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Resistance, Jihad, and Martyrdom in Contemporary Lebanese Shi'a Discourse

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This article examines the contemporary Shi'a understanding of jihad, martyrdom, and resistance through an analysis of the writings of two leading Lebanese Shi'a scholars: Muhammad Husayn Fadlallah and Muhammad Mahdi Shams al-Din. This article shows the impact of their writings on resistance movements in the region. It maintains that their discourse is central to the ideological foundation of Hizbullah, and also has affected the development of Hamas and its adoption of tactics developed in Lebanon against Israel.

In recent years, the terms *jihad* and *martyrdom* have become synonymous in the Western media with that of *terrorism*. This simplistic conflation disregards the multiple meanings of these terms as they are used within their discourses of origin. This article aims to add conceptual clarity to this muddled language by examining the contemporary Shi'a understanding of these concepts, and the closely related concept of resistance, through an analysis of the writings of two leading Lebanese Shi'a scholars: Muhammad Husayn Fadlallah¹ and Muhammad Mahdi Shams al-Din.²

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- 1. Sayyid Muhammad Husayn Fadlallah was born in Najaf, Iraq in February 1935 and grew up there. He spent the first 34 years of his life around the *hawza* (religious seminary) of Najaf. In 1966, forced to flee Iraq because of the persecution of the Shi'a by the Ba'th regime, Fadlallah moved back to Lebanon. In 1981, shortly after the Iranian revolution, Fadlallah publicly recognized Ayatollah Ruhollah Khomeini as the *wali al-faqih*. Since then, his role in Lebanon and the Arab Shi'a world at large has consistently and steadily grown. After Khomeini's death in 1989, Fadlallah has distanced himself from Iran. In 1995 he declared himself a source of emulation, or *marj'a taqlid*, despite resistance from Shi'a scholars in Iran and Lebanon. A good source for Fadlallah in English is Jamal Sankari, *Fadlallah: The Making of a Radical Shi'ite Leader* (London: Saqi Press, 2005). Also see his website, http://english.bayynat.org.lb/Biography/index.htm.
- 2. Muhammad Mahdi Shams al-Din was born in Najaf in 1936. He studied *fiqh* (jurisprudence) under Muhsin al-Hakim and Abu al-Qasem al-Khu'i. In 1969, Shams al-Din returned to Lebanon and helped Musa al-Sadr establish the Supreme Shi'a Council (SSC). In 1975, Shams al-Din was elected to the position of Vice-Chairman of the SSC. When SSC Chairman Musa al-Sadr disappeared during a visit to Libya in 1978, Shams al-Din assumed the helm of the SSC. He remained Deputy-Chairman of the SSC until 1994 when he was officially elected full Chairman of the Council. Shams al-Din passed away in 2001. For more on Shams al-Din, see http://Shamseddine.com/arabic/?page_id=2. This site is in Arabic.

MIDDLE EAST JOURNAL ★ VOLUME 62, NO. 3, SUMMER 2008

DOI: 10.3751.62.3.12

By scrutinizing four of their works published in Lebanon between 1998 and 2001,³ I will tease out their conceptions of jihad and martyrdom and articulate how these prominent Lebanese Ayatollahs base these concepts on their understanding of Shi'a tradition. Specifically, in the tradition that Michael Fischer has dubbed "the Karbala paradigm," which provides an exemplar for taking an active role and rebelling against injustice and tyranny, manifest in this case with the Israeli invasion and occupation.

In this article, I answer the following questions: What is the Shi'a definition of jihad and of "Islamic resistance?" Are they one and the same? If so, are they to be understood as an exclusively armed form of resistance or can "Islamic resistance" be non-violent? And more importantly to a Western audience, who is the target of this resistance? More specifically, can "resistance" occur against local corrupt rulers or is it always directed against Israel, against the United States, or against what has locally been termed "Western Imperialism?"

I then examine the impact of these writings on resistance movements in the region and analyze their implications. I argue that the discourse of Fadlallah and Shams al-Din has influenced Hizbullah in Lebanon, and I contend that the Party of God incorporated this resistance discourse into its ethos and made it its defining attribute if not its raison d'être. I also maintain that through its influence on Hizbullah, this discourse has affected the development of Hamas in neighboring Palestine. What do Fadlallah and Shams al-Din mean by resistance? How do they define the concept, and in what ways do they link it to jihad?

DEFINING JIHAD

According to Peters, "the Arabic word Jihad ... means to strive, to exert oneself, to struggle." Jihad is initiated for one of four principal causes: "1) defense, 2) revolution

- 3. More specifically, I will analyze the following works: a) Iradat al-Quwwa: Jihad al-Muqawama fi Khitab Ayatullah al-Uzma Al-Sayyed Muhammad Husayn Fadlallah [The Will to Power: The Jihad of the Resistance in the Discourse of the Grand Ayatollah Sayyid Muhammad Husayn Fadlallah] (Beirut: Dar al-Malak, 2000) and Kitab al-Jihad [The Book of Jihad] (Beirut: Dar al-Malak, 1998), both authored by Fadlallah; and b) Al-Muqawama fi al-Khitab al-Fiqhi al-Siyasi li Samahat al-Imam Muhammad Mahdi Shams al-Din [Resistance in the Politico-Religious Discourse of the Imam Muhammad Mahdi Shams al-Din] (Beirut: al-Mu'asasa al-Dawliah, 1998) and Fiqh al Unf al-Musallah fil Islam [The Jurisprudence of Armed Violence in Islam] (Beirut: al-Mu'asasa al-Dawliah, 2001), both written by Shams al-Din. The local conjuncture in Lebanon (1998 and 2001) makes the timing of the publication of these works on resistance and jihad interesting. Indeed, during that period the Lebanese population at large rallied around the "Islamic Resistance," and popular support helped Hizbullah lead a war of attrition against Israeli occupation of its self-declared "security zone." This war of attrition and the Israeli losses it led to were one of the reasons for the unilateral withdrawal of the Israeli army in 2000.
- 4. Michael Fischer, *Iran: From Religious Dispute to Revolution* (Cambridge, MA: Harvard University Press, 1980).
- 5. Such an assertion might help explain the current standoff in Lebanon between Hizbullah and the Siniora government. The party can be seen as trying to defend its right to remain a "resistance" group and to bear arms despite calls for its disarmament manifest in the discourse of Lebanese politicians and in UN Security Council Resolution 1559.
- 6. Rudolph Peters, *Jihad in Classical and Modern Islam* (Princeton: Markus Wiener Publishers, 1996), p. 1.

against tyranny, 3) establishment of the Shari'a [... and] 4) the punishment of treaty violators." The authority under which jihad is waged is both religious and political. In Shi'ism, a rightful jihad can be waged only under the leadership of the Imam. According to Shi'a beliefs, the Imam has been in Occultation since the ninth century, and no rightful jihad can be waged in his absence. Abedi and Legenhausen note that "[t]here have been strong elements within the ulama which insisted that neither the state nor the religious institution had any right to act on the behalf of the Imam. The Akhbari School of jurisprudence ... is famous for this position."

