

The US, Iran and Bargaining Positions

by George Friedman - March 1, 2021

The Iranian government has announced that it will not attend the first round of negotiations over restoring the agreement that limited its ability to develop nuclear weapons. Tehran says sanctions imposed by the administration of former President Donald Trump must first be removed for talks to begin.

Obviously, this is a tactic meant to improve its bargaining position with the United States. But that position must be credible, and read that way by both sides. Iran reads President Joe Biden to be particularly vulnerable on this issue. Biden has long maintained that **abandoning the nuclear agreement was a mistake** that he would correct at the first opportunity.

Biden therefore needs to resurrect the original agreement or replace it with something similar. Iran understands U.S. politics as well as anyone, and it has proved to be an excellent negotiator. If officials believe Biden must restore the agreement, they will make it as difficult as possible.

One of the best ways to negotiate is to appear irrational. Rational actors believe themselves to be reasonable and operate under the assumption that their counterparts believe them to be rational too. Negotiators might well be rational, but showing their cards in a reasonable way gives the counterpart a roadmap of how to calm the talks. Iran is a master at appearing suicidal, when, in fact, it is as scared of nuclear annihilation as any other country. Religious fanaticism about the annihilation of Israel, for example, doesn't comport with reality. The Israelis have a substantial nuclear arsenal and years of experience gaming possible Iranian threats. Any planned Iranian attack would be detected early in the process, and Israel would strike preemptively. In other words, the worst place Iran could be is close to completing a nuclear weapon, and its leaders know it.

The value of a nuclear program, on the other hand, is substantial. It shows an attempt to possess a nuclear weapon without giving any indication of already having one. It is the program that is perfect for Iran. It frightens without forcing anyone to take risky actions. The tools for building a program are lying on the floor with apparently earnest efforts to put it together. Iran gets to negotiate concessions for not building a nuke, even without itself being directly threatened by nuclear annihilation.

Meanwhile, it also tries to assert its power in a more effective way – by providing support, for example, for the Houthis in Yemen, Hezbollah in Lebanon, Hamas in Gaza and Islamic

Revolutionary Guard Corps forces in Syria, and by becoming deeply involved in Iraq. Iran's most effective foreign policy tactic in the region is delivering covert support to non-Iranian forces that can bring pressure on Sunni Arab states, Israel and U.S. forces still deployed in the region. Nuclear weapons are a notional concept designed to magnify Iranian power. Their real power rests on their ability to destabilize certain countries. This strategy carries with it only minimal risk compared to building a nuclear weapon and the missiles to deliver it. **Iran wants the ability to go nuclear without going nuclear** while engaging Israel, the Arabs and the Americans with covert operations that are difficult to counter.

Refusing to discuss the old nuclear treaty serves two purposes. It tests the new American president to see how badly he needs this agreement, and it allows the Iranians to escalate their actual priorities by using the American desire for a resurrected agreement. There's no real downside for Iran. What Tehran needs more than anything is the lifting of sanctions. The sanctions imposed on Iran after Trump abrogated the nuclear agreement are wrecking its economy and, in turn, generating political opposition to the architects of the first agreement. (This was compounded by the budding coalition between Sunni Arab states and Israel, a nominally defensive alignment that could, as Iran well knows, turn offensive quickly.)

Politically, if Biden wants to make good on his promises, he needs to resurrect some version of the old treaty. The Iranians read this need as an opportunity to extract concessions, particularly removing sanctions but also, in the long run, minimizing the threat from the forces across the Persian Gulf. These are critical to Iran.

Biden's problem is that he has not yet begun to govern. The first few months of any new administration is an extension of the campaign. Thus, Biden ordered an airstrike against Iran-backed militias in Syria to demonstrate that he is willing to strike at their prized covert operations. The Iranians are watching carefully to see if the left-wing of the party governs or if the center governs. Similarly, following his campaign commitment to human rights, Biden went after Saudi leader Mohammed bin Salman – who, according to U.S. intelligence, authorized the murder of Jamal Khashoggi – before trying to heal whatever breach in relations it might have caused.

The United States needs the Israel-Arab coalition to block Iranian covert ambitions, so it needs Saudi Arabia to be part of it. All presidents must figure out how to square the circle of what they promised to do and what they must do. And in this sense, Biden has a problem: He is pledged to resurrect an agreement that did not really address the problem of Iran, and he must do it to show the Europeans that he is not Trump while making clear to the Iranians that he is not giving away Trump's strategy without making a fundamental change in America's Iranian policy. And Iran will

make this as hard as possible for him.

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