

US-Iran Relations: Towards a Polar Reorientation In the Middle East?

Part I

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Political developments are moving extraordinarily fast in the Mideast nowadays, with Russian and American diplomacy being the primary catalysts. Moscow has teamed up with Tehran to kick-start a new round of Syrian reconciliation talks, and it's working with Riyadh in an effort to get the latter to agree to its inclusive (Syrian-government-incorporating) anti-ISIL initiative and hopefully withdraw its support for terrorists in the country.

As involves the US, Washington just struck a monumental deal with Tehran that paves the way for a rapprochement between the two sides, which of course has scared Riyadh to no end and somewhat motivated its cautious redirection towards Russia. No matter how complicated the larger situation appears, however, it's unmistakable that two main trends have emerged – Russia and Saudi Arabia are getting closer with one another at the same time that the US and Iran are doing the same. This makes for a very peculiar state of affairs at the moment that needs a thorough and clarifying elaboration, a categorical comparison of its two main components, and a forecast for its evolution in order to help make sense of it all.

The first two parts of the article looks at the specifics of the US-Iran relationship and the Russian-Saudi one, explaining how they came into existence and the complex cause-and-effect interconnection between both of them. Part III picks up where the previous two left off and compares the perceptions and motivations surrounding each pivot, categorizing them into eight primary tracks. Finally, Part IV contains a phased scenario forecast that concludes the series by using the prism of these two pivots and their respective explanatory logic to help predict a couple visions of what the Mideast's coming future might look like.

A Geo-Strategic Double-Think In The Desert

Both Iran and Saudi Arabia appearing to have be rethinking their traditional geostrategic relationships, in what could either be described as an embrace of multipolarity directed against no one (which in Iran's case would be a [walk-back](#) from its previous Resistant and Defiant policy) or a potential pivot on behalf of, or against, someone else. This piece deals with Iran while the subsequent one addresses Saudi Arabia, so let's begin by taking a look at what underlies Tehran's recent geopolitical reevaluation towards the West.

One could say that 'it's all about the atoms' when discussing what's behind the US and Iran's renewed diplomatic engagement, but that's just part of it, despite being a crucial component. The Iranian nuclear negotiations were essentially a trust-building exercise between the US and Iran that was mediated by Russia, which undertook the role of making

sure that Iran's position was heard and accommodated by the West. On the reverse end, having experience in negotiating with the US at the highest levels since the beginning of the First Cold War, Russia also sought to help Iran understand the full consequences of everything that was being discussed and proposed by the American side, hoping that this could help offset any forthcoming legal and/or strategic surprises that the US might try to pull (even in a post-sanction environment). Out of its goodwill efforts, Russia expected for Iran to billions of dollars from its unfrozen funds to mutual ally Syria, as well as promise that it wouldn't exploit its post-deal circumstances to overload the global energy market and crash commodity prices to its advantage.

The following section will contain a critical evaluation of the Iranian nuclear deal, but the reader must be reminded that the only reason it occurred was because Iran was the one who wanted to negotiate and resolve the dispute. Had it not taken the prerogative to do so or thought that it wouldn't be in its best interests (as understood by its sovereign and internationally recognized authorities), Russia and China, in this New Cold War context, could have very well stood by its side and supported its decision. However, since the Iranian government earnestly wanted to clinch a deal no matter what (despite the serious consequences that this entails for its sovereignty), Russia helped facilitate its ally's wish and respected its independent choice, and it did this no matter how disadvantageous the signed agreement might possibly end up being for its own long-term interests if Iran's intentions towards it change and/or it decides to violate the unwritten pact between them to not compete in the energy sphere.

Iran Takes A Loss...

Quite a few analysts have argued that Iran took quite a strategic loss in signing the nuclear deal, although they differ somewhat in their explanations for why it ultimately agreed to it in the first place. To speak on the agreement's critics and cautionaries, these include the likes of [Peter Lvov](#), [Christopher Black](#), and [Eric Draitser](#). Lvov says that the arrangement places Iran in the Western strategic camp and is a major loss for Russia, which Black seconds. They say that the Islamic Republic was coerced into embarrassing nuclear energy restrictions and oversight, as well as the continuation of "terrorism"- and ballistic missile-related sanctions out of combined fear of a conventional strike and/or Color Revolution. Draitser is less critical in his assessment and sees it mostly through a business perspective, but he does caution that it could have catastrophic long-term consequences for Eurasia's multipolar future.

