines political structures, whether they be international, domestic, or holistic. In this examination, constructivism seeks to look beyond undertaken action in order to understand the reasoning and motivation behind those actions. Further, it seeks to explain the creation of societal and cultural norms, placing importance on those norms, emphasizing how they create identity, on an individual and societal level.

This study will attempt to start at a constructivist perspective due to this focus on the creation of identity and the creation of norms. In this study, religion will be examined as the factor that helps to establish both cultural norms and identity. With this bond between religion and identity, a relationship between religion and politics is also created. Further, this fetters identity to action, which, for this study, means that religious doctrines influence political action. So, while constructivism does not traditionally address the relationship between religion and politics, it does allow a space for that topic to be discussed.

Study Design

With the study question in mind, as well as the theoretical framework, the design for undertaking the study must be addressed. This is a qualitative study of the relationship

of religion and politics, so for it, I will loosely use the case study method to conduct an exploratory study, the results of which will provide preliminary results for further study in the development of a testable hypothesis. In general, the case study method is used when the investigator has little control over events, and when the focus is on a contemporary phenomenon within some real-life context (Yin p13). A case study is “understood as the intensive study of a single case where the purpose of that study is -at least in part- to shed light on a larger class of cases” (Gerring p20). In this study, I will undertake studies on two non-government Islamist resistance organizations, Hamas and Hezbollah, providing an example of both Sunni and Shiite Islamist activity. The cases will focus on a contemporary phenomenon and will include collecting evidence from sources accessible to the researcher (Yin p23). In general, an exploratory case study

“ (a) grapples with complex phenomena in real-life contexts; (b) recognizes that the complex nature and, at times, the contemporary character of the phenomena diminishes the degree of control that can be exerted by the investigator; (c) incorporates multiple sources of data as a means to acquire and corroborate observations regarding the phenomenon of interest; (d) tends to rely heavily, albeit not exclusively, on qualitative data; and (e) aims to provide a cogent, detailed portrait of the phenomenon-the attributes it assumes, the variations it displays, the ways it appears to operate, and the combinations of factors that seem to shape the patterns observed in natural settings” (Ogawa and Malen p 273).

This study will incorporate the first four characteristics of this outline for an exploratory case study, but be less stringent on the last one, focusing more on the existence of the phenomena than with the operation or patterns formed by the relationship of religion and politics.

Generally, it is preferable to use several sources and case study research allows “the opportunity to use multiple sources of evidence,” allowing the claim that this method “far exceeds that in other research strategies” (Yin p96). However, I will conduct only an exploratory case study for several reasons, including time constraints, lack of resources needed to access multiple sources of evidence, and because any hypothesis generated

would require prior preliminary testing before investing further in an attempt at validation. Normally case studies collect data of a quantitative and qualitative nature. These sources of evidence include archival information that is “primary source,” which is generated by a government itself and is found within the archives of government. Additionally, interviews are a primary source of evidence. Beyond this, documentation is useful “to corroborate and augment evidence from other sources” (Yin p86) and includes “letters, memoranda, and other communiqués; agendas, announcements and minutes of meetings, and other written reports of events; administrative documents ...; formal studies or evaluation of the same ‘site’ under study; and news clippings and other articles” (Yin p85). While incorporating all these sources is preferable, this exploratory study will rely solely on “secondary sources” due to a lack of access into the core of Hezbollah and Hamas. One such source will be scholarly literature related to the two cases, covering the development and activity of both Hamas and Hezbollah. Additionally other articles will be used, primarily journal articles and books written for academic analysis of the role of religious doctrine in the resistance movements actions. Such sources will also be used to determine the significance of this study within the scholarly community and to provide a foundation upon which the study may be built and pursued. Another source of secondary evidence to be used will be news clippings and other media sources which describe, evaluate, and analyze the actions of the organizations.

Typically in using case study methodology, the data collected through these sources would be analyzed, through the explanation building analytical method. In this, the analysis of data attempts to explain the phenomenon, and thereby “to stipulate a set of causal links about it” which will allow for the establishment of explanations that “have

reflected some theoretically significant propositions” (Yin p113). This study will not take this final step. While the existence of a relationship between religion and politics examined through the role of the Islamic principle of Umma on the framing of resistance to Israel by both Hamas and Hezbollah may be used more generally to discern how religion is fused into the actions of resistance movements, this study is focused solely on establishing that relationship. The next step of creating causal links would be the focus of future study.

Literature Review

Studying and building upon the findings of other scholars serves two purposes in this investigation. The first is to serve as a starting point for the study, to provide insight into what has been uncovered and to shed light on what areas should be investigated and which are superfluous. The second purpose of incorporating the findings of other scholars is to establish the topic as relevant to the scholarly community and therefore worthy of study. At this point, it is important to focus on the second of these purposes for the scholarly integrity of this study on religion and political action.

Beginning at the broadest scope of the question, the studies of Daniel Philpott examine the realm of religion and political studies. In “The Religious Roots of Modern International Relations,” Philpott states that religion and the study of international relations, the theoretical framework for this study, are intimately connected due to the birth of international relations with the Treaty of Westphalia, which he claims is due to the Protestant Reformation. The premise is that there is no way to detach politics, and the study thereof, from religion. More specific to the question at hand, in “Explaining the Political Ambivalence of Religion,” he claims that the level differentiation of state and

religion and the political theology (religious views of the legitimacy of political authority) can be used to understand political action of the state. Another scholar in this area of religion and politics is Jonathan Fox, who in “Religion as an Overlooked Element of International Relations” looks at the influence of religion on decision making, legitimacy, and international conflict, concluding that religion is inseparable from politics. These are extremely general studies, but demonstrate that the linking of religion and politics is an established area for study within the scholarly community.

More specifically than religion and politics, the role of Islam in the political system has also been an area for study. This has especially been the case since 1979 with the Iranian Revolution. A principle starting point for these studies must be the writings of foundational Islamist thinkers. With this in mind, the writings of Sayyid Qutb, especially *Social Justice in Islam* as well as the writings found in *The Sayyid Qutb Reader*, present a Sunni perspective of Islamism, while Ayatollah Ruhollah Khomeini’s *Islam and Revolution* presents a Shiite view. Beyond this, there are also secondary sources which must be considered. Authors within this area have focused varied topics, from Roxanne Euben’s focus on the rise of Islamism through the works of Sayyid Qutb to John Esposito attempt to explain the differences of Islam and radical Islamic fundamentalism in *The Islamic Threat: Myth of Reality?* Many of the studies in this realm will make reference back to Samuel Huntington’s widely read, polarizing work *The Clash of Civilizations and the Remaking of World Order*, which states that world politics is becoming aligned based to a degree on religion, and at times indicates that there is a looming conflict between the secular west and Islamic influenced states.

Going beyond Islam, the doctrine of umma has also served as an area for study

within the scholarly community. In *Transnational Muslim Politics: Reimagining the Umma*, Peter Mandaville discusses the historical progression of the umma in Islam, interaction with the West and modernity, and how the umma exists both within Diaspora and in states that are Muslim dominated. This study helps to show the evolution of the concept of umma in the Islamic world as well as the political importance of the umma. Another study that focuses on the umma is Olivier Roy's *Globalized Islam: The Search for a New Ummah*. Throughout the course of the book, Roy covers the progression of Islam in the realm of politics, investigating the politicization of Islam, its interaction with Western culture and the responses which have come about. Further, Roy discusses possible future for the relationship between Islam and the West, and the role which conflict plays in that relationship. The idea of umma is also examined by Fred Halliday in "The Politics of Umma: States and Communities in Islamic Movements," which emphasizes that umma is an important concept for the study of international relations, especially in considering ideology within globalization and transnationalism. While this is not a comprehensive discussion of the inclusion of umma within the study of politics in the scholarly community, it does demonstrate that umma is an important concept for political study.

A final area to mention in the establishment of scholarly tradition for this study of religion and politics is in the area of resistance movements. The scholars and works that create this area for study will be discussed in depth with the examination of Hamas and Hezbollah. In an effort to avoid repetition, these scholars and works will be reserved for the discussion of those movements and building the case for the role of the umma in framing Islamic resistance to Israel.

Introduction to Islam

Before proceeding any further in this study, or the discussion of this study, I feel it is necessary to provide a brief overview of Islam, as both a religion and political phenomenon. This will serve as a basis for much of the material which will be covered later, as well as introduce and define some terms which are of importance for this study. In this section, the history and beliefs of Islam will be described as a means of providing a backdrop for the study.

Islam is, first and foremost, one of the world's most followed religions, with 1.3 billion Muslim's worldwide (Nasr p34). Islam is one of three "monotheistic Abrahamic faiths," with the name being derived from an Arabic word meaning submission (CIA Factbook). Islam originated with the Prophet Muhammad in 610 when "a heavenly messenger, later identified as the Archangel Gabriel, interrupted his meditations and said, 'Oh Muhammad, you are the messenger of God' ... the spirit ordered Muhammad to 'Recite!' three times before he composed himself well enough to receive his first revelation," revelations which would eventually form the Quran, the holy book of Islam (Bogle p7). In receiving another of his revelations, "Muhammad is said to have undergone a miraculous nighttime journey to Jerusalem, followed by an ascent into heaven ... the huge rock that stands at the center of the Dome of the Rock, an early Islamic structure in Jerusalem, is held to be the spot from which the Prophet arose into the Divine Presence," which is why the city of Jerusalem to be the third holiest site to Muslims (Gordon p9-10). The message presented by Muhammad was not accepted by many at first, and led to persecution until, "in an event known as the *Hijra* (622), Muhammad departed Mecca for the northern town of Yathrib, known henceforth as

Medina” (Gordon p10), a move which “transformed Muhammad from a private person preaching a new faith to a leader wielding political and military authority. With that authority, Muhammad, at the head of a thousand followers, returned triumphantly to Mecca in January 630 to claim the city for Islam” (Mackey p43). Muhammad lived for two more years after the return to Mecca, and by the time of his death he had, “delivered a monotheistic religion containing precise ethical doctrines to most of western Arabia. In addition he had established a new community that was in essence an organized and armed state governing in the name of religion” (Mackey p43-44). This community of Muslims, which has grown from Muhammad to the 1.3 billion adherents today, composes the umma.

