The Iran Nuclear Deal – A Preliminary Analysis

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Iran and the P5+1 (the five permanent members of the UN Security Council plus Germany) have finally struck an interim deal on the former's disputed nuclear program in Geneva on 24 November 2013. The deal is a historic achievement on many counts: it succeeds in closing the gaps between Iran and the West, at least, for the time being; it breaks down the post-1979 paradigm of hostility between Tehran and Washington; and, above all, it helps the two antagonistic parties avert a possible dangerous move to war, in case diplomacy did not succeed. President Barack Obama has hailed the deal as 'an important first step' to resolve the Iranian nuclear dispute[1]. This has come as a major shock for America's traditional allies in the region – Israel and the Gulf Arab states who are stunned that Washington has moved so closer to Tehran, despite strong opposition from Riyadh and Tel Aviv.[2]

In this paper I argue that the interim nuclear deal, expected to lead to a comprehensive solution to the nuclear dispute in the next six months, is set to initiate a major shake-up in the Middle Eastern strategic environment. With US hostility towards Iran gradually reduced or neutralized, Tehran and its regional allies – Iraq, Syria and Hezbollah in Lebanon – are poised to dominate the Middle East. Neither Israel nor the Gulf Arab states led by Saudi Arabia would be in a position to counter Iran's regional expansion and influence. However, that does not mean Israel and Saudi Arabia would let Tehran go unchallenged; a new round of intensified rivalries and conflicts, short of the outbreak of actual armed hostilities, could characterize their relations in the future. In line with these basic contentions, I first examine the meanings and significance of the interim nuclear deal and then map out its strategic implications for Iran's relations with Israel and Saudi Arabia.

The Meanings of the Interim Deal

The deal, welcomed by both Tehran and Washington, is no permanent solution to the Iranian nuclear program; instead, its major significance lies in creating a congenial diplomatic atmosphere where the Iranians and Americans can talk and negotiate a mutually acceptable lasting solution. The shared desire to get to this point appears to have convinced both parties to make mutual concessions and move ahead. As per the terms of the interim agreement, a four page document, neither Iran nor the US is required to get the deal approved by their respective parliaments. This was a clever ploy to bypass the hardline opponents of the deal – the Iranian conservatives and the pro-Israel hawkish Congressmen – though a final comprehensive deal must pass the US Congress and the Iranian *Majlis*.

Iran, in a dramatic departure from the hardline nuclear stance of former President Mahmoud Ahmadinejad, makes a number of stunning concessions.[3] Tehran, first and foremost, commits not to seek any nuclear weapons in the future, agrees to keep uranium enrichment at the 5% level for the next six months while gradually eliminating its stock of uranium enriched to 20%, and promises to stop further advances of nuclear activities at the Natanz Fuel Enrichment Plant, Fordow Nuclear Plant and the Arak heavy water reactor. Iran does, however, retain its right to maintain enrichment R&D practices at the current level but undertakes not to construct any new reprocessing facility. The West, in return, offers Iran a number of economic concessions: no new nuclear-related sanctions for the next six months, allowing Iran's crude oil sale to current customers at the current level, a suspension of EU and US sanctions on Iran's petrochemical exports, gold and precious metals, as well as the suspension of US sanctions on Iranian auto industry and associated services. Additionally, the West undertakes to supply spare parts for Iran's civil aviation aircrafts for flight safety and agrees to release Iranian oil revenues held in Western banks to facilitate humanitarian trade transactions to meet Iran's domestic needs.

A comparative look at the concessions, made by both parties, suggests that Iran's concessions are much more substantial than what the West has offered, though Tehran boasts of its so-called 'enrichment right' which is vaguely defined in the agreement. The preamble to the agreement states: "This comprehensive solution would involve a mutually defined enrichment program with practical limits and transparency measures to ensure the peaceful nature of the program". Two implications follow from this statement: Iran's right to enrich is recognized but with 'practical limits'. Clearly, Tehran cannot enrich uranium at its own will and at a higher level not approved by the P5+1; and, secondly, the West accepts Iran's nuclear infrastructure, a departure from George W. Bush administration's and Israel's demand that Iran must dismantle all its nuclear facilities.

