

## Iran's Tightrope: Hezbollah or Washington?



As a temporary ceasefire between the United States and Iran came into effect at dawn on Wednesday, April 8, the world appeared, at last, to catch its breath after a wave of escalation that had gripped both regional and international audiences with anxiety. Yet this fragile calm proved short-lived. Israel quickly shattered the atmosphere, launching a wide-ranging and deadly escalation in southern Lebanon.

In the span of just hours, it carried out one of its most intense military operations in the course of its conflict with Hezbollah, leaving more than 250 Lebanese dead and over 1,160 injured, according to official figures from Lebanon's General Directorate of Civil Defense.

This escalation came at an exceptionally sensitive moment. Tehran backed by Pakistan had asserted that the Lebanese front fell within the scope of the de-escalation agreement. Iran, accordingly, stressed the need to uphold the agreement in full, rejecting any attempt to fragment it politically or militarily.

That position, however, soon collided with Washington's stance. President Donald Trump denied that Lebanon was included in the agreement, amid growing speculation that he had granted Benjamin Netanyahu's government a green light to carry out the operation.

Here, Iran finds itself facing an extraordinarily complex equation. On the one hand, it cannot abandon its support for Hezbollah, which entered the war as part of Tehran's broader strategic support network in its confrontation with the United States and Israel.

On the other hand, Iran is acutely aware that escalating this support too far could unravel the fragile agreement with Washington, undermine the emerging diplomatic track, and plunge the region back to square one.

Between these two poles lies the central question: how can Tehran manage this delicate balance between protecting its Lebanese ally and preserving an open line of understanding with the United States?

### An Early Dispute and Diverging Interpretations

Within hours of the ceasefire taking effect, a clear rift emerged among the parties over how to interpret several leaked provisions of the agreement chief among them whether Lebanon was covered by the de-escalation framework. While the Pakistani mediator emphasized that Lebanon was included, both Israel and the United States took the opposite view.

In a statement issued by the Israeli prime minister's office, it was made clear that Lebanon was not part of the agreement and that operations against Hezbollah would continue uninterrupted. Iranian Foreign Minister Abbas Araghchi responded on the platform X, stating that the United States must choose between a ceasefire and continuing the war through Israel, as it could not have both. He insisted that the terms of de-escalation were clear and did include Lebanon.

Washington, however, presented a markedly different account. It maintained that the ceasefire applied solely to the conflict with Iran and did not extend to Lebanon. U.S. Vice President J.D. Vance went further, suggesting that while the Iranians believed Lebanon was included, this was not in fact the case.

He stressed that the United States had made no such commitment and warned that the Lebanese file could become a factor threatening the collapse of the understanding with Tehran.

This divergence appears to go beyond a mere misunderstanding or technical difference in reading the text. Rather, it reflects a political struggle over interpretation each party seeking to frame the agreement in a way that serves its own strategic interests. The conflicting readings do not necessarily point to a textual error so much as they reveal deliberate efforts to assign differing, even contradictory, meanings based on shifting balances of power and interest.

Accordingly, the debate over Lebanon not only raises doubts about the agreement's coherence but also invites broader questions about its seriousness and the underlying motives behind its formulation and timing. These doubts deepen in light of other sensitive disagreements whether regarding uranium enrichment or the future of Iran's nuclear program suggesting that what has

been reached may be less a durable agreement than a temporary pause, vulnerable to collapse at the first serious test.

### How Does Iran Read This Escalation?

Tehran does not view Israel's escalation in Lebanon as a mere, containable breach of the agreement. Rather, it sees it as a deeper and more consequential move one whose timing carries political and security messages. From Iran's perspective, Tel Aviv is attempting to impose a new equation: one that grants it additional leverage at the negotiating table while simultaneously reshaping regional balances in line with its strategic vision.

In this light, Iran interprets the escalation as a dual message. The first is directed at Tehran itself: any understanding with Iran does not constrain Israel's military freedom in Lebanon, and any agreement with Washington does not automatically extend protection to Iran's regional allies.

The second message is aimed at the United States, affirming that Israel retains the right to define the arenas of war and de-escalation according to its own security calculations not according to flexible diplomatic formulations or ambiguous agreements.

Accordingly, Tehran views the escalation as an Israeli attempt to exploit the U.S.–Iran ceasefire window to the fullest extent possible by intensifying pressure on Hezbollah before broader political understandings can take shape understandings that might impose greater constraints on Israel's room for maneuver.

From this perspective, the exceptional ferocity of Wednesday's strikes appears as a calculated effort to establish new facts on the ground before the contours of the next phase are set.