Over the nearly 1400 years since the founding of Islam, there have been several splits and derivations, but the most important for this study is the Shia - Sunni split. The Sunni branch of Islam represents nearly 75 percent of Muslims worldwide (CIA Factbook), while “Shias number from 130 million to 195 million people, or 10 to 15 percent of the total” (Nasr p34). The two groups split shortly after the death of Muhammad “over a religio-political leadership dispute about the rightful successor to Muhammad. The Shia believe Muhammad's cousin and son-in-law, Ali, was the only divinely ordained Imam (religious leader), while the Sunni maintain the first three caliphs after Muhammad were also legitimate authorities” (CIA Factbook). The Shia-Sunni split is important for this study due to the composition of the resistance movements to be discussed, with Hezbollah being a Shiite organization, while Hamas has a predominantly Sunni majority.

Islam is not just the political and historic entity which has been presented to this

point, it also is a system of religious belief. This belief is based on five articles found in a Quranic verse of warning which states “Whoever repudiates faith in God, and His angels, His books and His messengers, and in the last Day, has indeed gone into error” (Partridge p252). Further, Islam in practice centers on the Five Pillars, which are: “the testimony of faith (*shahada*), daily prayer (*salah*), giving alms (*zakah*), fasting during Ramadan (*sawm*), and the pilgrimage to Mecca (*hajj*)” (CIA Factbook). Both Shiites and Sunnis accept these principles, but Shiites also “emphasize divine justice as a core doctrine, as well as *Imamah*, a belief that the true leadership of the *umma* rests with the family of the Prophet through Ali” (Partridge p245). It is through the lens of these beliefs, and this historical background, that the question of Islamist resistance to Israel by Hamas and Hezbollah will be viewed.

Chapter Outline

The first chapter of this study will serve as an introduction to the remainder of the study. It will propose the questions to be examined, as well as discuss how the question will be addressed in this study and examine some of the existing literature pertinent to this study. Further, it will present some of the key concepts and ideas that will set the stage for what will be studied. The second chapter will be a case study, focused on Hamas and the Sunni perspective of resistance. It will examine the history of Hamas, its resistance to Israel, and the role which religious doctrine has and continues to play in that resistance. The third chapter will echo the second, however, it will be focused on Hezbollah and the Shiite aspects of this study. The final chapter will examine the findings of the two case studies. It will use these assessments and findings to determine and explain what may be learned about the role of religious doctrine and thought in

resistance. Finally, the fourth chapter will discuss if the findings of this study warrant further study into this field of the religious influence on resistance.

Chapter 2

Sunnis and Hamas

The first case study in this research project is focused on the conception of the umma in Sunni Islam and what role it plays in resistance movements. More specifically, this study will examine the resistance organization Hamas, and the question of what role Islamic doctrine, particularly that of the umma, plays in framing the policy and action of Hamas. This study will require first an investigation of the umma from the Sunni perspective, followed by a general overview of Hamas, including the history and development of the organization, as well as the role of Islamic doctrine in that development. Once an understanding of both the Sunni umma and the development of Hamas has been established, it will then be possible to examine the specific role of the umma in framing resistance for Hamas.

Umma in Sunni Islam

Islam is a religion with many branches, of which the largest two are Sunni and Shia. As mentioned earlier, the Sunni and Shia split over the question of leadership of the umma. The Sunni branch is the branch “who reached a compromise, or at least an agreement to disagree, on these questions” (Crone p219) of leadership. The resulting belief is that leadership is elective, meaning, “that it is an office filled by the community, not an individual quality with which God has singled out a particular person above all others. Nobody was born an imam; one could not acquire the position without being chose by someone else” (Crone p226-227). With this basis of compromise and election, the Sunni branch of Islam became the dominant branch and still is, as “the overwhelming majority of the world’s 1.3 billion Muslims are Sunnis” (Nasr p32).

Sunnis and Shias split over the issue of the leadership of the umma, serving as a starting point for discussing the conception of the umma in Sunni Islam. The question of leadership of the umma is important because, as Tamin Al-Barghouti notes, “the umma is the body that follows, the entity that is followed is the ‘Imam’” (Al-Barghouti p38). In Sunni Islam, the functions of leadership of the umma are “the normal functions of the political authority, protecting the community against external threats and keeping the law and order internally” (Al-Barghouti p44). This view of the leadership of the umma led the Sunnis to a view of the umma as a political entity, in which Sunnis “attached enormous importance to communal togetherness, and this they showed in their treatment of rebels too” (Crone p229-230). A prominent Sunni theologian, Mawardi (972-1058 CE), wrote that when there is a conflict in the umma, “Muslim rebels are still Muslims,” and that “both of them are still part of the umma despite the fact that they do not agree” (Al-Barghouti p49). All this indicates that the Sunni conception of the umma is one of a political unit composed of all Muslims, despite disagreements that may exist among them.

B.A. Roberson notes that this view of the umma among Sunnis extends into fundamentalists² through the Muslim Brotherhood, who “proclaimed the unity of all Muslims, and of the umma, and established branches in different countries, which survive to this day (one of the most recently established being the Movement of Islamic Resistance, *haraka al-muqawama al-islamiya*, or HAMAS, in 1987, in Palestine)”

²² Fundamentalism and Islamism: In this study, the terms fundamentalism and Islamism will be used. There is a lack of consensus regarding the meanings and usage of these terms. For the purposes of this study, fundamentalism and Islamism are being used to describe systems of thought that seek to employ Islam as the sole solutions to the issues of contemporary life, whether those are social, political, economic, etc.

(Roberson p34). Fundamentalist Sunni Islam goes a step further than the umma simply being a singular political unit in a belief that “the loyalty of a citizen of an Islamic state does not lie in that state; rather his loyalty is to the Muslim umma” (Al-Barghouti p72). Thus, the view of the umma for the Sunni is a single, transnational political entity composed of all Muslims, an entity that trumps all other ties or obligations. Now that the concept of the umma in Sunni Islam has been established, it is necessary to examine Hamas as a movement within the Sunni branch of Islam.

Leading to Hamas

Hamas as an organization emerged at the onset of the First Intifada in December 8, 1987, though its First Communique was dated December 14, 1987, praising the Intifada and resistance, while condemning the “Zionists” and partial peace settlements (Hroub 2000, p36, p265). The name of the organization, Hamas, is “both an acronym for *Harakat al-Muqawama al-Islamiya* (Islamic Resistance Movement) and an Arabic word meaning ‘zeal’” (Levitt, 2008 p8). While Hamas was founded in 1987, one must go further back to trace the development of the organization because “Hamas was established as the ‘paramilitary’ wing of the Palestinian Muslim Brotherhood, the roots of which, in turn, lie in the Egyptian Muslim Brotherhood” (Gunning p26). The Egyptian Muslim Brotherhood was founded in 1928 by Hasan al-Banna “as a movement for education and reform of ‘heart and mind’. But the movement soon developed a political dimension calling for an Islamic reform of state and government” (Nusse p12-13). The Muslim Brotherhood established its first branches in Palestine during the mid 1940s and grew quickly to the point that “by 1947, there were thirty eight branches and over 10,000 registered members, drawn from both the ruling elite and the lower classes” but were

divided by the creation of Israel in 1948 with the Gaza Strip under Egyptian rule and the West Bank becoming part of Jordan (Gunning p26-27). Khaled Hroub notes that this division weakened the bond between those in the West Bank and Gaza, and as a result, “the Brethren in the Gaza strip took on revolutionary and military traits, the Brethren in the West Bank adopted a political and educational approach” (Hroub 2000, 20).

This split also saw a lull in activity from 1948 to 1967, during which “in Egypt, the group was suppressed, and in Jordan the Islamists were both tolerated and co-opted (to such an extent that, in the 1950s, the Brotherhood sided with the Jordanian regime against secular Palestinian groups)” (Levitt 2008, p 20). Egyptian suppression of the Muslim Brotherhood in Gaza resulted from a conflict with the secular leader of Egypt, Gamal Nasser, under whose rule “the movement was banned and declared illegal, and those Brothers who were not jailed went underground” (Hroub 2000, p23). At the same time the Gazan Brotherhood saw a decline in influence as Nasser promoted a popular pan-Arabic ideology with “themes such as Arab nationalism, Arab unity, socialism, and the liberation of Palestine” while “the Brotherhood, by contrast, put less emphasis on these themes, focusing more on Islam as a frame of reference and as an aspect of identity” (Jensen p14). While the Gaza branch of the Brotherhood was weakened and driven underground, the branch in the West Bank was incorporated into Jordan, and “became a political, educational, and proselytizing organization that avoided any real military activities” with weak nationalist tendencies (Hroub 2000, p20). During this period of inactivity as a resistance movement, the Brotherhood in the West Bank “focused in welfare and local politics, participating in municipal and national elections, and winning parliamentary seats” (Gunning p28). The period incorporation of the West

Bank Brotherhood into Jordan and suppression of the Brotherhood in Gaza came to an end in 1967.

In 1967, Arab forces led by Egypt's Nasser suffered a demoralizing defeat in the Six Day's War at the hands of Israel. This defeat led to the end of the ideological dominance of Arab nationalism, and "consolidated within Palestinian political thought the ideas of self reliance and the pursuit of popular liberation strategies rather than dependence on regular Arab armies" (Hroub 2000, p29). This saw the emergence of Palestinian nationalism and re-emergence of Islamism as "Gaza and the West Bank we re-united under one sovereign power, facilitating the emergence of a indigenous, territories-wide Palestinian leadership" (Gunning p29). This reunification of the territories, though under Israeli domination, saw a reunification of the Palestinian Brotherhood, which initially "re-emerged as a modest charitable network, rather than a political faction" (Gunning p30). The period between the defeat of Arab Nationalism in 1967 and the emergence of Hamas in 1987 can be split into four stages for the Palestinian Muslim Brotherhood (Levitt 2008, p22). The first period was from 1967 to 1975, during which there was "a campaign to build mosques and to 'mobilize, unite, reorient, and consolidate the faith of a new generation so as to prepare it for the confrontation with Zionism'" (Hroub 2000, p30). The second stage came from 1976 through the mid 1980s, which could be called "the phase of social institution building, reflecting the formation of Islamic student societies, clubs, and charitable societies that became the meeting point for the new Islamic youth" (Hroub 2000, p31). The third stage overlaps the second from 1981 to 1987 and saw the growth of "political influence through the establishment of the mechanisms of action and preparation for armed struggle" while the fourth stage is the

launching of Hamas in 1987 (Levitt 2008, p22). The Palestinian Muslim Brotherhood saw a cessation of its operations with the creation of Hamas as all the political and charitable affiliates of the Brotherhood came under the umbrella of Hamas.

