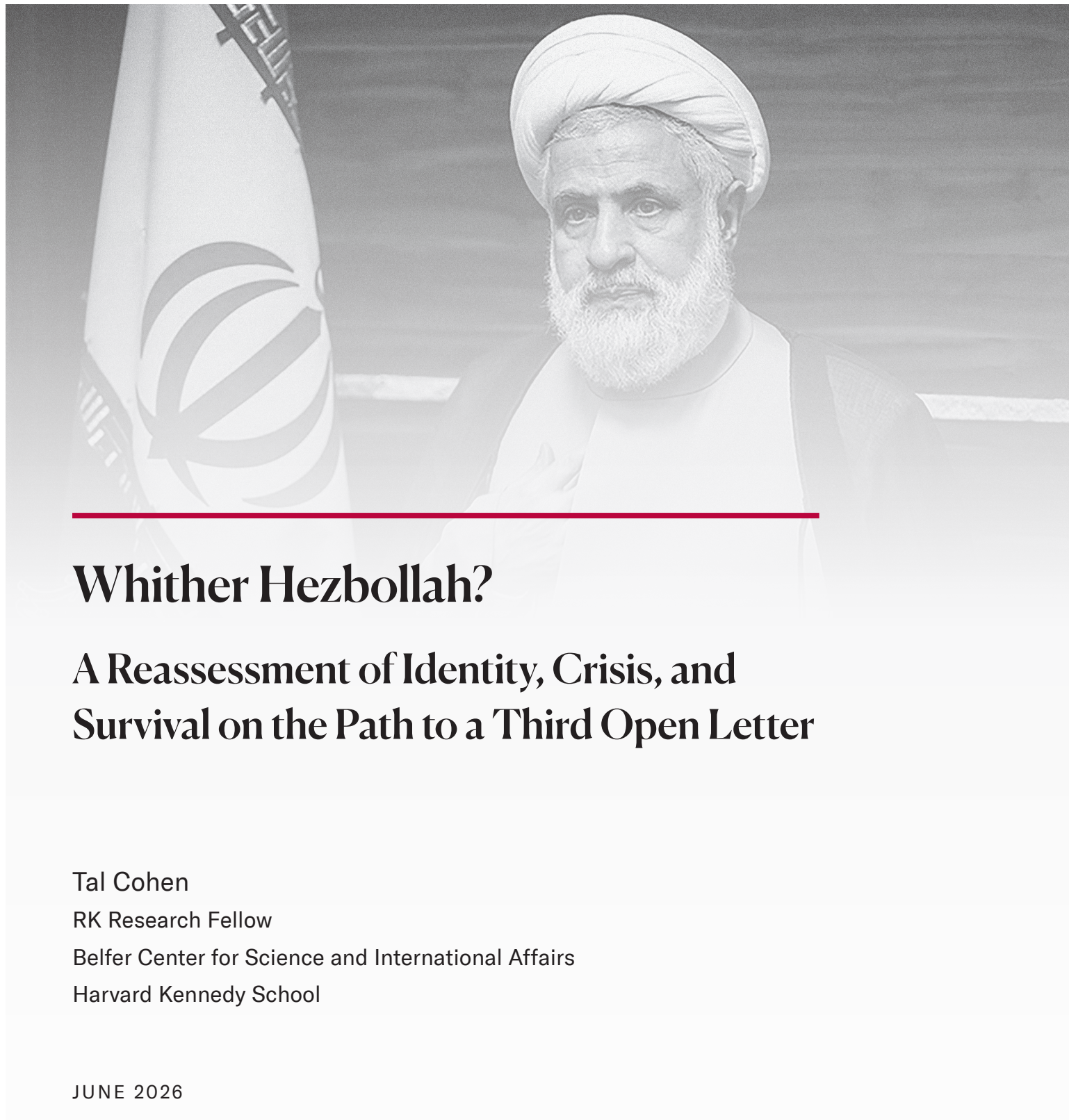




Whither Hezbollah?