Iranian analysts also believe the escalation serves two primary objectives. First, it reinforces a strategy of separating fronts and dismantling the cohesion of the "axis of resistance." Just as Israel previously succeeded in separating the Lebanese front from Gaza, it now seeks to detach Lebanon from the Iranian track itself thereby weakening Tehran's ability to manage its regional leverage as a unified pressure bloc.

Second, it aims to disrupt—or gradually undermine—the agreement with the United States, driven by an Israeli conviction that the deal fails to meet its minimum strategic expectations, while others see it as a political gain for Iran and a clear shortfall in achieving Israel's maximal goals.

Thus, Iran's reading does not separate battlefield developments from political calculations. It views the escalation not as a limited military operation but as part

of a broader struggle over the shape of future understandings, the limits of influence, and the regional balance that will emerge after this round of conflict.

### Tehran Before a Complex Equation

Recent developments place Tehran squarely before a deeply fraught dilemma, caught between two equally difficult options.

The first is to scale back its support for Hezbollah or at least lower its ceiling in order to preserve the agreement with the United States, particularly in light of the heavy losses it has sustained during the conflict and the mounting military, political, and economic pressures pushing it toward avoiding another draining confrontation.

Yet this path comes at a high cost. A retreat from supporting Hezbollah could shake Iran's image as the central leader of the "axis of resistance" and undermine its credibility among regional allies in Lebanon, Yemen, and Iraq. It could also open the door to a contraction of its regional influence, placing its allies in politically precarious positions and potentially stripping Tehran of one of its most important deterrent assets.

The second option is to press ahead with supporting Hezbollah, insisting that any agreement must include de-escalation in Lebanon, while keeping open the possibility of retaliatory missile strikes against Israel. But this path carries significant risks: it would raise the cost of negotiations with Washington and could ultimately derail the diplomatic track altogether especially given the increasingly hardline tone from the United States and explicit warnings from Donald Trump that any full breach of the agreement could trigger a far more severe escalation.

Iran thus finds itself at a critical crossroads: either preserve the agreement at the expense of its regional standing, or uphold its alliance with Hezbollah at the risk of collapsing the understanding with Washington and dragging the region back to square one.

This is not merely a tactical decision or a reaction shaped by short-term calculations. It is a fundamental test of Tehran's ability to balance the demands of influence with the imperatives of survival a test that will help define the contours of deterrence and regional equilibrium in the coming phase.

### Three Possible Paths

Within this framework, Tehran appears to be attempting to craft a delicate formula: supporting the Lebanese front without triggering the collapse of its agreement with the United States. Yet this balancing act is far from straightforward, presenting Iran with three primary scenarios.

The first is a diplomatic path, centered on intensifying pressure through mediators and building international support for including Lebanon within the agreement during the two-week de-escalation window. However, this route faces significant obstacles, particularly given Benjamin Netanyahu's determination to retain Lebanon as a crucial political and security card both in regional negotiations and for his own domestic and international positioning.

The second is a political-negotiation track, leveraging Iran's pressure tools at the bargaining table. In this context, Tehran may invoke the Strait of Hormuz not necessarily through direct escalation, but as a strategic bargaining chip alongside intensified diplomatic efforts.

This path could also involve discussing potential concessions, such as limits on uranium enrichment, the transfer of enriched uranium abroad, or adjustments to aspects of Iran's broader nuclear program.

In this sense, Hezbollah becomes not merely an instrument of escalation but a negotiating asset through which Iran seeks to reshape the very terms of de-escalation. For this reason, this scenario may be the most likely to gain traction with Washington if it offers a pathway to broader gains.

The third scenario is the military option the most sensitive and dangerous comprising two sub-paths. The first involves bolstering Hezbollah through logistical, military, and intelligence support, transforming the confrontation into a prolonged war of attrition that would exhaust Israel and place it under sustained pressure, potentially drawing in other Iranian-aligned actors across the region.

Yet this approach faces a critical constraint: time may not be on Tehran's side, particularly if Israel is racing to impose facts on the ground before the agreement's fate becomes clear.

The second sub-path is a far more extreme "Samson option," involving freezing the agreement and resuming operations against Israel—directly or indirectly—thereby collapsing the ceasefire and reigniting escalation across the region.

While such a move might allow Iran to project steadfastness toward its allies, it would also dramatically raise the cost of confrontation with the United States and risk plunging the region back into full-scale conflict. Ultimately, this option depends on Iran's actual capabilities, its willingness to endure a prolonged confrontation, and the tools it possesses to sustain such escalation.

In sum, Tehran now faces perhaps its most sensitive test since the start of this round of conflict: whether to preserve the cohesion of its alliance network and regional influence, or to maintain de-escalation and avoid a new wave of



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instability that could threaten not only its regional standing but the stability of its governing system itself.

Between these paths, the central challenge remains: how can Iran protect its image before its allies without collapsing its understanding with Washington and without pulling the region back to the brink of explosion?

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