This approach was countered by a follower of the Usuli School, Ayatollah Ruhollah Khomeini, who developed a theory that allows the *faqih* (religious scholar) to combine both the religious and political attributes of the Imam: *wilayat al-faqih* or the guardianship of the Jurisprudent. Khomeini argued that no function of government is reserved to the Hidden Imam. Still, Khomeini was wary of the use of the term as there is a degree of sensitivity in the Islamic world as to what exactly constitutes jihad and the conditions under which it is to be waged. This sensitivity "is reflected in the failure of the leaders of the Islamic Republic to use the term jihad when reporting on the war with Iraq; instead they refer to the 'Iraqi Imposed War.'" However, the language and symbols of jihad and martyrdom were used in the Iraq-Iran War (1980-1988). Kamran Aghaie argues that "the symbolic language of jihad and martyrdom was used extensively and effectively to mobilize the masses of Iranians to fight against the Iraqi invasion. Because Iran was severely 'outgunned' by Iraq and its supporters ... 'martyrdom' was especially commonplace." of the Usual Paris of the Usua

In *Kitab al-Jihad*, Muhammad Husayn Fadlallah draws on the works of previous Shi'a scholars to define the concept of jihad. He identifies it as "a sacrifice of the self and one's financial assets to fight polytheists and unbelievers, or to raise the profile of Islam and perform the rituals of faith." Fadlallah maintains that several Qu'ranic verses call man to jihad using his person and finances, as "these are the two main forces one can unleash in the service of God." He states the goals of the jihad as:

- 1. Working to build a life on the basis of belief in God, his Prophets, and his laws.
- 2. Protecting Islamic dogma from persecution.
- 3. Granting victory to the persecuted and downtrodden in their fight against colonialist and exploitative tyrannies.
- 4. Undermining unbelievers.
- 5. Protecting oneself by fighting invaders and halting their aggression against believers, their homeland, and sacred places. ¹³

Muhammad Mahdi Shams al-Din states that jihad as agreed upon by Muslim

- 7. M. Abedi and G. Legenhausen, eds., *Jihad and Shahdat* (Houston: The Institute for Research and Islamic Studies, 1986), p. 15.
 - 8. Abedi and Legenhausen, eds., Jihad and Shahdat, p. 17.
 - 9. Abedi and Legenhausen, eds., Jihad and Shahdat, p. 19.
- 10. Kamran Scott Aghaie, *The Martyrs of Karbala* (Seattle and London: University of Washington Press, 2004), p. 133.
 - 11. Fadlallah, Kitab al-Jihad, p. 14.
 - 12. Fadlallah, Kitab al-Jihad, p. 73.
 - 13. Fadlallah, Kitab al-Jihad, p. 74.

scholars "can only be against unbelievers who are not linked to Muslims by treaties or truces and who do not live among Muslims under the law of *dhimmis*," ¹⁴ i.e., as a protected minority. He also notes that jihad against other Muslims is illegitimate. ¹⁵ Therefore, the legitimacy of using armed violence against ruling regimes in Islamic countries as a form of jihad depends on whether the people in power can be seen as *Kafir* (apostates or unbelievers). He quickly points out that if the rulers appear to be Muslim, recognize Muhammad as a Prophet, and accept his message, then they cannot be considered apostate. Their divergence from an Islamic political system is an insufficient reason to label them apostates. One cannot wage a jihad against them because their position is not that of clear, unadulterated apostasy. ¹⁶

Shams al-Din's claim that jihad against Muslim local rulers is illegitimate demonstrates a notable distinction between Shi'a thought and that of Sunni thinkers such as the Egyptian Sayyid Qutb or contemporary "jihadis" such as Usama bin Ladin who call for a jihad against what they see as unjust local regimes. ¹⁷ For the Shi'a, the fight against corrupt local regimes falls under another heading: that of fighting oppression. For that purpose, the use of the "Karbala Paradigm" becomes paramount, as we will see later in the case of pre-revolutionary Iran.

RESISTANCE AND MARTYRDOM

In his book on the jurisprudence of armed violence, Shams al-Din affirms that:

Armed political violence, exhortations to violent actions and violent responses to a foreign invader or occupier is ... a legitimate *defensive* jihad [emphasis added] ... It is also a duty for the entire nation ... Whether this jihad takes the form of a regular war or that of a public or secret resistance or guerrilla warfare does not impinge on its legitimacy.¹⁸

Resistance, then, is a form of jihad. It is a defensive jihad¹⁹ against an occupying force, in this case Israel. Sermons by both religious leaders emphasize the importance of resisting Israeli ambitions in Southern Lebanon. For example, Shams al-Din says:

We will not surrender to the enemy. We will do our duty in facing him, in fighting him, in resisting him. ... At the same time our duty is to be steadfast and stay rooted in the land. We should resist displacement by any means possible, because

- 14. Shams al-Din, Figh al-Unf al-Musallah, p. 47.
- 15. Shams al-Din, Figh al-Unf al-Musallah, p. 49.
- 16. Shams al-Din, Figh al-Unf al-Musallah, pp. 51-52.
- 17. When the fight against the local regimes seen as the "near enemy" does not succeed, the neo-Salafis go against the "far enemy," i.e., the United States, attacking this enemy on his own territory as demonstrated by the events of September 11, 2001. For more on the evolution of Salafi movements, see Fawaz Gerges, *The Far Enemy: Why Jihad Went Global* (New York: Cambridge University Press, 2005).
 - 18. Shams al-Din, Figh al-Unf al-Musallah, p. 23.
- 19. As Amal Saad Ghorayeb has shown, "Jihad is essentially defensive, as opposed to an offensive activity in Hizbullah's conception." Amal Saad Ghorayeb, *Hizbullah: Politics and Religion* (London: Pluto Press, 2002), p. 122.

