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Between good neighborhood and the bomb. Iran's quest for a place in a changing global order



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***Between good neighborhood and the bomb.
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Cover: The Zolfaghar missile, 2017 [Tasnim News Agency]

TABLE OF CONTENTS

Executive Summary	4
Introduction.....	5
1. The Islamic Republic at the crossroads	7
<i>1.1. Setting the game: Regional interactions</i>	<i>7</i>
<i>1.2. The dawn of a new era?.....</i>	<i>8</i>
2. Middle East geopolitical dynamics	12
<i>2.1. Israel: David vs Goliath</i>	<i>12</i>
<i>2.2. Arab Gulf states: Saudi Arabia, Oman, Qatar, and the UAE.....</i>	<i>15</i>
<i>2.3. Iraq, Lebanon, and Yemen: Under the shade of Iranian military influence.....</i>	<i>17</i>
<i>2.4. Azerbaijan: The strategic role of Iranian Azeris</i>	<i>20</i>
<i>2.5. Afghanistan: Opportunity or threat?.....</i>	<i>21</i>
<i>2.6 Iran's maritime quest and its strategic importance for the region.....</i>	<i>22</i>
3. The big game: Iranian balance of great powers' regional influence	24
<i>3.1. United States: The nemesis of the regime</i>	<i>24</i>
<i>3.2. China: Tied by Western criticism?</i>	<i>26</i>
<i>3.3. Russia: Playing with the bear</i>	<i>27</i>
<i>3.4. Turkey: Compartmentalization and the search for cooperation</i>	<i>29</i>
<i>3.5. The European Union: An unfavorable future.....</i>	<i>30</i>
4. Iran's nuclear ambitions, the US and the JCPOA: Prospective analysis	33
<i>4.1. Historical background.....</i>	<i>33</i>
<i>4.2. Impact of the nuclear program for the stability of the region.....</i>	<i>35</i>
<i>4.3. What about the future?</i>	<i>36</i>
Conclusion. In search for a place in a changing global order.....	40
Bibliography	42

EXECUTIVE SUMMARY

What does the future hold for Iranian regional aspirations and nuclear ambitions?

The following working paper focuses on the growing influence of Iran across the Middle East region and its main geopolitical trends. It examines the main underlying geopolitical influences in Iranian strategic thinking, particularly focused in its relations as a regional power with other external actors, namely Russia, China, Turkey, the EU and the United States. Concerning the latter of them, the report pays special attention to Iranian efforts in the development of nuclear capabilities. After the failure of the JCPOA, several scenarios could take place, especially now that Tehran is believed to have enriched sufficient uranium to build a simple, compact nuclear bomb. Thus, through the elaboration of a prospective analysis, several drivers are identified so as to draw conclusions about the medium-term future of the republic, further complemented with the brief elaboration of two plausible scenarios.

With the outbreak of the conflict in Ukraine, and its adverse consequences for the entire continent, the current global order is now experiencing a change in its traditional drivers. New actors are emerging with capacity to influence and exert power across different regions of the world. Iran finds itself in the midst of finding a place in such order; a place that may imply shifting its traditional focus on the West to look Eastward. Chinese growing influence in the region is bound to keep growing and will be a determinant factor in the future of the region, as will also be Tehran's development of nuclear capabilities and Israel's subsequent response.

In general terms, this report has found that:

√ Iran is more likely to make a strategic shift towards Russia and China rather than engaging in further dialogue with the US and the European Union, especially with the growing influence China will have in the Middle East.

√ The current wave of social unrest and protests is not as the events of 2011. The Regime does no longer have the same level of support, and the future of the current system in Iran will largely depend on the outcome of these.

√ Tehran will most likely achieve nuclear capabilities before the end of 2024, and it won't be longer until they are able to launch nuclear missiles. Agreements over the JCPOA are highly unlikely to happen, given the distanced positions between both sides; and it would be useless considering the terms of the original agreement are almost over.

√ With the most recent agreement between Tehran and Riyadh, tensions among the Gulf States and Iran will depressurize to some extent, leading to the establishment of diplomatic relations between both and a decrease of Israel's influence in the region.

√ The withdrawal from Afghanistan by the US will not offer Tehran greater influence in the country, as Tehran does not recognize the Taliban government and still faces several issues which could potentially lead to an escalation of tensions in their shared frontier.

√ In spite of European need for oil imports, Tehran is more likely to align with Russia and China rather than with the Western block. Chinese investments could be the substitute for it, and Tehran can be expected to keep supplying Russia with weapons and drones for the conflict in Ukraine.

√ In the light of this cooperation, Iran can be expected to increase its global role throughout 2023 and 2024, leading to the configuration of an anti-Western block with the three countries.

INTRODUCTION

Global politics are in the midst of a profound change. The current global order, set after the end of the Second World War, is slowly coming to an end. For more than a year, the war in Ukraine has made the very basis of such order tremble in ways that were unthinkable until now. The enduring conflict has come to show the strategic weaknesses of the European Union while also dividing the world between those who stand with Ukraine and those who support Putin's government. The latter has relied, among others, on weapon supplies by the Islamic Republic of Iran during this year, even though Tehran has not fully positioned itself in favor of Moscow, the conflict will have consequences for Iranian-Russian relations and the strategic role of Russia in the Middle East.

Both with this conflict and the emergence of China and Russia as revisionist powers challenging the hegemony of the United States, the latter now finds itself moving away from its previous strategic focus—fighting terrorism in the Middle East—to confront the expanding influence of Beijing. The policy shift previously mentioned, together with the paramount consequences brought about by the war in Ukraine have also prompted significant changes in geopolitical dynamics, aside from the withdrawal of the United States from Afghanistan and the proxy war between Iran and Saudi Arabia, in Syria and Yemen, resulting in the emergence of a new Cold War in the Middle East.

In such context of global change, the Islamic Republic of Iran is now trying to find its position as a dominant actor in a region in which it is already an important player for numerous reasons. It is strategically located in the Middle East with an extensive land border with countries such as Iraq, Turkey, Afghanistan, and Pakistan. This location provides Iran with a strong influence over regional politics and allows Tehran to project power beyond its borders, including in the maritime domain towards the Arabian Sea. During the last century, it has been exploiting some of the world's largest oil and gas reserves it has in its national territory, something that has also placed the regime as a major player in the global energy market. Its oil and gas industry make significant contributions to its economy, accounting for more than 80% of its exports, while the commercial routes transiting near its coastal waters through the Strait of Hormuz and the Gulf are some of the busiest in the world at the moment. This geostrategic position holds a special value derived from its predisposition as a natural passage for China's Belt and Road Initiative (BRI) while also being geographically protected from the outside by extensive mountain ranges.

Iran complements its geostrategic location with an ambitious nuclear program, which has been developing for decades in an attempt by Tehran to become a regional nuclear power. Supported by its reliance in the military, the Iranian regime has sought to use the nuclear issue to improve its domestic position and to direct public anger against the outside world, arguing that the imperialist powers are attempting to deprive Iran of the “dignity” and “respect” that it deserves. In more recent years, Iranian nuclear efforts have caused a wave of concerns ever since the United States pulled out from the Joint Comprehensive Partnership of Action (JCPOA), by virtue of which the regime was set to give up in its aspirations to develop nuclear capability in exchange of the removal of economic sanctions imposed on them during the years. Tehran's desire of destroying the State of Israel, its sworn enemy in the region, has been ongoing for numerous years, and is set to remain as one of the main drivers in regional geopolitics. Through what is known as the

Shia crescent, Iran exerts its influence through proxy wars and military groups in the countries of the region, attempting to establish a corridor that reaches the Jewish state.

In general terms, Iranian foreign policy during the last decade or so has been characterized by a defiance to the international community in its pursuit of nuclear capabilities; an endeavor which has brought it a significant amount of backlash and rejection. Nevertheless, in recent years the regime has enjoyed the support –direct or indirect– of countries such as Russia and China, who have relied in Iran in order to strengthen their position against the Western block. In the face of the continuous economic sanctions imposed against it, Iran could potentially look for a strategic reorientation towards the Eastern countries in an effort to disregard Western demands and counterbalance the sanctions which keep constraining Tehran's national economy. For such purpose, the development of its own nuclear program would seem a suitable instrument to have.

Thus, this report draws in the first place a strategic analysis on Iranian foreign policy trends, looking at its relations with other regional neighbors such as Azerbaijan, Iraq, Yemen, Saudi Arabia, India, the Gulf monarchies, and Israel. Tehran's relations with some of them have proven to be decisive for the shaping of regional geopolitical dynamics. In second place, the report makes an analysis on the influence of external powers of the region, including Russia, China, Turkey, India, and the United States. The interests of each of them with the regime have also been a major driving force in Iran's current position. Yet, there are still some uncertainties on how its nuclear program will evolve in the short to medium term. Therefore, a prospective analysis was carried out in order to assess the future of Iran's nuclear ambitions with their regional and international consequences, included in the last part of this report.

Although there is a vast array of factors currently concurring in the political and strategic landscape for Iran, making the assessment of its medium-term future a daunting task, there are nevertheless several key takeaways which are helpful in the study and analysis of such future. As will be developed though out this paper, Iran is currently in the midst of yet another moment social unrest. Looking for ways to solve, or at least alleviate, the internal crisis will be the first major tasks for the Regime (Section 1). Secondly, the geopolitical landscape of the Middle East has been an intricate one for many decades. With so many actors, clashing interests, and a complex mixture of clashing interests and rivalries, the intricated relations between all regional players is directly related to Iran's role in the geopolitical dynamics of the Middle East (Section 2).

Additionally, the region is also shaped by the external influence of great power competition, namely among Russia, India, China, and the United States, each with its own interests and distinctive relation with Tehran. China, with the recent agreement brokered between Saudi Arabia and Iran, is now in position to take a stronger role in the region; but the influence of the rest of powers will also play a crucial part in the future of Iran's position among them (Section 3). Lastly, Iranian nuclear ambitions are another main pillar and important factor to be taken into consideration to assess the future of the regime. Getting closer day after day to acquiring the long-desired nuclear capability, the program will face considerable challenges, and there are still numerous uncertainties on what will happen to Iran once it reaches such capability (Section 4).

In the end, many of these factors will need to align for Iran to succeed in its regional quest to become a dominant regional actor; and depending on how it ends up doing so, the Islamic Republic could very well end up facing a change of regime over the next decade.

1. THE ISLAMIC REPUBLIC AT THE CROSSROADS

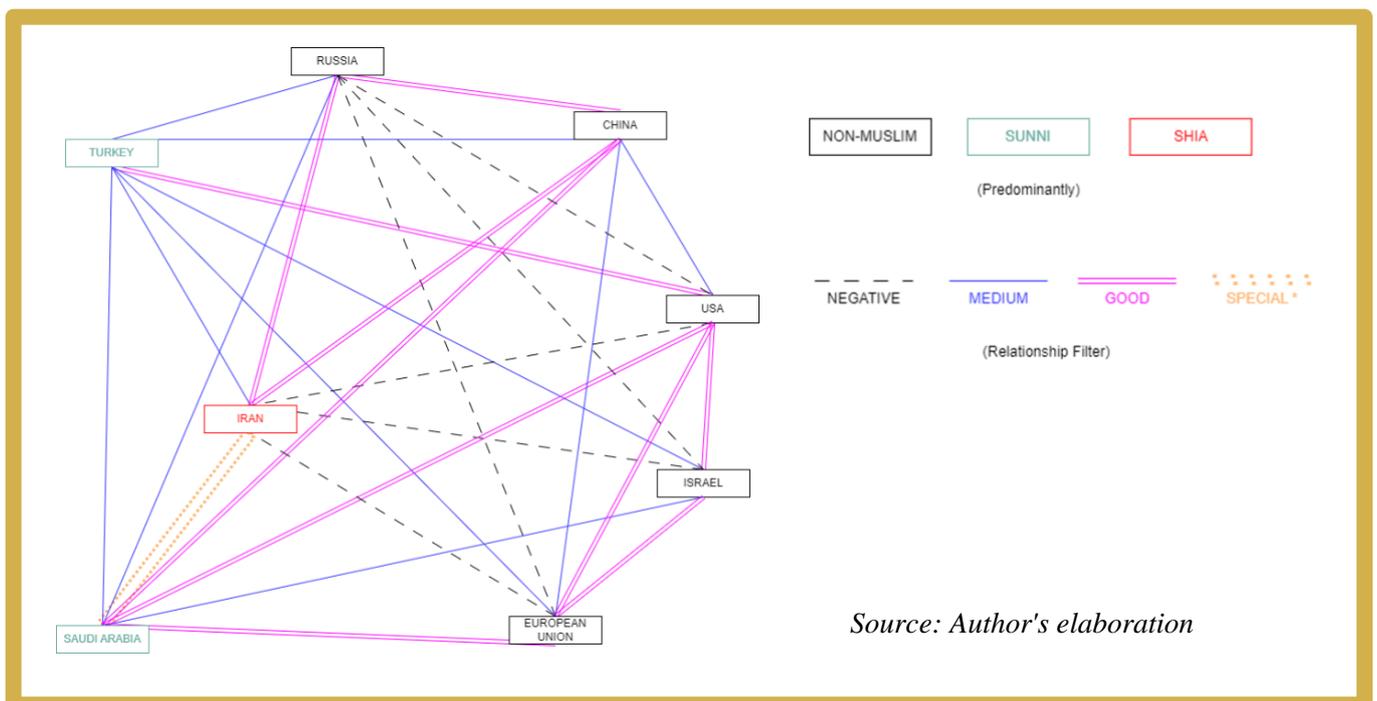
Iran is a very complex nation with a long history, which making it one of the greatest players in the Middle East. Despite being a raising power in the region, the Republic’s stability has been put to test during the last few years. Shaped by its history and geography, it has one of the oldest cultures in human history; a history which during most recent times has been marked by revolutions and internal disputes.

Prior to the 1979 Revolution and its subsequent shift against Western culture and values, it was one of the closest allies in the region, a key partner of the western powers – especially the United States. Nevertheless, after the Revolution, the Islamic Republic and its rulers made a radical turn away from such a culture to the point they now hate Western ideals. This can be clearly seen on how one of the pillars the republic rests on the vehement opposition to the United States and most of its allies. The key factors that have made Iran reach its current position in the Middle East are the already-mentioned Revolution of 1979, the “abuses” suffered from other global powers, not just in the region, but in the global sphere; and the frustration of losing all of what Iran used to represent in the past. This has translated in a foreign policy directed towards the re-establishment of its position as a dominant actor in the region, by means of developing a nuclear program that will allow Iran to access the selected club of States with nuclear capabilities.

1.1. Setting the game: Regional interactions

The relationships between the countries in the Middle East are shaped by a complex web of historical, cultural, economic, religious, and political issues. For this reason, it is not easy to provide a comprehensive explanation of the relations between all countries in the region with Iran. However, an actor's map is provided in order to summarize and for the reader to better understand what the key relationships between the different actors and the regime are, and in which tensions or partnerships they have in the region.

