Babel: Translating the Middle East

“Nuclear Negotiations with Iran”

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FEATURING
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Transcript by Rev.com
Jon Alterman: Henry Rome is deputy head of research at the Eurasia Group, a political risk consultancy, and he’s a longtime watcher of Israel and Iran. Henry, welcome to Babel.

Henry Rome: Thank you so much, Jon. It’s great to be here.

Jon Alterman: Back in February, many of us felt that we were close to an Iran nuclear deal or the revival of an Iran nuclear deal. We still don’t have one. What happened?

Henry Rome: I was among that group as well, so this is a question that I have been wrestling with over the past few months. I think there are basically two explanations for why we’re sitting here in July with no deal. The first explanation is that a deal was extremely close at hand, but there were wrenches thrown into the process. There were invites sent out for a signing ceremony. There was a deal written, and then Russian demands after the invasion of Ukraine really threw a wrench in the process. There was diplomatic momentum, and that has helped to really sideline the process. The United States and Iran were bogged down in fights over the Islamic Revolutionary Guard Corps (IRGC) terrorist organization status. Iran saw the invasion of Ukraine as benefit for itself, politically. It distracted the West. It made the West more reliant on Iranian energy sources. Essentially, the Russian invasion threw off what was a delicate and sensitive process—likely for the longer term. I think there is a second explanation, which is that there is not a deal now because there was never going to be a deal. It seems that, if there was not a Russian invasion, there would have been other factors come into play to throw off negotiations. There are structural reasons—in terms of Iran’s distrust of the United States, Iran’s demand for economic guarantees, etc.—that would have reared their heads either way. Essentially, something else would have gotten in the way. I don’t know for a fact which explanation is better. I tend to fall into the former camp. I think that there is still maybe a one-in-three chance that the United States and Iran strike a deal, so I do not think it’s a predetermined outcome here. That is as best as I can wrestle with it because it is quite a challenging situation, and there is a lot of whiplash for those of us watching it unfold.

Jon Alterman: Do you think, do you think the Iranian government really wants to make a deal, or are there parts of the government that want a deal and parts of the government that don’t want a deal?

Henry Rome: I think Iran has long been fairly ambivalent about an agreement. In contrast with the United States—which has been quite eager to secure a deal—the Iranians have always had a more measured approach. I think Iran is open to a deal on the right terms, but at this stage, the Venn diagram between those terms and what the U.S. administration would be willing to offer just does not overlap. Still, I do think it is important to keep in mind that Iranians can change on a dime and that its positions are not as constrained by domestic politics as it might appear. A really key example of this is the back and forth over the designation of the IRGC as a terrorist organization. That had been presented as an immutable Iranian policy that the United States would need to move on in order for there to be a deal, but in recent weeks, there have been shifts from the Iranian side in terms of entertaining discussions on potentially delaying that or removing other related sanctions to try and compensate for its removal. There is movement there, but I am still skeptical
that there will be an agreement. There are lots of reasons why Iran would want to keep the prospect of a deal alive, but I do think that there is perhaps a bit more flux than it might appear from the outside. It is still my view that the Raisi administration—and especially the foreign ministry—is more supportive of a deal than other elements of the regime. I’m not sold on the idea that the IRGC is dead set against the deal, driven by economic considerations, because I think the IRGC is kind of like the house in a casino. They always win. They win under circumstances of sanctions when they can corner the market on exporting oil, and they win as sanctions are relieved because the government has more money to funnel to their accounts and they have greater access to international technology. I think to a certain extent, the kinds of conversations happening in Tehran are very difficult for folks on the outside to discern, but I am ambivalent about where the Iranians are in terms of a deal.

The Biden team has said for many months that there will come a time when making a deal wouldn’t make sense because Iran would have gained too much knowledge or would have enriched too much uranium. There was a sense back in the spring that that time was imminent. They still haven’t declared that a deal doesn’t make sense. Do you think we’re ever going to reach that point?