the conspiracy that aims at taking the land also aims at emptying it ... to prepare for its settlement [by Israelis].²⁰

In another sermon, Shams al-Din maintains, "[T]he only practical option for the Lebanese is resistance ... in its many forms, political, ideological, and military." He perceives resistance as self-defense, and the latter is permitted by Islamic law. The definition of the self in this case is encompassing: it includes property and honor. ²²

Fadlallah affirms that resistance protects human dignity: "[R]esistance allows man to feel human ... to feel alive. It allows man to feel he is not a negligible quantity manipulated by his enemies." He says that calling resistance Islamic "is to have mankind follow the teachings of true Islam." ²⁴

According to Fadlallah and Shams al-Din, resistance takes two forms. First, it is a fight against the occupier, a defensive jihad that uses all possible means to defend the land, including martyrdom. In that case, the "bombers give themselves in a spirit of obligation. ... Their deaths are seen as a sacred duty to sacrifice, to give themselves up totally."²⁵ For Ivan Strenski, these sacrifices are offered to the bomber's imagined community, and that community is obliged to accept and to reciprocate the sacrifice. To render the sacrifice meaningful the community must engage in reciprocity through a continuation of the struggle. Through this sacrifice, the bomber becomes a "martyr," and he is made holy. "[A]t the same time, the sacrifice performed makes the territory ... 'holy' since [it] is a site of an event of making something holy, as well as an intended recipient of sacrifice."²⁶

Land made holy by martyrdom must not be abandoned to the enemy. Hence the second meaning of resistance: *sumud*, steadfastness, a passive resistance manifest in a refusal to leave the land. Fadlallah and Shams al-Din fear the Lebanese of the South will repeat the fate of the Palestinians of 1948 and 1967: becoming part of an unwanted Diaspora. These justifications of resistance, manifest in suicide bombing, one of its aspects, speak to Robert Pape's assertion that:

suicide terrorist campaigns are primarily nationalistic not religious ... every group mounting a suicide campaign over the past two decades has had as a major objective — or as its central objective — coercing a foreign state that has military forces in what the terrorists see as their homeland to take those forces out.²⁷

The discourse of our two authors is then a nationalistic discourse couched in an Islamic language. ²⁸ Hence, religion becomes a justification for a secular purpose: the

- 20. Shams al-Din, Al-Muqawama, p. 85.
- 21. Shams al-Din, Al-Muqawama, p. 232.
- 22. Shams al-Din, Figh al-Unf al-Musallah, p. 168.
- 23. Fadlallah, Iradat al-Quwwa, pp. 34-35.
- 24. Fadlallah, Iradat al-Quwwa, p. 40.
- 25. Ivan Strenski, "Sacrifice, Gift and the Social Logic of Muslim Human Bombers," *Terrorism and Political Violence*, Vol. 15, No. 3 (Autumn 2003), p. 22.
 - 26. Strenski, "Sacrifice, Gift and the Social Logic of Muslim Human Bombers," p. 25.
 - 27. Robert Pape, Dying to Win (New York: Random House, 2005), p. 21.
- 28. Although Pape's argument has been criticized on the basis of the recent suicide bombings in Iraq that have targeted local civilians as well as members of the coalition forces, Pape's definition is [Continued on next page]

liberation of the land. This goal can be called "secular" because the aim is not the freedom of the Muslim Umma at large, but rather the liberation of a specific territory.

KARBALA, RESISTANCE, AND SHI'ISM

The battle of Karbala (680 AD), which saw the martyrdom of Imam Husayn at the hands of the Umayyads, is perhaps the central narrative of Shi'ism. According to Hamid Enayat, "Husayn is ... the only Imam whose tragedy can serve as a positive ingredient of the mythology of any persecuted but militant Shi'i group of the Twelver School."²⁹ The story of Karbala was used in the mourning rituals of Muharram under the different ruling dynasties in Iran. The purpose was to move the audiences to tears, as salvation was accomplished through lamentation. For a long time, "the concept of the martyrdom of Husayn as vicarious atonement prevailed over its interpretation as a militant assertion of the Shi'i cause."³⁰ This began to change in the last decades of Pahlavi rule in Iran.

In the prelude to the Islamic revolution, "the religious leadership surrounding Khomeini used religious symbols effectively to motivate the Iranian masses against the Shah's regime. One of the most important set of symbols used in this oppositional political discourse was the Karbala Paradigm." In one of the new politicized interpretations, the oppressed Iranian masses came to represent Husayn and the martyrs who died with him on the plains of Karbala, while the Shah and his regime were equated with the Umayyad rulers. Another narrative emphasized the Imam not only "as a model for rebellion against the Shah [but also] against foreign imperialist powers."

In the Lebanese case, we see a shift in the Karbala paradigm from resisting the oppressor, be it the local tyrant or the faraway imperialist powers exemplified by the US, to resisting another oppressor — the invader, or Israel. This is unsurprising because in Iran "the Karbala narrative [had] proven to be a relatively … flexible set of symbols, the interpretation of which has readily evolved in accordance with changing political trends." Indeed "the Karbala paradigm continued to be used in new forms throughout the 1980s and 1990s. The Shah, the United States, Israel, and Iraq … were equated with Yazid, and the Islamic revolutionary regime and its supporters with Hoseyn and his followers." Hoseyn and

In a series of speeches from the early 1980s on the occasion of 'Ashura, the tenth day of the Muharram celebrations, Shams al-Din affirms, "'Ashura is an occasion to

[Continued from previous page]

certainly valid for the form of "terrorism" described above. This was the form of "terrorism" available in the Middle East until the Iraq invasion of 2003.

^{29.} Hamid Enayat, *Modern Islamic Political Thought* (London and New York: I.B. Tauris, 2005), p. 181.

^{30.} Enayat, Modern Islamic Political Thought, p. 183.

^{31.} Aghaie, The Martyrs of Karbala, p. 87.

^{32.} Aghaie, The Martyrs of Karbala, p. 87.

^{33.} Aghaie, The Martyrs of Karbala, p. 110.

^{34.} Aghaie, The Martyrs of Karbala, p. 112.