Motivations in Reaching the Deal

The agreement raises a number of critical questions: Why did the Iranian government under President Hassan Rouhani make such substantial nuclear concessions now? Conversely, why did the Ahmadinejad government not offer similar concessions and make peace with the West? What factors have propelled the West, particularly the US, to negotiate and conclude a deal with the Rouhani government?

Former President Ahmadinejad, not a cleric but a fierce nationalist, pursued a policy of confrontation with the West – no concessions and no show of weakness on the nuclear issue. Backed by hardline conservatives and powerful domestic constituencies, most notably the Islamic Revolutionary Guards, he resisted all pressures to coerce Iran into submission.[4] Iran's nuclear policy under President Ahmadinejad defied the West even in the face of possible joint US-Israel military strikes and the expansion of crippling sanctions.[5] President Obama's call to Tehran to unclench its hands, made at the time of his first inauguration to the White House in January 2009, did not produce the desired result. The Obama administration, on its part, was also half-hearted during its first term in office to reach a deal on the nuclear issue. There was a clear lack of political will on the part of the president to give diplomacy a serious try. Both Tehran and Washington officially preferred to engage in diplomatic dialogues but both parties hoped that a negotiated settlement would not be finally reached.[6] In addition to Congressional opposition and lobbying by pro-Israel groups not to negotiate with Iran, President Obama had another powerful disincentive to pursue a slack diplomatic track: a negotiated settlement of the nuclear issue with the hardline conservative and nationalist forces would have given them an extra degree of popular legitimacy and an electoral boost at the cost of the reformist forces. This is a scenario President Obama probably wanted to avoid.

President Hassan Rouhani's election in June 2013 changed the strategic calculus across the board. Rouhani's West policy is premised on two specific pillars: a) the normalization of relations with the West by successfully navigating the nuclear stand-off; and b) the lifting of sanctions in order to revamp the Iranian economy. Obama was quick this time to seize the opportunity created by the political change in Iran. He moved ahead firmly, stopped the Congress from thwarting his plans to engage with Iran through diplomacy and put the pro-Israel lobbies in check.

A host of regional and strategic factors, including enormous human and material costs of the wars in Afghanistan and Iraq, the Arab Spring and the deadlock in Syria, and America's Asia 'pivot' led the Obama administration to reassess the 'Iran policy'. The wars in Afghanistan and Iraq, in addition to tens of thousands of casualties on both sides, had cost the US treasury nearly US $4 trillion by the end of 2011.[7] A war with Iran would likely have been even costlier in terms of the scale of human costs, material damages, and the potential regional spillover effects of a war. The Arab Spring, and subsequent fall of some dictators, has further complicated the regional situation by pitting internal and external rival groups involved in the Syrian war. The resilience of the Iran-Syria-Hezbollah group, actively backed by Russia, to face the US-Israel-Qatar-Saudi Arabia-Turkey bloc exposes the futility of the use of force against Iran to eliminate its nuclear facilities. The Iran threat is also exaggerated by the West. Even if Iran arms itself with nuclear weapons, it would never be in a position to directly threaten Israel or America. The guaranteed second strike capability by Tel Aviv and Washington remains a powerful disincentive for the Iranians not to think of any military misadventures, since Israel as well as the US, with nuclear-tipped missiles, are capable of hitting major Iranian population centers and cause massive damages to the Iranian nation.[8]

Furthermore, under Obama's second term, it is not Iran or the Middle East but China who is emerging as the real rival to the US' global status and influence. If there are any threats to US global standing, those threats originate from

China's economic rise and expansion across Asia, Africa and Latin America. China's booming economy is projected by various economic forecasts to overtake the US economy by the year 2025. Beijing and Washington are condemned to be serious rivals jockeying for power and influence across the globe. This explains why Washington has prioritized the Asian theatre in its strategic roadmap[9] and is seeking a gradual withdrawal from the Middle East. Restoring effective relations with Iran is a crucial step in US reconfiguration of strategic priorities.