That is right, and the U.S. position, even before this spring, was that we were in a “weeks not months” situation and that Iran’s nuclear program was advancing at such a rate that recapturing the benefits of the Joint Comprehensive Plan of Action (JCPOA) would just become harder and harder to such an extent that it wouldn’t be worth it to the United States. That was months ago, and we are where we are. The United States has long said that it’s being guided by a technical clock here, not a chronological clock, by way of explaining that it is Iran’s progress on the nuclear program that is driving the calculations about what the United States would recoup by returning to JCPOA. But I think it’s become clear at this point that it’s not a technical or chronological issue but a political issue. The political decision from the United States has been clear at this point. In a lot of ways, it’s actually a mirror image of where the Iranians are—which is that there’s a desire to keep the possibility of a deal alive even though the odds of a deal continue to decline. I think what we’re seeing here is the technical nonproliferation community kind of clashing up against the political realities that the United States is facing right now. That reality is that the United States does not want to turn its back on the JCPOA because that would require deciding on what to do next, and all of those options are quite messy, costly, and complicated—especially headed into the midterm elections. You are right that the talk about deadlines has really faded away. Iran’s nuclear program has only increased since that point, but the JCPOA is still on the table even though the nuclear benefits that it would convey continue to be reduced.

A couple of weeks ago, I heard a, a former U.S. national security adviser argue in private that at some point Iran is going to get a bomb, and the United States is going to have to think in a longer term about shifting toward a policy of deterrence. Do you think that’s a crazy idea—both in terms of what the United States will have to do and whether U.S. policy is going to have to pivot from denial to deterrence.

I don’t think it’s a crazy idea because if the Iranians do end up getting a bomb, I think the U.S. policy options are limited at that point. The real option would be to try
to deter the Iranians from using it, to try to find ways to keep Iran from using a nuclear umbrella to advance its regional objectives, and to try to contain any kind of proliferation cascade. I think deterrence is a fallback, for sure, but there is also a reason why decades of U.S. administrations have tried to avoid having to rely on that fallback for all those reasons. Trying to execute a deterrence policy would require much more military investment in the region and a lot more effort to try to reassure partners in the region. With renewed focus on Russia and the goal to try to pivot to China, these are thing that U.S. presidents really do not want to have to contemplate. I don’t think it’s a crazy idea. I think it would be the option if it comes to having to use it, but it certainly would not be the preferred option.

Jon Alterman: When President Biden was in Israel a couple of weeks ago, he and Prime Minister Lapid signed a Jerusalem Declaration that argued that the United States is prepared to use all elements of its national power to ensure that Iran never gets a weapon. Do you think that phrase, “all elements of its national power,” means the same things to Israelis and Americans?

Henry Rome: I think that the U.S. and Israeli positions are clear on two ends of the policy spectrum. On the one end on JCPOA, the United States is clearly supportive, and the Israelis are clearly opposed. On the other end of the spectrum involving an Iranian breakout to a weapon, I think it is fair to say that the United States and Israel are quite aligned on using military force to try to stop that from happening. It is between those two poles that the issue is much more complex. That is where the divergences become, even more significant between the United States and Israel in the kind of world of no deal and no bomb—which by the way, I think is the most likely outcome for the foreseeable future. The Israelis want more political pressure, more economic pressure, and a credible military threat. The United States is not really interested in turning up that dial to the extent that the Israelis want them to turn the dial. It is in the between space that there’s going to be a lot of disagreement, and some friendly tension between partners over the coming months—and perhaps longer.

Jon Alterman: The way that you drew the spectrum was that on one end, Iran does not have a bomb. On the other end, Iran is close to having a bomb. Extending that spectrum out, the other part of it would be that Iran does have a bomb. What do you think the Israelis would do if we came to a point where Iran did acquire a nuclear weapons capability?