The Charter of Hamas

Hamas was founded on December 8, 1987, and on August 18, 1988 distributed its Charter, a document “manifesting its form, unveiling its identity, stating its position, clarifying its expectations, discussing its hopes, and calling for aid, support, and members” (Maqdsi p123). The Charter is composed of thirty-six articles in five chapters, which interweave nationalistic and Islamic principles, which are of importance for this study.

The first chapter of the charter is composed of eight articles, and serves as an introduction to the movement. In these articles, Hamas identifies itself as an Islamic resistance movement born out of the Palestinian Muslim Brotherhood consisting of all Muslims loyal to Allah who know their obligations to themselves, Allah and country welcoming all who “adopt its doctrines and ideology, enact its program, guard its secrets and desire to join its ranks” (Maqdsi p123). Hamas marks itself as an international organization, due to the international nature of Islam, dedicated to the liberation of the entire territory of Palestine as a “link in [a long] chain of the Jihad³ against the Zionist occupation” (Maqdsi p124), with the use of the term Jihad in this instance is to indicate an armed struggle. The chapter ends with the motto for Hamas:

*“Allah is its Goal.
The Messenger is its Leader.
The Quran is its Constitution.*

³ See Appendix on Concept of Jihad for discussion of topic and explanation for why it is not discussed in greater depth at this point.

*Jihad is its methodology, and
Death for the sake of Allah is its most coveted desire” (Maqdsi p124).*

The second chapter of the Charter of Hamas consists of two articles outlining the goals of the organization. This is done in broad language, stating a desire to restore and proclaim an Islamic state and effect change. In so doing, Hamas declares it “will be a support to the weak, a victor to the oppressed” (Maqdsi p125).

The third chapter of the charter covers articles 11 through 22, and specifies the strategy and means to accomplish the broadly stated goals. In this, Hamas identifies the land of Palestine as an “Islamic *Waqf* [Trust] upon all Muslim generations till the day of Resurrection (Maqdsi p125), and as a result, the full territory of Palestine is to be an Islamic state, achieved through Jihad rather than peace settlements. It goes on to state that Palestine is to be liberated through three spheres, Palestinian, Arabic, and Islamic, and that it is “obligatory for every Muslim, no matter where he is” (Maqdsi p126). It is in this chapter that Hamas first appeals to the Umma in the effort to liberate Palestine through both material support and education, which will “instill in the minds of the Muslim generation that the Palestinian cause is a religious cause” (Maqdsi p127). The chapter then explains the roles that women and the arts play in the support of the Palestinian cause, and the importance of social welfare to those in need throughout the entire Palestinian population. It concludes with a condemnation of Zionism and its international supporters.

The fourth chapter of the Charter of Hamas explains the positions Hamas takes on other Palestinian movements, Arab and Islamic governments, people of other faiths, and the Palestinian people. The charter makes a distinction between Islamic and nationalistic movements, offering full support to Islamic movements, while reserving the right to

dispute nationalist movements that are loyal to other states (Maqdsi p129-130). Hamas devotes a separate article to the Palestinian Liberation Organization (PLO), labeling it as a father or brother, but stating, “secularist ideology is in total contradiction to religious ideologies, and it is upon ideology that positions, actions, and decisions are made,” therefore Hamas cannot partner with the PLO unless there is a change in the PLO’s ideology (Maqdsi p130-131). Here again, Hamas clarifies the importance of Islam and its doctrine in all aspects of its operations. The charter then calls on Arab and Muslim governments to be open to supporting the liberation of Palestine, appealing to the umma in the areas of supplying fighters, “educating the Islamic people ideologically, morally, and culturally in order to plays its role in the battle for liberation”, as well as creating media support for the struggle (Maqdsi p131). This chapter also calls for people of other faiths to not fight against Islam, as it provides a shadow for peace among the adherents of different religions (Maqdsi p 132). The chapter ends with a claim that Zionists have attempted to divide the umma through peace settlements with Arab states, and warns of the dangers of such actions, as well as the need to unite for the Palestinian cause (Maqdsi p132-133). Throughout this chapter, the importance of Islamic doctrine, particularly in uniting the umma to the cause of the liberation of Palestine, is emphasized.

The final chapter of the Charter of Hamas provides the framework of history through which Hamas views itself. In it, Hamas identifies itself as the continuation of the soldiers who fought for the cause of Islam during the Crusades (Maqdsi p133-134). Hamas states that in the Crusades, “the Muslims did not get Palestine back until they gathered under their religious banner and united together, glorified their lord, and took off as *Mujahids*,” a course of action that must be duplicated for the liberation of Palestine

(Maqdsi p133). In this concluding chapter, Hamas again declares the necessity of unity among the umma in to reach their goal of an Islamic state in Palestine.

This has provided an overview of the thirty-six articles that comprise the five chapters of the Charter of Hamas. The purpose of this discussion is to demonstrate the importance of Islamic doctrine, particularly that of the umma, in the founding of Hamas. It is this foundation that set the stage for the policies and actions of Hamas that would follow. This also provides an insight into the ideology of Hamas, which is an important facet in this study.

Hamas Since the Charter

The Charter of Hamas was useful for Hamas at its onset for the purposes of “manifesting its form, unveiling its identity, stating its position, clarifying its expectations, discussing its hopes, and calling for aid, support, and members” (Maqdsi p12). In the more than two decades following the publication of the Charter, Hamas has risen to become a powerful movement in the Palestinian territories. That rise will be examined to provide deeper insight into Hamas and show how Islamic doctrines have guided the movement.

Hamas was founded during the First Intifada. Beyond simply being founded during the First Intifada, “Hamas claimed to have started the uprising that broke out in December 1987 in refugee camps in the Gaza Strip. It was Hamas members who spread the movement to the West Bank. Frequently, Hamas was described as the ‘head’ of the Intifada” (Nusse p68). The First Intifada has been referred to vaguely up to this point, and clarification is necessary. Intifada translates to “uprising” (Gunning p34) and the First Intifada describes the period from 1987 through 1993 during which “Palestinians

from all walks of life—youth, merchants, labourers, women and children—joined massive demonstrations, economic boycotts, tax resistance and strikes, protesting the military occupation of their land and demanding national independence” (Tharoor p3). The First Intifada came to an end in 1993 when the leadership of the PLO signed of the Oslo Agreement with Israel, an agreement Hamas saw as a insulting to the Palestinian people and the Intifada by “squandering those efforts in the theatrics of settlement” (Hroub 2000, p81).

While the Oslo Agreement was a negotiated truce between the PLO and Israel, Hamas did not follow the truce. Since the agreements, Hamas has become known for terrorist attacks, particularly suicide bombers, the first of which occurred in April 1993 (<http://www.cfr.org/publication/15268/>). Between 1989 and 2000, “Hamas carried out at least twenty-seven attacks, including twelve suicide bombings and three failed bombings. These attacks caused approximately 185 deaths and left over 1,200 people wounded” (Levitt 2008, p12).

On September 28, 2000, Ariel Sharon, leader of Israel’s Likud party, with “about a thousand Israeli police and soldiers, strode into Jerusalem’s Haram al-Sharif (the “Noble Sanctuary”) in a gesture designed to assert his right as an Israeli to visit the Muslim holy place” (Said p27). The presence of Sharon served as “the spark that ignites a round of fighting, dubbed the ‘second intifada’ by Palestinians,” lasting from September 2000 until 2005, during which , “according to B’Tselem, an Israeli human rights group, the violence claimed the lives of 1,050 Israelis and 3,358 Palestinians” (<http://www.cfr.org/publication/15268/>). The Second Intifada came to an end in 2005 following Israel’s withdrawal from the Gaza Strip and Hamas agreed to a cease fire, two

events which allowed Hamas to claim “having done more for Palestinian state building than the peace process” and showed a openness of Hamas towards a two state system (Gunning p52). The results of the Second Intifada increased the popularity of Hamas while showing a level of moderation, which fed election victories for Hamas. In January 2005, Hamas won 77 of 118 contested seats in municipal elections in the Gaza Strip, and in January 2006, “Hamas candidates won 74 seats in the 132-member Palestinian parliament,” taking control of the Palestinian Authority (Jensen p43). The victory of Hamas caused “the United States, the European Union, and other international donors to suspend aid to the Palestinian Authority,” decisions that would see in June 2007, the collapse of a shared power agreement between Hamas and Fatah with Fatah forming “a new government in Ramallah, which is quickly recognized by the United States and European Union,” while Hamas controlled Gaza (<http://www.cfr.org/publication/15268/>).

With Hamas in control of Gaza, “Israel sealed off its borders, causing businesses to wither. Hamas remained defiant, and increased the rate of rocket attacks against border communities within Israel,” leading retaliation by both sides, and a June 2008 truce (<http://topics.nytimes.com/top/reference/timestopics/organizations/h/hamas/index.html>).

The truce ended on December 19, 2008, which led to strikes by both Hamas and Israel, leading to January 3, 2009 when, “Israel opened a ground war, sending tanks and troops across the border into Gaza,” which lasted until January 18, 2009, “a devastating 23-day battle in which more than 1,300 Palestinians and 13 Israelis died” (<http://topics.nytimes.com/top/reference/timestopics/organizations/h/hamas/index.html>).