Strategic Benefits for Iran

The more important question is what strategic benefits the interim deal brings for Iran and how these are interpreted by Tehran's regional competitors – Israel and Saudi Arabia. The interim deal recognizes Iran's right to peaceful nuclear technology and also their right to enrich at a level of 5%, essentially accepting the Iranian nuclear status quo as a reality. Secondly, the deal facilitates Iran's dominance in the Gulf neighborhood and in the greater Middle East region. So far there were two principal challenges to Iranian bid for supremacy in the Gulf area – the Arab opposition to Iranian dominance, and the US countervailing military postures, in cooperation with the Gulf allies, to rein in Tehran. With Iran-US relations leaning to the positive track, the Arab opposition to Iran is weakened. The Gulf may now become a part of Iran's 'internal security'[10] which greatly worries Saudi Arabia and also the United Arab Emirates which itself has territorial disputes with Iran over a number of Gulf islands, particularly Abu Musa.[11] Thirdly, the deal eases constraints on Iran's formal or informal alliance relationship with Syria, Iraq, and the Hezbollah group in Lebanon. Known as the 'resistance front' in the Middle East, it is likely to evolve as a solid political and military axis to challenge Israel seriously.

The Deal and Israel

Iran's recognition as a regional power by the West is an unwelcome development to the Arab states and Israel. They fear that Iran, which was the principal US ally in the region until the 1979 Islamic Revolution, would once again replace them as Washington's favored ally. Quoting a former State Department official in a *The New York Times* report on 11 November 2013, after the first round of negotiations in Geneva fell through due to French interjections, US allies in the region were said to be haunted by a 'genuine fear of Iran' and they felt abandoned by the US.[12]

Israel's reactions to the deal were the sharpest. Prime Minister Benjamin Netanyahu condemned the deal as a 'historical mistake',[13] after his tireless efforts to scuttle negotiations in Geneva had failed. There were real reasons for the Prime Minister to be worried. The acceptance of Iran as a regional power was something anathema to Israel, because Iran has publicly called for the destruction of the Jewish state many times. Tel Aviv preferred to maintain and even further strengthen the sanctions regime to force the Iranian religious authorities to surrender, which Washington did not view as a viable option; they instead stood firm and contended that the Iran deal would make Israel 'safer'.[14]

Equally worrisome to Israel is the presence of Iran-backed anti-Israel armed groups – mainly Hezbollah and Hamas. Iran openly supports the Hezbollah forces financially, militarily and diplomatically while using Syria as a conduit to transfer arms supplies.[15] Until the anti-government uprisings kicked off in Syria in March 2011, Hamas was a recipient of Iranian cash and arms to strike Israeli cities. But Hamas' support for anti-Bashar Al-Assad rebel groups has strained its relations with Iran and Syria.[16] The Iran deal makes no references to threats posed by these armed groups and how they would be tackled by a resurgent Tehran. Another major Israeli concern is its apparent downgrading as a regional ally by the US. For a long time, Israel was an 'indispensable' US ally in the Middle East, and they maintained similar policies and coordinated actions on important issues, including Palestine, Iran–Syria–Hezbollah alliance, Iranian nuclear program, and so on. The US rapprochement with Iran largely undermines Israel's strategic necessity for Washington, though America remains as committed to Israeli security as before.[17]

A more ominous implication of the deal refers to Israel's nuclear program and capability. Israel is widely believed to have produced nuclear weapons in the early 1960s which it neither confirms nor denies. It never signed the Non-proliferation Treaty (NPT) either. The deal with Iran, a NPT signatory, has the potential to create enormous international pressures on Israel to come clean on the nuclear issue, sign the NPT and open up its nuclear

installations for intrusive verifications by the International Atomic Energy Agency (IAEA). The Iran deal, in the changed strategic context in the Middle East, denies Israel the justification to continue its opaque nuclear policy.

Prime Minister Netanyahu's Iran stance, however, sounds more hawkish and his demand to totally dismantle the Iranian nuclear infrastructure is unrealistic. Iran has successfully resisted this demand for the last decade, and has not given any indication that it intends to alter its position in this regard in the future. Furthermore, there is reason to believe that not everyone within the Israeli power structure shares Netanyahu's views; for example, in a recent talk to journalists in Tel Aviv, an Israeli military intelligence official said that the defense forces were open to a deal with Iran and hoped that the deal might help stabilize the region once the West recognizes Iran's nuclear status.[18] Though Mr. Netanyahu fiercely opposed the Iran deal, his armed forces were seemingly ready to live with it.

