

America's Iran Strategy

by George Friedman - February 23, 2021

President Barack Obama's administration had a primary goal in the Middle East: It did not want Iran to become a nuclear power. It did not want Israel to be forced to launch a preemptive strike against a nuclear Iran, triggered by the public declaration of Iran's intentions against Israel. American allies in the region – Saudi Arabia and the United Arab Emirates, among others – were frightened that a nuclear Iran might compel them into a subordinate position. And the Obama administration, dedicated to military disengagement from the region, was afraid that to calm regional fears, the U.S. would have to take military action against Iran's emerging power, with dangerous consequences.

Obama's administration engineered an agreement with Iran under which Iran would agree to stop its nuclear weapons program and permit international technical monitoring of the program. Implicit in the agreement was that if Iran complied with the terms of the deal, broader agreements would emerge, allowing Iran to normalize its relationship with the outside world and increase its economic well-being.

The agreement was criticized at the time for three reasons. First, Iran was capable of both permitting inspections and evading them, by shifting the location of the nuclear program. Iran has many caves and tunnels where nuclear activities could be concealed. Inspections are focused on known facilities because of the dearth of inspectors and the breadth of the country. In other words, inspections appear to be a reliable guarantee, but their reliability is inherently uncertain. Second, the agreement did not address Iran's relations with other countries in the region, against which Iran has carried out covert and overt operations. So it did not do anything against Iran in Syria, Lebanon or Yemen, nor did it do anything about Iranian destabilization of and strikes against other countries, such as its attack on a Saudi refinery. Finally, it did not address Iran's missile program, which seems to involve missiles of multiple ranges and payloads. If Iran were building a nuclear-capable medium-range missile, as some claimed, then there was a mystery. If Iran were abandoning its nuclear program, why spend scarce resources on these kinds of missiles?

The Obama administration's position was that all of these were important issues but that reaching a long-term understanding with Iran required a step-by-step approach. If the U.S. sought everything at once, it would achieve nothing, and the goal was to use economic incentives to draw Iran forward. His critics said that the patient approach left the door open to dangerous offensive operations, and

that, as protecting the agreement would inevitably become a political objective, Iranian actions that violated American interests but not the agreement would be overlooked with the hope of preserving the nuclear deal. There were arguments to be made on both sides, but the core issues were that the guarantees against a continued nuclear program were uncertain in their performance and that the agreement left Iran with significant nonnuclear opportunities.

An element of Donald Trump's election campaign was his opposition to the Iran nuclear deal. He unilaterally insisted that the agreement go beyond nuclear weapons to the missiles that delivered them. Rather than using an incentive of further economic relations, he imposed significant sanctions on Iran and made their removal the incentive. In other words, where Obama sought not to weaken Iran economically but to focus entirely on the issue at hand, Trump chose to weaken Iran economically in order to expand the goals of the agreement to cover missiles.

Trump also sought to decrease Iran's foreign operations, or at least increase the cost, by supporting a system of relations, **beginning with Israel and the United Arab Emirates** and **expanding to other countries**, that was designed to both isolate Iran and limit its ability to play off one Arab country against another. By the end of the Trump administration, the map of the region had shifted, and with it Iran's position. Its economy was in steep decline, the hostility of the Arab world was consolidated, and the assumption was that between coalitions and economic costs, the Iranian political and military operations in the Arab world would decline, something not yet clearly visible. But economic weakness and a degree of political unrest in Iran are obvious.

Joe Biden ran against Trump's Iran policy, as Trump had run against Obama's. All of this gave the shift a political dimension. Trump favored the actions he took, but he also welcomed them as an attack on Obama's position. Similarly, while we don't have a clear sense of Biden's strategy on Iran, he has a political imperative to reject Trump's policy.

The Middle East is at the moment a radically different place than it was at Obama's or Trump's point of decision. The coalition that was formed had the American imprimatur, even if the mechanics of the creation were primarily in the hands of local powers. But now Biden must consider not only the nuclear deal and Iran but also the effects on the way in which recognition of Israel formed a coalition that even countries that have not formally recognized Israel are part of. The foundation of this organization arises from hostility to Iran, and the fear that when it reemerges, its power will swamp the region. Israel fears Iran's nuclear weapons, the Saudis fear Iranian drones and Iranian proxies in Yemen, and so on. On the whole, these countries welcomed Trump's revision of Obama's approach for the reasons given.

The inclination of Biden, given the American political process, is **to reinstitute Obama's strategy** and repudiate Trump's. But the problem is that a return to Obama's strategy, with the withdrawal of sanctions, would reasonably quickly revive the Iranian economy, strengthen the Iranian hardliners who refused to bend in the face of Trump's policy and would then be vindicated, and create a massive crisis in the Middle East.

There are those who would argue that the Abraham Accords are a house of cards unable to hold together. That may be true. But it is there now, and it is there because of Iran. A shift in U.S. policy on sanctions will be read in this region as the U.S. moving to a pro-Iran position, a view that might not be true but will appear to be the case. Israel will see it as a mistake, and the UAE and the rest of the Sunni world will argue that whatever the subjective intent of the Biden administration, the objective fact is that its policy is strengthening Iran. And as a result, the anti-Iran construct that is seen as American in its root will in fact fragment. And in a fragmenting Middle East, war is a frequent accompaniment.

Biden obviously doesn't want this, and his pledge to resurrect Obama's nuclear deal will pass. Consider that if Israel draws the conclusion that the Abraham system is of no importance and allows it to fragment, Israel will conclude that the management of the Iranian threat is solely an Israeli problem, and Israel strategically cannot allow the threat to evolve. The Saudis, who are facing the Iranians in many ways and who are being investigated by the Biden administration for human rights violations, will have to pick a new direction. It is not in the American interest to have allies (however distasteful to the current ideology) start choosing new directions. At the moment the region is relatively peaceful. If Iran were let out of its box without major concessions and controls, the region would go back to looking how it normally looks. And given Biden's opposition to "America First," instability there will draw the U.S. in.

Like every American president, Biden has his campaign position and then his governing position, just as the campaign advisers who were awarded senior positions find themselves more liability than asset. In any case, if he moves ahead to serious talks with Iran, the rest of the Middle East will be extremely frightened. A U.S.-Iran entente – which is how it will be seen – is not compatible with a U.S.-Israel or U.S.-Arab alliance. Candidates may speak of things that become impossible in the light of victory. They get over it.

It may seem as if I am charting a history based on the whims of a president. But presidents are simply trapped by reality. Put another way, the U.S. sought to pacify the Middle East. One fear was Iranian nuclear weapons, and the first focus was on them. But the concern about Iran in the region went beyond nuclear weapons to other dimensions of Iranian power. The U.S. then generated a broader response, from sanctions to a regional coalition. But the coalition is fragile, and concerns about Iran's nuclear program are still there. A return to the initial agreement is attractive, but since it will unleash other forces the U.S. doesn't want to see, the problem becomes more complex.

The U.S. had to withdraw major military force from the region as the initial intervention failed to achieve its goals. But the U.S. can't be indifferent to the region because it is a strategic part of Eurasia, and other great powers can take advantage of it. In the long run, it is easier to manipulate the region to American ends than to dislodge another major power, or face the emergence of a regional power destabilizing the region. And thus we see Israel and the Arab coalition. Speaking of presidents is a useful marker, but **their policies are crafted by reality**, not the other way around.

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