Hamas remains in control of Gaza, and “has suspended its use of rockets and shifted focus to winning support at home and abroad through cultural initiatives and public

relations” in an attempt to build a “culture of resistance” (El-Khodary and Bronner).

Hamas and Islam

The Charter of Hamas explicitly defines the organization as an Islamic movement. Placing Hamas within the realm of Islam is necessary for this study, as it seeks to use Hamas and Hezbollah as indicators for Islamic resistance movements across the Sunni – Shia divide. Hamas, represents the Sunni branch of Islam in the study. This is due to the position of Hamas as a resistance movement within Palestine, which consists of the territories of the Gaza Strip and the West Bank. According to estimates, the population of the Gaza Strip is 99.3 percent Muslim, while the West Bank is 75 percent Muslim, with both of Muslim populations predominantly Sunni Muslim (CIA Factbook). This indicates that the population from which Hamas draws its members is mainly Sunni. Further, Matthew Levitt notes that the Muslim Brotherhood is a Sunni Muslim group, and “Hamas never fully broke off from the Brotherhood. It is not a splinter group; rather it *is* the Palestinian branch of the Muslim Brotherhood” (Levitt 2008, p30). With this identification of Hamas as a Sunni Muslim group, it becomes possible to look at the connection of the umma to the policies and practices of Hamas. As was marked throughout the glimpse of the Charter of Hamas, the umma is frequently alluded to in the rhetoric of Hamas, while Hamas has operated through Islamic institutions. In examining the continued role of Islamic doctrine, especially the umma, in Hamas, more current statements from Hamas will be examined, as well as the activities of Hamas.

The documents to be examined are linked to the 2006 parliament elections, and are outlined by Khaled Hroub in “New Hamas Through Its New Documents. The first document to examine is the 2006 Platform for Change and Reform, which stated the

beliefs of Hamas for the 2006 Palestinian parliament elections. In its statement of principles, Hamas claims “Historic Palestine is part of the Arab and Islamic land and its ownership by the Palestinian people is a right that does not diminish over time. No military or legal measures will change that right” and that “The Palestinian people, wherever they reside, constitute a single and united people and form an integral part of the Arab and Muslim nation” (Hroub 2006, 9). Such claims are based in Hamas’ conception of the umma as a singular political unit that may not be dissolved. While “the language of the electoral platform overall is secular and bureaucratic, the religious references that it does contain fuelled suspicions (arising from Hamas's origins and history)” (Hroub 2006, p14-15), and help to demonstrate the underlying influence of Islamic doctrine, particularly the umma, in the ideology of Hamas.

A second document is the proposal by Hamas for the National Unity Government Program. This document contains thirty-nine articles, which are centered “around the concept of the two-state solution without a hint of the "liberation of the entire land of Palestine" or "the destruction of Israel" found in the charter” (Hroub 2006, p16-17). According to Hroub, the platform is limited in its references to Islam, however, those few references are based in the idea of the umma in that they call for support from Islamic community. These references are found in article 12, which calls for "asserting our Arab and Islamic dimension and activating the support of our Arab and Islamic nations for our people and its just cause in all aspects,” a call that is echoed in the thirteenth and thirty-seventh articles (Hroub 2006, 19). Through the proposal for a unity government it is clear that an appeal to the umma for support of the Palestinian cause remains a key component of the ideology of Hamas.

The third document identified is the cabinet platform, which was delivered on March 27, 2006 by Prime Minister elect Ismail Haniyeh, and “represents Hamas alone, having been drafted after the collapse of the national unity negotiations when there was no longer any need to make concessions to the factions” (Hroub 2006, p19). In his explanation of the document, Hroub notes that Haniyeh outlined seven challenges that would compose the agenda of Hamas in power, the sixth of which is “raising the status of the Palestinian question at the Arab and Islamic levels,” (Hroub 2006, p23) yet another appeal to the necessity of support among the umma for Palestine. In this document, the call for support from the umma has shifted from a call to resistance to a call for investment, asking “Palestinian Arab and Muslim entrepreneurs to come to Palestine and discover investment opportunities in various sector of the economy” (Hroub 2006, p24). In this document, as well as the other two, “the references to Islam are general, having to do either with the nature of Palestinian society ... or in relation to the Palestinian cause” (Hroub 2006, p26). In this, the scaling back of Islamic doctrine from the explicitly stated ideology of Hamas has not included a retreat from appeals to the umma for support.

Aside from ideological statements appealing to the umma, Hamas has placed Islam at the center of its activity since its inception. While the Charter of Hamas appealed to Islam and identified the movement as specifically Palestinian and Muslim, much of the building of Hamas has come through institutions of Islam. According to Jeroen Gunning, “many activists are recruited through the mosque, and Hamas’ emphasis on Islam is an important recruiting factor” (Gunning p200), with a study of jailed members finding “almost 50 percent cite the mosque, Moslem Brotherhood, or other religious influence as central” to recruitment (Levitt 2008, p83). Beyond using the Islamic community and

institutions as grounds for recruiting, in his book *Hamas*, Matthew Levitt notes that Hamas uses Islamic charities to “offer a veil of legitimacy for terrorist fundraising” through social welfare groups which “engender grassroots support for said groups and create fertile spotting and recruiting grounds” (Levitt 2008, p62). In addition to “the tens of millions of dollars raised by Hamas each year from foreign charities, individuals, businesses, and criminal enterprises, the terrorist organization is also a massive beneficiary of support from foreign governments ... Saudi Arabia, Iran, Syria, Lebanon, Libya, Sudan, Yemen, and Qatar” (Levitt 2008, p171). This demonstration of the funding of Hamas reveals another way that the practice of Hamas looks to the umma. In its appeal to Islamic charities and Muslim majority states (a point which Levitt expounds upon in Chapter 3, 6, and 7 of *Hamas*), it is clear that Hamas considers the umma an important contributor to any action it takes, and therefore a necessary component of all of its operations. It may also be seen in these appeals that the umma is not forced to act. While Hamas appeals to the unity of the umma and the obligation that should accompany that unity, in each case, action by the umma is requested, not compelled. This implies that the members of the umma possess a degree of free will.

Conclusions

In this study, the Sunni conception of the umma has been presented, as has the history, development, and current position of Hamas. Through this study, it has become clear that the umma is an important factor for Hamas both ideologically and operationally. While many of the Islamic factors that were prevalent at the founding of Hamas have faded from its ideological statements, references to the importance of, and need for support from, the umma have remained. Beyond appealing to the umma, Hamas

has also demonstrated a reliance on the umma for support, politically and financially. In all this it may be seen that for a Sunni resistance movement such as Hamas, the umma is a necessary component.

Chapter Three

Shias and Hezbollah

The second of the case studies in this research project is focused on the conception of the umma in the Shia branch of Islam, and the role it plays in resistance movement. Particularly, this study will examine the resistance movement Hezbollah, and the question of what role the Islamic doctrine of the umma plays in framing its policies and actions. In order to execute of this study, it will be necessary to differentiate the Shia conception of the umma from the Sunni, which will require a look into the history of the Shia branch of Islam. Additionally, a general overview of Hezbollah will be required, including the history and development of Hezbollah and the role of Islamic doctrine in development. Once all this has been accomplished, it will be possible to examine the role of the umma is in framing resistance for Hezbollah.

Umma in Shia Islam

Shia Islam is the largest minority Muslim group and “number from 130 million to 195 million people, or 10 to 15 percent of the total” (Nasr p34). The Shia branch of Islam may be traced nearly to the founding of Islam, to the death of the Prophet Muhammad in 632 AD, when “the question of succession became the main issue over which Muslims disagreed” (Al-Barghouti p14). In choosing the next leader of the umma, Abu Bakr was selected by consensus, though “a small group of the Prophet’s companions believed that the Prophet’s cousin and son-in-law, Ali ibn Abi Talib, was more qualified for the job and that it had been the wish of the Prophet that he lead the Muslim community” (Nasr p35). Despite this disagreement, Abu Bakr was the second leader of the umma, followed by Umar, and Uthman before Ali would ascend to leadership, though a small group

maintained their support of Ali (Waines p155). This group became known as “*Shi’at Ali*, the partisans of Ali, or just the Partisans (Shi’a/Shiites)” (Al-arghouti p16), and came to the understanding that “Ali had been designated by God, in the Quran and by the Prophet, through his sayings, to become the Prophet’s successor” (Al-Barghouti p17).

Due to the assassination of Uthman, which led to Ali becoming the leader of the umma, a civil war between Ali’s supporters and those supporting Uthman’s cousin Muawiya, marred Ali’s rule, and after failed attempts at arbitration, “ended only when Ali was assassinated by angry extremists who blamed both him and Muawiya for the crisis” (Nasr p36). The failure of arbitration and the resulting violence, led to the Shias “establishing a theory of divine duty and right of the chosen successor of the Prophet and his descendants to rule and guide the community of Muslims, independent of that community’s consensus” (Al-Barghouti p17). Beyond this theory, Shias came to believe that “Muslims had erred in choosing their leaders, and that error had mired their faith in violence and confusion. The dissenting voices rejected the legitimacy of the first three Rightly Guided Caliphs, arguing that God would not entrust his religion to ordinary mortals chosen by the vote of the community” (Nasr p37). This belief was reinforced by the leadership of the Caliphs following Ali, Muawiya and Yazid, who created the basis of the Umayyad Dynasty and excesses caused “the heart of Islam had been ripped out” while “Arabs consolidated their power from the borders of India to North Africa” (Geaves p104).

The greatest offense of the Umayyad Dynasty came under the rule of Yazid, and to this day is marked by Shias as Ashura, when on the tenth day of Muharram, Shias practice “collective atonement through lamentation and self-flagellation” (Nasr 32). The

day commemorates the day that Hussain, the son of Ali and grandson of Muhammad, and his force of 72 men were met near Karbala by an army of over five thousand had their water supplies cut off after six days of fighting, and “bravely charged the much larger Umayyad army, only to be cut down and massacred. The fallen were beheaded; their bodies left to rot in the scorching heat of the desert, and their heads were mounted on staffs” (Nasr p41). The brutality of these actions horrified many within the umma, and galvanized the Shia view of the Umayyad Dynasty and the Sunni community “As representative of an illegitimate and degenerate empire that could never be the true people of God” (Geaves p107). The martyrdom of Hussain added to the previous failure of arbitration between Ali and Muawiya led to a belief in the failure of the umma and necessity for divine selection of leadership, and became the basis for the “Shiite doctrine of the fallibility of the Umma and the infallibility of the Imam” (Al-Barghouti p18).