Henry Rome: Back during the prior nuclear crisis, a decade ago, there was a lot of talk from the Israeli side about whether an Iranian bomb represented an existential threat to Israel. Former prime minister Benjamin Netanyahu’s view was that it did constitute an existential threat. There were a lot of folks in the Israeli security and defense establishment who took the view that it was a serious threat but not an existential threat. The logic there was that an Iranian bomb is a real challenge, but when you talk about something being an existential threat, is the option to just pack up and go home? No, of course not. You have to make policy to try and address that negative outcome. I think Israeli policy would really focus on deterrence, of course. It would be a very costly approach because it would require focusing a lot more resources on strategic weapons and nuclear weapons and scenarios for having to content with an Iran that is much more aggressive or having to design an approach to a country like
Saudi Arabia—which, it is reasonable to assume, would be the most likely to follow suit from an Iranian nuclear weapon. It would really complicate relations with the United States. At least, it would reshuffle the current approach between the United States and Israel. There are other implications, as well. It would really impact the amount of money that the government has to spend on defense versus other things. It would impact things like the tourism industry, and perhaps the willingness of people to come and spend time in Israel. These are the range of issues—from the kind of extremely serious to the manageable—that I think Israeli decision makers would be facing and the reason why they don’t want to have to be facing it. I have no doubt that Israeli strategic decision makers would come up with a new approach. It would just be far from an ideal outcome.

Jon Alterman: How would that deter Israel, and what kinds of Israeli actions would no longer be thinkable if they felt that Iran really did have a weapon?

Henry Rome: I think there would have to be new rules of the game, essentially, between Iran and Israel that would have to be negotiated in a kinetic way. Under what circumstance would Iran threaten to use a nuclear capability? How would it try to message that? These are all things that the United States and the Soviet Union worked through for decades. From the top of the list would be: does Iran try to explicitly extend a nuclear umbrella to its allies and its forces in Syria and Lebanon? Does it constrain Israel’s ability to interdict weapons shipments—things like that. That is probably where the friction would immediately arrive. That process of negotiating what is within bounds and what is not would be a very contentious and intense process.

Jon Alterman: There are some political scientists—Ken Waltz and others—who have argued that a more proliferated world is a more secure world because everybody deters everybody else. I think what I hear you saying is that figuring out what the rules of the road would be within a more proliferated Middle East would actually be a very messy process.

Henry Rome: Exactly. I think the real criticism in the political science literature of the Waltz idea is that it assumes nations will behave rationally and responsibly with their weapons. There are some who would say that the Iranians are not deterrable and that they would be at risk of using a device or transferring a device to a terrorist group. I’m not necessarily in that camp, but I think all of those questions would arise and be real challenges. The other aspect is how does a country like Israel deal with a Saudi Arabia that might be interested in acquiring or developing a nuclear device under that circumstance? It just unlocks a whole series of issues—not only between Israel and Iran but broader issues that they would prefer to avoid. My money would be that we don’t end up in a situation like that.

Jon Alterman: We’ve had a fairly constant Iranian government attitude toward both uranium enrichment and negotiating with the West over Iran’s nuclear program. We are now looking potentially at a political transition in Iran when the supreme leader leaves the scene as he gets increasingly elderly and perhaps ill. People are talking about the rise of the IRGC as a potentially more important force in Iranian domestic politics going forward. Do you expect the Iranian government’s approach to the nuclear question to change over the next decade? Do you think it’s going to fundamentally stay the same?
Henry Rome: Holding all else equal, when it comes to a transition away from the current supreme leader, I don't expect a major shift from the Iranian side because I think the attitudes towards the nuclear program have likely been well socialized and are the result of consensus at the top of the Iranian regime—both in terms of political elites as well as the security establishment. From their point of view, the nuclear strategy has largely worked as designed. It has provided Iran with a threshold capability. It has become an object of focus for the West at the expense of other Iranian activities. There are tangible domestic benefits that it has conveyed—although of course, there's a very significant domestic cost that Iran has also incurred. I think the prevailing attitude will endure—that it's better to be just short of a bomb and get those benefits without opening Pandora's box of what being a nuclear weapons state would entail. I would bet that is going to endure over time, given that even if the leader departs the scene, there will probably be continuity among the individuals and institutions that would come out of that process running the state. But that is the money question, and I don't think anybody has a clear and convincing view about precisely where this is going to head.

Jon Alterman: Henry Rome, thank you very much for joining us on Babel.

Henry Rome: Thank you so much.