Figure 1. Map of actors. Iran and its relations with other states



The Middle East is divided between two major Islamic currents, Sunni, and Shia. Tensions and confrontations have emerged as a result of this split, particularly in nations like Saudi Arabia, Bahrain, and Iraq. Additionally, there are proxy conflicts going on between Saudi Arabia and Iran, in Yemen and Syria. The Gulf Cooperation Council (GCC) is an alliance of six Arab countries in the Persian Gulf. It is confirmed by Saudi Arabia, Kuwait, Bahrain, Qatar, the United Arab Emirates, and Oman. Over the last decades, there have been certain tensions among them, but the strategic shift taken by Saudi Arabia with Iran will undoubtedly bring them closer at the same time it shakes the geopolitical map of the region. Turkey has also emerged as a major player in the Middle East in recent years, with its intervention in Syria, support for Qatar in the Gulf crisis, and increasing ties with Iran. External actors of the region, such as Europe, the United States, Russia, and China, have a complex and sophisticated relation with Iran. Russia and China have established close cooperation with the regime during the last years, becoming the main strategic allies of the regime. On the other hand, relations with Europe and the United States have been strained in recent years due to different disagreements regarding Iran's nuclear program and human rights violations, as well as the cancellation of diplomatic relations in 1979 with the latter.

In sum, Iran's relations with other Middle Eastern nations are complicated and frequently characterized by tension and conflict. Even while there have been some attempts to mend fences between Iran and these countries, disagreements of different nature have still been present. Most recently, the agreement between Iran and Saudi Arabia (traditional rivals in the region) to restore diplomatic relations and engage in cooperation over some issues has been quite significant. Although positive for both, Iran still must cope with its internal crisis, which has a serious potential of damaging Tehran's regional aspirations.

1.2. The dawn of a new era?

Iranian history is inevitably associated with different cycles and revolutions, the most prominent of which is the 1979 Revolutions which brought the current regime of the Ayatollahs into power. Under the new regime, Iran became isolated from Western influence, got loosen from US control, and began its own pursuit of the Islamic Caliphate. Yet, such quest has faced decades-long struggles inside its national territory, with the republic being immersed in a severe economic crisis, aggravated by its differences with the West (leading to the outbreak of several uprisings and general social unrest ever since).

As of 2023, the Republic of Iran is going through another internal revolutionary moment, which could eventually lead to a revolutionary outcome as well. During the past months, the nation has been affected by internal disputes and protests. In September 2022, the death of a young 22-year-old girl named Mahsa Amini who had been held in custody sparked a wave of social protests and unrest that extended all over the country. The mass protests ended up revealing certain weaknesses of the national government; namely, the central government's ability to control the most important economic sectors, and the endurance of security forces to withhold such massive protests.¹ Yet, although the core of the uprising was a result of the feminist movement against the tight regulations on women and how they should wear their hijabs, it has been argued that “Iran is experiencing a revolutionary moment. Whether that will translate into a revolutionary outcome is still uncertain. A lot would need to happen both inside and outside the country

¹ Kylie Moore-Gilbert, “Iran’s revolutionary moment”, *Australian Strategic Policy Institute*, (17 October 2022), (<https://www.aspistrategist.org.au/irans-revolutionary-moment/>).

for the protesters to succeed in removing the regime, which would not go quietly or without significant bloodshed.”² Thus, it is likely that these dynamics continue for some time, further testing Tehran’s ability to withhold its domestic situation. Should they fail in doing so, Iran will most likely enter in yet another chapter.

Over the following months after the outburst of protests, many people were killed and arrested. In March 2023, the Iranian Judicial authority declared that over 22,000 people who were associated with the riots had been pardoned and saved from execution or serving a life sentence in prison.³ Yet, in spite of this, two men were hanged in January 2023, after they had been found guilty of killing a Basij militia member.⁴ Such events have undoubtedly proven that the regime is no longer enjoying the same support as it did four decades ago. Today, the government is facing an unprecedented crisis, which, although it may appear to be suppressing it through force, “underlying grievances against the Islamic Republic will fester.”⁵ There are others who argue there is still work to do. Dokki Fassihian, an international democracy and human rights expert, argues how

“It may be easier to just adopt a fact-finding mechanism and call on Iran to cooperate with it, which we know it will not. But that time would be better spent beginning discussions on how to assist this long-suffering nation to reach a brighter future. It should focus on how to give protesters a much-needed psychological and political boost from the international community. If Iranians are brave enough to sacrifice their lives to live in a democratic country, then the UN Human Rights Council should find the resolve to recognize the Iranian people’s right to that future.”⁶

At the end of the day, however, it is not likely that economic sanctions will lead Tehran to moderate its profile and cancel its missile program, or to approach the West at all. Tehran has found in China and Russia a new opportunity to grow in the other direction; and with the recent agreement with Saudi Arabia, it will be more able to balance the West’s negative impact. This reorientation could also provide Tehran a higher degree of freedom on its nuclear developments. Limiting its sponsorship to both Hezbollah or the Quds Force throughout the Shia crescent would also mean giving Israel and its allies in the region more space, something contrary to what the regime wants. Yet, while the regional domain appears to be a bit more favorable now, there is still much to consider in the domestic sphere.

It has been argued that the current uprising Iran has experienced over the last months is significantly different to the last of a similar kind, which took place in 2009.⁷ Back then, the Green Revolution which broke after Mahmoud Ahmadinejad was proclaimed President under doubtful circumstances developed with a series of mass uprisings and

² Ibid.

³ N./A. “Iran pardons 22,000 people who took part in protests”, *Reuters*, 13 March 2023, <https://www.reuters.com/world/middle-east/iran-pardons-22000-people-who-took-part-protests-2023-03-13/>.

⁴ N./A. (2023) Iran proceeds to two more executions in connection with protests”, *LeMonde*, 7 January, https://www.lemonde.fr/en/international/article/2023/01/07/iran-proceeds-to-two-more-executions-in-connection-with-protests_6010650_4.html

⁵ Dalia Dassa Kaye, “Israel’s dangerous shadow war with Iran”, *Foreign Affairs*, 27 February 2023, <https://www.foreignaffairs.com/israel/israels-dangerous-shadow-war-iran?emci=fc0a010e-5bc3-ed11-a8e0-00224832e811&emdi=1ab95c29-f4c3-ed11-a8e0-00224832e811&ceid=23710681>.

⁶ Dokki Fassihian “Iranians need more than condemnation in Geneva; they want recognition of their right to democracy”, *Middle East Institute*, 21 November 2022, <https://www.mei.edu/blog/iranians-need-more-condemnation-geneva-they-want-recognition-their-right-democracy>.

⁷ Hamid Dabashi, “What happened to the Green Movement in Iran?”, *Al-Jazeera*, 12 June 2013, <https://www.aljazeera.com/opinions/2013/6/12/what-happened-to-the-green-movement-in-iran>.

demonstrations of civil disobedience. While the world watched through the tv-screen how the popular uprisings evolved, the government responded with significant intensity and brutal repression that resulted in the killing of many protesters by the Basij.⁸ Yet, more than a decade later, many have argued this time it won't be as easy as then. According to Saeed Ghasseminejad, an Iranian analyst for the US-based Foundation for Defense of Democracies,

“There is a sea of blood between the regime and majority of Iranians. After three decades of failed experience with the reform project, Iranians do not buy the myth of reform anymore, be it political, economic, or social. And the regime has put itself in a position that making concessions to the protesters will most likely only expedite its fall.”⁹

According to him, there are numerous factors which will decide the fate of the regime, but the option of failure for the regime is no longer that far away. “With deteriorating economic conditions and few prospects for reform, it may only be a matter of time before a new wave of protests takes hold.”¹⁰ In this sense, the death of the Ayatollah or an attack over any of their nuclear facilities could have important consequences. With the death of Qasem Soleimani by a US drone attack almost three years ago,¹¹ the government is missing one of its main strategists and thus, the Quds Force is not what it used to be with him.

Therefore, a combination of factors including the death of the supreme leader, a significant military attack that damages their nuclear facilities, or a growth of the civil society's uprisings, together with the economic difficulties the regime is currently exposed to,¹² could very well lead –if combined– to the collapse of the Islamic Republic as we know it. Yet, as months have passed, the general level of tensions has decreased. Thus, in order to better assess how likely it is for Iran to remain in its current position in the Middle East arena, as well as towards the global powers, the following sections will develop the main features of current geopolitical dynamics; Iranian relations with the main global powers (the United States, Russia, China and India) and their influence in such regional dynamics; and –more importantly– the prospects for Iranian nuclear ambitions and their potential to be used as a strategic tool by Tehran.

A SWOT Analysis provides a clear picture of Iran's current situation. With geography on their side (in terms of its position and the abundance of resources in its ground), and the opportunity of trade and economic growth with its Asian partners, the country will face the challenge of dealing with its internal situation, as well as its dependency of oil exports and political instability of the regime.

⁸ The Basij, or “The Organization for Mobilization of the Oppressed” is one of the five different branches which make up the IRGC. It was established during the 1979 revolution as a paramilitary volunteer militia, and are currently led by Gholamreza Soleimani.

⁹ Oubai Shahbandar, “Look ahead 2023: Why the Iranian regime's future hangs in the balance”, *Arab News*, 3 January 2023, <https://www.arabnews.com/node/2225851/middle-east>.

¹⁰ Dalia Dassa Kaye, supra note 8.

¹¹ N./A. (2020) “Qasem Soleimani: US kills top Iranian general in Baghdad air strike”, *BBC*, 3 January, <https://www.bbc.com/news/world-middle-east-50979463>.

¹² Ibid.

Figure 2. SWOT Analysis

STRENGTHS	WEAKNESSES
<p>✓ Strategic location of the country Situating at the crossroads of Central Asia, South Asia, and the Arab states of the Middle East + Access to Persian Gulf and Caspian Sea</p> <p>✓ Abundant natural resources Iran has 10% of the world's proven oil reserves and 15% of its gas reserves</p> <p>✓ Rich in human capital It is the land of the young and highly-educated people. 3rd Country in the world with more engineers. Skilled workforce</p> <p>✓ Strong proxy forces in the region Its proxies are well- equipped with modern and sophisticated weaponry</p>	<p>✓ Dual system of government This system mixes elections with a powerful supreme leader</p> <p>✓ Economy at doldrums Limited access to international market due to the sanctions. High inflation. The banking sector is also under-developed. A lot of dependence on oil exports</p> <p>✓ Political instability and corruption</p> <p>✓ Limited Hard Power Iran can deter, deny, spoil, but it can rarely shape the events</p> <p>✓ Lack of conventional military strength</p> <p>✓ Few allies in the region</p>
OPPORTUNITIES	THREATS
<p>✓ Expansion of trade and economic ties with its partners in Asia</p> <p>✓ Improve relations with other regional actors Including with its new agreement with Saudi Arabia</p> <p>✓ Diversification of its economy Reducing dependence on oil and gas exports, will boost other sectors. Also, it will encourage foreign investment on those sectors</p> <p>✓ Strategic location of the country Capacity to control and influence trade and natural resources transportation through land and sea</p>	<p>✓ High dependency on oil exports Iran must compete with other countries producing oil</p> <p>✓ Political tensions with other countries Other countries are trying to “defeat” Iran</p> <p>✓ Regional instability</p> <p>✓ The regime's future is at stake With the current popular uprisings</p> <p>✓ High Unemployment</p>

2. MIDDLE EAST GEOPOLITICAL DYNAMICS

The Middle East's geopolitical map is heavily influenced by its geostrategic situation in the global map. For centuries, the region was at the very crossroads between Asia and Europe, separating some of the most prominent empires in ancient history. With the massive discoveries of oil and other fuels during the early twentieth century, and the building of the Suez Canal, which transformed global commercial routes, global powers rushed into the region in an attempt to take stake of all the natural resources harbored in the region. These two factors, geography, and oil reserves, provide the region with its core strategic value while also help explaining why there have been so many problems and political unrest during the last hundred years.

In this environment, Iran relies on strategic depth¹³ to exercise its influence in the region, a strategy aimed at destabilizing a region rather than letting their enemies succeed there. In the case of Iran, that region is the Middle East, which it aims to destabilize through the Shia Crescent. With such actions, Tehran hopes to get as geographically close as possible to Israel, with the ultimate purpose of destroying the Jewish State.¹⁴ In the process of doing so, several countries in between are also affected by this rivalry. In this section we review the relations of the Republic with some of its neighboring countries, as well as the impact that the most recent agreement between traditionally opposed countries Iran and Saudi Arabia is expected to have over the upcoming years.

2.1. Israel: David vs Goliath

Israel, together with Iran, is the other nation in the Middle East which is most influential in the geopolitical dynamics of the region. The Jewish State views Iran as an imminent threat to its national security, in a region where Israel is surrounded by Arab states. One of the most prominent aspects of such threat is the nuclear deal of 2015. It has been argued that should it be implemented, it could serve Iran to threaten Israeli national security.¹⁵ On the other hand, one of the options which could be potentially used by Israel would be to launch an attack or a series of attacks when having sufficient evidences of Iran having reached nuclear capacity. Such option has both detractors and supporters, who argue over whether that would escalate things further without actually destroying the Iranian program or it would serve as a deterrent towards Tehran's ambitions. Although unclear, these and other debates open a crucial question: Does Israel have the capacity to carry out an attack that effectively hampers the Iranian nuclear program that goes further than just slowing it down for a period of time?

"The Islamic Republic of Iran is an anti-status quo power that seeks to eradicate U.S. influence in the Middle East, eliminate the state of Israel, and expand its own influence

¹³ More precisely, the concept of strategic depth, which is also applied by Pakistan, India and Russia, refers to the existing gap between a state's potential enemies, and its economic, political and demographic heartland. It measures the distance between the source of that state's power, and its potential aggressors in the region. This way, the greater the distance and the difficulty for the enemies to reach such heartland, the greater the level of strategic depth that state has. For more on the concept, see: "The Importance of Strategic Depth", *International Strategic Analysis*, 24 October 2018 (<https://www.isa-world.com/news/strategic-depth>).

¹⁴ N./A. (2022) "Iran threatens on state TV to destroy Israel, Azerbaijan", *Arab News*, 26 October, <https://www.arabnews.com/node/2188576/media>.

