

IRAN



Regional nightmare and international concern



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EXECUTIVE SUMMARY

The quality of life in the current Islamic Republic of Iran is sufficient to prevent the fall of the regime for the short term, but insufficient to ensure political stability. The plurality of Iranian society produces political tensions that are easily exacerbated during times of economic hardship and result in recurrent protests, which the Iranian regime is adept in repressing via the use of force. The regime consistently follows periods of moderate reform from within the regime with a period of conservatism and undoing of the permitted liberalization. For the past five presidential terms, the regime has allowed its moderate opposition to win the presidency for alternating intervals, appeasing social unrest, and projecting a higher quality of democracy to the international community without meaningfully impacting the regime's control of Iran. Conservative control of society has been strengthened since Bush's 2002 "Axis of Evil" speech and even more so since Ahmadinejad's economic empowerment of the IRGC and the bonyads.

The regional influence of Iran in the Middle East is increasing and will continue to do so at least in the short term. Iran's regional popular reputation is mixed. Regardless, due to its hardpower, Iran has been able to prevail even in the cases where the local elections turned out against its proxies by using brutal force, such as in Iraq. Iran currently controls four Arab capitals. Iranian successful proxy warfare in Yemen and regional demographic shifts in Iraq and Syria in favor of the Shias that can even amount to demographic reengineering are likely to continue and be intensified at least in the short term. However, Iran increasingly finds its expansionist role in the region in conflict with its national interests.

In Afghanistan, Iran has chosen to prioritize Iranian national security over its self-appointed role as the protector of Shia minorities by collaborating with the Taliban. In Syria, Iranian economic interests recently outweighed Iran's status as the most trusted ally of the Assad regime for decades. Though unlikely to deeply affect the relationship with Syria, the latest fallout between Syria and Iran due to the latter's increase in oil export prices might be a sign that Iran is overstressing its resources abroad. Iran boasts the recent resumption of diplomatic relations between Tehran and Riyadh. Coupled with the lack of similar advancements between Saudi Arabia and Israel, this debilitates the anti-Iranian bloc in the region, making the containment of Iran even less likely. While the threat of Iran led Israel and the Persian Gulf countries to a path of closer cooperation, it is unlikely that the Gulf nations would endorse any radical move regarding Iran on Israel's part. With

UAE not endorsing an attack against Iran due to the security reasons, Qatar building bridges with Tehran, and the legitimacy problems posed by Saudi cooperation with Israel, the latter is unlikely to receive any real Arab support in the offensive against Iran.

The war in Ukraine is driving Iran and Russia closer together militarily and economically, resulting in increased technological capacity in Iran which will contribute to Iran's proxy warfare. Russia's Gazprom's recent \$40 billion USD deal with Iran may replace the lost Western FDI needed to fully exploit Iran's fossil fuel reserves. Iran still suffers under international sanctions: GDP per capita has dropped by half in the last decade. Still, greater trade with China and Russia, in addition to smuggling and an advanced tech industry, have increasingly allowed Iran to persist economically even under heavy international sanctions.

Iran's breakout period for weapons-grade uranium stands under a week at present. However, it would take Iran anywhere from six to 24 months to produce an effective atomic weapon. The Iranian approach to JCPOA renegotiations has been characterized by seemingly confident stubbornness rather than desperation. Iran has three demands: no more IAEA investigations into Iran's undeclared nuclear activities in the past, the removal of the IRGC from international terrorist lists, and JCPOA guarantees against another US unilateral withdrawal. Of these three demands, only the second can be legally conceded. Of the P-5 plus one, only China is recently endorsing the JCPOA enthusiastically. The Western members (US and E3) have increasingly criticized Iran for human rights violations and in compliance with the 2015 agreement. Since the beginning of the war in Ukraine, Russia's contribution to JCPOA negotiations became unconstructive. With US endorsement of the JCPOA being intensely dependent on internal politics, and Iranian consideration of the JCPOA being intensely dependent on US involvement, any JCPOA signage will likely occur, if at all, after the 2024 November US elections and likely by early 2025 at latest to ensure maximum lifetime of US JCPOA participation. However, it seems more likely than not that the JCPOA will not be renewed at all. Faced with a post-JCPOA Iran, there is a real potential of an Israeli attack on Iran, which could plausibly lead to US military support for Israel and a prolongation and expansion of the conflict. China's recent support for the JCPOA can be seen as an indicator of real international fear in the face of the strong potential for an Israeli attack as a response to increasingly ambitious Iranian nuclear hedging.

INTRODUCTION

Since its foundation, the Islamic Republic of Iran has been at the forefront of international discussions characterized by contentious debates. Iran's current situation in the international field is the result of a complex web of domestic, regional, and international factors. The country's political system has faced significant challenges in recent decades, such as economic sanctions, political unrest, and social upheaval. Iran today is a hotbed of geopolitical tensions, largely due to its nuclear program, support for militant groups, and involvement and influence in regional conflicts. Iran currently holds a complicated position in the world, where it is confronted with both opportunities and problems on the domestic, regional, and global levels, and faces possible new alliances as a consequence of the Ukrainian war.