A Reassessment of Identity, Crisis, and Survival on the Path to a Third Open Letter

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JUNE 2026



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Executive Summary

This paper analyzes the ideological, operational, and logistical challenges confronting Hezbollah following the dramatic events of 2023–2026. Several factors precipitated this unprecedented transformation. These include Operations “Arrows of the North” and “Lion’s Roar,” deep intelligence infiltration into the organization’s ranks, and the loss of key leadership, primarily Secretary-General Hassan Nasrallah in September 2024. Furthermore, Hezbollah faces the collapse of its Syrian front, a resource crisis in Iran, and a shifting relationship with the Lebanese state. Paradoxically, continued IDF presence in the south and active fighting provide Hezbollah with a ready justification for its survival, even as negotiations threaten to permanently delegitimize its armed existence.

The article traces Hezbollah’s ideological evolution through its two foundational documents: the 1985 Open Letter, which focused on Islamic ideological identity, and the 2009 Political Document, which emphasized Lebanese national identity and political integration. Drawing on a textual analysis of the writings of the current Secretary-General, Sheikh Naim Qassem, this brief study assesses whether Hezbollah might produce a document akin to a “Third Open Letter,” and what might hypothetically appear in such a document. Given the rapidly evolving nature of the conflict and the considerable uncertainty surrounding its outcome, the projections offered here should be understood as analytical assessments rather than definitive predictions. Multiple trajectories remain plausible, and this study makes no claim to forecast outcomes with certainty. This paper makes the case that:

- In any potential “Third Open Letter” the organization will likely partially retreat from its Lebanese national aspirations and reinforce a clandestine, sectarian-Shi’ite identity.
- Hezbollah may replace its ambitions for decisive military victory with a theology of survival, framing the destruction as a “divine trial,” and concentrate its efforts on liberating Lebanese soil from the IDF’s presence and sabotaging peace negotiations between Israel and Lebanon.
- Hezbollah is likely to maintain formal allegiance to Tehran absent a dramatic ideological shift in Iran. Recent diplomatic developments suggest that Iran’s new leadership continues to regard Hezbollah as a strategic asset but The February 2026 death of Ayatollah Khamenei, however, is assessed to reduce the depth of this commitment to Tehran.

Introduction

Founded in 1982 under Iranian Revolutionary Guard sponsorship, Hezbollah has long existed between two identities. The first is transnational and ideological: a movement bound by wilāyat al-faqīh to the religious authority of Tehran. The second is local and Lebanese: a Shi'ite organization embedded in southern Lebanon, the Bekaa Valley, and Beirut's southern suburbs, increasingly entangled in the politics of a fragile state.

Hezbollah has published two foundational documents: the "Open Letter" of 1985 and the "Political Document" of 2009. These were not mere media declarations. They were constitutive texts designed to bind Hezbollah's constituency, particularly Lebanon's Shi'ite community, to its organizational DNA and evolving strategic objectives. The 1985 manifesto emphasized the organization's religious foundations, its absolute commitment to Iran, and its integral role in the concept of wilāyat al-faqīh (rule of the Islamic jurist). The 2009 manifesto aimed at institutional integration into the Lebanese political arena. It sought to navigate two parallel and frequently conflicting identities: the Iranian-religious and the Lebanese-national (Alagha, 2011). The organization's foundational documents are best understood as formal attempts to manage this inherent tension between its two identities; they are declarations addressed primarily to Hezbollah's own constituency, defining who the organization is and why it fights.

Since the outbreak of war in October 2023, Hezbollah has plunged into a profound ideological and existential crisis. This crisis deepened following the start of Israel's Operation "Arrows of the North" in September 2024 and the targeted assassinations of Secretary-General Hassan Nasrallah, his designated successor Hashem Safieddine, and the military leadership. Today, tectonic shifts have fundamentally altered Hezbollah's strategic environment. The organization has lost logistical depth following the collapse of the Assad regime in Syria. Additionally, the death of Iran's Supreme Leader in February 2026 has created acute uncertainty regarding regime continuity in Tehran. Locally, Hezbollah faces severe economic and demographic devastation within its Shi'ite support base, alongside intensifying pressure from a Lebanese state increasingly committed to disarming the group. Israeli Lebanese negotiations add further pressure, threatening to permanently delegitimize Hezbollah's armed existence. Yet continued IDF presence in the south simultaneously provides the organization with a ready justification for survival, and a cause around which to rally its base.