^{35.} Aghaie, The Martyrs of Karbala, p. 132.

reject injustice, to protect mankind's dignity, and to guard man's present and future,"³⁶ that "the only Shi'a ideology is resisting occupation,"³⁷ and "the Israeli invasion has made a Karbala of Lebanon."³⁸ In a 1983 sermon, Shams al-Din declares the beginning of resistance against Israel by drawing a parallel between the Lebanese plight under the Israeli occupation and the martyrdom of Imam Husayn at Karbala. With language echoing Catholic descriptions of the Passion of Christ, he says, "Karbala represents the pinnacle of sacrifice and offering for Islam and mankind." He also maintains that "Islam is a constant revolution, a constant movement, and renewal in mankind."³⁹

Ayatollah Fadlallah agrees with these interpretations of the defining moment of Shi'ism, the martyrdom of Imam Husayn at Karbala. In a 1992 sermon on the occasion of 'Ashura, Fadlallah argues that "it is meaningless for those who oppose resistance to celebrate 'Ashura." Joseph al-Agha maintains that:

Fadlallah regarded martyrdom operations that are conducted by Muslim believers upon the approval and sanctioning of Muslim religious scholars, as religiously sanctioned self-sacrificial defensive jihadi acts of resistance against the occupying Zionist enemy. As such Fadlallah defined martyrdom as a legitimate act of resistance ... Fadlallah emphasized that martyrdom inculcates the Muslim populace with a sense of collective action, identity, and empowerment that project to the world the plight of the oppressed. Thus, according to him continuous engagement in martyrdom is the only solution to the Zionist violent occupation.⁴¹

Resistance, then, is at the core of Shi'a identity. These discourses reinforce the centrality of this concept and its logical conclusion of martyrdom in Shi'a thought. Indeed, Hizbullah readily acknowledges that Karbala has become so firmly ingrained in the Shi'ite psyche that the Islamic resistance in Lebanon could not have emerged without it.⁴²

RESISTING ISRAEL (AND BY EXTENSION THE US) AS A MORAL/RELIGIOUS DUTY

Shams al-Din declares that "resisting all the projects of Israel [in Lebanon] is a moral and religious duty." ⁴³ He gives a series of principles for this resistance, chief among which are the following: a rejection of collaboration with Israel and treatment of such collaboration as high treason; an interdiction to sell land to Israel; and a call upon the population in South Lebanon to remain steadfast. ⁴⁴

Shams al-Din seems aware that help should not be expected from the internation-

- 36. Shams al-Din, Al-Muqawama, p. 70.
- 37. Shams al-Din, Al-Muqawama, p. 96.
- 38. Shams al-Din, Al-Muqawama, p. 101.
- 39. Shams al-Din, Al-Muqawama, p. 108.
- 40. Fadlallah, Iradat al-Quwwa, p. 113.
- 41. Joseph al-Agha, *The Shifts in Hizbullah's Ideology* (Amsterdam: Amsterdam University Press, 2006), p. 139.
 - 42. Saad-Ghorayeb, Hizbullah, p. 125.
 - 43. Shams al-Din, Al-Muqawama, p. 103.
 - 44. Shams al-Din, Al-Muqawama, p. 115.

al community, the UN Security Council, or world powers. He says, "We will not wait. We will work to put pressure on the international community to reject the Israeli presence in Lebanon but we will not stop resisting." He continues prophetically: "Israel is a friend of the United States, the ally of the United States ... They [the US] should seriously consider its interests in the region." On the topic of the United States, he maintains that the Lebanese "should create an international shock ... we should shock the international community and the forces active in shaping public opinion, especially in the United States. The US should realize the situation is still dangerous and American responsibilities are still great." Such talk in the early 1980s was prescient. Barely a few months after this sermon in January 1983, suicide bombers attacked the Marine barracks and the US embassy in Beirut. Prior to September 11, 2001, this was the largest single attack against US interests and personnel in the post–World War II period.

In what might sound today as a prophetic reading of the current situation in the region after the Iraq War, Shams al-Din declares: "The Israelis have two projects. One is to control Lebanon ... the other project is part of an American hegemonic vision of the region. It is a will to rule the region and control its resources, its peoples, and its [strategic] areas."48

For his part, Fadlallah considers the inconsistencies in US foreign policy to be representative of a double standard. He asks how the "United States can wage a war against Iraq when it invades Kuwait but does not say anything to Israel when it occupies Palestinian territories." Fadlallah further articulates his position on US regional policies: "We are not against the American or European peoples … We are against the American political administration that tries to impose its hegemony on the Islamic peoples and on the peoples of the Third World … This is why we need to be aware of American plans especially as we know these plans are linked to Israeli interests." He elaborates on these linkages between Israel and the US: "We are against the US because it works at humiliating us. When the US talks of peace, it means an Israeli peace, a peace at our expense." He says the problem is that "the US does not admit the humanity of our man [Arab people]." In a post-Oslo world where the Arab street saw the Palestinians lose despite having made all kinds of concessions, this declaration rings true.

Fadlallah clearly argues "these are attempts to humiliate the Arabs,"⁵³ and Israel and the United States "do not respect us [Arabs], do not respect our rights, our freedoms." He then concludes by declaring: "We do not wish to attack anyone, but it is our right to be strong to repel any attempts that aim to diminish our strength and dignity."⁵⁴ Indeed, the assumption here is the following: just as the French had the legitimate and

^{45.} Shams al-Din, Al-Muqawama, pp. 150-151.

^{46.} Shams al-Din, Al-Muqawama, p. 151.

^{47.} Shams al-Din, Al-Muqawama, pp. 133-134.

^{48.} Shams al-Din, Al-Muqawama, p. 229.

^{49.} Fadlallah, Iradat al-Quwwa, pp. 79-80.

^{50.} Fadlallah, Iradat al-Quwwa, pp.168-169.

^{51.} Fadlallah, Iradat al-Quwwa, p. 171.

^{52.} Fadlallah, Iradat al-Quwwa, p. 229.

^{53.} Fadlallah, Iradat al-Quwwa, p. 238.