During the Umayyad Dynasty, the Shia did not accept the legitimacy of the Caliphate, and instead followed the “teachings of the descendents of Ali and Hussein, who succeeded one another on the basis of the father choosing his successor from among his sons. Those Imams did not have the actual political power under the Umayyad rulers, rather they had moral authority of being models to their followers” (Al Barghouti p 22). There is disagreement among Shias as to the number of imams from the line of Ali as “succession crises through the ages led to offshoots that broke away from the main body of Shiism – also known as Twelvers, for recognizing twelve imams” (Nasr p75). Each of the offshoots would come to be known by the number of the last Imam, and in each of these sects, “whenever a line of succession ended, the last Imam in the line was considered the Messiah, the Mahdi, the leader who ‘would return at the end of the time to

fill the world with justice as it was filled with injustice.’ The last of those Imams was Mohammad son of Hasson, the twelfth in the line of succession from Ali” (Al-Barghouti p23). It is believed that the Mohammad succeeded his father at the age of five, but that “God hid the Twelfth Imam from physical access in order to preserve his life,” and that during the period of his hiddenness, “the Twelfth Imam is the unseen Lord of the Age (*imam al-zaman*), the permanent imam until the Day of Judgment” (Nasr p67). Anticipation of the return of the hidden imam has become a part of Shia doctrine and in Shiism is “part of the belief in the correct interpretation of the Quran,” a lack of belief in which does not mean one is not “a Muslim, only a misguided one according to Shiite doctrine” (Al-Barghouti p44). Thus, though Sunnis are misguided in their beliefs, they are still part of the umma.

Following the disappearance of the Twelfth Imam, the Shia declined in political influence, and the view of the Shia gradually became that rather than a ruler of the umma, the hidden Imam was merely a guide that Muslims must choose to follow, and “his powerlessness thus becomes essential in his functions as a guide rather than a benevolent enforcer” (al-Barghouti p45). The Shia view that the Imam was the only legitimate authority faced the questions of leadership, and concluded that “in a case where the Imam was prevented from assuming his rightful authority, the interfering power was rendered illegitimate, and the ruler ‘unjust’ (*al-ja’ir**) and ‘unrighteous’ (*al-zalim**)” (Sachedina p98). This illustrates the principle of the just ruler necessary for the leadership of the umma to the Shia, a principle Abdulaziz Abdulhussein Sachedina describes as requiring obedience to the just ruler, the deputy of the Imam, and disobedience to the unjust ruler (or usurper) as obedience to God (Sachedina p 99). While these obligations were placed

upon the Shia, their decline in power and influence made challenging the Sunni caliphate an impossibility. In these conditions, the goal of the Shia became “to keep the faith until the imam’s return. Passive resistance replaced active rebellion. Shias would not recognize the legitimacy of Sunni rule, but they would not directly challenge it either” (Nasr p72). While under Sunni rule, but unable to challenge it and, “with the occultation of the last Imam, as we shall see, the jurists became the sole leaders of the Shi’a, and their guardians in all matters affecting their lives” (Sachedina p 49). The traditional view holds that the jurists have guardianship over three areas of community life: first, “over the persons and property of those who might otherwise be victimized,” second “over property and activities upon which the religious life of the community depends,” and third “over the welfare of the Muslim community, encompassing the responsibility of serving as a social force” (Rose p169).

This view of the jurists acting as deputies and guardians was challenged by Ayatollah Khomeini, who wrote, “after the Occultation, the just *faqih* has the same authority that the Most Noble Messenger and the Imams had ... here we are not speaking of status, but rather of function. By ‘authority’ we mean government, the administration of the country, and the implementation of the sacred laws of the *shari’a*” (Khomeini p62). In this, Khomeini notes that the leadership of the umma should fall to the *faqih*, that is “in the absence of the Imam, the scholars, the best qualified interpreters of the text, and therefore the traditional legislators of the Umma, should also inherit his executive powers” (Al-Barghouti p45). In arriving at such a conclusion, Khomeini realized “there is nothing in the rulings of the Imamite jurists to prevent jurists from assuming the authority (*wilaya**) invested in them indirectly by the twelfth Imam,” which could allow the jurist

to become the just ruler (Sachedina p118). In so doing, Khomeini brought about “the transformation of Shi’ism from a religio-political tradition into a revolutionary ideology” (Rose p167). This transformation found in the thought of Khomeini described an ideal Shia government, which tends “to regard velayat-e faqih as licensing jurisprudents to rule in the imam’s place with his full powers during the occultation” (Rose p176). While there was support for such a claim in the Shia tradition, Khomeini was the first to express and exercise such views.

With all of this, the view of the umma in Shia Islam is similar to that of Sunni Islam, in that it is a political unit. However, in the Shia conception, religious scholars rather than simply one who is fit to rule should undertake the leadership of the umma. Thus, the religious dynamics of Islam are equated to the political dynamics in the Shia conception of the umma.

The Shia of Lebanon

Now that the development of Shia Islam, and the conception of the umma in it, has been discussed, it is possible to examine the history and development of Hezbollah. In order to examine the development of Hezbollah, and understanding of the country of Lebanon, Hezbollah’s country of origin, and the Shia of Lebanon, is necessary. This section will examine the dynamics of Lebanon that helped to spawn Hezbollah, as well as the origins of the organization itself.

Lebanon did not exist as a political unit until after World War I, when “France acquired a mandate over the northern portion of the former Ottoman Empire province of Syria. The French separated out the region of Lebanon in 1920, and granted this area independence in 1943” (CIA Factbook). In this territory, there is no religious majority,

with large populations of Christian Maronites, Sunnis, and Shias, and the government of Lebanon was designed to reflect this plurality. Due to census statistics at the founding of Lebanon, “Sunni-Maromite domination of the political system, in which virtually all significant offices –from parliamentary seats to senior army and bureaucratic posts - were distributed according to confessional – which is to say, ascriptive sectarian-criteria,” (Norton p110-111) establishing a system in which Shias were practically disenfranchised politically. Under this system, “the Maronites were accorded the presidency and the Sunnis the prime ministership, while the Shiites were only allocated the post of parliamentary Speaker, a position richer traditionally in patronage possibilities than significant political power” (Norton p111). This system saw the Shia in Lebanon remain impoverished politically “despite a half-century's demographic changes, which saw the Shiites replace the Maronites as the largest confessional group in Lebanon,” a reality reflected by the Shias underdevelopment economically and socially (Norton p111). The underdeveloped Shia community of Lebanon could be divided into three groups, the “elite, the ‘Zuama,’ included the members of the rich families in the south and in Beqaa. The religious elite, the ‘Ulema,’ included the members of the families comprising the Shiite religious establishment, some holding a distinguished familial pedigree. The third stratum included all the peasants, laborers, and small merchants” (Azani p49). The demographics of Lebanon began to evolve in the 1960’s with “the transition from the village to the city, changes in the natural increase in the various communities, immigration, the impacts of modernization, and the appearance of new players in the Lebanese arena,” all of which served to elevate the status of the Shia in Lebanon and to break down the three classes of Shia society (Azani p51).

The rise of Lebanese Shia was mirrored by the rise of Sayyid Musa al-Sadr, who became one of the most influential political leaders and was “courted by the Maronite Christians, who saw him as a reasonable and intelligent reformer committed to Lebanon, and the PLO, which recognized his growing influence among the Shiites,” a courtship which allowed him to shift alliances as he saw necessary (Norton p113). The shifting of alliances by al-Sadr can be traced to “an interest not to destabilize the fragile foundations on which the Lebanese state stood, and on the other hand, the discrimination of the community by the state,” which required undertaking actions beneficial to the Shia community (Azani p54). Lebanon’s 1975 civil war nearly derailed the efforts of al-Sadr, as his “movement was one of social protest, and the din of battle almost smothered it” (Norton p114), while at the same time, “the collapse of the state and the resulting violence took a tremendous toll on the Shi’ite community, producing another cycle of demographic, social, and economic dislocation” (Hamzeh p14). The 1975 Lebanese civil war was the first in a line of paradigm shifting events for the Shia in Lebanon, and “the cataclysmic succession of events – civil war, Israel’s 1978 invasion and Sadr’s disappearance – was capped by the Iranian Revolution in 1979. The fate of Sadr and triumph of Shia Islam under Khomeini, at a time of civil ferment in Lebanon was a potent political and theological cocktail for the Lebanese Shiites” (Jaber p13-14). These events helped to foment religious radicalism in Lebanon, and combined with the mysterious disappearance of the moderate al-Sadr saw his political movement, Harakat al-Mahrumin, which translates to the Movement of the Deprived, give “way to a political organization and militia, Amal (Hope), which dominated Shia politics until Hezbollah” (Nasr p85). Following years of political and social repression, a short period of relief and political

awakening, and a civil war and foreign invasion that negated any gains made by the Shia of Lebanon, the stage was set for the emergence of Hezbollah.

Hezbollah emerged out of Amal in 1982. Amal, which translates to hope, is an acronym for “Afwaj al-Muqawamah al-Lubnaniyyah, or Battlions of the Lebanese Resistance” (Hamzeh p21). Amal was founded by al-Sadr shortly after the outbreak of the civil war as the military arm of the Movement of the Deprived, because he believed “that in the 1970s Lebanon it was no longer possible to maintain political power without military might and that, in a violence-saturated environment, a militia was an existential necessity for the survival of the community” (Azani p55). The emergence of a Shia militia positioned Amal to take the political lead of Lebanese Shia, however, in 1978 al-Sadr never returned from a trip to Libya, and “in the wake of al-Sadr’s disappearance, Amal experienced factionalization and militancy” (Hamzeh p23). Despite this splintering, “on the eve of the Israeli invasion of 1982 it was undoubtedly the most important Shiite political movement in Lebanon” (Norton p116), but the invasion served to be to great of an obstacle for the Amal movement without the charismatic leadership of al-Sadr.