A substantial body of scholarship has examined Hezbollah's military capabilities, its relationship with Iran, and its role in Lebanese domestic politics. Since October 2023, much of the analytical focus has understandably turned to immediate strategic questions: how the organization might reconstitute its arsenal, navigate Lebanese state pressure, and manage a diminished Iranian patron. This article does not set aside those questions but approaches them from a different angle. Rather than asking what Hezbollah will do, it asks what kind of organization Hezbollah is becoming and how that evolving identity is likely to shape its next foundational document.

This article has three main objectives: to trace the historical development of Hezbollah's identity; to analyze the significance of the strategic upheavals experienced between 2023 and 2026; and to assess the potential contours of a "Third Open Letter." This forthcoming document will be essential for charting the organization's reconstitution. While this article was written dynamically as events unfolded, including the ongoing US-Israeli Operation "Lion's Roar," the analysis provides a robust framework for understanding Hezbollah's trajectory amidst considerable uncertainty.

This article draws on four main sources. The first is a close reading of Hezbollah's two foundational documents: the 1985 Open Letter and the 2009 Political Document, as primary texts in their published English translations. The original documents were composed in Arabic; the analysis relies on established

translations, supplemented by scholar Joseph Alagha's comparative study (Alagha, 2011). Second is a textual analysis of Secretary-General Naim Qassem's published writings, particularly *Hezbollah: The Story from Within*, which provides direct insight into his theological framework and leadership philosophy. Third, open-source reporting from established outlets covering the 2023–2026 conflict is used to reconstruct the strategic context analyzed in Chapter 2. Finally, the analysis draws on the author's direct professional engagement and observations of Hezbollah's organizational behavior over more than two decades. Where these sources leave gaps — and they do — the article makes its assumptions explicit rather than obscuring them.

The analysis presented here is necessarily tentative. The situation remains highly fluid, the range of possible outcomes is wide, and any assessment of Hezbollah's future trajectory must be held with appropriate intellectual humility. What follows is an informed analytical framework, not a forecast, which seeks to reduce uncertainty about the future versus unambiguous predictions.

1. The Evolution of Organizational DNA – Between Revolution and Integration

To assess Hezbollah's future, it is necessary to trace the historical axes along which the organization has moved over the past decades. Hezbollah's ideological history is dynamic and highly responsive to geopolitical shifts. Examining the drafting and publication processes of its previous foundational documents reveals the distinct stages of maturation and institutionalization the organization has undergone.

1.1 The Open Letter of 1985: Radicalism, Purity, and Islamic Universalism

The “Open Letter to the Downtrodden in Lebanon and the World” (al-Risāla al-Maftūḥa) was published on February 16. Although the document was officially published in print on February 22, 1985, it was first read aloud a week earlier, on February 16, by the organization's spokesman at the Uza'i mosque (Alagha, 2011).

Framed with intense religious fervor, the document was composed during Lebanon's civil war, shortly after the massive suicide bombings against American and French forces in Beirut. It reflected a clandestine and radical vanguard that viewed itself as an organic extension of the Islamic Revolution in Iran.

The drafting process reveals the organization's early structure. The letter was not written by a single individual. Instead, it emerged from a consensus among the first-generation Shi'ite clerical leadership, including Subhi al-Tufayli, Abbas Musawi, and Ibrahim Amin al-Sayyid. This process occurred under the strict supervision of Iranian Revolutionary Guards officers and the Iranian ambassador in Damascus, Ali Akbar Mohtashemi-Pour. The publication method also reflected Hezbollah's militant character. Rather than holding a formal press conference, Sheikh Ibrahim Amin al-Sayyid read the document aloud from the pulpit of the al-Shura mosque in Beirut. It was subsequently distributed as a pamphlet through Friday sermons (Shapira, 2000; Alagha, 2011).