¹⁵ Sajjad Safaei, "Is a renewed JCPOA a threat to Israel", *Middle East Institute*, 26 August 2022, <https://www.mei.edu/publications/renewed-jcpoa-threat-israel>.

in order to become the dominant regional power.”¹⁶ Tehran's strategy is conceived in a way that it avoids conventional purposes, out of its knowledge about the high costs that those bring. In turn, Iran leans more to grey zone strategies, which mostly characterize by its proxy warfare and psychological operations.¹⁷

An example of the expansion of Iran's military sphere of influence (in terms of military cooperation with other regional actors) is the newest drone factory in Tajikistan, which was inaugurated in May 2022. It is set to manufacture and export Ababil-2 multipurpose drones, with reconnaissance, combat, and suicide capabilities.¹⁸ Initiatives like this are helping Iran strengthen its ties with Tajikistan and other nations, which allow it to counterbalance the negative effect of US sanctions against its arms exports, while also extending its influence there. The opening of the factory there has sparked a debate over the possibilities of Israel striking at the factory to destroy it, given Tel Aviv and Dushanbe established diplomatic relations back in 1992.¹⁹

Iran has formed a network of political parties and groups which conform the so-called Axis of Resistance. It is composed by groups from Lebanon, Iraq, Syria, Palestine, Afghanistan, and Yemen. Such axis is now argued to be shifting, from a centralized and hierarchical structure with Iran in the middle, to a decentralized one which allows more autonomy to all its members.²⁰ Three factors could explain such shift. Firstly, the growth in size and strength of the axis members; secondly, the increased vulnerability of the central organization to disruptions as a result from the deaths of several commanders, and lastly, the challenges derived from political power and corruption for Iran's partners.²¹

Prime Minister Netanyahu's approach to Iran has been based on addressing the Iranian population with video broadcasts. In them, he continuously expresses solidarity and friendship with them, arguing about the need for establishing a democracy in Iran; one which drives away the current Islamist regime intentions.²² Netanyahu's initiative has been credited as prompting a delegitimization of the regime's posture against Israel and leading to the erosion of the Islamist regime's legitimacy.²³

In May 2022, Israeli PM Naftali Bennet –in power in a period when Netanyahu was in the opposition– threatened Iran and their sponsoring of armed attacks against Israel through its proxies. “As we have said before, the era of the Iranian regime’s immunity is over. Those who finance terrorists, those who arm terrorists and those who send terrorists will pay the full price,” he said.²⁴ This shift in Israel’s approach to the multifaceted problem posed by Iran could be directly associated with Iran’s growing nuclear efforts,

¹⁶ Michael Eisendstadt, “Operating in the Grey Zone: Countering Iran’s Asymmetric way of war”, *The Washington Institute for Near East Policy*, January 2020, <https://www.washingtoninstitute.org/media/791?disposition=attachment>.

¹⁷ Ibid.

¹⁸ Eric Lob, “Iran’s drone factory in Tajikistan”, *Middle East Institute*, 3 June 2022, <https://www.mei.edu/publications/irans-drone-factory-tajikistan#:~:text=>

¹⁹ Ibid.

²⁰ Nancy Ezzeddine and Hamidreza Azizi, “Iran’s increasingly decentralized Axis of Resistance”, *War on the Rocks*, 14 July 2022, <https://warontherocks.com/2022/07/irans-increasingly-decentralized-axis-of-resistance/>.

²¹ Ibid.

²² Reza Pachizadeh, “Israel’s Approach to Iran: The Netanyahu Revolution”, *The Begin-Sadat Center for Strategic Studies*, 5 August 2022, <https://besacenter.org/israels-approach-to-iran-the-netanyahu-revolution/>.

²³ Ibid.

²⁴ N./A. “Israeli PM threatens Iran for instigating attacks through proxies”, *Middle East Monitor*, 30 May 2022, <https://www.middleeastmonitor.com/20220530-israeli-pm-threatens-iran-for-instigating-attacks-through-proxies/>.

which have not received an international response solid enough so as to deter its efforts. In early 2023, Iranian critical military infrastructure was attacked by an unknown source, although there were high suspicions on both Israel and the US.

As pointed out by Abdolrasool Divsallar, from the Middle East Institute, these small-scale attacks

“Cannot meaningfully impact the Islamic Republic’s military and nuclear capabilities. Tehran has faced such sabotage and limited strikes for years now, suggesting a failure by the country’s security services to protect critical infrastructure. Finding it difficult to prevent such incidents, Iran’s military-industrial entities seem to have taken an alternative approach — accepting that attacks on their facilities will happen but taking various technical and administrative steps to minimize their impact.”²⁵

These attacks, as well as many other during the last years have proven two crucial aspects about the Iranian nuclear development. First, Israel and its allies have shown an increased desire to prevent Tehran from developing sufficient capabilities to strike targets in the Middle East or beyond. Such desire has not proven useful, so far, to serve as a deterrent against Iranian efforts as Tehran keeps advancing in its process of enriching uranium. And secondly, as professor Divsallar underlines, that Israeli ambitions of destroying the entire Iranian nuclear program when having sufficient evidence of a serious nuclear capacity by Tehran which could potentially be used against Israel. Iranian facilities are spread across a huge extension of its national territory, and thus, it would take a massive number of coordinated attacks to be able to affect Iranian activity. Therefore, returning to the question posed earlier on whether such an attack by Israel to its national facilities kind of attack is, as of today, highly improbable given the size it would need to be in order to be effective.

Additionally, the new agreement signed by Iran and Saudi Arabia brokered by China has been shocking for Israel, whose Prime Minister Netanyahu has made of its foreign policy a quest against the Iranian regime. Such event is one of the most prominent strategic shifts in recent Middle Eastern geopolitics, after the US-brokered Abraham Accords between Israel and the Arab states. In all probability, it will diminish US influence in the region, and will open a window of uncertainty for the Israeli government, who had been eager to approach Saudi Arabia in an effort to further isolate Tehran’s regime in the region.²⁶ Thus, as of March 2023, Israeli quest in the Middle East is now shadowed by the Saudi turn, and the potential to tilt the balance in favor of Tehran; something which will inevitably lead to an intensification of clashes between the two countries. Although it is still too early to assess how significant will the change of status among them be as a result of the agreement, it is clear it will contribute to easing tensions in their neighboring countries (as shown in the following section with the Gulf states).

What is already clear is that Israel’s way of dealing with Iran, favoring military deterrence rather than nuclear diplomacy, appears to be influencing the US and Western approach in general.²⁷ In spite of the repeated statements issued by Israel that it do not have any

²⁵ Abdolrasool Divsallar, “A message to Tehran: What drone attacks on Iranian critical infrastructure tell us”, *Middle East Institute*, 1 February 2023, <https://www.mei.edu/publications/message-tehran-what-drone-attacks-iranian-critical-infrastructure-tell-us>.

²⁶ Isabel Debre & Samy Magdy, “Saudi deal with Iran worries Israel, shakes up Middle East”, *AP News*, March 11 2023, <https://apnews.com/article/saudi-iran-diplomatic-relations-middle-east-d78f3ceac0561f4fb20301e4f32eef88>.

²⁷ Dalia Dassa Kaye “Israel’s dangerous shadow war with Iran”, *Foreign Affairs*, 27 February 2023, <https://www.foreignaffairs.com/israel/israels-dangerous-shadow-war-iran?emci>.

intention to engage in a direct war with Tehran, there is already a raging shadow war between them, and should therefore be kept under close watch.²⁸ Furthermore, Israel is losing certain level of support in the region, with some countries vowing to expel their Israeli diplomats; something which will further complicate things for Israel.²⁹

2.2. Arab Gulf states: Saudi Arabia, Oman, Qatar, and the UAE

Over the past years, with the regional adventurism of Mohammed Bin Salman, the Islamic Republic of Iran and Saudi Arabia have struggled for dominance in the Middle East. They have encountered each other in nearly every regional issue, fracturing international alliances and sustaining wars across the region, while raising fears of a direct conflict between the two powers that could involve the US.³⁰

Both countries were at loggerheads until March 2023, which marked the beginning of a new chapter for their diplomatic future. Although their differences are not something new, given the competition between both countries to expand their sphere of influence was accentuated after the 1979 Iranian Revolution, tensions had been significant during the last years, mainly affecting Yemen and other countries where their proxies are more present. The religious disparity between them has also contributed to intensify the long-standing dispute that has been ongoing for several decades. Iran predominantly adheres to Shia Islam, whereas Saudi Arabia considers itself as the foremost Sunni Muslim authority. This religious issue also affects and divides the Middle Eastern region, with various nations having either Shia or Sunni majorities that seek for assistance or direction from Iran or Saudi Arabia based on their religious inclination.³¹

Although religion has played a significant role in the relations between both countries, it is not the primary driving force behind their rivalry. Instead, their competition has mainly gravitated around the commercial sphere, particularly in the field of oil. Saudi Arabia has a greater reserve of oil than Iran and purposely keeps the price of oil low. Conversely, Iran, with a limited supply of oil and facing economic difficulties due to war and international sanctions, aims to increase the price of oil. Saudi Arabia has even flooded the oil market to punish Iran for exceeding its oil quotas, resulting in a power struggle within the Organization of the Petroleum Exporting Countries (OPEC).³²

Iran and Saudi Arabia also hold different perspectives regarding the United States of America. President Joe Biden has resumed diplomatic engagement with Iran, seeking to restore the multilateral nuclear deal from 2015 that the previous administration, led by Donald Trump, had withdrawn from. While discussions have hit a roadblock, they are taking place amidst wider efforts in the Middle East to repair relationships strained by conflicts and competition. Biden has emphasized the importance of prioritizing human rights in his foreign policy approach. This has significant potential implications for US

²⁸ Munqith Dagher, "How will a Revival of the JCPOA affect regional politics and Iranian militias?", CSIS, March 2022, 11. https://csis-website-prod.s3.amazonaws.com/s3fs-public/publication/220328_Dagher_JCPOA_RegionalPoliticsIranianMilitias.pdf.

²⁹ N./A. "Jordan parliament votes to recommend expelling Israeli ambassador", *Al-Jazeera*, 22 March 2023, <https://www.aljazeera.com/news/2023/3/22/jordan-parliament-votes-to-recommend-expelling-israeli-ambassador>

³⁰ N./A. "Iran and Saudi Arabia battle for supremacy in the Middle East", *World Politics Review*, 7 February 2023, <https://www.worldpoliticsreview.com/israel-iran-saudi-arabia-battle-for-supremacy-in-the-middle-east/>.

³¹ Jonathan Marcus, "Why Saudi Arabia and Iran are bitter rivals", *BBC News*, 16 September 2019. <https://www.bbc.com/news/world-middle-east-42008809>.

³² N./A. (2018) "Saudi Arabia and Iran: A Regional Rivalry", Factsheet Series No. 209, June, *CJPME*, https://www.cjpme.org/fs_209.

allies in the Middle East, notably Saudi Arabia; but for the time being, Biden has not made major alterations to Washington's policies in the region.³³

The main strategic shift in their relations took place on March 10th, 2023. After several days of secret negotiations between both governments under the auspices of the Chinese government as sponsor, the two reached a historic agreement that ended years of hostilities between both in what many dubbed “the Cold War in the Middle East.” With the re-establishment of their ties, the threat to Gulf security and stability has now been significantly reduced.³⁴ In the statement issued by the three nations, they detailed that “the agreement includes their affirmation of the respect for sovereignty of States and the non-interference in internal affairs.”³⁵ Also fond of the agreement was the United States, which even though had not been directly involved in the talks, had been kept informed on the process. “This is not about China. We support any effort to de-escalate tensions in the region. We think that’s in our interests, and it’s something that we worked on through our own effective combination of deterrence and diplomacy,” said the White House.³⁶

This new agreement will favor the situation in Yemen, a country with a fragile situation and affected by numerous conflicts since the Arab Spring of 2011, when it became severely fragmented into multiple power sources inside the same country.³⁷ With the current control of the northern region of the country by Ansar Allah, there are fluid rivalries between several other actors in the south, making it rather difficult to predict how will they behave and when will a resolution for the situation arrive. Saudi Arabia has an important role in Yemen, having advocated for the Hadi government (the main rival of Ansar Allah) as interlocutor in their political negotiations. The country has often been dubbed Riyadh's backyard, a place where the kingdom can be the dominant actor. Its strategic location has attracted numerous security and economic interests from numerous actors.

In contrast, Iran had traditionally supported the opposite faction in the country, making Yemen a chessboard for both countries. This situation is now set to improve, as de-escalation will help Iran to undercut American efforts to leave them isolated, while also allowing Saudi Arabia to keep its focus on economic development. This major turnaround for both nations has been received very positively by most GCC countries (Oman, Qatar, UAE, Bahrain, and Kuwait), as well as by Turkey, Iraq, and Egypt.³⁸

Thus, recent events indicate there may very well be a decrease in strategic tensions between Iran and the Gulf States over the upcoming years, while instigating a wave of optimism in countries such as Syria and Yemen, the up until now traditional scenarios of military tensions between the Sunni and the Shiite. Although some of the GCC are still closer to Israel, it remains to be seen whether the strategic shift will bring complications for Israel's position in the Middle East. Oman played a role with the nuclear deal acting as a bridge for negotiations, and more recently, both Tehran and Oman signed multiple

³³ N./A. 2023, *supra* note 29.

³⁴ Parisa Hafezi, “Iran and Saudi Arabia agree to resume ties in talks brokered by China”, *Reuters*, 10 March 2023, <https://www.reuters.com/world/middle-east/iran-saudi-arabia-agree-resume-ties-re-open-embassies-iranian-state-media-2023-03-10/>.

³⁵ *Ibid.*

³⁶ *Ibid.*

³⁷ Javier Bordón, “El conflicto de Yemen y Arabia Saudí: sin influencia para resolver, pero con motivos para no hacerlo”, *Real Instituto Elcano*, 23 July 2021. <https://www.realinstitutoelcano.org/analisis/el-conflicto-de-yemen-y-arabia-saudi-sin-influencia-para-resolver-pero-con-motivos-para-no-hacerlo/>

³⁸ Parisa Hafezi, *supra* note 34.

agreements, MOUs and cooperation agreements on energy, transport and trade.³⁹ With bilateral cooperation among them, the traditional policy implemented by Qatar, Oman and Kuwait (by which they have kept close cooperation with Saudi Arabia while maintaining economic and political relations with Iran)⁴⁰ will now be strengthened, as they won't have to balance between both states. Qatar had, up until 2017, refused to take sides in the Saudi-Iranian rivalry, while the UAE and Bahrain had strongly criticized Tehran's regime. Qatar, with its relation with Iran being vital for its own economic and national security interests, has also made efforts to stretch ties with its neighbor out of the mutual interest both have in preserving their shared gas field (the South Pars/North Dome), inciting other Gulf states to engage in political dialogue with Iran in late 2022.⁴¹

Lastly, the UAE has traditionally held an ambiguous position with the regime, with Abu Dhabi, in charge of the security policy, taking a much harder stance on Tehran than Dubai, with stronger commercial ties. Yet, over the last year, there were also efforts to approach Tehran and strengthen their ties "to achieve the common interests of the two countries and the wider region."⁴² As said, all these events, and the most recent Saudi-Iranian Agreement specially, are likely to lead to a decrease in strategic and political tensions between the GCC members and Tehran, with significant ambiguity and uncertainty on the part of Israel and the US.

2.3. Iraq, Lebanon, and Yemen: Under the shade of Iranian military influence

According to Robert Kaplan, the crescent encompassing Jordan, Lebanon, Syria and Iraq is one among the several Middle East "shatter zones." Such region, vastly impregnated with the Sunni-Shia divide, had the particular potential to be controlled of Iran. "The instability Iran will cause [in the region]," he argued, "will not come from its implosion, but from a strong, internally coherent Iranian nation that explodes outward from a natural geographic platform to shatter the region around it".⁴³ Indeed, that is what has happened over the past years since such prediction was formulated in 2009.