Following al-Sadr, Nabih Berri rose to the position of leadership of Amal, and he “succeeded in steering Amal away from its clerical origins to a more secular platform” (Jaber p14). This move to a moderate position furthered the rift in the Shia community, and helped define two groups in the community, “the pragmatic and moderate majority, regarding itself as part of the Lebanese state and working toward changing the regime on the basis of the accepted rules of the game, and the extremist minority, denying the legitimacy of the secular and pro-Western Lebanese regime and working toward its overthrow in a revolutionary act” (Azani p59). This more militant group identified with

the revolutionary message of Iran's Ayatollah Khomeini, who led the Islamic Revolution of Iran in 1979, and "as a result, Sayyid Husayn al-Musawi, a member of Amal's command council, broke away in June 1982, and founded Islamic Amal," which would grow into Hezbollah (Hamzeh p23).

When Hezbollah was founded, the "initial goal was to launch a revolt against the Israeli occupation," but this soon expanded to "embrace the task of ridding Lebanon from the presence of Western forces and influences. These aims would be conducted under the banner of Islam, with the sponsorship of Iran and with the blessing of Syria" (Jaber p20-21). From its outset, Hezbollah has been closely tied to Iran, as "its fighters were trained by Iran's Revolutionary Guards," who enabled Hezbollah's militia as it "quickly developed into a lethal and highly organized military force, far more radical in its views than Amal – committed to pan-Islamic revolution" (Nasr p114-115). While Hezbollah was organizationally conceived in 1982, it was not until February 1985 that the views of the organization came into view, when "Hezbollah formally announced its existence in an 'Open Letter' – a political manifesto that outlined the party's aims and ideology" (Noe p5). This document provides an insight to the founding of Hezbollah, as well as a point of origin for the progression of Hezbollah's development.

Hezbollah's Open Letter

As with the study of Hamas, a look into the foundational document of Hezbollah is necessary to understand the organization. As previously noted, the Open Letter of Hezbollah was released in February 1985. While "this letter is a programmatic document rather than explanation of the components of Hizbullah's ideology," (Hamzeh p27), it does reveal the general leaning of the organization at its founding. The document

identifies the identity, fight, and objectives of Hezbollah, as well as addressing external communities. This portion of the study will outline and highlight some of the notable aspects of this document.

The Open Letter begins by clarifying the identity of Hezbollah. This is stated in the opening of the letter by the explanation “We are the sons of the *umma* (Muslim community) - the party of God (Hizb Allah).”⁴ The document expounds upon who constitutes the membership of Hezbollah by claiming, “We are an *umma* linked to the Muslims of the whole world by the solid doctrinal and religious connection of Islam ... This is why whatever touches or strikes the Muslims in Afghanistan, Iraq, the Philippines and elsewhere reverberates throughout the whole Muslim *umma* of which we are an integral part.” In this statement, the importance of the *umma* as a singular unit to Hezbollah is exhibited, as is the necessity for the *umma* to act together. Hezbollah also incorporates an explicitly Shia doctrine into the idea of the *umma* by stating that their actions are based upon “legal principles laid down by the light of an overall political conception defined by the leading jurist,” identified in the document as Iran’s Ayatollah Khomeini. Beyond this Shia understanding of the *umma* and its leadership, the Open Letter also declares Hezbollah’s identity as a resistance movement, committed when necessary to the use of force, as “our military apparatus is not separate from our overall social fabric.”

After identifying itself as a Shia resistance movement dedicated to the universal causes of the *umma*, Hezbollah expounds upon its fight, the reason for its existence. In so

⁴ All quotations from Hezbollah’s Open Letter taken from document accessed from Stand With Us (http://www.standwithus.com/pdfs/flyers/hezbollah_program.pdf), credited to The Jerusalem Quarterly, number Forty-Eight, Fall 1988. This was the only source that provided the full document, though others corroborated the substance of the Open Letter.

doing, America, France, Israel, and the Phalangist are implicated as ones who “invaded our country, destroyed our villages, slit the throats of our children, violated our sanctuaries and appointed masters over our people who committed the worst massacres against our *umma*.” This is in reference to actions by the Phalangists, the political party of Lebanese Maronites whose militia massacred thousands of Palestinians and Shias in the refugee camps of Sabra and Chatila due to the assassination of President Bashir Gemayel in 1982 (Jaber p77). The massacre, and the subsequent international silence regarding the massacre is noted as the reason for Hezbollah’s creation, as the Shia of Lebanon “could not bear any more treachery. It decided to oppose infidelity - be it French, American or Israeli - by striking at their headquarters and launching a veritable war of resistance against the Occupation forces.”

With the purpose for Hezbollah’s existence explained, the Open Letter moves on to discuss the objectives of the movement, with three central goals. The first is “to expel the Americans, the French and their allies definitely from Lebanon,” indicating that the movement is focused on the nationalistic issues of Lebanon. The second stated objective is “to submit the Phalanges to a just power and bring them all to justice for the crimes they have perpetrated against Muslims and Christians,” which again is focused within Lebanon. The third of the principle goals of Hezbollah is “to permit all the sons of our people to determine their future and to choose in all the liberty the form of government they desire,” another explicitly Lebanese issue. The Open Letter is clear in stating that only Islam is capable of preventing further imperialistic inroads into Lebanon, though it also claims no desire to force an Islamic system upon Lebanon and that the confessional system of government is the cause of Lebanon’s problems, and must be replaced rather

than reformed.

After identifying the objectives of Hezbollah, the Open Letter addresses both the Christians of Lebanon and the world. To the Christians, the letter urges toleration with Muslims, and further moves to proselytizing in saying, “Open yourselves up to Islam where you'll find salvation and happiness upon earth and in the hereafter. We extend this invitation also to all the oppressed among the non-Muslims.” To those outside of Lebanon, the Open Letter declares the Hezbollah rejects “both Capitalism and Communism, for both are incapable of laying the foundations for a just society,” and that Hezbollah as an organization seeks to bring justice to those who have not experienced justice.

Hezbollah Since the Open Letter

In the nearly 25 years since the publication of its Open Letter, Hezbollah has undergone drastic changes, most notably in its status, both within Lebanon and internationally. This section of the study will provide a brief overview of the development of Hezbollah since the Open Letter. Early in its development, including the period leading up to the Open Letter, Hezbollah “was surprising in its innovativeness and the level of determination and sacrifice that characterized its attacks,” to the point that by early 1984, Israel began to withdraw troops from parts of Lebanon (Azani p66). By 1987, five years after its conception, “Hezbollah’s presence in southern Lebanon was a fait accompli. Nevertheless, it was defined as a presence with the aim of resisting Israel’s stay in the south,” and as such, were tolerated by Amal as a non-threat (Azani p64).

The neutrality between the groups came to an end in 1988, following the kidnapping of a UN worker by a group linked to Hezbollah, which eventually led to the

War for Supremacy of South Lebanon in which “Amal, with military support from Syria, instigated the war on the basis that it was foiling Hezbollah’s attempts to take over its territory in South Lebanon and transform the area into an Islamic state” (Jaber p32-34). At the end of the war between the two Shia factions, “Hezbollah defeated the Amal movement in Beirut and won recognition as an organization with military and political power that must be taken into account. However, its failures in the south distanced it from the circle of anti-Israel activity” (Azani p76). The conflict between the two movements was settled by a series of Damascus Agreements, in which Hezbollah “assured both Syria and Amal’s leadership that, contrary to their belief, it had no interest in forming Islamic cantons in the South and was not interested in taking over as the Shiites political leader” (Jaber p35-36). While the war with Amal cemented Hezbollah’s status as a political and military force in Lebanon, it also signaled a shift towards a pragmatic approach to domestic politics, marked first of all by the peace settlements, which demonstrated Hezbollah’s desire that “first, it wanted to make the movement the standard bearer of the resistance against Israel by increasing its attacks on Israel, and second, it wanted to end the war with Amal and to restore its standing in the Shiite community” (Azani p85).

As part of the restoration of its standing in the Shia community, “Hezbollah’s leaders engaged in a heated debate over whether to participate more fully within Lebanon’s political system,” with those in favor of participation winning, a decision standing in direct opposition to the Open Letter” (Noe p6-7). This coincided with Hezbollah’s election of new leadership, with Abbas al-Musawi replacing Subhi Al Tufeili as the secretary general, which was seen “as part of a new trend that would include

joining the Lebanese political system as an opposition party with a Lebanese character” (Azani p87-88). Al-Musawi was killed early in 1992, and was replaced by Hassan Nasrallah (who remains the secretary general of Hezbollah), who continued Hezbollah’s integration into Lebanon’s political system, as well as overseeing the “escalating rate of attacks in the early 1990’s, from 19 in 1990 to 187 in 1994” (Noe p7-8). Hezbollah participated in its first elections in 1992, and in it “captured eight of the twenty-seven seats allocated to the Shi‘ites in the Lebanese parliament,” as well as winning four other allied seats (Hamzeh p112-113). In 1996’s next round of elections, Hezbollah saw its representation drop from eight to six seats, a decrease that some attributed to the belief “that the fighting against Israel’s security zone came at the expense of the treatment of social problems” (Azani p105). Hezbollah rebounded in the 2000 elections winning nine seats as renewed emphasis on “the party’s committed constituency and its social welfare services that have contributed to Hizbullah’s success” (Hamzeh p115). By 2008, Hezbollah’s status had reached the point that “an agreement among the country’s political factions gave Hezbollah and its opposition allies the right to veto any cabinet decision” (<http://topics.nytimes.com/top/reference/timestopics/organizations/h/hezbollah/index.html?8qa&scp=1-spot&sq=&st=nyt>). The latest round of elections in 2009 saw Hezbollah’s alliance win 57 total seat, a number fewer than expected, as “the Lebanese Parliament will be divided almost exactly as it was, denying the new majority a mandate to govern alone” (Slackman). Despite these results, it is clear that Hezbollah has grown to become a political force in Lebanon.