^{54.} Fadlallah, Iradat al-Quwwa, p. 300.

inalienable right to resist German occupation by any means during World War II, so too do the Lebanese to resist Israeli occupation in the 1980s and 1990s. Our authors' statements corroborate John Mearsheimer and Stephen Walt's controversial article in which they claim that "the combination of unwavering support for Israel and the related effort to spread 'democracy' throughout the region has inflamed Arab and Islamic opinion." ⁵⁵

Fadlallah and Shams al-Din, then, see resistance against occupation as a moral and religious duty. This resistance can take the peaceful form of *sumud* (steadfastness), or it can take the form of military struggle against the occupier. In the latter sense, it becomes a form of jihad. Indeed, Fadlallah clearly states, "God did not close the door of jihad"⁵⁶ and calls for such a jihad against the forces of *Istikbar* (oppression or injustice) personified by the US and its client state, Israel.⁵⁷

The occupier that the clerics call Muslims to fight against is, of course, Israel, with whom the US is often lumped. And while the two religious leaders criticize Arab authoritarian regimes, they see such regimes as propped up by the United States to protect its own interests in the region. However, there is no real call for fighting those regimes or trying to bring them down. After all, the leaders of these regimes are nominally Muslim. It is crucial to note that Fadlallah and Shams al-Din do not call for attacks against the US, especially not for attacks on US territory.

PALESTINE, RESISTANCE, AND TERRORISM

The Palestinian cause is a leitmotif of contemporary Lebanese Shi'a discourse. In one of his speeches from 1981, Shams al-Din says, "[T]he salvation of the Arab world is in Palestine and the peace of the world is in Palestine." In a 1982 television interview, in reference to the Palestinian situation, he declares that the people of South Lebanon cannot live like refugees or wait for international or Arab charity. In a 1984 sermon⁵⁹ on the occasion of "Jerusalem day," Shams al-Din reminds Arabs and Mus-

- 57. Fadlallah, Iradat al-Quwwa, p. 297.
- 58. Shams al-Din, Al-Muqawama, p. 73.
- 59. 1984 witnessed the ferocious "war of the camps" between Shi'a and Palestinian groups in [Continued on next page]

^{55.} John Mearsheimer and Stephen Walt, "The Israel Lobby," http://www.lrb.co.uk/v28/n06/print/mear01_.html.

^{56.} Fadlallah, *Iradat al-Quwwa*, p. 296. Ayatollah Fadlallah is referring obliquely here to the right to *ijtihad* (which comes from the same root in Arabic as *jihad*), loosely translated as "interpretation," or more correctly, "working with the sources of dogma" which is one of the four standard bases on which Islamic law is built (in addition to the Qu'ran, the Sunna, and *Ijma*', or consensus). In Sunni Islam "the activity of ijtihad is assumed by many a modern scholar to have ceased about the end of the third/ninth century, with the consent of the Muslim jurists themselves. This process [is] known as 'closing the gate of ijtihad' ... Some date the closure at the beginning of the fourth Islamic century and others advance it to the seventh [century]." Wael Hallaq however asserts that "[a] systematic and chronological study of the original legal sources reveals that these views on the history of ijtihad after the second/eighth century are entirely baseless and inaccurate. [T]he gate of ijtihad was not closed in theory nor in practice [in Sunni Islam]." Wael B. Hallaq, "Was the Gate of Ijtihad Closed?" *International Journal Middle East Studies*, Vol. 16, No. 1 (Summer 1984), p. 3. Ayatollah Fadlallah is demonstrating his knowledge of the Sunni schools of thought while simultaneously drawing our attention to the distinction between the two Islamic traditions.

lims that Jerusalem had been the first *qibla* (direction of Muslims' prayers) before the Ka'aba and that "Jerusalem to those who follow the path of God is as important as the Ka'aba."⁶⁰

Speaking a decade later, Fadlallah reflects on resistance in Lebanon and Palestine by saying, "[T]he experience offered by our fighters in South Lebanon, and in Palestine, in the West Bank and Gaza leads us to believe that resisters can vanquish the enemy if only in one [small] location." Fadlallah also maintains that resistance is a "pressure card" to be used against Israel. He declares: "The importance of the Intifada in Palestine and the meaning of the resistance in Lebanon and in any country ruled by injustice and tyranny is they give confidence and self-dignity to the nation." In another sermon, Fadlallah says that "the resistance in Lebanon and the Intifada in Palestine have saved face and have maintained a form of cohesion before Israel."

Responding to accusations of terrorism by the international community and media, Fadlallah maintains that the suicide bombers are not terrorists, but rather freedom fighters. He says that "[our] fighters do not fight for the love of combat or for a desire of terrorism. They fight to defend man and home, the present and the future. This is something accepted by all religions, all cultures." He also argues that when "Israelis are killed the world reacts but no one asks about our dead, who have been killed [by Israel] because the world believes we are a people who only deserve to live according to their ways." Fadlallah insists the world "talks of terrorism or killers, of savagery but does not awake to the terrorism of Israel and its massacres of civilians ... Therefore as a nation that respects itself, as a generation that respects its present and its future, we should not be shaken by these words: terrorists, murderers, fanatics, killers." It is a call to the Muslim nation to see resistance as a form of jihad, a sanctified institution in Islam, performed by some for the good of the entire community (fard kifaya).

REGIONAL IMPLICATIONS OF THIS DISCOURSE

While they were probably not the immediate spiritual advisors of the future Hiz-

[Continued from previous page]

Lebanon. Shams al-Din's ability to transcend the petty fights of the time to concentrate on the liberation of Jerusalem (an important symbol for all Muslims) is not only laudable but demonstrates his ability to go beyond local, momentary interests.

- 60. Shams al-Din, Al-Muqawama, p. 195.
- 61. Fadlallah, Iradat al-Quwwa, p. 105.
- 62. Fadlallah, Iradat al-Quwwa, p. 150.
- 63. Fadlallah, Iradat al-Ouwwa, p. 167.
- 64. Fadlallah, Iradat al-Quwwa, p. 224.
- 65. Fadlallah, Iradat al-Quwwa, p. 84.
- 66. Fadlallah, Iradat al-Quwwa, p. 85.
- 67. A *fard kifaya* (collective duty) is an act that is obligatory for the Muslim community collectively if it is carried out by some members of the Muslim community, then other Muslims do not have to perform it; but if nobody takes it upon himself or herself to perform the act on behalf of the community, then all Muslims have failed (and will be punished). Jihadis, on the other hand, consider it to be *fard 'ayn*, or a permanent and personal obligation. As such, jihadis believe that they are justified in taking up arms and carrying out terrorist attacks on their own authority.

bullah,⁶⁸ Fadlallah and Shams al-Din were closely linked in the 1980s to the movement's future leaders, not only through relations of kinship but also through a more direct relation of mentorship or work. For example, several future leaders of Hizbullah served on the board of Amal with Ayatollah Shams al-Din.⁶⁹ Therefore, the discourse analyzed above can be understood as central to the ideological foundation of Hizbullah. It influenced the leaders of the party in their fight against Israel, in their perception of the United States, and in their understanding of resistance and terrorism. Jihad became defined as a fight against imperialism and occupation, against a foreign enemy in the homeland, not against co-religionists or compatriots.