Ideologically, the letter categorically rejected Lebanon's confessional power-sharing arrangements (al-muḥāṣaṣa), viewing the state as a corrupt construct of Western imperialism. The objective in 1985 was not integration, but the dissolution of Lebanon into a borderless, universal Islamic republic. Furthermore, the document formally enshrined absolute obedience to Imam Khomeini as an unquestionable jurisprudential authority. The struggle against Israel and the West was defined as a personal religious-legal duty (taklīf shar'ī) rather than a national territorial dispute (Hezbollah, 1985).

1.2 The Transitional Period: The Taif Agreement and Political Entry (1989–2009)

The path to the second document required significant ideological compromises. Following the Taif Agreement in 1989, Hezbollah stood at a crossroads. Unlike other Lebanese militias, Hezbollah retained its weapons under the banner of “resistance to the Israeli occupier” in the south. Internal pressure to gain political influence led to a dramatic decision in 1992, backed by a fatwā from Iran, to participate in parliamentary elections (Norton, 2007). This initiated a gradual process of “Lebanonization.”

The climax of this process arrived with Israel's withdrawal from South Lebanon in 2000, which forced the organization to invent new justifications for maintaining an independent armed force. While the 2006 Second Lebanon War was presented internally as a “divine victory,” it exposed the limits of Hezbollah's power. The massive destruction of Shi'ite infrastructure generated domestic fury, pushing the organization to formalize its standing in Lebanese society through a new political framework.

1.3 The Political Document of 2009: Accommodation and Hegemony

In November 2009, Hezbollah published a 52-page manifesto (Hezbollah, 2009). By this time, Hezbollah had transformed into Lebanon's most powerful political party and largest employer, operating an extensive network of social services and a quasi-regular army.

Unlike the 1985 letter, the 2009 document was the product of careful, institutionalized staff work. Commissioned by the Shura Council, it was approved by the General Congress and presented by Hassan Nasrallah at a highly orchestrated press conference. This shift in presentation reflected the transition from a religious militia to a governing party seeking media legitimacy.

Crucially, the new document publicly renounced the immediate demand for an Islamic state in Lebanon (Hezbollah, 2009). The organization explicitly recognized the country's multi-confessional reality and accepted consociational democracy as a legitimate political framework. At the heart of the manifesto was the defense equation: “Army-People-Resistance.” Hezbollah justified its continued armed status by arguing that the Lebanese Armed Forces (LAF) were too weak to deter “Israeli aggression.” Therefore, the resistance did not rebel against the state but rather complemented it.

The Syrian civil war, which began in 2011, would later test this framework severely. In this author's assessment, when forced to choose, Hezbollah prioritized its Iranian commitments.

2. The Strategic Earthquake (2023–2026) – The October 7 Dilemma and the Collapse of the Pillars

The crisis Hezbollah currently faces, in the most basic sense, is an earthquake that has shattered the status quo on which Hezbollah built four decades of power. The moment has forced the organization to ask questions about its survival that it has never before had to confront.

Following the 2006 war, Hezbollah generally abstained from joining Israeli Palestinian conflicts from Lebanese territory. However, in the years preceding 2023, the Iranian-led “Axis of Resistance” developed the “Unity of Arenas” doctrine. This strategy envisioned a synchronized, multi-front war to overwhelm Israel. An explicit

order from Tehran to execute this plan would have forced Nasrallah to prioritize his resistance identity over Lebanese national obligations.

On October 7, 2023, Hamas launched its attack independently, without prior coordination with Iran or Hezbollah. Caught off guard, Hezbollah chose a middle path. Operating under the flawed assumption that a weakened Israel would avoid a two-front war, Hezbollah initiated a limited war of attrition in the north. The organization framed this engagement to its operatives as solidarity with Jerusalem, while presenting it domestically as a preemptive defense of Lebanon. This miscalculation led to an extended conflict that eventually escalated into a full-scale Israeli offensive.

2.1 Intelligence Penetration and Leadership Decapitation

The breaking point occurred when Israel demonstrated unprecedented intelligence penetration into Hezbollah's ranks. The targeted explosions of communication devices created total chaos, neutralizing thousands of operatives and sowing deep internal paranoia.