Although this vision clashes with the fact that Iran is "by design and by default", regionally and globally, a strategically lonely region (though not completely isolated),⁴⁴ it hasn't prevented Tehran from establishing itself as the regional power. From this lonesome but important position, Iranian grand strategy across the Middle East is aimed at establishing a Shiite corridor that ranges from West Afghanistan all the way to the Mediterranean coast.

Iraq has significant strategic importance in this region, having the world's fifth-largest reserves of crude oil, which represent around 17% of the proven reserves in the Middle East. Adding to this, "its position between a hostile Iran and a Syria tied to Russia will

³⁹ N./A. (2022) "Omán e Irán firman una docena de acuerdos en la visita de Raisí al Sultanato", *Atalayar*, 23 May. <https://atalayar.com/content/oman-e-iran-firman-una-docena-de-acuerdos-en-la-visita-de-raisi-al-sultanato>

⁴⁰ Julien Barnes-Dacey, Ellie Gerenmayeh & Hugh Lovatt, "The Middle East's New Battlelines", Policy Brief, *ECFR*, 2019. https://ecfr.eu/wp-content/uploads/The_Middle_Easts_New_Battle_Lines.pdf.

⁴¹ Margarita Arredondas, "Qatar anima a los países árabes del Gofa a dialogar con Irán", *Atalayar*, 16 September 2022. <https://atalayar.com/content/qatar-anima-los-paises-arabes-del-golfo-dialogar-con-iran>.

⁴² N./A. (2022) "UAE, upgrading ties with Iran, says envoy to return to Tehran within days", *Reuters*, 21 August, <https://www.reuters.com/world/middle-east/uae-ambassador-iran-resume-duties-coming-days-foreign-ministry-2022-08-21/>.

⁴³ Robert D. Kaplan (2012). *The Revenge of Geography*, New York: Random House.

⁴⁴ Mohiaddin Mesbahi, "Iran and Central Asia: Paradigm and Policy," *Central Asian Survey*, Vol.23 (2) (2004): <https://www.tandfonline.com/doi/full/10.1080/02634930410001310508>, 128.

have a major impact on the stability of the Gulf and the Levant – so will Iraq’s Kurdish population that has long created tension with Turkey.”⁴⁵

Hezbollah has improved its capabilities and gained a more significant role within the government, at the same time Iran has helped it acquire weapons (including the Fateh-110/M-600 missiles, Shahab-1, and Shahab-2 missiles and M113 armored personnel carriers). Such missiles and weapons are placed in Syria in order to prevent them from being attacked by the IDF ground forces, and protect them from any air strike that may be launched from Israel.⁴⁶ The group has also carried out attacks (including both missile firings and cross-border raids) over Israeli population for the last twenty years, and its efforts to strengthen its presence in Syria and expand its control are predicted to keep increasing over the following years by taking advantage of the civil war.⁴⁷

The height of Hezbollah's attacks was in 2006, when, according to a US Congressional Report, there were more than 4,000 rockets fired into the northern region of the country during the course of 34 days (and resulting in the death of 55 Israelis).⁴⁸ It is estimated that Iran gave during 2021 more than \$700 million to Hezbollah.⁴⁹ Its support for the organization includes the provision of rockets and short-range missiles, which in turn allows Iran to strengthen its position in the region against Israel.⁵⁰ Yet, Iran seems to have difficulties in Lebanon, where Hezbollah has been criticized on its performance and Tehran’s increased influence in the country.⁵¹

Syria is also in close cooperation with Iran in the fight against Israel, as it serves to Tehran's strategy of establishing a corridor that reaches the Mediterranean through Baghdad, Damascus, and Beirut.⁵² In fact, Syria provides shelter to ten Palestinian armed groups responsible for the deaths of many Israeli citizens over the past years. Among those ten are Hamas, the PIJ, the Popular Front for the Liberation of Palestine, and Democratic Front for the Liberation of Palestine.⁵³ They work closely with Iran, with whom they have a long history of cooperation agreements. According to the Jusoor Institute, as of June 2021, Syria hosted Iranian presence throughout 10 different governorates, amounting to a total of 131 outposts for the IRGC forces and other militias.⁵⁴ Like other Israeli enemies, Syrian Armed Forces have never been able to come out victorious from a conflict against the Israeli Defense Forces. Thus, Syria fights against

⁴⁵ Anthony H. Cordesman & Grace Hwang. “Iraq, the United States, and the New Middle East”, *CSIS*, 5 August 2021, <https://www.csis.org/analysis/iraq-united-states-and-new-middle-east>.

⁴⁶ David Daoud, “Hezbollah is preparing Syria as second battlefield against Israel”, *Long War Journal*, 16 March 2017, <https://www.longwarjournal.org/archives/2017/03/hezbollah-is-preparing-syria-as-second-battlefield-against-israel.php>.

⁴⁷ N./A. “Hezbollah’s shot at permanency in Syria”, *Stratfor World View*, 6 April 2016, <https://worldview.stratfor.com/article/hezbollahs-shot-permanency-syria>.

⁴⁸ Carla E. Hamud, “Lebanese Hezbollah”, *Congressional Research Service*, 1 February 2021, <https://crsreports.congress.gov/product/pdf/IF/IF10703>.

⁴⁹ IAG White Paper, “Outlaw Regime: A chronicle of Iran’s destructive activities”, *US Department of State*, September 2020, 14, <https://www.state.gov/wp-content/uploads/2020/09/Outlaw-Regime-2020-A-Chronicle-of-Irans-Destabilizing-Activity.pdf>.

⁵⁰ Carla E. Hamud, *supra* note 48.

⁵¹ Sima Shine, Raz Zimmt & Ephraim Asculai, “Iran: Toward a Nuclear Crisis or a Nuclear Threshold”, *INSS*, 2022, <https://www.inss.org.il/publication/iran-2022/>.

⁵² N./A. “Map of the military bases and outposts of foreign forces in Syria”, *Jusoor Institute*, 1 June 2021, <https://jusoor.co/details/>.

⁵³ Mitchell Bard, “Military Threats to Israel: Syria”, *Jewish Virtual Library*, 2022, <https://www.jewishvirtuallibrary.org/syria-military-threat-to-israel>.

⁵⁴ As indicated by most recent estimates and surveys.

Israel through the support of these groups above mentioned, and by supporting Hezbollah in Lebanon as well.⁵⁵

However, it has been argued that despite the evolution made in the matter, Iranian missiles' lack of GPS guidance is a significant disadvantage against Israeli systems of precision strike air launched missiles such as the Storm Shadow.⁵⁶ Abdolrasool Divsallar shares a similar view-point, as for him, "Russia's more powerful, precise, and diverse missile stockpile was not able to change the course of the war in Ukraine, so there is no reason to believe that Iranian missiles could ever do so, especially against a more powerful opponent."⁵⁷ Nevertheless, the US Defense Intelligence Agency reported in 2019 that "In July 2017 and January 2019, Iran launched its liquid-propellant Simorgh SLV, which could be capable of ICBM ranges if configured as a missile."⁵⁸ Tehran's efforts to improve precision and achieve longer ranges is a factor to be closely followed.

The Fateh-110 missile is a short-range ballistic missile, 8.8 meters long, weighting around 3,400 kg (with a payload of 500 kg), and a single-stage solid propellant.⁵⁹ The IRGC has additionally displayed two variants of this missile, named Hormuz-1 and Hormuz-2, devised as anti-ship variants with anti-radiations capabilities.⁶⁰ The Zolfaghar, another short-range ballistic missile from the Fateh family, has a length of 10 meters and a 500 kg high explosive warhead, with a range of 700 km.⁶¹ They have been used in several strikes to Syria and Iraq since 2017.

The Shahed-136 drones provided by Iran, have, according to John Hardie and Ryan Brobst, "increased Russia's long-range strike capacity as Moscow's traditional missile stocks dwindle."⁶² These drones (kamikaze drones designed to be thrown to the targets instead of just firing their missiles), are among the most used in Ukraine at the moment, Yet, Iranian Foreign Ministry and the Kremlin keep denying the supply or use of Iranian drones to Russia. When asked about it, Kremlin spokesman Dmitry Peskov said "Russian equipment with Russian nomenclature is used";⁶³ and Iranian Foreign Minister declared that "the arming of each side of the crisis will prolong the war."⁶⁴

⁵⁵ Mitchell Bard, "Military Threats to Israel: Syria", *Jewish Virtual Library*, 2022, <https://www.jewishvirtuallibrary.org/syria-military-threat-to-israel>.

⁵⁶ Anthony H. Cordesman. "The Iranian Missile Threat", *CSIS*, 30 May 2019, <https://www.csis.org/analysis/iranian-missile-threat>.

⁵⁷ Abdolrasool Divsallar "Iran is learning from Russia's use of missiles in Ukraine", *Middle East Institute*, 2 May 2022, <https://www.mei.edu/publications/iran-learning-russias-use-missiles-ukraine>.

⁵⁸ N./A. "Iran Military Power: Ensuring regime survival and securing regional dominance", *Defense Intelligence Agency* (2019), 85. [https://www.dia.mil/Portals/110/Images/News/Military Powers Publications/Iran Military Power LR.pdf](https://www.dia.mil/Portals/110/Images/News/Military_Powers_Publications/Iran_Military_Power_LR.pdf).

⁵⁹ Missile Defense Project, "Missiles of the World: Fateh-110", *Missile Threat*, *CSIS*, 9 August 2016, last modified 31 July 2021, <https://missilethreat.csis.org/missile/fateh-110/>.

⁶⁰ Ibid.

⁶¹ Ibid.

⁶² John Hardie & Ryan Brobst, "Iranian Shahed-136 drones increase Russian strike capacity and lethality in Ukraine", *Long War Journal*, 18 October 2022, <https://www.longwarjournal.org/archives/2022/10/iranian-shahed-136-drones-increase-russian-strike-capacity-and-lethality-in-ukraine.php>.

⁶³ Michael Georgy, "Iran agrees to ship missiles, more drones to Russia", *Reuters*, 19 February 2022, <https://www.reuters.com/world/exclusive-iran-agrees-ship-missiles-more-drones-russia-defying-west-sources-2022-10-18/>.

⁶⁴ Michael Horovitz, "Iran reportedly set to ship ballistic missiles to Russia for use in Ukraine", *The Times of Israel*, 16 February 2022, <https://www.timesofisrael.com/iran-reportedly-set-to-ship-ballistic-missiles-to-russia-for-use-in-ukraine/>.

Thus, in the light of the technological development and the capacity to exert influence in the region through strategic depth, it is foreseeable that Tehran will face additional obstacles in trying to maintain its influence. This puts the commonly known as Shia Crescent at a delicate position for Tehran's interests. Additionally, the fact that the domestic upheaval which began in 2022 is not set to vanish without leaving a scar in Iranian society further complicates the regime's quest for regional hegemony. The following years will thus be determinant for the future of Tehran's quest in the region. Without a solution to internal disputes and increased stability in the region, the capacity to project its influence in the region will rely almost exclusively on their diplomatic ties with the GCC members.

2.4. Azerbaijan: The strategic role of Iranian Azeris

Azerbaijan, located to the north of Iran in the Southern Caucasus region, is another significant actor in the regional geopolitics of Iran, sharing a total of 765 kilometers of border with it, and with the only division between both territories being the Aras River and its reservoir. Relations between the two countries have been particularly harsh as a result of defense and security cooperation between the two states; the latest episode of escalation between the two neighbors came in late 2022, when the Tehran regime sent its troops to the Aras River in a magnificent demonstration of power and capabilities.⁶⁵

Azerbaijan and Israel enjoy a close relation in terms of security and defense cooperation, something which Tehran does not particularly appreciate. The two nations have had good relations since Israel established its embassy in Baku in the 1990s and Israel helped the Azeris defeat Armenia in the war over the region of Nagorno-Karabaj. Furthermore, their common position against the Iranian regime has made both nations come even closer to one another. Around 40% of Israeli oil imports come from Azerbaijan, and such positive and cooperative relations have never been accepted by Iran⁶⁶ (especially since Iranian Azeris account for more than 15% of the total Iranian population).⁶⁷

During more recent times, Tehran has shown strong concerns over Israeli-Azeri cooperation efforts, which include the former's supply of drones and military equipment in exchange of the aforementioned oil supplies. This strategic relationship is mutually beneficial, also providing the Israeli government with a leverage towards Tehran, which could potentially be used to its advantage in case of conflict with Iran. In January 2023, after the go was given for the establishment of an Azeri embassy in Israel, the government responded by saying that "the opening of the embassy marks the start of a new phase in our bilateral relations and is proof that our cooperation is rising to a new level."

Thus, the role of Azerbaijan must not be overlooked when trying to better grasp regional dynamics, as it has the potential to become a focus of future military escalations should Israel and Iran maintain their current rhetoric in the region. Although it is not likely that a conflict will break out between the two of them, regional disputes with them could nevertheless be another aspect debilitating the regime's position.

⁶⁵ Ofer Laszewiki, "Drones israelies a cambio de gas azerí: la nueva alianza regional que aterriza a Irán", *La Razón*, December 2022, <https://www.larazon.es/internacional/asia/20221226/tp6yn5rsczgg7n6vftxct55w4.html>.

⁶⁶ N./A. "Azerbaijan appoints first ever ambassador to Israel amid Iran row", *Reuters*, 11 January 2023, <https://www.reuters.com/world/middle-east/azerbaijan-appoints-first-ever-ambassador-israel-amid-iran-row-2023-01-11/>.

⁶⁷ "Iran: People and Society", 2023, *CIA World Factbook*. <https://www.cia.gov/the-world-factbook/countries/iran/#people-and-society>.

2.5. Afghanistan: Opportunity or threat?

Afghanistan is another important piece in the game table of Middle East geopolitics, with significant relevance for the Iranian Regime. With the two nations sharing a common border, similar languages, and close cultures, they could potentially aspire to have common interests as well. At least, that is what most would have said prior to the 2021 US withdrawal from the country. With the Taliban takeover of the Afghan government immediately after such event in August 2021, both countries now face a higher risk of confrontation over several issues vital for each other's national security, and the opportunity for both to leverage such opportunity seems harder than before.

As said, these two countries could have very likely been close allies in the region, but the summer of 2021 opened several issues between both countries which indicate that their relationship is more tilted towards regional confrontation rather than cooperation. The most relevant from those issues are their shared border, the rights over water reserves in the region, and the evolution of the refugee situation as result of the 2021 events.