✘ The author's own [analysis](#) on this matter was written back in November when it first seemed like all sides would seal a deal, and it's actually quite relevant to the current post-deal strategic situation. Overall, it's argued that while Iran might see certain economic, military, and soft power benefits in the agreement, it's put itself in a position to be exploited by the US further down the line and end up losing everything that it had earlier thought it gained. To expand on that piece for the current realities, it does seem like Color Revolution fears definitely motivated Iran's leaders. For one, the '[Kurdish test run](#)' from early May could have made them realize their vulnerability to a transnational Kurdish uprising, which might be the reason the government is [officially neutral](#) in the [current Turkish-Kurdish War](#) and has [temporarily closed its border](#) with its northwestern neighbor.

Another point to be made is it's not just Kurds who are at risk of becoming Color Revolutionaries, but regular pro-Western Iranian youth of any ethnicity. To many of them, the Islamic Revolution is a national tradition, but not one that they enthusiastically or

actively support (which isn't the same as saying they reject it). It's kind of like baseball for most Americans - it's boring, but they still go to a game every once in a while to show their patriotism and as something to simply do with their time, but they're by no means 'baseball fans' (or anti-baseball, for that matter). Also, President Rouhani does appear to have very strong liberal shades much like former Russian President Medvedev, and since he's officially running the show (just as Medvedev was during his tenure), Khamenei ([reluctantly](#)) supports him just as Putin did Medvedev when it came to UNSC 1973 that the West ultimately used to escalate the War on Libya. In both instances, it can be argued that the 'man behind the throne' didn't fully approve of what his formal representative was doing, but still had to go along with it regardless in order to avoid a public government split that could easily be taken advantage of by international forces and their affiliated media outlets (as well as be the trigger for a [premature] Color Revolution attempt).

...So 'Everybody' Wins (Except Russia)

Here's a quick overview of the dividends that all 6 negotiating partners are expected to receive once the deal begins to be formally implemented early next year:

Iran:

Tehran is eager to unfreeze the billions of dollars of seized funds that it had in the West, hoping to redirect them to its Hezbollah, Syrian, and Houthi allies as soon as possible. On the domestic front, it's courting Western investment, capital, and expertise with the expectation that this will help facilitate an [economic boom](#) in the country. The Iranian market unquestionably has all the qualities for success (highly educated, resource-rich, very large, etc.), but the sanctions put an unexpected halt to its growth over the past decade.

US:



An Iranian worker welds two gas pipes at the beginning of construction of a pipeline to transfer natural gas from Iran to Pakistan, 2013. Source: AP

As written about articulately and soberly in Draitser's analysis, the US is looking for a strategic partner that can help it indirectly extend influence into the heart of multipolar Eurasia, which explains Washington's surprising turn-around when it comes to dealing with Iran. Building upon this assessment, it can be suggested that the US wants to encourage newly assertive and rightfully confident Iran to take things a step further by expanding its soft power influence along the southern flank of the former Soviet Union (Caucasus, Caspian, Central Asia), which could make the country an uncomfortable rival to traditional Russian influence there. One should recall a fleeting, yet important, detail mentioned almost as an afterthought in the [Hoagland-Blinken Doctrine](#), where the strategic opportunity is held out for the US to support Iran's possible post-sanctions role "as a gateway to Europe, as a gateway to India" for the Central Asian region.

China/France/Germany/UK:

These countries are mostly concerned with the economic and energy consequences of the

deal, since they all want in on the coming riches. It was just described why Iran is ripe for an economic renaissance, so focusing on its energy potential, there are 3 complementary opportunities that Iran. The first two deal with [gas](#) export to the EU via either an Iran-EU and/or a Turkmenistan-Iran-EU pipeline, while the other is to China through the [Iran-Pakistan-China](#) route (with an additional [Iran-India project](#) being planned as well). The combined effect of all this gas on the market could [predictably depress prices](#), and this would be compounded by the opening of Iran's underutilized [oil reserves](#) as well (with the gas price being indexed to oil). Iran is used to surviving sanctions and 'living on less', so to speak, so it and its budgetary interests can easily absorb the relatively miniscule profit margins associated with low oil and gas prices since such expected revenue is still better than whatever Iran would be receiving if the sanctions were still in effect. Beijing, Paris, Berlin, and London are always in favor of the cheapest energy imports possible, so it would obviously be to their advantage to see all of these projects come to fruition (not just the LNG ones) to advance their mutual price-lowering objectives, and as just said, Iran looks to be supportive of this scenario despite reassurances that it may have previously given to Russia.