However, the implications of the discourse go beyond Lebanese territory and spill over into Palestine. Approximately at the same moment that Shams al-Din was calling for jihad in Lebanon, Hamas adopted the notion of a defensive jihad against Israel. ⁷⁰ In addition, since the 1990s, Hamas has adopted the same tactics of war that the Lebanese Hizbullah had used against the Israeli army in Southern Lebanon and the efficacy of which Hizbullah had proven: suicide bombings.

In Lebanon, the first suicide bombings against Israel or its local allies had been undertaken by members of leftist secular groups. Hizbullah quickly adopted suicide bombings, which soon became its trademark.⁷¹ Under the leadership of Hasan Nasrallah (1992-present), all operations of the "Islamic Resistance" against the Israelis in Southern Lebanon became better planned and more costly to the Israelis, on both human and material levels. Indeed, "since 1995, the ratio of Hezbollah to IDF/SLA casualties had been less than 2 to 1."⁷²

Therefore, Hizbullah has given an Islamic label to suicide bombing in Lebanon. It has become a new form of martyrdom that emulates the martyrdom of Imam Husayn. Al-Agha notes:

Building on its religious ideology Hizbullah justifies martyrdom operations by arguing that they are part of a rationale and vision, an overall vision that is based on the necessity to use all possible force in facing the Israeli enemy. That is why mar-

- 68. Fadlallah has constantly been referred to as the spiritual advisor of Hizbullah especially by American and Israeli experts on terrorism. However, he has been denying this connection since the 1990s. In an interview with the author on January 7, 2006, Ghalib Abu-Zaynab, a Hizbullah politburo member, denied that Sayyid Fadlallah is the party's spiritual leader.
- 69. For more on Amal and its members, see Augustus Richard Norton, *Amal and the Shi'a* (Austin: University of Texas Press, 1987). In his book, *Hizbullah: The Story from Within*, Naim Qassem, the second in command of Hizbullah, refers to three clerics whose ideological visions, capabilities, and belief in the necessity of taking action lead to a gathering of the core groups that would found Hizbullah. These three clerics are Musa al-Sadr, Ayatollah Shams al-Din, and Ayatollah Fadlallah. Naim Qassem, *Hizbullah: The Story from Within* (London: Saqi Books, 2005), pp. 14-17.
- 70. Shaul Mishal and Avraham Sela, *The Palestinian Hamas* (New York: Columbia University Press, 2000), p. 37.
- 71. According to Joseph al-Agha, "On November 11, 1982, Ahmad Qasir, Hizbullah's first suicide bomber ("martyr"), detonated himself in the Israeli headquarters in Tyre, in southern Lebanon, killing around 76 military officers and wounding 20 others. ... In Qasir's honour, Hizbullah annually celebrates 'Martyrdom Day' on the eleventh of November." Al-Agha, *The Shifts in Hizbullah's Ideology*, p. 35.
- 72. Augustus Richard Norton, "Hizballah of Lebanon: extremist ideals vs. mundane politics" (New York: Council on Foreign Relations, 1999), p. 27, http://www.cfr.org/pdf/Norton.pdf.

tyrdom operations were launched against the Israeli army occupying south Lebanon as a policy and curriculum/program ... The motivation behind these martyrdom operations was targeting the Israeli occupying army with violent hits that would shake its military capabilities so that it would ... eventually withdraw.⁷³

Martyrdom had been a trademark of the Islamic revolution in Iran when the Basijis, the so-called "martyrs of the revolution" or "God's madmen," introduced suicide missions as a tactic in Iran's war against Saddam's regime (1980-1988). While suicide missions are to be differentiated from suicide bombings, as the first involve only sacrificing the self for the cause and do not entail dying while killing as many enemies as possible, the influence of Iran on the Lebanese case is still clear. The Pasdaran (revolutionary guards) who came from Iran to train the members of the newly created Hizbullah brought with them this new version of martyrdom in Shi'ism, the idea of "altruistic suicide," which was quickly taken up and modified by Lebanese Shi'a. Hence, "Lebanese martyrs died for politico-religious reasons bound up with Hezbollah's interpretation of Shi'ite Islam. Their initial motivation was exclusively political and stemmed from their devotion to the national struggle."

How did this specific Shi'a understanding of Islam and of suicide missions come to be used by a Sunni group such as Hamas? Sunnism does not have recourse to the same historically entrenched narratives of martyrdom as Shi'a Islam. Indeed, the theological perspective in Sunnism marginalizes the concept of martyrdom, and suicide operations are traditionally rejected as counter to God's law. Contacts between members of Hamas and Hizbullah and the relationship between Hamas and the Egyptian Muslim Brotherhood might help explain this puzzle.

It is well known that in 1992 Israel expelled 415 Palestinians to South Lebanon. According to several sources, most of them were allegedly associated with Islamist movements, mainly Hamas. 77 A few months later 100 of these deportees were allowed to return and the remaining deportees were exiled for no more than 12 additional months. During their exile, these Palestinians came into contact with their Lebanese counterparts who imparted to them their techniques of resistance. The transfer of the suicide tactic from Lebanon is evident in the date of the first suicide mission performed in Palestine — April 16, 1993, i.e., only ten weeks after the return of the first group of deportees from Southern Lebanon. Hamas had adopted the idea of suicide bombings four years earlier, after the arrest of its top ranking officials in 1989. As Pedahzur notes, "In leaflet no. 68 ... there was a summons to the movement's loyalists to start engag-

^{73.} Al-Agha, Shifts in Hizbullah's Ideology, p. 106.

^{74.} The Basijis were established in 1979 following the decree of Ayatollah Khomeini ordering the creation of an army of 20 million to protect the Islamic Republic against both its internal and external enemies. The Basijis were mainly young teens between the ages of 11 and 17 recruited in primarily rural areas or in the poor slums of urban centers.

^{75.} Durkheim defines altruistic suicide as one where the individual who kills himself/herself assumes "it is his/her duty." The person gives up his life as a sacrifice for others. Emile Durkheim, *Suicide* (New York: The Free Press, 1951), p. 219.