The border shared by both countries runs for more than 700 kilometers, from the border with Turkmenistan in the Northern region to the border with Pakistan in the Southern part. In the summer of 2022 there were several incidents along the border traversing the Kong district, in Nimroz. The events resulted in the death of a Taliban and several other wounded, with accusations of the Iranian military personnel over several Taliban who had crossed into its territory and tried to raise a Taliban flag. Iranian forces claimed the Taliban incursion was due to the mistaking of a rock wall constructed to contain smugglers but is not the actual border.⁶⁸

Both countries have also suffered over the past years from droughts, and the waters of the Helmad River have also created frictions between both countries. The two have built dams and dug wells without any kind of environmental surveys, while also diverting the flow of water to better reach their own crops and fields.⁶⁹ This situation could also escalate if not adequately dealt with; and for such matter, it is in the best interest of both sides to find a solution that does not require the use of force. For Iran, the region is also quite delicate as it is often used as transit for illegal trafficking. Tehran has devoted significant resources to fight it, but smugglers always end up finding new routes to enter into their territory.⁷⁰

Thus, it can be effectively argued that, as of today, the internal situation in Afghanistan as a result of the evolution of events over the past two years does not indicate there will be any substantial agreement between both countries, at least in the medium term. Iran still refuses to recognize the Taliban government,⁷¹ and the numerous issues in which both governments are still confronted makes Afghanistan a regional threat for Iranian national integrity and an actor which will have to be closely watched. The situation with their shared border could eventually escalate into a military confrontation, and their disputes over refugees and water will also complicate the situation further.

⁶⁸ Maziar Motamedi. "Border fight between Iran and Taliban kills one: Afghan official", *Al-Jazeera*, 31 July 2022, <https://www.aljazeera.com/news/2022/7/31/border-fight-iran-taliban-afghanistan>.

⁶⁹ Fatemeh Aman, "Water Dispute Escalating between Iran and Afghanistan", *Atlantic Council*, August 2016, <https://www.atlanticcouncil.org/wp-content/uploads/2016/09/Water-Dispute-Escalating-between-Iran-and-Afghanistan-web-0830.pdf>.

⁷⁰ Ibid.

⁷¹ Maziar Motamedi, *supra* note 68.

2.6. Iran's maritime quest and its strategic importance for the region

Lastly, Iran must also be considered as an important maritime actor in the region, with access to both the Indo-Pacific region and the Red Sea, and with real capacity to exert a significant degree of harm to global maritime routes and oil supplies. Both in the Red Sea as in the Gulf, naval forces deployed by Iran have been a regular trait for more than a decade.⁷² Although Tehran does not hold the same capabilities and influence in the Red Sea and Gulf waters as compared to the Strait of Hormuz region, their capacity to disrupt global shipping by blocking either Hormuz or Bab-el-Mandeb is significant, nevertheless.

Iran has the capacity to cause a major commercial blockade should Tehran decide to close maritime transit through the Strait of Hormuz. This strait holds an enormous strategic value for global maritime shipping, being the busiest maritime oil transit chokepoint as of today.⁷³ Even though it is widely accepted that it would only be able to block access through it during a couple of days, it would still prove harmful to global oil shipments. According to Caitlin Talmadge, resorting to a naval blockade of any kind in such region would be the most devastating option among Iran's potential responses to an attack by Israel or the United States. With its littoral warfare capabilities, including antiship cruise missiles and mines, the Iranian Navy could end up disrupting maritime traffic through the strait for a month or more.⁷⁴

Iranian capacity of doing so does not come from its conventional navy, but from that of the Islamic Revolutionary Guard Corps (IRGC). The IRGC Navy usually operates smaller boats and vessels with multiple types of weapons, against traditional bigger navies. This allows them to achieve tactical surprise and pose a serious threat (when holding higher numbers of these kinds of vessels) to other navies in the region. In fact, despite their vessels being smaller, they do have the potential to close or restrict access through the Strait of Hormuz. As a matter of fact, there have been several instances of Iranian patrol boats harassing US Navy warships around the Strait.⁷⁵

During more recent times, the IRGC Navy has shown significant efforts in evolving its assets so as to adapt to the current technological trends in terms of naval power. The drone attack at the Russian base of Sebastopol in October 2022 was the firmest example of the bright future for unmanned surface vessels and aircraft in naval strategy. Properly learning from such event, and the potential these vessels bear, the former Iranian-flagged container ship *Shahid Mahdavi* was spotted getting converted into a warship to carry both helicopter and fixed-wing unmanned aerial vehicles in late 2022.⁷⁶ With it, Iran will have

⁷² See, for example, the latest naval exercise conducted by the IRGC Navy in January 2023 along the Persian Gulf, which included a varied display of assault vessel combat operations, launching cruise missiles and rockets, or even the use of unmanned smart submarine systems and helicopter-launched rockets.

⁷³ N./A. "EIA: World Oil Transit Chokepoints, NANGS, July 2017, <https://nangs.org/analytcs/eia-world-oil-transit-chokepoints-2016-eng-pdf>

⁷⁴ Caitlin Talmadge. "Closing Time: Assessing the Iranian Threat to the Strait of Hormuz," *International Security*, 33:1 (Summer 2008), 82.

⁷⁵ Sam LaGrone, "Iranian patrol boat harasses pair of US warships, says CENTCOM", *USNI News*, 6 December 2022. Available at: <https://news.usni.org/2022/12/06/iranian-patrol-boat-harasses-pair-of-u-s-warships-says-centcom>.

⁷⁶ Sam LaGrone, "Iran building drone aircraft carrier from converted merchant ship, photo shows", *USNI News*. 3 January 2023. Available at: <https://news.usni.org/2023/01/03/iran-building-drone-aircraft-carrier-from-converted-merchant-ship-photos-show>.

to board ship-launched drones; which will in turn allow for better options to counter Israeli attacks and keep targeting adversaries' tankers and ships in longer ranges.⁷⁷

Figure 3: Iranian naval headquarters and areas of responsibility



Source: Naval Post

These hybrid tactics developed by the IRGCN are yet another proof of Tehran's capacity of inflicting high levels of damage to commercial shipping and energy infrastructure with tactics reminiscent of the French "Jeune Ecole" in the 19th century. As said, the Strait of Hormuz has an enormous strategic relevance for global oil shipping, and the capacity to control transit through it and using it to its advantage grants Iran yet another way to exert its influence in the region. Yet, taking a closer look to its naval operations around the region over the past decade, the Navy appears to be able to sustain both conciliatory and radical approaches to its maritime domain.

In the case that domestic protest currently active in Iran grow to an extent that leaves them out of control for the regime, Iran is very likely to escalate its actions in the Gulf's waters, assuming higher risks in its tactics, and making more hostile deployments in the region of the Arabian Peninsula. The importance of the maritime domain will be paramount for Iran's future, as cooperation in maritime security and naval joint exercises is a strong field through which China and Russia could get further close to Tehran, as demonstrated by the recent drills carried out in the Gulf of Oman.⁷⁸ Both Russia and China are aware of the strategic importance of these waters, as well as of Iran's privileged position towards them.

⁷⁷ Eric Lob & Edward Riehle. "Assessing the threat of Iran's drone carriers", *Middle East Institute*, 7 March 2023, <https://www.mei.edu/publications/assessing-threat-irans-drone-carriers>.

⁷⁸ Darlene Superville. "China, Russia, Iran hold joint naval drills in Gulf of Oman", *AP News*, 15 March 2023, <https://apnews.com/article/china-russia-iran-naval-drills-oman-gulf-9f515b3246e4cbe0d98a35e8399dc177>.

3. THE BIG GAME: IRANIAN BALANCE OF GREAT POWERS' REGIONAL INFLUENCE

Aside from the geopolitical dynamics developed in the previous section, Iran is also heavily influenced by the regional game among bigger countries from afar, namely China, India, Russia, and the United States. Thus, it is useful to understand how each of these actors influences Iran's position, and what may their interest bring for the future of Iran in the global arena. In general terms, Iran is in a position in which it may take advantage of its relationship with China, as Beijing is gradually erasing the US footprint in the Middle East and becoming the key mediator between the Regime, the Gulf States and Israel.⁷⁹ On the other hand, Russia is also close to Iran in terms of military sales and oil exports. Yet, the conflict in Ukraine and Western sanctions have made them competitors in the oil exports market, and Iran faces the difficult decision of whether to approach the West with its oil or remain at Putin's side. The United States, firm ally of Israel, is still pushing for the establishment of a nuclear deal beyond the JCPOA which maximizes benefits for all parties involved. Such outcome, however, is for the moment difficult to envision.

3.1. United States: The nemesis of the regime

Relations between Iran and the United States are set to go through a crucial period over the following months and few years. With Iran supplying Russia with military drones and other weapons, and the nuclear future of the region beyond the JCPOA more than uncertain, Washington finds itself in the need to rethink its strategic approach to a region where it keeps losing influence as time goes by.⁸⁰ Thus, the role of the US appears to be less important than ten years ago, although it is still very relevant to grasp how the future of Iranian nuclear projects will evolve.

Over the last years, the United States has been aiming at restricting Chinese growing influence in the region, and specially within the Gulf countries. Yet, in spite of Biden's push to strengthen Saudi-American relations, it has not been particularly successful in doing so. On the contrary, the recent partnership between the Saudis and the Iranian regime, sponsored by China, has further damaged its intentions, while also debilitating even more its position in the region.

In terms of its relations with Iran, these have been driven by Washington's desire to prevent Tehran from developing nuclear capabilities and destabilizing the Middle East. Yet, there are more concerns aside from these, namely: its development of increasingly accurate ballistic missiles, the drones Iran provides to Russia with other tens of millions of dollars to support military proxies, aggression at sea by seizing drones and provocations to US naval forces, cyberattacks, and plots to kill US officials in retaliation for the killing of General Soleimani.⁸¹ Thus, in the light of Iranian progress in the quest for nuclear weapons, it is likely the US will keep strengthening its efforts to engage in

⁷⁹ Tuvia Gering, "Full throttle in neutral: China's new security architecture for the Middle East", *Atlantic Council*, Issue Brief, 15 February 2022, <https://www.atlanticcouncil.org/in-depth-research-reports/issue-brief/full-throttle-in-neutral-chinas-new-security-architecture-for-the-middle-east/>.

⁸⁰ Christopher Chivvis, Aaron David Miller & Henry Rome. "What are America's strategic options in Iran?", *Carnegie Endowment for Peace*, 3 November 2022, <https://carnegieendowment.org/2022/11/03/what-are-america-s-strategic-options-on-iran-event-7972>.

⁸¹ N./A. "US: The Iran Threat and Options", *The Iran Primer*, 13 March 2023, <https://iranprimer.usip.org/blog/2023/jan/25/us-iran-threat-options>

any diplomatic dialogue that makes Tehran consider other options with less destructive potential.

The US is a firm supporter of Israel and its position in the Middle East among all its neighbors. This is most evident with the increasing number of military exercises between the two of them. In November 2022, they simulated an air force attack on Iranian nuclear facilities; in January 2023 they have held both an exercise with F-35 stealth fighters and the “Juniper Oak 23” (their largest joint exercise to this day);⁸² and in February they have held two more on cyber warfare and another with the US Marines.⁸³ The recent iteration of Exercise Juniper Oak is a clear response to the mounting of tensions which took place over the first weeks of 2023 in Iran.

These military exercises are also in line with the US official position towards the issue, clearly described in an interview by President Biden last year. Arguing how the US is “prepared to use all elements of its national power”, he underlined that Iran will be much more dangerous with nuclear capabilities than without them. Yet, regarding the nuclear issue (which is further developed in Section 5), the US needs to adopt a proper strategy to deal with the situation in Iran. In doing so, the option of Iran not reaching nuclear capabilities should be discarded; given the most recent reports by the IAEA indicate Tehran may have already reached beyond 84% of uranium enrichment, it will only be a matter of months before they are able to reach the level.⁸⁴ Some argue that Western powers should, in the light of such evidences, ramp up their diplomatic efforts in an attempt to prevent further escalations of tension. The enterprise will prove to be a difficult one, however, in the light of recent diplomatic developments in the Middle East and the complications derived from switching administrations at the White House.

As of March 2023, evidence suggests a shift in US strategic thinking; the search for an update that will provide US strategists and policy makers with a new roadmap to deal with the issues of Iran and other regions, in the context of great power competition. The recent publication of the “Joint Concept for Competing” is, in the words of Anthony Cordesman, “a major departure from the past U.S. focus on warfighting and reappraisal of both the need for a global approach to competition and of the threats posed by potentially hostile major powers like Russia and China, and smaller powers like Iran and North Korea.”⁸⁵ With it, Washington will have a much clearer picture of how to do things correctly, especially considering the poor quality of its recent National Security Strategy and the request for the new defense budget.

As will be seen with China in the following section, the upcoming two or three years are going to be crucial in their rivalry for influence in the Middle East. The outcome of such standoff will also be crucial for the future of the Gulf and for Iran as it will determine whether Tehran becomes either closer to the West or it moves further away. Although for the moment seems clear that the former option is less likely to happen, the US can be

⁸² Michael Eisenstadt, “The Juniper Oak Military Exercise: Implications for Innovation, Experimentation, and US policy towards Iran”, *The Washington Institute for Near East Policy*, 1 February 2023, <https://www.washingtoninstitute.org/policy-analysis/juniper-oak-military-exercise-implications-innovation-experimentation-and-us-policy>.

⁸³ N./A. (2023) supra note 81.

⁸⁴ Francois Murphy, “US, European powers express alarm at Iran enriching Uranium to 84%”, *Reuters*, 8 March 2023, <https://www.reuters.com/world/us-european-powers-express-alarm-iran-enriching-uranium-84-2023-03-08/>.

⁸⁵ Anthony H. Cordesman. “The US Joint Chiefs New Strategy Paper on Joint Concept for Competition”, *CSIS*, 17 March 2023, <https://www.csis.org/analysis/us-joint-chiefs-new-strategy-paper-joint-concept-competing>.

expected to continue with its efforts to find a diplomatic alternative to Tehran's current roadmap.

3.2. China: Tied by Western criticism?

Although it has already been extensively repeated, China is on the verge to become one of the main political actors in the Middle East. One of the latest examples of such intent is the significant agreement brokered for Iran and Saudi Arabia, by which both countries have put an end to their seven year-long “Middle East Cold War,” and agreed to solve some of their differences while reopening their respective embassies. Although quite significant, this is just the latest example of a trend which has been ongoing for a while now. Thus, Beijing's aspirations to position itself in the region while the US keeps losing the influence it once had, it is worth considering the main implications brought about by this growth of Chinese leadership.

Like it has been underlined, China is currently expanding its presence across the region, with a clear determination of getting further involved in regional geopolitics and affairs. This trend, by which Beijing provides limited security alternatives that undermine US dominance, is set to continue, and grow during the following years.⁸⁶ As pointed out by Tuvia Gering, researcher at the Institute for National Security Studies (INSS),

“Over the last decade, China's interests in the Middle East have grown far beyond energy security. China has been the Arab world's largest trading partner since 2020, surpassing \$330 billion in two-way trade in 2021. It was the largest foreign investor in the Middle East during Xi's first visit to the region in 2016, with \$29.5 billion (including construction), though the upward trend has sharply decelerated, and foreign direct investment (FDI) flows have remained at roughly \$5.5 billion since 2009.”