Russia:

Russia's position is arguably a lot weaker than all of its co-negotiators' when it comes to the expected windfalls following the Iranian nuclear deal. Of course, it theoretically has the same market opportunities as the others, but given that Russian businesses don't have that robust of a presence in Iran as it is, they're not really at a competitive advantage, and their rivals have the international scaling experience necessary to rapidly accelerate investments and drive out them out if it comes to it. This means that Russia's expected economic dividends in Iran might not be as big, let alone as certain, as some pundits allege. Also, as was mentioned, the US may use Iran (with its witting or unwitting compliance) as a springboard for projecting destabilizing influence along Russia's strategic southern periphery in the Caucasus, Caspian, and Central Asian. On top of that, it was just detailed how Iran could disrupt global energy prices to Russia's detriment, and this would assuredly have serious long-term reverberations for the country's budgetary and economic considerations. All in all, aside from some possible military and mild energy investment deals, it doesn't seem like Russia directly gains anything at all from the Iranian nuclear agreement (except that billions of dollars of unfrozen funds could assist mutual ally Syria), and it actually looks to lose quite a bit of strategic leverage as a result of it (or at the very least, be confronted with a host of strategic uncertainties that can complicate its policy applications in Eurasia).

But Did It Really Understand What It Was Doing?

Iran radiates the vibe that it's confidently in full control of everything that it's unleashed with the nuclear deal, but how well does it really understand (or even properly recognize) some of the more far-reaching consequences associated with it? Here's a quick checklist of the positives and negatives as they relate to Iran and the West in three key categories:

+/- Economic Opportunities

This is an immediate win-win for both sides (especially the West and their energy interests), but further down the line, it could be used as an element of pressure against Iran depending on how the Iranian-Western relationship matures. The deeper the US and its Western allies can entrench themselves in Iran's post-sanction economic recovery, the more influential they'll become, and thus, the more needed they'll be by the government in order to keep

economic growth solid. This could create national security implications if those same 'Western partners' decide to 'suggest' certain political actions that Tehran doesn't agree with, and worse if they do so under the implicit threat of returning to the sanctions regime under the false auspices of Iran "returning to nuclear weapons research". With growing pro-Western influence and likely even associated NGOs operating in the country by that time, it's questionable to what degree Tehran would be able to reject their decrees without being subjugated to a new round of Color Revolution destabilization (especially if the mere threat of sanctions is enough to trigger a pre-planned anti-government campaign by co-opted citizens).

+/- Nuclear Checks

The meticulous detail to nuclear checks (which it must be said, no other country in the world has to humiliatingly go through) contained within the agreement is beneficial to the West, which by no means ever wants Iran to develop a nuclear deterrent, but it's against Iran's strategic interests for a couple of reasons. Foremost of these is that it eliminates the possibility that Iran could change its mind if the bilateral situation ever deteriorates to the point where it's once more threatened by the US and its allies. In such a scenario, Iran could of course renege on the deal, but then it could lose out on future economic cooperation when the [sanctions snap back](#) (although previously agreed-upon deals will remain in force). Like Black noted in his previously cited piece, Iran has essentially surrendered any future nuclear deterrent or threat thereof, which ironically makes it even less safe than before because the omnipresent American/GCC military threat never went away when Iran's nuclear sovereignty did (although the US' current motives are not to strike), but Iran is now unable to use the nuclear card to its defensive advantage if such threats ever rise again.

- "Race To The Finish"

It was earlier written how Iran will likely send some of the billions of dollars of unfrozen funds it receives next year to its Hezbollah, Syrian, and Houthi allies, and this has thus opened up a 'race to the finish' between the US and Iran. The general idea is that Washington must bring its regional wars to a 'favorable' conclusion before Tehran's truckload of treasure arrives to the battlefield and buffets the defensive potential of its partners, thereby rendering the US' attempts at 'victory' all but useless and completely changing the regional dynamic. While there are certainly positive opportunities for Iran and its allies to be found in this reality, it does create a very unpredictable scramble by the US to urgently secure its militant and regime change interests before it's too late (hand-in-hand with [Turkey](#), it must be reminded), and in hindsight, this scramble and the fear it inspired in Saudi Arabia is one of the partial reasons for Riyadh initiating its nascent partnership with Moscow (which is being viewed [negatively](#) in Tehran).

[To be continued...](#)

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