



Peace in pieces — a ceasefire that never was

2 MONTHS AGO

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The lack of clarity, trust and enforcement renders the ceasefire in West Asia merely theatrical, and for Asean, the need to prepare for volatility is imperative.

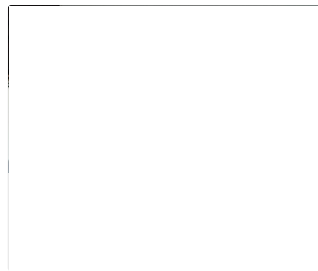


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The world breathed a sigh of relief when news broke of a two-week ceasefire between the US and Iran.

Markets rallied. Oil prices briefly dipped below US\$100 per barrel. Diplomats spoke of “a step back from the brink”.



Yet within hours, that fragile calm began to fracture — revealing not a peace secured, but a ceasefire already in pieces.

At the heart of the problem lies a fundamental truth: there was never a shared understanding of what had been agreed upon.

Iran, Pakistan, and several mediators believed the ceasefire extended to Lebanon. Israel did not.

The US reinforced this ambiguity, with President Donald Trump later clarifying that Lebanon was “a separate skirmish”.

The consequences were immediate and devastating.

Israel launched one of its largest waves of attacks on Lebanon, striking over 100 targets and killing more than 250 people within hours of the ceasefire announcement.

The United Nations described the assault as “horrific”, warning that such actions placed enormous strain on an already fragile truce.

Thus, what was presented as diplomacy quickly devolved into a contest of narratives.

Iran accused both Israel and the US of violating the ceasefire's terms. Israel insisted it had not.

Washington described the disagreement as a “legitimate misunderstanding”.

But in geopolitics, misunderstandings are rarely benign. They are often the prelude to escalation.

Nowhere is this more dangerous than in the Strait of Hormuz — the artery through which roughly one-fifth of the world's oil flows.

Iran responded to Israeli strikes by halting or restricting tanker movements, claiming that it had been permitted to do so under a recent passage

This is no mere tactical manoeuvre. It is strategic leverage of the highest order.

Even when partially open, the strait is no longer truly open. Shipping traffic has slowed to a trickle. Insurance approvals remain uncertain. Satellite interference continues.

In effect, the global economy is now hostage not just to war — but to ambiguity.

And ambiguity, in this case, is weaponised.

Iran has reportedly introduced a US\$2 million toll per tanker, transforming a geopolitical chokepoint into a revenue stream.

This signals a profound shift: from disruption to institutionalisation.

The Strait of Hormuz is no longer merely contested; it is being redefined.

For Israel, the calculus is equally stark. The war in Lebanon is not peripheral — it is central to its strategic objective of degrading Hezbollah.

Any ceasefire that excludes Lebanon is therefore not a ceasefire at all, but a partial pause.

For the US, the situation is even more paradoxical. Washington seeks de-escalation with Iran while tacitly supporting Israeli operations in Lebanon.

The result is a policy contradiction — one that undermines its own diplomatic credibility.

In short, each party is operating under a different map of the same agreement.

This is why the ceasefire is collapsing in real time.

The deeper lesson is sobering.

Modern warfare is no longer confined to battlefields. It extends into legal interpretations, media narratives, and economic instruments.

A ceasefire today is not simply a cessation of hostilities — it is a contested text, subject to competing readings and strategic manipulation.

And when that text is unclear, the guns do not fall silent. They merely pause.

For Asean, the implications are immediate and severe. Southeast Asia imports approximately 2.2 million barrels of oil per day from the Gulf.

Any disruption in Hormuz reverberates instantly across fuel prices, food supply chains, fertilisers, and even semiconductor production through helium shortages.

This is not a distant war. It is an economic shockwave.

The notion that a ceasefire — even a flawed one — can stabilise markets is increasingly untenable.

As recent events show, markets now respond not just to agreements, but to their credibility. And credibility, once lost, is not easily restored.

The current truce suffers from three fatal flaws.

First, it lacks clarity. The exclusion — or inclusion — of Lebanon was never definitively agreed upon. This alone renders the ceasefire structurally unstable.

Second, it lacks enforcement. There is no mechanism to verify compliance or adjudicate violations. Each side becomes judge and jury of its own actions.

Third, it lacks trust. Iran does not trust the US. Israel does not trust Iran. And increasingly, even allies question Washington's consistency.

Without these three pillars, any ceasefire is merely performative.

The tragedy is that diplomacy did succeed — briefly. Pakistan's last-minute intervention demonstrated that even in the most volatile conditions, dialogue is possible.

But diplomacy without precision is diplomacy in name only.

Peace cannot be built on ambiguity.

If anything, the current crisis underscores the urgent need for what may be termed "Track 1.5 diplomacy" — a hybrid model that combines official negotiations with sustained back-channel engagement.

Only through such mechanisms can misunderstandings be pre-empted before they metastasise into conflict.

Yet time is not on the side of diplomacy.

Each passing hour of uncertainty tightens the chokehold on global energy flows.

Each retaliatory strike deepens the cycle of escalation. Each contradictory statement erodes the possibility of trust.

What we are witnessing is not the failure of a ceasefire. It is the fragmentation of peace itself.

A ceasefire divided by interpretation, undermined by action, and exploited for leverage is no ceasefire at all. It is a pause between wars – one that may prove shorter than anyone expects.

For Asean, and indeed the world, the message is clear.

Prepare for volatility. Because when peace is negotiated in fragments, conflict returns in full.

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