Iran is also included in these Chinese interests, namely through the Comprehensive Strategic Partnership (CSP) signed with Tehran in 2021, coinciding with the fiftieth anniversary of the establishment of diplomatic relations between the two states. Under such agreement, which took a long and arduous time to achieve due to the implementation of the JCPOA and the killing of Iranian general Qassem Soleimani,⁸⁷ China solidifies its presence in the region more firmly. Beijing's presence in the region, and in the Gulf in particular, “indicates a strong preference for the maintenance of the status quo. China's interests in the Persian Gulf are largely economic, and commercial logistic dictates that its political support will promote those interests.”⁸⁸

With the new agreement brokered between Saudi Arabia (with which China already has strong ties) and Iran, Beijing has also gained political-diplomatic influence, something which undoubtedly benefits their economic interests as well. Although Chinese interests in Iran are not as big as they may be with other Gulf countries, this approach must be understood as a prerequisite for regional stability, which is a bigger Chinese interest than actually engaging in economic relations with Tehran. Put it simply, for China to maximize its commercial and economic benefits in the region, having the region be as stable as possible is desirable; in order to achieve such stability, tensions with Iran must be reduced

⁸⁶ Tuvia Gering. “Full throttle in neutral: China’s new security architecture for the Middle East”, *Atlantic Council*, Issue Brief, 15 February 2023, <https://www.atlanticcouncil.org/in-depth-research-reports/issue-brief/full-throttle-in-neutral-chinas-new-security-architecture-for-the-middle-east/>.

⁸⁷ Talks between the two governments began in 2016, making it almost five years until its signing. In contrast, the PRC had previously signed similar agreements with Saudi Arabia and the UAE, both of which were adopted and implemented much faster.

⁸⁸ Jonathan Fulton. “The China–Iran Comprehensive Strategic Partnership: A Tale of two Regional Security Complexes”, *Asian Affairs*, 2022, 53:1, 152.

as much as possible. Furthermore, as a result of its highly beneficial strategic position, “Iran is often considered a potentially important partner for China in developing the BRI given its overland connection through the Silk Road Economic Belt.”⁸⁹ Nevertheless, for this to end up favoring Tehran, the political and social crisis the regime currently faces should be solved, including as well proper infrastructure to support commercial activity. “Iran offers little in the way of linkage to its Gulf neighbors, while the GCC countries have been steadily developing ports, free zones, and industrial parks on both sides of the Arabian Peninsula.”⁹⁰ Should it not, China will most likely look to other countries in its quest to enhance its economic revenue in the Middle East.

Yet, Iran can also take advantage of its closer relations with Beijing to escape as much as possible from Western sanctions and keep up with its nuclear quest. On a recent visit from Ebrahim Raisi to Beijing, both leaders discussed the potential of their partnership for each other’s futures. Xi Jinping expressed how “China supports Iran in safeguarding national sovereignty,” while criticizing the US role in controlling global affairs.⁹¹ Thus, over the following years, both countries could be expected to increase the number of cooperation agreements and joint initiatives on numerous aspects. Furthermore, Iran’s application to join the Shanghai Cooperation Organization (of which India, China, Russia, and Pakistan are members)⁹² could lead to a strengthening of mutual relations between the block, leading Iran further away from Western influence. Thus, as Iran's situation in the region keeps improving with these actors, prospects for a re-approaching with the West will keep diminishing at the same time China, Russia, and Iran become closer and closer. Although their relations with Russia differ (China supports Ukraine's sovereignty although claiming they understand Russia's motives, while Tehran has been actively supplying Moscow with weapons and drones), they (and other Gulf states) are nevertheless bound together against US criticism. “Gulf Arab states have developed close ties with Beijing despite their longstanding relationship with key ally the United States as they seek capital and technology to diversify their economies away from hydrocarbon revenues. These states have to weigh the value of their partnership with the United States.”⁹³

In the light of this evolution, therefore, it is foreseeable that Chinese ties with Iran will keep improving over time. Such partnership is in the best interest of both, as it will allow Beijing to extend its economic influence and revenue, and will also allow Iran to improve its economic situation derived in part from Western sanctions (and also to keep developing its desired nuclear capability without that much opposition). The role of Russia, cooperating with both as well, will also add to the partnership, binding the three actors closer together.⁹⁴

3.3. Russia: Playing with the bear

Russia is one of the most dominant external actors in the Middle East, and has been so for many decades. Aside from its long involvement in Syria, the Kremlin has traditionally

⁸⁹ Ibid, 153-154.

⁹⁰ Ibid, 154.

⁹¹ Isabella Jewell. “China and Iran strengthen cooperation amid Western pressure”, *Euronews*, 15 February 2023, <https://www.euronews.com/2023/02/15/china-and-iran-strengthen-cooperation-amid-western-pressure>.

⁹² For more information on the structure, functioning and strategic objectives of the organization, see <http://eng.sectesco.org/>.

⁹³ KN Pandita (2022) “China takes the tech route to boost ties with the Middle East; US looks at Beijing-Gulf synergy with alarm”, *Eurasian Times*, 4 December, <https://eurasianimes.com/china-takes-the-tech-route-to-boost-ties-with-the-gulf-nations/>.

⁹⁴ Ibid.

shied away from large-scale military commitments in the region.⁹⁵ Its relationship with Iran is now strongly shaped upon one crucial factor: the conflict in Ukraine. Although their relationship prior to February 2022 was centered upon its businesses in arms sales and oil imports, Western sanction imposed on both countries are now a common trait shared by them. In such context, Moscow and Tehran have developed a revisionist approach calling for the strengthening of ties with the East.⁹⁶ Their cooperation in the region stems primarily from the energy sector. More precisely, in the exploitation of Iranian oil fields, on the one side, and the Caspian Sea on the other. The latter's geostrategic value, being the largest inland body of water and rich in oil and gas, is derived from being the connection between both countries in the absence of a land border between them.⁹⁷

Although Iran has never supported Russia's position officially, it has nevertheless increased its arms sales to Moscow. In the early days of 2023 Russia deployed more than 80 units of Iranian Shahed drones, confirming the ties among the two countries have strengthened over the last few months. Such tie has been dubbed more of a partnership of convenience than anything else, given their overall relationship has not been significantly altered in any way.⁹⁸ In this sense, it has been argued that Russia has no particular long-term strategic vision for its companies to establish in the Iranian market. For Iran, Russia appears now as protector of the Islamic regime, but a new competitor in the oil global markets as a result of Western sanctions imposed by the EU over Ukraine.⁹⁹

Precisely, this last issue of oil exports presents Iran with a dilemma. On the one hand, European dependency on oil imports could provide Tehran with a strategic opportunity to take advantage of it and strengthen its profile among these nations by making an attractive offer to them. The situation leaves Iran in a better position, at least on paper; Europe is now more willing to isolate Russia rather than Iran. On the other hand, however, Russia is a strong actor to have on its side, and the government's circles fear what could Putin do if betrayed. For the Kremlin, the former option of siding with the West in favor of securing its oil exports would be seen as a bold movement. From Russian perspective, the conflict in Ukraine is yet another clear sign of a longstanding conflict between the two sides that will last for years. Thus, the prospects of having a united block of countries in the Middle East (including Iran) sided with Russia and with Beijing (which is now emerging as another crucial player with the potential to gain even more influence over the upcoming years) is much more attractive for Moscow.¹⁰⁰

For Russia, given the current situation, keeping Iran close and willing to keep up with its military sales agreements is more than essential. As was pointed out in an event for the

⁹⁵ Eugene Rumer & Andrew S. Weiss "A Brief Guide to Russia's Return to the Middle East", *Carnegie Endowment for International Peace*, 24 October 2019, <https://carnegieendowment.org/2019/10/24/brief-guide-to-russia-s-return-to-middle-east-pub-80134>.

⁹⁶ Samir Puri, "The Strategic Hedging of Iran, Russia, and China: Juxtaposing Participation in the Global System with Regional Revisionism", *Journal of Global Security Studies*, 0(0), 1–17, 2017; Farhad Rezaei, "Iran and Russia: Completing the Pivot to the East?" in Farhad Rezaei, "Iran's Foreign Policy After the Nuclear Agreement", pp.51-8, *Middle East Today*, 2019.

⁹⁷ María Ballesteros Miguel. "Russia's relationship with Iran in the context of the 21st century geopolitics". Opinion Paper *IEEE* 36/2022, pp. 5-6. https://www.ieee.es/Galerias/fichero/docs_opinion/2022/DIEEEO36_2022_MARBAL_Rusia.pdf

⁹⁸ N./A. "The War in Ukraine and its Impact on Russia-Iran Relations", *Middle East Institute*, Event, 26 May 2023. <https://www.mei.edu/events/war-ukraine-and-its-impact-russia-iran-relations>.

⁹⁹ Ibid.

¹⁰⁰ Jon Alterman & Hanna Notte "Russia in the Middle East after Ukraine", *CSIS*, Transcript from an Online Event, 24 January 2023. <https://www.csis.org/analysis/russia-middle-east-after-ukraine>

CSIS, “there seems to be a calculation now in the Kremlin that as long as the war in Ukraine continues, Russia needs to put a premium on that Iranian partnership.”¹⁰¹ Therefore, the future of their relations will be determined, in the first place, by Iran’s economic situation and whether the need to approach the West in search for the economic revenues of oil exports; and secondly, by the degree of military sales between the two actors. Whether for the war in Ukraine or not, Iran can be an important market for Russia’s military industry, and thus, someone worth having positive relations with. Between the two of them, it is more likely that these upcoming years see a rapprochement between both; especially now that China has increased influence in the region. In such case, Iran could potentially see its global role increased with its two partners;¹⁰² so long as its domestic economy and social situation allows for it.

3.4. Turkey: Compartmentalization and the search for cooperation

During the first decade of this century, Turkish-Iranian relations and regional cooperation experienced a big intensification. Ankara’s need for energy resources and Tehran’s vast deposits of oil and natural gas thus drove cooperation between the two of them.¹⁰³ In July 2022, Turkish President Recep Tayyip Erdogan visited Tehran to meet with Ebrahim Raisi. In their meeting, both leaders discussed ways to establish closer economic cooperation, leading to the announcement by the Turkish leader of their mutual intentions of boosting oil and natural gas imports from Tehran.¹⁰⁴ Yet, their relations are not as fluent as they may be, with several issues causing them to confront and even clash. Thus, it is useful to consider how important are the differences between them, and how they may affect the future of Iran in the region as well.

The relation between Turkey and Iran has been described as one “characterized by recurrent patterns of amity and enmity in the past two decades.”¹⁰⁵ In general terms, both countries are considered regional middle powers, with the common aim of strengthening their position throughout the entire region. They neither support nor reject fully each other’s policies, but the truth is they have opposing ideologies and political identities and have traditionally held marked differences on numerous issues, viewing one another as both security threats and competitors. Some of these aspects straining their relations are Turkish support for Bashar Al-Assad’s opposition, their support for opposing sides in the Iraqi conflict, or the Kurdish issue.¹⁰⁶ Furthermore, even if Turkey does have differences with the US and Europe, it is still a NATO member with important military bases.¹⁰⁷

¹⁰¹ Jon Alterman & Hanna Notté “Russia in the Middle East after Ukraine”, CSIS, Transcript from an Online Event, 24 January 2023. <https://www.csis.org/analysis/russia-middle-east-after-ukraine>

¹⁰² Such influence may be even bigger in case Tehran achieves its long-desired nuclear capability. For the prospects of this happening, and plausible scenarios on how this would impact the global arena, see Section 5 in page 40.

¹⁰³ F. Stephen Larrabee & Alireza Nader “Turkish-Iranian Relations in a Changing Middle East”, RAND, 2013, https://www.rand.org/content/dam/rand/pubs/research_reports/RR200/RR258/RAND_RR258.sum.pdf.

¹⁰⁴ Alex Vatanka. “Erdogan in Tehran, but Turkey and Iran have plenty of mistrust to overcome”, *Middle East Institute*, 3 August 2022, <https://mei.edu/publications/erdogan-tehran-turkey-and-iran-have-plenty-mistrust-overcome>.

¹⁰⁵ Hossein Aghaie Joobani. “Under Ebrahim Raisi, Iran and Turkey may be entering a new phase of bilateral ties”, *Atlantic Council*, 20 January 2022, <https://www.atlanticcouncil.org/blogs/iransource/under-ebrahim-raisi-iran-and-turkey-may-be-entering-a-new-phase-of-bilateral-ties/>.

¹⁰⁶ Larrabee, ix, supra note 103.

¹⁰⁷ Munqith Dagher “How will a Revival of the JCPOA affect regional politics and Iranian militias?”, CSIS, June 2022, 12. https://csis-website-prod.s3.amazonaws.com/s3fs-public/publication/220328_Dagher_JCPOA_RegionalPoliticsIranianMilitias.pdf.

When current president Ebrahim Raisi came to power in Iran, prospects for the opening of another chapter in their relations were raised, arguing that the “Neighbors First” policy implemented by Tehran with its most immediate neighbors could eventually lead to an improvement of their overall situation. The three aforementioned regions of indirect conflict between them (South Caucasus, Syria, and Iraq) have the potential to affect their overall political relationship. At the end of the day, “despite all these purported points of mutual interest, the notion that there is any push toward an Iranian-Turkish partnership is premature. Such pledges have been made many times before, and remained unfulfilled, since Erdoğan took power in Ankara in 2003.”¹⁰⁸ Therefore, both countries should carefully consider to what extent are their differences so as to attempt to remain close in certain aspects key for them. As argued by Larrabee and Nader,

“Given its dependence on Iranian energy, especially natural gas, Turkey has a strong stake in preventing relations with Iran from deteriorating too badly and in not taking actions that could give Tehran an excuse to step up support for the Kurdistan Workers Party.”¹⁰⁹

The solution to such threat, however, could be found in a trend both have been following over the past years, often referred to as “compartmentalization strategy,” by virtue of which economic issues and geopolitical rivalries act as a guiding principle that prevents the negative spillover of certain disagreements into areas of bilateral cooperation.¹¹⁰ This model, which has worked so far, is likely to continue over the following years in the light of the unlikelihood of them solving their geopolitical rivalry. With the recent agreement between Tehran and Abu Dhabi as another positive step forward for Iran, the compartmentalization strategy between Tehran and Ankara is set to remain efficient while geopolitical pressures in the Middle East go down. Although it is obvious that tensions in the Middle East generally will not subside with these recent events, it will still be helpful to make positive improvements. On the nuclear issue, for example, Turkey has been rather tolerant towards Tehran's nuclear ambitions during the past decades. Although this situation could change should a crisis erupt between them, as long as the compartmentalization strategy remains “active,” there is not much to fear on Iran's side.