The Deal and the Gulf Arab States

The Gulf Arab States were, like Israel, dismayed by the Iran deal, though officially they have welcomed it expressing the hope that it would lead to a WMD-free Middle East.[19] Saudi Arabia, the Gulf heavyweight, was more vocal against Iran's nuclear program and clearly stated that if the deal did not stop Iran from developing the bomb, Riyadh would either develop its own bomb or obtain the same from Pakistan, in whose nuclear program the Saudis have reportedly invested billions of dollars.[20] Back in April 2009, King Abdullah warned the US: "If they [Iranians] get nuclear weapons, we will get nuclear weapons".[21] The Saudi pronouncement does not, however, match its capabilities; the Kingdom has enough wealth and money to support a nuclear program but it lacks technical expertise to develop a bomb. As of now, Saudi Arabia has even no nuclear power plant to generate electricity to meet its growing industrial consumption. On top of that, the international reactions to a Saudi nuclear program, as the Iranian case attests, would be severe enough to force it to abandon such a program.

Saudi opposition to the Iran deal lies in Tehran's regional expansion, the alleged Iranian link to Shiites in the Kingdom and other Gulf states, and a growing sense of vulnerability rendered by US failure to act on the Syrian war and its courting of Iran that forced Prince Bandar bin Sultan, the spymaster of the Kingdom, to call for a reassessment of relations with Washington.[22] Saudi perceptions of Iranian threats are further exacerbated by two important developments: Riyadh's recent political and military defeats in the Gulf and the Levant, and the vulnerabilities of its oil industry infrastructures to possible Iranian attacks. In recent years, Riyadh has lost a series of political battles to Tehran: in Iraq, Saudi-supported Sunni political forces are marginalized; in Lebanon, Hezbollah's growing dominance has cornered the pro-Saudi March 14 alliance of Sunni political forces; and in Syria, Iran-supported government troops are winning against the Saudi and West-backed rebel forces.[23]

The Saudis are especially worried that most of their oil infrastructures (oil fields, refineries and oil export terminals), which are located in their Eastern Province on the Gulf shore, are within the easy range of Iranian missiles. Iran's upper hand in the Gulf poses real threats to global Saudi oil exports through the Straits of Hormuz, a narrow waterway Iran controls. The Saudis fear that a nuclear Iran may choose to dictate their oil production, policy and pricing as conflicts between them over oil production and pricing issues erupted in the past.[24] While Iran seeks to maximize oil prices to maintain good fiscal health to support employment opportunities for its growing young population, the Saudis prefer long-term stability in the global oil markets by maintaining reasonable oil prices. On different occasions, the Saudis have angered the Iranians either by increasing or cutting oil production to damage Iranian oil interests. Despite Iran's objections, the current surge in Saudi oil production to fill the gaps created by Western sanctions on Iran is an example.[25]

A Possible Arab – Israel Front against Iran?

The Iran nuclear deal clearly puts Israel and Saudi Arabia at a great disadvantage, if not in great danger. Neither country, not Saudi Arabia, at least, is in a position to counter Iran and its regional allies single-handedly. Perceiving vulnerabilities caused by America's apparent shift from the 'special relationship' with the Kingdom, sealed by the 1945 oil for security bargain, Riyadh has already approached Russia and China as alternative protectors. Neither Beijing nor Moscow has shown any interest to come to the defense of the Al-Saud rulers in opposition to their ally, Iran.[26] For Israel, the firm US commitment remains but a militarily and strategically dominant Israel capable of

keeping the hostile states in check is no longer a viable policy option. In 2006, Israel fought a major war with Iran-backed Hezbollah which it did not clearly win and Tel Aviv's military supremacy is further undercut by a rising Iran. One striking similarity between Israel and Saudi Arabia is that both states have the same rivals and enemies – Iran, Syria, and Hezbollah. That common thread ties them together to put up a joint front to counter Iranian dominance. The back-channel communications between Riyadh and Tel Aviv to thwart the nuclear deal already suggests the possibility of a common front against Tehran. A former Israeli diplomat at the UN has said: "We have a common enemy, Iran, and we have shared disappointments from our allies, mainly the United States, something that created a somewhat strange alliance between Israel and the Gulf states".[27]