In addition to its political growth, the period since the Open Letter has seen Hezbollah endure several conflicts with Israel. Among these are Israel’s 1993 Operation

Accountability and 1996's Operation Grapes of Wrath, as well as the 2006 Summer War (<http://www.cfr.org/publication/15268/>) the first two being incursions by Israel into southern Lebanon. Following the truce after Operation Accountability, "Hezbollah claimed that Israel breached the truce and attacked civilian targets 231 times between 1993 and 1996. In return the Party of God says it retaliated with Katyushas (rockets) against settlements in northern Israel on thirteen occasions" (Jaber p173). In both of the operations, the goal was to "alienate the Lebanese civilian population from the Resistance in the hope of ending their support for Hezbollah," but in both cases the strategy failed (Jaber p178). The 2006 war between Hezbollah and Israel went further than the previous operations in demonstrating the growth and influence of Hezbollah. Following a July 12 Hezbollah attack in which it kidnapped Israeli soldiers, Israel invaded Lebanon, and "of all Israel's wars in 1948, this was the one for which Israel was most prepared" (Parsi p274). While both sides endured losses in the thirty-three days of fighting, "the war turned Hezbollah and its sponsor, Iran, into regional power brokers" (Nar p256). The result of this war was that "rather than strengthening and reinforcing the image of Israel's invincible deterrence," Israel was weakened and Hezbollah's "strategic capability wasn't significantly damaged, and its political strength within the complicated Lebanese sectarian mix may have been enhanced" (Parsi p276-277). This serves to demonstrate the growth and power of Hezbollah, as it has moved from a local Lebanese Shia resistance movement to a force capable of defeating Israel in war.

Hezbollah and Islam

Hezbollah, since its inception, has been a distinctly Shia movement. In its founding document, the Open Letter, it clearly states that it is part of the umma, and that

the culture of the movement “is based on the Holy Koran, the Sunna and the legal rulings of the *faqih* who is our source of imitation.” In this, the view of the umma as explained by Ayatollah Khomeini serves as the basis for the conception of the umma. Khomeini explained that “the imperialists and tyrannical self-seeking rulers have divided the Islamic homeland. They have separated the various segments of the Islamic umma from each other and artificially created separate nations” (Khomeini p48-49). Further, Khomeini states that in response to this separation of the umma and “in order to liberate the Islamic homeland from occupation and penetration by imperialists and their puppet governments, it is imperative that we establish a government” (Khomeini p49). The government to be established is one led by the *faqih*, or Islamic jurist, and to Khomeini, “the governance of the *faqih* is a rational and extrinsic matter; it exists only as a type of appointment” (Khomeini p63). Thus, in the view of Khomeini, the understanding of the umma is as a single unit of all Muslims, and should be under the leadership of the just Islamic scholar. This reflects the tradition Shia understanding of the umma, as a singular unit under the guidance of the Imam, and waiting for the return of the Twelfth Imam.

The importance of the Shia view of the umma and those of Ayatollah Khomeini to Hezbollah may be seen through the statements of Hassan Nasrallah, the secretary general of Hezbollah. In a speech on the thirteenth anniversary of Khomeini’s death he declared the movement’s reliance upon the Shia conception of the umma, and that of Ayatollah Khomeini by stating “We pledge ourselves to our Imam on his day of remembrance, that he will remain ever present in our minds, our hearts, and the blood in our veins, until all our great and lofty objectives are achieved” (Noe p277). Nasrallah reiterated these sentiments in a speech for Al-Quds Day in 2005, stating that “the genius of Imam

Khomeini, who was so knowledgeable of his time, led him make this deeply intellectual, ideological, political, emotional, and popular connection between the most precious Islamic religious occasion and the most sacred and important of causes” (Noe p353), the cause being the unity of the umma in resisting Israel’s expansion into Jerusalem and Palestinian territory. In these, and numerous other statement, the leadership of Hezbollah has expressed a desire for the unity of the umma under religious leadership, for the cause of resistance.

Conclusions

In this study, the Shia conception of the umma has been presented, as has the history, development, and current position of Hezbollah. Through this study, it has become clear that the umma is an important factor for Hezbollah both ideologically and operationally. Throughout its development, Hezbollah has looked to both Islamic doctrine and the inspiration of Ayatollah Khomeini for direction. In this, the unity of the umma is seen as a goal for aspiration, and the rule of the umma by the leadership of the just Islamic jurist is a necessary component. While Hezbollah has moved towards pragmatism in its political stance, the importance of Islam and the umma has remained.

Chapter Four

Conclusion

This study began with the goal of determining what role, if any, religious doctrine play in forming the policy and directing the action of resistance movements in the Islamic world. In order to do this, the conception of the doctrine of the umma was investigated in both Sunni and Shia Islam. That investigation was combined with an examination of a Sunni and Shia resistance movement, Hamas and Hezbollah, and the role which Islamic doctrine, especially that of the umma, plays in each. In this conclusion, the conception of the umma in both Sunni and Shia Islam will be compared, as well as the role that such a conception plays in Hamas and Hezbollah. Finally, those findings will be contrasted with the anticipated outcome stated with the introduction of the study question.

The Umma in Sunni versus Shia Islam

In looking at the umma in both Sunni and Shia Islam, there have been many similarities, but few differences. In both branches of Islam, the umma is the universal community of Muslim believers. Also, both branches see the umma as split due to the fracture of the Islamic world following the collapse of the Ottoman Empire after World War I. Sunni and Shia Islam both believe that the umma consists of all Muslims, despite doctrinal differences that may exist, while holding to the belief that doctrinal differences are simply areas in which other Muslims are misguided. Also, in both of these branches of Islam, the umma is a single political entity that supersedes any other form of allegiance or obligation.

The central difference in the belief of Sunnis and Shias on the doctrine of the umma is in the area of leadership. This was the cause for the Sunni-Shia split, and

persists as the main cause for disagreement between the branches. Sunnis believe that leadership of the umma should be determined by consensus, and as a result, the leader is not required to be an expert in Islam, simply one who strives to follow the principles of Islam. The Shias disagree with the belief that the umma should be led by an Imam, and in waiting for the advent of the Twelfth Imam, that jurists should be in leadership. Due to this difference in the qualification for leadership, there is also a difference in the response to leadership. In Sunni Islam, the leader of the umma is a fallible individual, and therefore following the leadership is voluntary. For Shias, the Imam is the representative of Allah, and as such is a source for emulation, which necessitates greater attentiveness to the position of the umma. The importance of the leadership of the umma, and the choice in following the dictates of that leadership compose the main differences in the conception of the umma between Sunni and Shia Islam.

The Umma in Hamas versus Hzbollah

This study moved from examining the umma in Sunni and Shia Islam to looking at the umma in resistance movements. Hamas was used as an example of a Sunni resistance movement, while Hezbollah was examined as a Shia movement. In the investigation of both of these movements, it was demonstrated that both were founded with stringent adherence to Islamic doctrines, and that both moved towards a more pragmatic viewpoint as they moved into the mainstream of politics among their constituencies. In both cases though, the appeal to the umma remained, though in most instances, it was an appeal rather than a point of action.

For Hamas, and the Sunni branch of Islam it represents, the umma plays a central role in its founding documents, as well as those that followed. In each of those cases, the

umma is referenced as a cause for their resistance to Israel as the land of Palestine is part of an Islamic trust that must be defended. Beyond that, through its documents, Hamas appeals to Muslims worldwide for support in their struggle, financially, physically, and in the media. In all of these appeals, Hamas reflects the Sunni view of the umma, in that Palestine is part a single unit that should be supported by all Muslims, but at the same time, it is upon the individual to decide to support Hamas in its resistance.

Hezbollah also appeals to the umma through its founding documents and has continued to reference the umma through the statements of its leaders. However, while Hamas appeals to the umma to provide support for resistance, Hezbollah states that the unity of the umma is the reason for its existence, and that it will act for the cause of the umma. Beyond this, Hezbollah uses the umma as justification for its actions, and demands that Muslims participate in unifying the umma and acting for its defense. Hezbollah also points to the inspiration of Ayatollah Khomeini for the unity of the umma under jurists during the occultation of the Twelfth Imam. In this difference between requests for voluntary action and the united umma acting under the leadership of jurists, the difference between Hamas and Hezbollah is seen. This serves to show that there is a difference in the conception of the umma, and how it affects the formation of policy and actions for these resistance movements.

Study Question Revisited

In the introduction, the question of this study was presented. At that point, it was stated that the adoption of particular aspects of religious doctrines would play a role in resistance movements and that how religious doctrines are perceived would serve to create identity within resistance movements, and further that the identity formed propels

the movement to action. More specifically to this study, this assumption was that there is a difference in the way Hezbollah and Hamas view the concept of umma, and that the difference would be in those included in the umma. The study has found that there is a difference in how Sunnis and Shias conceive the umma, and that difference is manifested in their actions and policies. This part supports the stated beliefs introducing this study. However, the difference in the two is not the scope of the umma, it is in the area of leadership. The issue of scope would have affected those grouped into the umma, and therefore would confine the territory for resistance to those areas in which members of the umma are found. However, since the issue is that of leadership, it is not the territory of resistance that is restrained, but the requirement to resist.

Beyond the aspect of the umma, this study was centered on the question of identity as it relates to resistance. In both Hamas and Hezbollah, the Islamic nature of the movements propels the action of the members of the movement. The Sunni and Shia characteristics of each movement frame the necessity for resistance, and solidify the following of each of the movements. While the doctrine of the umma may not serve as the central premise for either Hamas or Hezbollah, it does serve to distinguish Sunni and Shia Islam, and it is Islam that fuels each of these movements. Therefore, the adoption of particular aspects of religious doctrines does play a role in resistance movements how religious doctrines are perceived serves to create identity that directs the policies and actions of resistance movements.