3.5. The European Union: An unfavorable future

Since its inception, the European Union has been at odds with the Islamic Republic. With opposing political systems and cultures, the last decades have been filled with attempts to approach Tehran in an effort to slow its nuclear program as much as possible. The JCPOA, backed initially by the United States, was among the strongest candidates for compelling Iran to slow down in its quest. With it, the brief period in which European sanctions were lifted for the Islamic Republic due to the agreement, saw how Iranian banks had the opportunity to open offices in EU countries, Brussels allowed Member States to import oil from Iran, and even released all the funds from many Iranian individuals and companies (and from the Central Bank of Iran as well) that had been frozen.¹¹¹ As described by the then-Chief of EU Foreign Policy, Federica Mogherini, “this agreement is an agreement that is going to improve the security of this region, being an

¹⁰⁸ Vatanka, supra note 104.

¹⁰⁹ Larrabee et Al, viii, supra note 103.

¹¹⁰ Joobani, supra note 105.

¹¹¹ Hirah Azhar “Iran and the European Union: Prospects and Challenges”, *Center for Geopolitics and Security in Realism Studies*, 20 April 2016, <http://cgss.org/publications/55>.

agreement that is a solid one, a good one. This gives us the potential to build on it.”¹¹² After the Trump Administration decided to withdraw, things went back to how they had been prior to that.

But the main problem for the European Union now is the lack of a strategy, a proper action plan on how to deal with Tehran. For obvious reasons, the nuclear program is among the top priorities for the West in general, who see a nuclear-capable Tehran cooperating with China and Russia as a potential destabilizer in the region and the globe. Plus, another worrisome aspect for many is the UN Security Council Resolution 2231/2015 on the Iranian nuclear program.¹¹³ The weapons embargo established with it against the Islamic Republic will reach its end in October 2023, allowing Tehran from then onward to export short-range ballistic missiles. And given there is nothing in the horizon that suggest the conflict in Ukraine will have come to an end by then, it is foreseeable Russia will be the first customer.¹¹⁴

Additionally, there are several other developments which currently shape the stage for confrontation between Iran and the European Union. Firstly, the brutal crackdown the regime has been showing with the uprisings inside the country, which aside from all the killings, was followed by the appointment of another police chief, General Ahmad Reza Radan, to tighten up with the protesters and hope to extinguish them.¹¹⁵ The news of the execution of Alireza Akbari, Iran’s former deputy defense minister, who held dual British-Iranian nationality, also send shockwaves towards the West. British Prime Minister Rishi Sunak dubbed his execution “a callous and cowardly act carried out by a barbaric regime with no respect for the human rights of their own people.”¹¹⁶ Lastly, reports have surfaced on possible plans for a new drone production site in Tolyatti, Russia, where Iran could boost its military transfers to Russia when the aforementioned UN embargo reaches its end in October 2023.¹¹⁷

Thus, in the context described above, with a wider confrontation between both sides, the European Union is in dire need of rethinking its approach towards the Islamic Republic.¹¹⁸ In the face that traditional measures, including global outrages as a response to the brutal actions of Tehran with protesters, are no longer working as they should, it is likely that relations between the two will remain strained over the following years. It is foreseeable that the main drivers of such future between the EU and Iran will be the development and outcome of the war in Ukraine, the role of China as new global influence in the region, and the evolution of Iranian nuclear developments—which, as we will be seen in the following section, is likely to reach the sufficient level of enrichment to develop its own weapons over the following three years.

¹¹² Edward Yeranian “EU’s Mogherini visits Iran, vows to implement Nuclear deal”, *VOA News*, 28 July 2015, <https://www.voanews.com/a/eu-mogherini-visits-iran-commits-to-implementing-nuclear-deal/2881513.html>.

¹¹³ United Nations Security Council, Resolution 2231 (2015), <https://www.un.org/securitycouncil/content/2231/reports-secretary-general>.

¹¹⁴ Oubai Shahbandar, “Look ahead 2023: Why the Iranian regime’s future hangs in the balance”, *Arab News*, 3 January 2023, <https://www.arabnews.com/node/2225851/middle-east>.

¹¹⁵ N./A. “Iran replaces police chief amid protests”, *Gulf News*, 23 January 2023, <https://gulfnews.com/world/mena/iran-replaces-police-chief-amid-protests-1.93081226>.

¹¹⁶ N./A. “Factbox: Alireza Akbari: the British-Iranian executed by Tehran”, *Reuters*, 14 January 2023, <https://www.reuters.com/world/middle-east/alireza-akbari-british-iranian-executed-by-tehran-2023-01-14/>.

¹¹⁷ Shahbandar, supra note 114.

¹¹⁸ Ibid.

If something remains clear for now, is that a strengthening of ties between Tehran and the West is not as likely as with China, Russia, and other Eastern countries with similar interests. Iranian regional ambitions can't be fulfilled following the Western way, and Iran can neither attempt to find a place for them in this changing global order; thus, Tehran sees in its eastern and northern neighbors a better chance to fully develop and reach those ambitions. Never mind the need of Western countries to get oil imports; as long as they remain opposed to the nuclear program and with the Iranian economy crippled as it is, there will be no approach between Iran and the West.

4. IRAN'S NUCLEAR AMBITIONS, THE US AND THE JCPOA: PROSPECTIVE ANALYSIS

When people think about Iran, they often think about nuclear weapons; and as a matter of fact, the Iranian nuclear program is a big one. The program started during the era of the Shah, in the 1970s, and was halted by Khomeini the following decade. Nuclear capacity for Iran also means a way to reinforce its regular armed forces. With it, together with the gray-zone tactics and irregular warfare, Iran makes up for its military weakness. Iran attracts attention, it becomes important as regional and global actor. Likewise, Iran has such a program for the same reasons any other nation would want to have such power: it is a guarantee of survival, an insurance policy, if you may. It provides with the ability to be regarded as a serious actor, one with which it would not be wise to be at odds.

The government of Libya is one of the most prominent examples in favor of Iran pursuing nuclear capabilities. Gaddafi, who was in possession of such weapons, agreed to get rid of them in exchange for non-intervention in his country by foreign nations. While the main Western powers agreed to this, they invaded the country shortly after Gaddafi took the weapons away, and then ended up killing him.

This last section of the report has been elaborated with the information resulting from a prospective analysis exercise on the future of Iranian nuclear ambitions and their impact for the Middle East region. For such purpose, six drivers have been identified as the main trends upon which the future of Iranian nuclear capabilities will depend on. All five of them constitute critical uncertainties, and thus, are expected to keep evolving during the following five-year period. After a brief historical background on the Iranian nuclear program and its current status, the section describes the content of each of the five drivers, and then describes what can be expected from the regime's ambitions and how will it affect both regional geopolitics and the great powers game described in the previous section. The main concern in general terms is, first, when will Tehran finally reach the nuclear threshold; and second, how will its opposed neighbors react to that.

4.1. Historical background

One of the major strategic concerns with Iran, and the one which draws the attention of this report in a special way, is Tehran's strong aim to develop nuclear capabilities and become a regional nuclear power. The Iranian nuclear dream was the brainchild of the Shah, who envisioned a nuclear program that would transform its country into the third superpower, together with the United States and Russia, back in the 1970s.¹¹⁹

When trying to study the Iranian regime, the main idea to bear in mind is the existence of a broad domestic constituency in support of the development of nuclear technologies based on Iran's desire for international recognition as an important regional and global actor.¹²⁰ Although it is still one of the big uncertainties around Tehran's ambitions, it is imaginable that unless something rare happens (namely, a big attack by any of its opposed states), that status will eventually be reached. Back in 2013, Davies and Pfaltzgraff proposed three potential ways through which Iran could achieve a status of nuclear capability:

¹¹⁹ Kenneth M. Pollack. *Unthinkable: Iran, the Bomb and American Strategy* (Simon & Schuster, 2013), 34.

¹²⁰ Jacquelyn K. Davis & Robert L. Pfaltzgraff. *Anticipating a Nuclear Iran: Challenges for US Security* (New York: Columbia University Press, 2013), 4.

First, Iran could actually deploy nuclear weapons with credible evidence that it had done so. This approach would rely on Iran’s fielding of specific systems—nuclear warheads and delivery vehicles—for all to see [...] Alternatively, Iran could adopt a stance of nuclear ambiguity, neither affirming nor denying a nuclear weapons capability based on a highly secret program that moved Tehran steadily toward the nuclear weaponization threshold [...] Finally, Iran could progress systematically toward nuclear weapons status while continuing to assert that its nuclear programs are intended only for peaceful purposes and entirely compatible with its membership of Non-Proliferation Treaty regime.¹²¹

Iran is also known for its role in producing weapons systems purchased by numerous states across the globe. The SHIG (Shahid Hemmat Industries Group) and SBIG (Shahid Bakeri Industries Group) are the two main producers of Iran’s ballistic missiles.¹²² According to Anthony Cordesman, from CSIS, “Iran has certainly carried out missile developments that could allow it to deliver nuclear warheads anywhere in the region, hit much of Europe, and develop some form of ICBM.”¹²³ As he points out, from Iranians perspective, their efforts come as a response to what they perceive are threats to their national security, and thus, missiles offer “the ability to strike deep into Arab territory in spite of its gross inferiority in air power and precision air strike capability.”¹²⁴

The IAEA recently acknowledged that Tehran had reached a level of uranium enrichment of around 84%, something which, although not surprising, sent shockwaves in Israel’s direction. Prime Minister Benjamin Netanyahu threatened with responding to Tehran’s progress if continued, given it directly threatens Israel national security (as well as regional stability). “How do you stop a rogue nation from acquiring nuclear weapons? [...] You had one that is called Saddam Hussein’s Iraq. It was stopped by military force, ours. You had a second one that is called Syria that tried to develop nuclear weapons. And it was stopped by a military action, ours.”¹²⁵

As former CIA Agent Kenneth Pollack expressed a decade ago, long before the JCPOA and its mishaps had even taken place, “there are no good options left when it comes to dealing with Iran and its pursuit of nuclear capability.”¹²⁶ Thus, this should lead to the assumption that any of the possible scenarios which may end up taking place for Iran, there will always be a negative element in them.

According to Davies and Pfaltzgraff, Iran has two kinds of goals (strategic and operational) with its nuclear program—and consequently, with its foreign policy in general. Among its strategic goals, the most significant of them are expanding its influence over Persian Gulf Arabs and reclaim sovereignty over disputed waters-territories, extending its control over the flow and pricing of Gulf oil, and eliminating US influence in the region by isolating it. On the other hand, the main operational goals are

¹²¹ Ibid, 1-3.

¹²² “Iran Military Power: Ensuring regime survival and securing regional dominance”, *Defense Intelligence Agency* (2019), 84.
https://www.dia.mil/Portals/110/Images/News/Military_Powers_Publications/Iran_Military_Power_LR.pdf.

¹²³ Anthony H. Cordesman, “The Iranian Missile Threat”, *CSIS*, 30 May 2019,

<https://www.csis.org/analysis/iranian-missile-threat>.

¹²⁴ Ibid.

¹²⁵ Jon Gambrell, “Iran acknowledges accusation it enriched uranium to 84%”, *AP News*, 24 February 2023, <https://apnews.com/article/iran-politics-international-atomic-energy-agency-israel-government-benjamin-netanyahu-45b623742bb6bd4c7314de7df6c3f1e9>.

¹²⁶ Kenneth M. Pollack, 2013, *supra note 119*.

to implement a strategic deterrence strategy to deter a US or Israeli attack on Iran and to change the power equation in the Middle East and in the Central and South Asia regions, and to master nuclear technologies before engaging with the West while attempting to diversify its infrastructure.¹²⁷

Thus, in the light of such objectives, there is much to grasp from how the nuclear program would impact the future of the region and its stability, especially now that Iran has agreed to further transparency and the West is in the need to ramp up its diplomatic efforts with Tehran.

4.2. Impact of the nuclear program for the stability of the region

Knowing the exact number of nuclear warheads that a country has is not always as easy as it may appear at first, and even more in the case of a country like Iran. In most cases, what we have are estimations, ideas, or suppositions, all of which are usually based on movements and activity seen around bases. Thus, considering this together with the fact that one of the most important aspects of having nuclear capabilities is the element of deterrence, that uncertainty over the number of nuclear warheads of a nation is something desired. An enemy with nuclear capability is a dangerous enemy, and thus, it is not desirable to escalate tensions with someone who has the potential to destroy a country. In the case of Iran, that exact number would be difficult to know, and that uncertainty plays to Tehran's advantage,

Nevertheless, it is widely accepted that Iran has now acquired a sufficient quantity of fissile material to create an atomic bomb of its own. Even though Iran has not yet enriched it enough so as to be able to produce a modern nuclear weapon (most estimates point to a 60% of enrichment), the trend of its progression suggests that Iran will eventually reach it.¹²⁸ When that becomes the case, there will certainly be implications for both its closer allies as well as for its opposition (namely, Israel, the US and the EU). It will also affect the desire by some Arab states of establishing “a legally binding treaty establishing a Middle East zone free of nuclear weapons and other weapons of mass destruction.”¹²⁹ This intention, however, will face significant obstacles in the quest to be achieved, most of them derived from the complicated situation in the global arena and the conflict in Ukraine; problems that will also be aggravated by Israel's reluctance to join the Non Proliferation Treaty and Iran's efforts to get the weapons.¹³⁰

For Russia, there may be a certain level of utility in keeping the JCPOA in a continued limbo, because such status generates a certain degree of tensions in the Middle East, and thus, consumes US bandwidth therein.¹³¹ Although it is still unclear how will the Saudi-Iranian agreement affect Saudi perspective on its neighbor nuclear ambitions, it will certainly contribute to reduce the risk of a potential spillover and confrontation with its neighbor.

¹²⁷ Jacquelyn K. Davis & Robert L. Pfaltzgraff. 2013, supra note 120.

¹²⁸ William Alberque & Amnah Ibraheem, “Iran Approaches the Nuclear threshold”, Analysis, *International Institute for Strategic Studies*, 10 November 2022, <https://www.iiss.org/blogs/analysis/2022/11/iran-approaches-the-nuclear-threshold>.

¹²⁹ Tomisha Bino, “The Middle Eastern WMD-Free Zone and the NPT”, *Arms Control Association*, July 2022, <https://www.armscontrol.org/act/2022-07/features/middle-eastern-wmd-free-zone-npt>.

¹³⁰ Rebecca D. Gibbons, “Nuclear Diplomacy in the Biden Administration,” *European Leadership Network*, January 2021, <https://www.europeanleadershipnetwork.org/commentary/nuclear-diplomacy-in-the-biden-administration/>.