It is, however, not the first time that Israel and the Gulf Arab states are in strange alliance. Israel and Saudi Arabia pursued joint policies against the nationalist agenda of Gamal Abdel Nasser of Egypt while Tel Aviv covertly aided the Saudis in their proxy war in Yemen against Nasser's forces in the 1960s. During the period of heightened Arab-Israeli tensions and the wars of 1956, 1967 and 1973, Saudi Arabia viewed Israel more as a foreign policy concern than a threat; the real threat, according to Riyadh, was a Soviet presence in the Middle East.[28] Apparently, Riyadh and Tel Aviv have coordinated their policies in the past based on the old adage that 'the enemy of my enemy is my friend'. In the changed Middle Eastern strategic context, Iran has emerged as their common rival that requires policy coordination and collective actions. Both countries appear ready to set aside their old hostilities to deal with this more pressing strategic issue. This was echoed by Mr. Netanyahu at his 2013 UN General Assembly address: "The dangers of a nuclear-armed Iran and the emergence of other threats in our region have led many of our Arab neighbors to recognize, finally recognize, that Israel is not their enemy".[29]

Real hurdles, however, undermine the possibility of a formal alliance between Riyadh and Tel Aviv. In the Arab world, Israel is generally viewed as a political and cultural outcast created and nurtured by the West. Israeli settlement policies and its consistent refusal to negotiate peace with a commitment to return to the pre-1967 border are the main obstacles to Arab – Israel reconciliation. Riyadh cannot have formal relations with Tel Aviv until Israel agrees to the creation of an independent Palestinian state. Israel, in contrast, views Saudi Arabia as a 'fanatic Islamic state' and blames Riyadh for aiding fundamentalist groups that hate Israel.[30] Riyadh, however, ranks lower than Iran, Syria, Hezbollah and al-Qaeda in the Israeli list of enemies.

Differences in views and perceptions notwithstanding, there is potential for Israel and Saudi Arabia to forge a common platform to respond to their common strategic concern – countering Iran. Other regional states that have signed peace treaties with Israel, such as Jordan and Egypt, are likely to be drawn in to this common platform pitted against the Iran-Iraq-Syria-Hezbollah alliance. That means more intensified rivalries and conflicts between the two sides of the strategic divide – but they are unlikely to wage major wars against each other.

Three factors make wars between the two rival groups very unlikely. A war between Israel and Iran or between Iran and Saudi Arabia would be extremely damaging. The use of latest military technologies and equipment in the war, which all sides possess, would result in large-scale destructions of their domestic infrastructures and industrial capacities as well as a significant death toll of their respective populations. No leader would risk that. Secondly, neighboring countries, who are most likely to be either involved or affected by the war, have every incentive to prevent such developments from occurring. The path to war is a deadly path for all. Thirdly, there exist no dangerously critical issues, such as direct territorial disputes or conflicts over natural resource-sharing between Iran and Israel and between Iran and Saudi Arabia that may precipitate wars between them.

To conclude, the Iran deal is a historical development in the conflict-prone Middle Eastern strategic environment, a deal that holds the potential not only to reorient Tehran – Washington relations but also to bring about noticeable far-reaching changes in intraregional relations. The deal facilitates the rise of Iran as a dominant regional power by gradually lifting off Western sanctions and ending Tehran's global financial and diplomatic isolation. It also strengthens Iran's sphere of influence that stretches from Tehran to Beirut via Baghdad and Damascus. The prospect of a regionally dominant Iran has created serious concerns in Israel and Saudi Arabia who are out to step up collective actions to contain Iran. Riyadh and Tel Aviv are not friends but they feel compelled to jointly respond to the new strategic reality. This unfailingly points to the development of a new pattern of conflicts and rivalries between Iran and its allies, on the one hand, and Israel and Saudi Arabia, on the other. But they are more likely to manage

their conflicts short of direct war.

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