Days later, Hezbollah suffered a devastating decapitation strike. Hassan Nasrallah was not merely a Secretary-General; he was a living symbol and the strategic architect connecting Tehran, Beirut, and Damascus. His assassination, followed by the elimination of his successor Hashem Safieddine, struck the system's core. Concurrently, Israel dismantled the "Jihad Council," eliminating Chief of Staff Fuad Shukur, Radwan Force commander Ibrahim Aqil, and other senior military figures. This vacuum severed decades of operational experience, leaving field units isolated and without strategic guidance.

2.2 Loss of Syrian Logistical Support

A critical consequence of recent regional shifts was the fall of the Assad regime in Syria. For decades, Syria served as Hezbollah's lifeline. It was the overland bridge through which precision missiles and advanced technologies transited from Iran to the Bekaa Valley. The collapse of central authority in Damascus in December 2024 and the seizure of supply corridors by hostile forces effectively severed Hezbollah from its Iranian patrons. Consequently, Hezbollah transformed from a regional proxy into an isolated local militia, unable to replenish its strategic weapons stockpiles under a near-total interdiction siege.

2.3 Theological and Economic Orphaning

The death of Supreme Leader Ali Khamenei during US-Israeli strikes in February 2026, generated profound theological and material crises for Hezbollah. Structurally built upon obedience to the Iranian supreme authority, the organization suddenly faced ideological uncertainty. Furthermore, as Iran grappled with domestic instability and strangling Western sanctions, Tehran's attention shifted toward regime survival.

The massive annual budget Hezbollah previously received from Iran has been drastically curtailed. Hezbollah's welfare institutions, including the Martyrs' Foundation and the al-Qard al-Hasan banking system, suffered enormous military and financial blows. From a purely economic standpoint, Hezbollah is likely to struggle immensely to return to its pre-2023 operational scale.

2.4 Fracture of the Political Status Quo in Lebanon

The 2023–2026 campaigns displaced over a million Shi’ite residents and brought the “Dahiyeh Doctrine” to Hezbollah’s strongholds. This destruction provoked intense fury among Lebanon’s Christian, Sunni, and Druze communities. Exploiting Hezbollah’s military weakness, the Lebanese government instructed the LAF to deploy southward and demanded the militia’s disarmament in accordance with UN Resolution 1701. Although a gap remains between the state’s declarations and its enforcement capacity (LBCI Lebanon, 2024; Sewell, 2025), the 2009 “defense equation” has definitively collapsed. Hezbollah is now effectively designated as a rogue entity by the very state it claimed to protect.

Compounding this pressure is the emergence of direct Israeli Lebanese negotiations. For Hezbollah, a formalized peace agreement would constitute an existential strategic threat — one that would simultaneously delegitimize its armed resistance, normalize Israeli presence on terms it cannot control, and permanently foreclose the “liberation” narrative that sustains its organizational identity. Hezbollah is likely to treat any negotiation process as a priority target for disruption, employing both political pressure within Lebanon’s institutions and covert destabilization to prevent an agreement from taking hold.

3. The Ideological Prism of Current Secretary-General Naim Qassem

Assuming Hezbollah survives as an organized framework, the task of drafting the “Third Open Letter” will fall to Secretary-General Sheikh Naim Qassem. A textual analysis of his writings, particularly his book *Hizbullah: The Story from Within*, reveals a leadership style and worldview fundamentally different from his predecessor’s.

3.1 The Bureaucrat-Theologian

Hassan Nasrallah was a consummate orator who appealed to the masses’ emotions and played the regional chessboard. In contrast, Naim Qassem emerges as a rigid jurist and a systematic, didactic bureaucrat. Transitioning from charismatic to institutional leadership requires a shift in how the organization claims legitimacy. Qassem cannot rely on personal magnetism to console a grieving constituency. What Qassem can offer instead is something colder and more austere: a theological vocabulary for understanding loss (Qassem, 2005).