¹³¹ Jon Alterman & Hanna Notte, “Russia in the Middle East after Ukraine”, *CSIS*, Transcript from an Online Event, 24 January 2023. Available at: <https://www.csis.org/analysis/russia-middle-east-after-ukraine>

On the contrary, Israel's position towards the issue is widely known in the region. Israel is the example of a country whose survival could depend on whether Iran has nuclear weapons or not. Tehran's repeatedly stated goal of destroying the State of Israel is one of the reasons behind Israel's military will in a region predominantly Muslim (and hostile to Israel).¹³² During the term of Yair Lapid, talks between the US and Iran to discuss possible ways to restore the JCPOA were received quite negatively in Israel. For the critics, if the draft and the different propositions discussed in August 2022 by both were to crystalize in any kind of formal agreement, that would fail to meet with the common objective of preventing Iran from becoming a nuclear state.¹³³

The US is, with Israel, one of the main concerns over Tehran's progression with uranium-235. As long as the possibility is on the table, the United States is expected to keep trying to negotiate with Tehran the terms for any kind of agreement. Yet, with the uncertain future of President Biden and the following term (a Republican candidate would likely take a stance similar to the one of Donald Trump), the following three years will be of crucial importance for the future of the region's stability and relations between Washington and Tehran. Thus, to properly update the US' strategic and operational planning for a potential Iranian contingency, four main ideas should be considered: (1) The implementation of an operational strategy to attain US objectives in the face of nuclear threats posed by Iran; (2) The reassuring to all allies and coalition partners that extended deterrence remain as a viable option considering Iran's development of nuclear weapons; (3) The planning against and mitigating efforts against the effects an Iranian first use of nuclear weapons or a dirty bomb would entail; and (4) The prevention against the transfer of nuclear materials from the Islamic republic to other states or nonstate armed groups.¹³⁴

4.3. What about the future?

It is with some level of suspense that the region awaits to see how the Iranian nuclear issue will evolve. In order to assess what the future of Iranian nuclear capabilities will look like over the following years, as well as the future of the nuclear deal with the United States and other Western nations, six main drivers have been identified in order to properly build on plausible future scenarios. All six drivers are considered to be critical uncertainties, in the sense that they will likely experience an evolution over the next five to ten years. Thus, how each of these values or tendencies evolve during this period, will have a significant impact on the future of the region and Iranian relations with Western powers.

Additionally, we also consider that the evolution of these drivers will also be crucial to answer certain questions on the matter. Namely, the main issues which have been addressed through this prospective analysis are:

Will Iran achieve nuclear capability, in the short or medium term? If Iran was about to take that step, or did take that step, how would Israel, the United States, Saudi Arabia, and China react?

¹³² Bhnaym Ben Talebu, "When Iran says 'Death to Israel,' it means it", *The Atlantic*, 15 July 2022, <https://www.theatlantic.com/ideas/archive/2022/07/joe-biden-middle-east-israel-iran/670530/>.

¹³³ Kelsey Davenport, "Iran nuclear deal negotiations reach final stage", *Arms Control Association*, September 2022, <https://www.armscontrol.org/act/2022-09/news/iran-nuclear-deal-negotiations-reach-final-stage>.

¹³⁴ Jacquelyn K. Davis & Robert L. Pfaltzgraff. (2013), *supra* note 120.

Is there any prospect of an agreement being reached before some of the main provisions of the JCPOA end in 2025?

Is an escalation of tension between Iran and the Arab countries of the Persian Gulf foreseeable in the medium term? Would an Israeli attack to abort Iran's nuclear capability have the support of those Arab neighbors?

The first three questions posed are rather short to answer, more straightforward than the remaining ones. Most of the content derived from the identified drivers focuses on the medium-term escalation of tensions between the Iranian Regime and both Israel and the United States.

The **first driver** is the support enjoyed by the regime from China and Russia, which are now its most relevant partners. Although it is not clear to which extent, with their support, Iran's nuclear program will keep developing at a stronger pace, while they help Tehran undermine Western economic sanctions. The most likely scenario in this regard is, as has been acknowledged throughout this report, a strategic reorientation of Iran towards the East.

The **second driver** is the evolution of the nuclear agreement and discussions related to it. With prospects for a renewal of the JCPOA, or something similar in nature, almost gone, the future of Iran's ambitions will also depend on how those talks evolve; specially because its economic situation will largely depend on it. Thus, the most likely scenario for the following years is that they may reach some minor agreements, such as Iran's disposal to further transparency recently announced, but no successive agreement is established to limit the program.

The **third driver** is the regime's relation with the West (mainly the US). As described along this paper, Tehran has not shown any sign of willingness to come closer to it. Rather its strategic approach to China and the East is likely to keep increasing, while relations with the Western block remain cold and tense over the following years.

The **fourth driver** is the opposition with Israel as a driving force of Iran's ambitions. This has been the main input for Tehran for decades and will remain as such for the years to come. In this sense, it is likely that Iran will reach nuclear capability, but there won't be any significant escalation in the short to medium term. Although Israel's position will play a central role as well, it is not in the best interest of any of them to launch an attack that automatically destabilizes the region.

The **fifth driver** is the level of intensity of Iran's regional influence. In this aspect, regional confrontation with other neighbors and ability to finance its military groups will also be key. Considering the recent developments and the potential for easing tensions with its Arab neighbors, Iran's hard power could experience certain growth over the following years as a result of its nuclear progress, but an improvement in relations between some of them can be expected in the short to medium term.

The **sixth and last driver** is the degree of opposition by the Gulf states. Although in the past, and specially under the Trump administration, US support for them made them present a stronger opposition, the most likely scenario for the following years is a decrease of tensions as they improve diplomatic relations with Tehran. Saudi Arabia is not set to be particularly comfortable with Iranian nuclear ambitions, but with the diplomatic breakthrough between both, Riyadh and Tehran could eventually find a common ground for further agreements which benefits both sides equally.

Figure 4: Prospective evolution of the Iran's nuclear issue in the short/medium term
Alternative outcomes for six selected drivers. Most likely outcomes are in bold

SUPPORT FROM RUSSIA AND CHINA TO THE REGIME	EVOLUTION OF THE NUCLEAR AGREEMENT	RELATIONS WITH THE US AND THE WEST, WITH THE OPPOSITION BETWEEN TWO SYSTEMS	OPPOSING NUCLEAR POLICIES BETWEEN ISRAEL AND IRAN	INTENSITY OF TEHRAN'S REGIONAL INFLUENCE THROUGH THE REGION	DEGREE OF OPPOSITION FROM THE GULF COUNTRIES AGAINST TEHRAN'S
Russia and China give up in their efforts to support the Regime out of the negative economic and political consequences with the West	After the ending of the JCPOA, no further agreement is reached and Iran achieves nuclear capacity, being able to influence its neighbors	Relations between the West and Tehran worsen, and a proxy war breaks out in the Middle East with similar characteristics to the Ukraine conflict	Iran develops a nuclear weapon, prompting an Israeli attack on their facilities and a conflict breaks out in the Middle East	Iranian power remains strong and can destabilize the region, advancing towards Israel	GCC Countries don't oppose to Tehran, causing the regime to expand its influence and control over them
Both countries remain close to Tehran but without explicitly supporting the Regime's policies	The ending of the JCPOA is followed by a period of stability with no relative tensions nor an agreement between the two blocks	Relations between both blocks remain cold and tense over the following years	Iran reaches the capacity to develop nuclear weapons by the situation remains stable	Iranian proxies face opposition in the ME countries they operate in, and Iran begins to lose influence	The United States continues to give support to the GCC Countries. This results on Gulf Countries distancing from Tehran
Russia and China become closer allies of Tehran as a result of the war in Ukraine, supporting their policies and creating an antagonist block to the West	Both sides agree on minor measures after the ending of the JCPOA that contribute to regional stability, but no successive agreement is created, and Iran develops nuclear weapons	Iran improves its relations with the West and the US, enabling cooperation between both and an ease of tensions in the region	Iran is sanctioned by Western Countries in a way that they can no longer proceed with their nuclear program	Israel effectively attacks Iranian proxies with Western support and the Regime loses most of its influence	High degree of support of the United States to the GCC Countries, and Saudi Arabia breaks relations again out of discontent with the nuclear efforts
	A new agreement is reached limiting Iranian nuclear development while the West lifts its economic sanctions on Tehran's economy		Iran gives up in its efforts to develop a nuclear weapon after an agreement is reached with Israel	Iranian diplomatic efforts with Arab countries leads to a period of low tensions without giving up its ultimate goal of attacking Israel	Iran progresses in diplomatic efforts to reach minimum ground of interests, diminishing regional tensions without completely allying to them

In the light of the analysis above detailed, we can affirm that it is very likely that Iran will achieve nuclear capability in the short to medium term. By now, it seems clear that Iran is much closer to it than it was back when Trump decided to breach the JCPOA. “Iran has known since at least 2003 how to build nuclear weapons, a technology some 70-plus years old. This has been shown via multiple International Atomic Energy Agency reports. Iran has also known for over 15 years how to enrich uranium via centrifuges. It was operating many thousands of them in the run up the JCPOA negotiations.”¹³⁵ Therefore, the only decent solution in the light of Iranian potential is attempting to make Tehran agree once again to put a limit to its possession of materials and their use. But the fact remains that no matter what kind of agreement is reached, no agreement will ever fully prevent Iran from being a latent nuclear state.¹³⁶

Additionally, any prospects for an agreement of such nature being reached before the end of 2024 are, for the moment, vague; and will inevitably depend on the extent to which Tehran agrees to restrict itself again. For this to happen, both the United States and its Western allies will have to hand additional incentives to the Islamic republic aside from the lifting of economic sanctions.¹³⁷ As of today, Iran’s strategic reorientation to the East during the last few years, as well as their support to Russia in Ukraine, will further complicate the negotiations and distance Tehran from the West. This turn, aside from Chinese diplomatic efforts, is largely a consequence of the Trump-Pompeo-Bolton failure with the JCPOA years ago. In this sense, any agreement that can be reached keeping Iran from building nuclear weapons will be better than what we have today.

Lastly, prospects for an escalation of tensions between Iran and its Gulf neighbors can never be fully discarded, but the current situation indicates that there are low chances of this occurring. The diplomatic milestone reached between Saudi Arabia and Iran will not completely solve differences between both countries, but will undoubtedly contribute to reducing tensions, including with the nuclear issue. This diplomatic movement puts Israel in a much problematic position than two or three years ago. Now that these countries have agreed to build on these agreements, Netanyahu would find it much harder to enjoy Saudi support should he decide to launch an attack over Iranian nuclear facilities. Although he has previously stated that whenever Iran reaches the 90% level of enrichment they would launch an attack on Iran,¹³⁸ it is not clear they could succeed in doing so. Therefore, an attack of those characteristics is not plausible, especially after the most recent reports on Iranian agreement to be more transparent with its program development.¹³⁹

¹³⁵ Jon B. Wolfsthal, “Iran’s nuclear potential can be cut, but not eliminated”, *Bulletin of the Atomic Scientists*, 8 February 2022, <https://thebulletin.org/2022/02/irans-nuclear-potential-can-be-cut-but-not-eliminated/#post-heading>.

¹³⁶ Ibid.

¹³⁷ Ibid.

¹³⁸ Yonah Jeremy Bob, “Israel thinks Iran 2 years from being able to detonate nuke – explosive”, *The Jerusalem Post*, 16 November 2022, <https://www.jpost.com/middle-east/iran-news/article-722597>.

¹³⁹ Kelsey Davenport, “Iran agrees to additional transparency”, *Arms Control Association*, 15 March 2023, <https://www.armscontrol.org/blog/2023-03/p4-1-iran-nuclear-deal-alert>.

CONCLUSION

In search for a place in a changing global order

This report has examined Iran's current situation in the midst of the profound changes the Middle East and the world are currently experiencing. With the war in Ukraine having shaken political stability and security across the European continent, its side effects have also reached Iran and its neighboring countries. In such context, political unrest within its borders as has been taking place since September will be a key factor for the future of the Islamic Republic. With these protests aggravated by its poor economic situation, Tehran will now face a period of uncertainty towards its future; which will force it to take a vital decision for its future. On the one hand, coming closer to the West would improve their economic outlook while hampering their ambitions for regional control and nuclear capabilities. On the other, a strategic shift towards the East (with Russia and China as main partners) could also be a way to improve its national economy, and with better prospects for its nuclear program.

Its support to the Russian Armed Forces in Ukraine by supplying them with weapons and drones has contributed to improving its ties with Moscow without explicitly supporting its clash against Ukraine and the entire European continent. Thus, it is likely that Tehran will move towards their Eastern partners over the upcoming years, further complicating the Western desire for another agreement on Tehran's nuclear goals. In this sense, the US' stance on the matter will be determined by the outcome of the 2024 Presidential Elections. Should a Democrat candidate remain at the White House, Washington's stance will lean towards the aim of reaching an agreement after the ending of the JCPOA; whereas if Republicans win, the current status quo will remain as it is (with Tehran looking more favorable to Beijing and Moscow).

The regional dynamics will also prove to be vital for the future of the Islamic Republic. With significant tensions stemming from its neighbors in Azerbaijan and Afghanistan, Tehran will also need to balance a careful approach to these issues so that they don't end up escalating into harder military confrontation. In this sense, the recent partnership brokered by China will be a crucial turning point for their confrontation with Saudi Arabia. The reestablishment of diplomatic relations between them is very probably going to depressurize the entire region, especially those regions where their proxies had been more prominently confronted.

Such agreement will further complicate the situation with Israel. After having pushed for years towards an approach with the Gulf states, making it one of the main traits of his foreign policy, Netanyahu will now face additional difficulties in its quest to prevent Iran from reaching nuclear capabilities, and will very likely need to prepare for the idea of having a neighbor as Tehran with all the elements required to build the bomb available. Yet, in spite of their continuous statements on attacking Iran before such thing happens, it is very unlikely they will end up doing so. Furthermore, the ability to control the waters of the Gulf and the Strait of Hormuz will be another crucial aspect to take into consideration when waging potential paths of action by Tehran should the EU, Israel, or the US decide to take any hostile action against them. Iran's geostrategic position in the region is one of the most valuable assets Tehran can play in trying to ensure things go their way.

Lastly, the future for the European-Iranian relations is not a bright one at the moment. In the face of continuous efforts to suppress the Iranian nuclear dream, Iran will be drawn

further into the sphere of influence of China and Russia; moving away from the EU's initiatives to reach a potential agreement that limits their nuclear development in exchange for the lifting of sanctions. Iran will, in all probability, reach the level of enrichment that allows them to build the bomb; with potential to carry nuclear attacks on Israeli targets in the future. Furthermore, as long as the war in Ukraine continues, Tehran is expected to help Moscow with weapons supplies the moment the UN Resolution expires in October. And with the opportunity China brings to the table for Iran, the latter could see its economic outlook improve over the following years; and China, with its investments in the region and the efforts to broker diplomatic agreements among the Gulf states and the Islamic republic, will undoubtedly become the dominant global power influencing regional dynamics in the Middle East.

Without a doubt, Iran's future is now at a crossroads, one unlike any of the rest it may have encountered throughout its history; and its quest to find a place in this changing global order will largely depend on the way Tehran decides to go.

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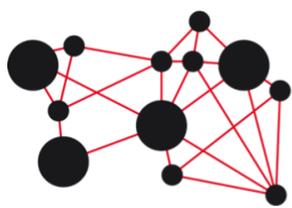
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