^{76.} Farhad Khosrokhavar, *Suicide Bombers: Allah's New Martyrs* (London: Pluto Press, 2005), p. 146.

^{77.} Andrea Nuesse, *Muslim Palestine: The Ideology of Hamas* (London: Routledge Curzon, 1998), p. 141 and Mishal and Sela, *Palestinian Hamas*, pp. 65-66.

ing in suicide missions against Israeli targets,"⁷⁸ yet no operations had been conducted during that period. The time spent in Lebanon by members of Hamas is a likely genesis for the implementation of this tactic.

While the return of the deportees may explain the timing of the first suicide bombing, it does not account from a theological viewpoint for the adoption of this tactic by a Sunni group. It has been noted that "while suicide is strictly forbidden in Islam," the "basic justification for [suicide bombing] comes from a very traditional vision of Islamic law, where a warrior is allowed to carry out a hopeless assault if it will encourage other Muslims." Furthermore, suicide operations have recently been the object of positive legal rulings. David Cook notes that "most of [these legal rulings] are related to Palestinian suicide attacks against Israeli civilians." These *fatwas* are formulated by important Sunni clerics such as the head of al-Azhar University in Egypt or Shaykh Yusuf al-Qaradawi, the media celebrity scholar of the Qatar-based network al-Jazeera. According to Cook, these *fatwas* are a response to the popularity of the martyrdom operations in the Arab world. However, these religious scholars

regularly seek to control the target of the martyrdom operations and focus them upon Israel ... The religious leadership of Islam that has "permitted" the use of martyrdom operations has usually stipulated that they should be used against military targets alone (with the exception of al-Qaradawi, who has stated that since all Israeli civilians are part of the military, they are all legitimate targets).⁸²

The same arguments had previously been used in Lebanon among Hizbullah members and by Fadlallah to allow for operations against Israel that might target Israeli citizens. The assumption is that there are no innocents among Israelis, whether they be settlers of the West Bank or within Israel proper.⁸³

Hence, while Sunni Islam does not have a tradition of martyrdom or a religious justification for it, the practice seems to have been justified *ex post facto* by religious scholars who needed to give it the legitimacy of Islamic law. We can therefore talk of a form of syncretism between Shi'a and Sunni beliefs in modern times. The practice of suicide bombings demonstrates the "fluidity of the frontiers between the two branches of Islam and especially the capacity of Sunnism to appropriate Shi'a notions while occulting these loans." Indeed, as Strenski notes, "there is a cross-fertilization of ex-

^{78.} Ami Pedahzur, Suicide Terrorism (Cambridge: Polity Press, 2005), p. 55.

^{79.} Pedahzur, Suicide Terrorism, p. 142.

^{80.} Mary Habeck, Knowing Thy Enemy (New Haven: Yale University Press, 2006), p. 124.

^{81.} David Cook, Understanding Jihad (Los Angeles: University of California Press, 2005), p. 143.

^{82.} Cook, Understanding Jihad, p. 144.

^{83.} Al-Agha notes, "Hizbullah considers the Jews as 'People of the Book,' and *only* regards the Jews living in Israel as Zionists, who should be killed ... Hizbullah neither discriminates against the Jews as a religion nor as a race. Thus, it seems that Hizbullah is not anti-Semitic in its overall orientation. It is worth mentioning that Hizbullah's equating the civilians with the military in the state of Israel, as radical as it seems, is neither new, nor is it confined to it or to Islamic movements." Al-Agha, *Shifts in Hizbullah's Ideology*, p. 188.

^{84.} Farhad Khosrokhavar, "Ben Laden et les nouveaux martyrs du Jihad" ["Bin Ladin and the New Martyrs of Jihad"], La Rivista del Manifesto, No. 24 (January 2002), http://www.larivistadelmanifesto.it/en/originale/24A20020115e.html.

tremist ideologies and theologies of both the Sunni and Shi'a, and an emergence of a radical ideology of martyrdom, self-immolation and jihad — culminating ... in the phenomenon of the human bomber."

There is then a spillover effect from Lebanon onto Palestine. Khosrokhavar argues that "the themes developed by Sunnis are not different to those of Shi'ite martyrs in Iran." This spillover has manifested itself visually in the Palestinian symbolism of protest and resistance: Indeed, ever since Israeli withdrawal from South Lebanon, Hizbullah has become a symbol of resistance in the wider Arab world and a source of emulation. Since the 2000 Israeli withdrawal, Arab television stations often have shown Palestinians in the West Bank and Gaza carrying Hizbullah flags.

The intensification of suicide bombings since the beginning of the al-Aqsa Intifada seems to be due to a desire to drive Israel from the Palestinian Territories by imitating Hizbullah's successful tactics. The success of Hizbullah in its war of attrition against Israel was manifest mainly in the change in Israeli public opinion *vis-à-vis* the Lebanon war and the appearance within Israel of grassroots movements like the Four Mothers, ⁸⁷ which demanded withdrawal from Lebanon. The Israeli withdrawal in 2000 was therefore the government's response to a change in Israeli public opinion.

In the occupied Palestinian Territories, the belief that the Israelis could be made to withdraw the same way they withdrew from Lebanon arguably led to an escalation of suicide bombings against Israeli targets, first military ones and then increasingly civilian targets. Mia Bloom points out, "Palestinians are convinced that military operations are the only way to wear down the Israeli resolve and weaken their desire to hold onto the Territories."88 Palestinian groups perhaps believed this assumption to be proven accurate when they celebrated the Israeli unilateral withdrawal from Gaza as a victory of their resistance policy. However, this conclusion ignores the realpolitik behind Ariel Sharon's decision to leave Gaza: the protection of the settlers in Gaza had become too costly in terms of finances and manpower. In addition, the fear of the "demographic bomb" (whereby the Palestinian population would exceed that of the Israelis in Historic Palestine in a couple of decades) led Sharon to advocate the consolidation of the Israeli presence in a smaller territory where Jews would be sure to remain the majority for the coming decades. The withdrawal from Gaza and the use of the newly built "security fence" serve as a way not only to acquire more strategic land but also to confine Israeli territory within a smaller, well-determined geographic area.