3.2 A Theology of Survival: Patience (Ṣabr) and Divine Trial (Miḥna)

Qassem’s worldview dictates that conflict is an enduring religious obligation (taklīf sharʿī) rather than a pursuit of rapid territorial gains. The concept of patience (ṣabr) is the cornerstone of his philosophy (Qassem, 2005). While Nasrallah constantly sought immediate “victory images,” Qassem views resistance as a generational condition. Qassem is likely to frame the devastation of the recent campaigns as a miḥna — a merciless divine crucible meant to purge opportunists from the ranks, leaving only a pure Shi’ite vanguard prepared for absolute sacrifice.

3.3 Redefining Religious Obedience

Qassem has written extensively on the unbreakable link between Hezbollah and wilāyat al-faqīh (Qassem, 2005). However, given the leadership crisis in Tehran and logistical severance, Qassem may be compelled to develop a more autonomous, “locally manufactured” resistance model. While he may publicly pledge allegiance to the Islamic Revolution, practical realities are likely to compel him to devolve authority to covert shūrā councils of local Lebanese clerics. These councils may provide the necessary jurisprudential justification for independent, decentralized underground operations.

3.4 The Liberation of South Lebanon as Organizational Anchor

Among the rationales most likely to assist Qassem in re-consolidating the organization is Israel’s declared intention to maintain a military presence in Lebanon for the foreseeable future. This circumstance paradoxically revitalizes Hezbollah’s foundational “liberation of Lebanon” narrative with renewed force. It enables the Secretary-General to address Shi’ite youth and the broader community around a clear, tangible, and emotionally resonant objective. The presence of an identifiable adversary on Lebanese soil provides Qassem with a constitutive organizing principle—one that transcends the internal debates over disarmament, governance failures, and economic collapse. In this sense, continued Israeli presence becomes not merely a military challenge, but an ideological lifeline for an organization in desperate need of purpose.

4. Assessment and Analysis – What Would the “Third Open Letter” Look Like?

What follows is an attempt to assess the likely contours of a “Third Open Letter.” These projections are necessarily speculative and should be read as informed analysis, not prediction. Rather than being read at a mass rally, this document would likely be disseminated as a clandestine jurisprudential text, distributed amidst an atmosphere of mourning and preparation for a prolonged war of attrition.

4.1 De-Lebanonization and Sectarian Retreat

The Third Letter is likely to acknowledge the failure of the 2009 integration framework. In response to the Lebanese government’s active opposition, Hezbollah may move away from its rhetoric of defending “all Lebanese communities,” focusing instead on the “self-defense of the believing community.” Qassem may authorize “covert insubordination,” encouraging civil disobedience and armed resistance against state disarmament efforts. This would represent a strategic regression to the persecuted, underground consciousness of the 1980s. Hezbollah may operate not as a ruling hegemon, but as an invisible network viewing the state as a hostile entity. Any developments toward a peace agreement or normalization between Israel and Lebanon would exert an enormous influence on this calculus, but for the foreseeable future Hezbollah is expected to resist any such arrangement and act systematically to undermine it.

4.2 The Ethics of Sacrifice (Fidā’) and Modern Karbala

The greatest psychological challenge for the letter’s drafters will be justifying the ruin of Shi’ite society. The

document is unlikely to apologize or accept responsibility for the miscalculations of October 2023. Instead, it may elevate the suffering to a level of religious sanctity. The motif of Karbala is likely to form the document's emotional core, equating the destruction of South Lebanon with the historical massacre of Imam Hussein. Nasrallah may be proclaimed the modern Sayyid al-Shuhadā' (Master of Martyrs). The narrative is likely to assert that Hezbollah acted as a defensive wall against a Western-Zionist conspiracy to destroy Islam — framing the physical survival of its remaining operatives as the ultimate “divine victory.” In this reading, the fact that anyone survived at all becomes, somehow, the point.

4.3 From “Decisive Victory” to “Clandestine Attrition”

Hezbollah's pre-2024 promises of conquering the Galilee and destroying Israel have collapsed. The reality of 2026 necessitates a drastic lowering of expectations. Qassem is likely to shift the ideological focus from decisive deterrence to basic equations of denial and clandestine attrition. The primary goal may be redefined as “preserving the ember of resistance.” The letter is likely to provide religious justification for tactical withdrawals and prolonged armistices, acknowledging that a “jihad of reconstruction” may span decades.