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Appendices

Appendix A

Jihad and Resistance

The concept of the umma serves in the formation of identity for Islamic resistance movements such as Hamas and Hezbollah, and as such propels organizational action. At the same time, no discussion of Islamic resistance is complete without addressing the issue of jihad. The main body of this study has attempted to refrain from such coverage, relegating the issue to an appendix, which seeks to explain the concept of jihad, correlate it to Islamic resistance, as well as providing an explanation of why the concept of jihad is designated for discussion in an appendix.

In the Quran, “the word jihad is mentioned about forty-one times” (Marranci p17). Beyond the Quran, the concept of jihad is developed in *hadith* and *maghazi* (literature), which record the experience and struggles of the early umma to build and sustain the Islamic faith in tumultuous times. The term itself derives “from the root *j.h.d.*, the meaning of which is to strive, exert oneself, or take extraordinary pains. *Jihad* is a verbal noun of the third Arabic form of the root *jahada*, which is defined classically as ‘exerting one’s utmost power, efforts, endeavors, or ability in contending with an object of disapprobation’ ” (Firestone p16). In this basic definition of jihad as “striving” the difficulty in understanding may be seen, because the directive of striving is not clearly identified. Due to this lack of clarity, the concept of jihad is often divided between greater and lesser jihad, where “spiritual jihad, or *jihad bil-nafs*, is seen by most Muslims as the ‘greater jihad.’ On the other hand, there is also the concept of *jihad bil-sayf*, literally ‘jihad by the sword,’ or violent jihad, traditionally viewed as the ‘lesser jihad’ ” (Springer p18). While there is this distinction between the greater and lesser jihad, “the

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Quranic word *jihad* became associated with a full, complex doctrine and set of practices relating to the conduct of war” (Bonner p22). This may be seen in the hadith tradition, in which the prophet Muhammad is at one point quoted, “I would like to fight in the way of Allah and be killed, then be brought to life again so I could be killed, and then be brought to life again so I could be killed” (Peters p21), helping to create a culture of martyrdom, as *jihad* is made a physical conflict.

The evolution of the concept of *jihad* into a doctrine for the conduct of war may be seen as a four-step process. Reuven Firestone identifies these four stages, both in the traditional understanding, as well as reorganizing them based on groupings of Quranic verses. The traditional stages, which correspond to the historic needs of the *umma* are as follows: nonconfrontation; defensive fighting; initiating attack allowed but within the ancient strictures; and unconditional command to fight all unbelievers (Firestone p51-65). Firestone regroups the Quranic verses thematically with the following divisions: “(1) Verses expressing nonmilitant means of propagating or defending the faith; (2) Verses expressing restrictions on fighting; (3) Verses expressing conflict between God’s command and the reaction of Muhammad’s followers; (4) Verses strongly advocating war for God’s religion” (Firestone p69). In both ways of categorizing verses regarding *jihad*, the concept is seen both as an internal and external struggle. Also, the verses demonstrate that there are different occasions for the use of each type of struggle, which creates a necessity of interpretation and discernment for practice of the verses.

One style of interpretation used for understanding the Quran is known as abrogation or *naskh*. The term *naskh* “literally means ‘obliteration’ or ‘annulment’. It is

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the suspension or replacement of one ruling by another, provided that the latter is of subsequent origin, and that the two rulings are enacted separately from one another” (Bonney p24). Abrogation developed as it was seen that “the Quran appears to contain a great deal of seemingly contradictory material” as a way to “determine which of the inconsistent statements on a topic was the latest to have been revealed” (Firestone p49). This process attempts to cope with the apparent contradictions and debated passages in the Quran, but there is not a consensus regarding the understanding of jihad. The Quran “was transmitted to the world through the person of Muhammad, who died in 632 CE,” (Bonner p23) however Muhammad transmitted the Quran orally, and the following process of creating a written collection of the Quran was completed during the reign of the caliph ‘Uthman (644-656 CE). This gap has allowed for debate over the chronology of when specific verses were revealed to Muhammad, and therefore, the order for abrogation, which is especially true in the understanding of jihad, as well as how the act of jihad becomes obligatory for the umma.

In addition to the practice of abrogation being used in an attempt to clarify some of the confusion associated with the concept of jihad, examination of the tradition of the hadith is also incorporated in to building an understanding of jihad. The word hadith “means ‘a piece of information,’ ‘narrative,’ or ‘account’ ” (Firestone p93), and as such, the hadith is composed of “reports of sayings and deeds, with normative force, attributed to the Prophet and those around him” (Bonner p21). These rose to importance in Islam as it was realized that “the fixed text of the Quran could not answer all the questions that naturally arose within the new community with regard to proper religious ritual, personal

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behavior, and law” (Firestone p93). To address these questions, “these traditions cover a broad range of subjects, in some instances supplementing accounts in the Quran, in others treating events and issues not addressed therein” (Cook p13-14).

In the Sunni tradition, the hadith remained as an oral tradition “until the ninth century, when tens of thousands of individual traditions were collected and reduced to writing in dozens of collections ... six of these collections of prophetic traditions from the ninth century eventually took precedence over all others” (Firestone p95). In the Shia tradition, collection of the hadith extended beyond the ninth century to include the sayings of the Imams in addition to those of the prophet Muhammad. In his book, *Understanding Jihad*, David Cook traces the development of the hadith from the oral to written tradition, as well as providing an overview of those who collected the sayings, and identifying that “much of the extensive tradition literature on the subject of jihad concerns broad themes: defining fighters and fighting, distinguishing classes of prohibitions in fighting, determining the equitable division of spoils and the fate of prisoners” (Cook p15). In discussing jihad, the central theme found in the hadith is “the propagation of the faith through combat,” while other themes include the conduct of warfare, leadership, collection of taxes from non-Muslims (*jizya*), asceticism, intention of jihad, martyrdom, and the internalized jihad (Bonner p49-51).

The use of the hadith is for questions that are not clearly addressed in the Quran, and therefore carries nearly as much weight as the Quran. The hadith, however, does not solve all issues of understanding with the concept of jihad. This is due to the necessity for Quranic understanding to create a universally unified position regarding apparent

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contradictions, while the hadith does not necessitate a consensus on the understanding of jihad. Thus, some of the hadith may come into disagreement, therefore “the listener or reader – especially if he holds a position of responsibility, such as judgeship – must choose between the conflicting traditions and must state the reasons and methods that have brought him to his choice” (Bonner p47). It is due to these complexities regarding jihad in the interpretation of the Quran, hadith, et cetera which exceed the parameters of this study, and deflect attention from the focus on the role of resistance by the umma, that the topic of jihad has been excluded from the larger study.

Much like the idea of umma, the conception of jihad differs within the Sunni and Shi'i communities. In the Sunni view of jihad, “the crux of the doctrine is the existence of one single Islamic state, ruling the entire umma. It is the duty of the umma to expand the territory of this state in order to bring as many people under its rule as possible. The ultimate aim is to bring the whole earth under the sway of Islam and to extirpate unbelief” (Peters p3). Under the Sunni view, “the Qur'an requires Muslims to strive to establish just public order overall. It is at this point that *jihad* becomes an offensive endeavor to bring about the world order that the Qur'an seeks” (Sachedina p106). Thus, the Sunni view of jihad is as a required exercise for the umma, meant to expand the influence of Islam throughout the globe.

The Shi'i view of jihad and the umma is similar to the Sunni view, but there are a few key differences. As previously noted, in the Sunni view jihad “the Islamic state [was] conceived as the sphere where the Islamic norms prescribed in the Shari'a were paramount. This conception of *jihad* was scrutinized by the Shi'i jurists in the light of

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their Imams' statements that did not regard the wars of expansion as being motivated by the Quranic injunction" (Sachedina p108). Thus, the Shia do not agree with the idea of using jihad for expansion of Islamic territory for either political or religious gains. The other key difference between the two is that "the Twelver Shiites hold that jihad can only be waged under the leadership of the rightful Imam" (Peters p4). To clarify the idea of leadership for jihad, "Imamite jurisprudence consistently underscores the point that the call to *jihad* can be issued only by an individual who is most learned in the purpose and the aim of Islamic revelation ... such an individual is the Imam or his deputy who possesses 'sound belief' (*iman sahih*) and 'sound knowledge' (*'ilm sahih*)" (Sachedina p 109). This traditional view holds that the jurists have guardianship over three areas of community life: first, "over the persons and property of those who might otherwise be victimized," second "over property and activities upon which the religious life of the community depends," and third "over the welfare of the Muslim community, encompassing the responsibility of serving as a social force" (Rose p169). Ayatollah Khomeini expanded the Shii jurists' authority as representatives of the Imam through his elaboration of the concept of *velayat-e faqih* in calling for jihad, which provided the just jurist with the authority to rule on behalf of and as representative for the Imam during his occultation.

Aside from these views on the expansionist aims of jihad and the necessity of the Imam, or his deputy, for declaration of jihad, the Sunni and Shi'i view of jihad is quite similar. This similarity has been paired with a popular distortion of jihad as "holy war", and in many cases an unrestrained war against all so-called "infidels" that has become the

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common understanding of jihad in the West. This understanding ignores the far more important Muslim discourse of the “greater jihad,” which describes, “personal struggles within oneself and struggles like that against poverty” (Deeb p204), struggles detailed by Laura Deeb’s studies of personal piety and gender roles among Lebanese Shia in her book *An Enchanted Modern*. Despite this emphasis on personal struggle, “the word *jihad* has been much maligned, used wither to conjure fear or to inspire violence” (Deeb p204).

With this, jihad has become a weighted term that may not simply be mentioned, but instead become a term that requires explanation and history to strip the values and prejudices that may be held by the reader. At the same time, any discussion of resistance in Islam requires a discussion of jihad, because it is the doctrine of struggle and striving in the name of Allah. There can be no resistance without struggling, and jihad is the concept that guides such action in Islam.

About the Author

Matthew Lawson was born in Tampa, Florida. In 2004, he earned a B.A. degree from the University of South Florida, majoring in Political Science with a minor in British and American Literature. He is scheduled to earn a M.A. in Political Science with a focus in Comparative Politics and International Relations from the University of South Florida in August 2010. Following this, he will pursue a Ph.D. at a yet to be determined institute.