Aoun's Sovereignty Push Exposes a Split in Iran's Proxy Strategy

23 NOVEMBER 2026

Sophie Rieckmann



Photo by Akbar Nemati on Unsplash

Hezbollah and Kataib Hezbollah bargain while the Houthis keep fighting

In his 21 November independence-day speech, Lebanese President Joseph Aoun named Israeli occupation and Iranian interference as twin obstacles to sovereignty, reaffirming that there will be "no weapons outside the state" taking foreign orders. He also urged Israel to withdraw, halt strikes and release prisoners, noting that June's Washington agreement on Israeli withdrawal and Hezbollah disarmament has stalled. Separately, it was reported that Hezbollah asked the IRGC not to drag it into another war with Israel, citing depleted forces, damaged infrastructure and eroding Shia support.

Aoun's framing of Iran as a threat to Lebanon's sovereignty indicates that host-state sovereignty, not Tehran, now dictates how Iran's partners behave:

where a proxy faces an assertive state, it bargains; where it is the strongest force, it fights.

Caught between Aoun's government and an exhausted Lebanese Shia base, Hezbollah wants to sit out a wider Iran war without disarming, seeking to fold Lebanon's settlement into US-Iran talks so Tehran absorbs the political cost. In Iraq, Baghdad's move against Kataib Hezbollah's Jurf al-Sakhr stronghold over oil smuggling ended in a compromise rather than an armed clash. Because Iraq is Iran's economic lifeline, and Kataib Hezbollah self-funds through smuggling, Tehran mediates rather than commands. Facing no state constraint in Sanaa, the Houthis remain Iran's sole active front, striking Saudi targets around Bab al-Mandeb.

This creates a clear division of labour under Tehran's regional proxy strategy: Lebanon and Iraq have become bargaining chips, while Yemen serves as Tehran's instrument of coercion. For Israel and Europe, disarming Hezbollah is no longer the decisive lever for containing Iran. Tehran's active deterrence now sits in the Red Sea, where diplomatic pressure on Beirut and Baghdad cannot reach.

EPIS