While Israel today accepts the idea of a smaller Israeli state in order to preserve its Jewish identity, it is not ready to relinquish its claim to all the disputed land and to the holy city of Jerusalem. Indeed, the claim Israel had on South Lebanon is not the same as the one the Jewish State has *vis-à-vis* the areas it calls "Judea and Samaria" or Jerusalem. Hence, whatever lands the Palestinians end up with will probably look like a series of unconnected "Bantustans" that cannot form the basis of a viable Palestinian state. Suicide bombings only will have alienated the international community from the Palestinian cause by making the Palestinians lose the moral high ground.

^{85.} Strenski, "Sacrifice, Gift and the Social Logic of Muslim Human Bombers," p. 13.

^{86.} Khosrokhavar, Suicide Bombers, p. 148.

^{87.} For more information, refer to the Four Mothers website: http://www.4mothers.org.il/peilut/ backgrou.htm.

^{88.} Mia Bloom, Dying to Kill (New York: Columbia University Press, 2005), p. 28.

CONCLUSION

The discourse of Fadlallah and Shams al-Din in the 1980s and 1990s paved the way for the emergence of Hizbullah as a Shi'a resistance force. The clerics' writings and sermons on jihad, resistance, and martyrdom constituted the intellectual underpinnings of Hizbullah's approach to these issues. Hizbullah borrowed the tactic of suicide bombings from secular leftist groups and endowed it with an Islamic character derived from the Iranian model of the Basijis: "Throughout the [Iran-Iraq] war, the main motive for the martyrdom of the Basijis was a desire to protect the threatened Islamic fatherland and to fight an Iraqi enemy supported and aided by Western Imperialism." Indeed, the use of suicide attacks was first adopted by the Basijis during the Iraq-Iran War of 1980-1988: They would run into areas covered by land mines, triggering them in preparation for the advance of more conventional troops. The suicide missions assigned to the young Basijis were given religious sanction: The young men would be following in the steps of Imam Husayn. These suicide missions, sanctioned by higher authorities, served as a foundation for the suicide attacks later conducted in Lebanon.

In fact, suicide missions were quickly adopted by the Lebanese Shi'a in 1983 in the form of suicide bombing attacks against French paratroopers and US Marines. These members of the Multinational Forces were seen not as neutral arbiters of the civil war, but rather as active participants who had sided with the Maronites. The use of suicide bombings against Israeli targets in South Lebanon soon became the *modus operandi* of Hizbullah. However, what the West and Israel saw as "terrorism" was seen by Hizbullah and by the Lebanese at large as legitimate resistance: Israel had invaded Lebanon and occupied it, and it was the inalienable right of the Lebanese to defend themselves against this aggression. From all of the above, I conclude that the Shi'a "terrorism" of the 1980s and 1990s was mainly nationalistic, albeit couched in religious language to make it more acceptable to the Shi'a masses. Religion in this instance was used as a rallying and unifying tool against the enemy.

The success of Hizbullah in its war of attrition against Israel was manifest mainly in the change in Israeli public opinion vis-à-vis the Lebanon war. The Israeli withdrawal in 2000 was therefore the government's response to a change in Israeli public opinion. In the occupied Palestinian Territories, the belief that the Israelis could be made to withdraw arguably led to an escalation of suicide bombings against Israeli military and then increasingly civilian targets. The aim of the Palestinian suicide missions also has been mainly nationalistic. It has been the liberation of the land occupied by Israel in 1967 in the case of some, such as the Palestine Liberation Organization-affiliated groups, or of Historic/Mandatory Palestine in the case of others, such as Hamas and Islamic Jihad. Yet, the source of inspiration has been Hizbullah. The different Palestinian groups use suicide missions as a way to avenge the deaths inflicted by Israel on the Palestinian civilian population and as a way to pressure a succession of Israeli governments. Indeed, Palestinians have assumed that Israel could be cornered into leaving the West Bank and Gaza (as it had left South Lebanon) if the number of casualties became too high and the burden of occupying these lands came to outweigh its benefit for the Jewish state.

It is crucial to note that the discourse in Lebanon and by extension in Palestine is different from that in Iran in the 1980s. Indeed, in Iran, "Khomeini's prestige was enhanced by the nature of his message — a death-obsessed Shi'ism that sanctified death by using the vocabulary of martyrdom and denying the legitimacy of life on earth during a period of war and crisis." In Lebanon, there is no cult of death, but a clear emphasis on resistance against occupation and on liberation.

We see therefore the emergence of a new school of thought in Lebanon, quite distinguishable from the Iranian school that glorified death for its own sake. It proposes a nationalist discourse based on religion, an "Islamic Nationalism" that needs to be differentiated from the Islamic transnationalism of al-Qa'ida. As a transnational organization without any roots, al-Qa'ida's main purpose is not to liberate a particular piece of land; rather, it is to vent its grievances against the West.

The proliferation of suicide bombings in Lebanon and then Palestine made the idea of suicide bombing, if not acceptable, somehow justifiable in the eyes of the "Arab Street." In the 1990s, and especially after the start of the al-Aqsa Intifada, Sunni Islam came to be associated with suicide bombings through their acceptance and propagation by Hamas in the Occupied Territories. This new Sunni tolerance for suicide bombing paved the way for a new form of terrorism, religious and transnational in character, exemplified by al-Qa'ida's attack on US soil on September 11, 2001.

To draw a clear distinction between Hamas and Hizbullah on one hand, and groups such as al-Qa'ida on the other, it is crucial to comprehend the discourse on jihad that has influenced Hizbullah's understanding of the concept and has impacted its behavior in the past two decades. An important difference between the two groups is that al-Qa'ida's religious legitimation of jihad is done by lay thinkers who are self-taught *ulema* (scholars), such as Sayyid Qutb or Abd Al-Salam Faraj, while Hizbullah's understanding of jihad is based on the works of Shi'a religious scholars classically trained in the *Figh* tradition of the Najaf *hawza*.

The pledges in 2006 by more than 100 Iranian nationals of different ages and sexes to become suicide bombers if their country was attacked by the US shows the potency of the Lebanese model and how it has returned full circle to Iran. *The Washington Post* quotes the volunteers: "Hezbollah, Hezbollah', the crowd chanted as a singing group supported by the Lebanese guerrilla group began songs calling for *Islamic Resistance*." ⁹¹

^{90.} Khosrokhavar, Suicide Bombers, p. 85.

^{91.} Emphasis added. Brian Murphy, "Iranians Pledge to Become Suicide Bombers," *The Washington Post*, May 25, 2006.