4.4 Decentralized Guerrilla Network

The document may also serve as an implied operational order. The loss of Syrian supply lines and Israel's intelligence supremacy have turned Hezbollah's centralized, hierarchical command structure into a liability. The organization will face pressure to transition to a dispersed, compartmentalized network of “anonymous popular resistance.” Local cells would operate with broad autonomy. Emphasizing the value of “self-sufficiency,” Hezbollah is likely to abandon the pursuit of strategic, game-changing weapons, focusing instead on the covert, local manufacture of basic armaments in underground workshops.

4.5 The “Black Market” Social Contract

Without massive Iranian funding, the Third Letter is likely to introduce a harsh new social contract. Supporters would be expected to embrace austerity, as the organization steps back from providing comprehensive civilian welfare. The concept of “jihad of wealth” (jihād al-māl) may require obligatory community funding. Furthermore, economic isolation may push the organization deeper into the black market, utilizing drug trafficking and smuggling to survive. The resulting poverty of the Shi'ite population is likely to be framed as a necessary trial of faith.

4.6 Autonomy within the “Axis of Resistance”

Hezbollah is likely to maintain formal allegiance to the Iranian regime if Tehran remains committed to the resistance axis. What Khamenei's death changes is not the relationship itself, but its depth. A new Supreme Leader inherits a partnership, not a bond. For Hezbollah, this creates space for greater autonomy while preserving the ideological framework — loyalty declared publicly, practiced more selectively. Recent indications suggest that Iran's post-Khamenei leadership continues to view Hezbollah as a strategic asset worth protecting. This does not reverse the trend toward greater autonomy, but it does complicate it.

4.7 The Expulsion of the IDF as an Organizational Anchor

With the IDF returning to active operations and seizing territory in South Lebanon, the Third Letter may seek to transform this Israeli presence into Hezbollah's political lifeline. Qassem is likely to minimize discourse regarding domestic devastation, concentrating on a single unifying objective: "liberating the pure land." Paradoxically, the Israeli presence may be framed as a divine opportunity to return to Hezbollah's roots as an asymmetric guerrilla movement. By focusing on expelling the IDF, Hezbollah is likely to attempt to silence internal criticism. The organization is expected to argue that any discussion of disarmament or domestic politics constitutes wartime treason as long as an occupying force remains on Lebanese soil.

Conclusion

Hezbollah in 2026 faces an unprecedented institutional collapse. The organization is undergoing a rapid and painful retreat from its status as a regional military power and Lebanese political hegemon, reverting to its origins as a persecuted, sectarian underground militia. It fights for physical survival against a highly advanced Israeli security apparatus and a Lebanese state that has grown intolerant of its autonomy.

Any "Third Open Letter," drafted under the bureaucratic and theological leadership of Naim Qassem, is unlikely to resemble either of its predecessors. The 1985 document proclaimed a revolution; the 2009 document claimed a state. The Third Letter may be best understood as a document of managed defeat — harnessing the Shi'ite theological concepts of *ṣabr* (patience), *miḥna* (divine trial), and *fidā'* (sacrifice) to reframe catastrophic loss as sacred necessity.

Yet the most consequential analytical finding of this study is paradoxical. The very forces that threaten Hezbollah's survival — continued IDF presence on Lebanese soil and the prospect of an Israeli Lebanese peace agreement — simultaneously provide the organization with its most potent ideological lifeline. An identifiable occupier is easier to mobilize around than an abstract ideology. A peace process is easier to sabotage than to confront. Qassem understands this. The Third Letter may not mourn what was lost. It may seek to weaponize it.

Whether this strategy succeeds in sustaining Hezbollah as a meaningful force, or whether it merely prolongs the organization's slow dissolution, remains deeply uncertain. What is clear is that Hezbollah's third ideological chapter will be its most somber — written not in the language of revolution or power, but in the language of survival.

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