Iran has a population of almost 90 million people, and it considers itself an important international player, flourishing and carrying a heritage of civilization stretching from the historic Persian Empire. Iran is strategically located at the crossroads of Europe, Asia, and the Middle East, making it a vital hub for global trade. In the north, the wealth of energy resources in the Caspian region is crucial from a strategic standpoint. Large quantities of oil and natural gas reserves are found in the sea, both in offshore deposits and nearby onshore areas. Also, its location on the Persian Gulf together with the Strait of Hormuz and the Gulf of Oman provides it with access to important shipping routes. One of the most significant oil chokepoints on the planet is precisely the Strait of Hormuz. Over 17 million barrels of oil, or 20 to 30% of the world's total consumption, pass across it each day on oil tankers, and the Strait of Hormuz is used to transport approximately 88% of all oil that leaves the Persian Gulf.

Iran is an important player in global trade and fossil fuel interests, a center of Sino-Russo rivalry with the West, and a dangerous potential nuclear player. Iran was the third-largest producer of natural gas in the world in 2020, and the fifth-largest producer of crude oil in the Organization of the Petroleum Exporting Countries (OPEC) in 2021. Iran was also ranked as the third-biggest oil and second-largest natural gas reserve holder in the world in 2021 and has some of the largest amounts of proven oil and natural gas reserves. Iran possessed 12% of the total global and 24% of the total Middle Eastern oil reserves as of the end of 2021.

The perception of Iran by the global powers is vital in current international relations. On the Western side, Iran is increasingly perceived as a country that threatens international security and stability, as well as a country that violates Western ideals of democracy and human rights. Iran's

nuclear program, which Tehran insists is peaceful, has been a subject of constant concern for the international community and especially the West. The US and other Western countries allege that Tehran aims to create nuclear weapons. Iran has been subjected to several punishing economic sanctions as a result, which have had a substantial effect on its people and economy. The recent protests and their subsequent violent suppression inside Iran, coupled with the Iranian supply of drones to Russia in Ukraine and Iranian regional expansionism, deepen the Western perception of Iran as an enemy.

When it comes to the European Union's relationship with Iran, one of the major historic achievements of European diplomacy was reached with the conclusion of the Joint Comprehensive Plan of Action (JCPOA). The EU continues to diversify its gas suppliers while it is still reliant on imported fossil fuels. The EU's priority for supply diversification has increased as a result of Russia's invasion of Ukraine and the Russian use of energy as a weapon. In these circumstances, Iran has the opportunity to emerge, exploring a more important role as an oil and gas supplier, but this potential position is contingent on the further development of a renegotiated or modified nuclear deal, which at the moment seems unlikely to succeed. The renegotiation of a modified nuclear deal with Iran faces many obstacles. EU member states' concerns about the Islamic Republic now go beyond nuclear proliferation to human rights and European security. This change in emphasis solidifies a shift in the EU's strategy vis-a-vis Iran from conditional dialogue to confrontation. Several sanctions were enacted by the EU during the last months of 2022 against individuals responsible for grave human rights breaches in Iran. Additionally, the sale of Iranian drones to Russia and their use in the conflict against Ukraine has been internationally denounced by the EU.

The relationship of the United States with Iran has been hostile since the events of the Iranian Revolution, in particular the forced occupation of the US Embassy in 1979. To date, diplomatic ties between the two countries are insubstantial at best. Antagonism with the US has deprived Iran of regional and global power, as the US has imposed severe sanctions on Iran. The severe pressure exerted by US sanctions on Iran was briefly alleviated during the Democrat administration of the Obama presidency starting in 2009 and the signing of the JCPOA in 2015. The JCPOA was intended to allow the P-5 and Germany to monitor Iranian nuclear activities more closely. The JCPOA was a divisive factor in US relations with key Arab countries, who saw the agreement as a betrayal of their alliances with the US. The pressure exerted on Iran by US sanctions returned forcefully with the Republican administration of the Trump presidency starting in 2017 and the unilateral US withdrawal from the JCPOA in 2018. The 2018 US withdrawal can be understood as the Republican party's prioritization of US alliances with key Arab countries at the expense of

international management of the Iranian nuclear threat. The Democrat administration of the Biden presidency beginning in 2021 has attempted to restore the 2015 nuclear consensus and the parameters it inflicts for Iran's nuclear infrastructure until 2030. However, US international sanctions on Iran persist to date. Given the lack of US bipartisan consensus, Iran has shown few efforts to enter a nuclear deal with the White House, citing concerns of political continuity.

On the Eastern side, Iran is important for China and Russia, and vice versa, as the three countries see themselves as a bulwark against the West and share the desire to challenge Western hegemonic rhetoric and shift the balance of power in the Middle East. Despite these common interests, Iran, China, and Russia each pursue their own separate political, economic and social agendas and compete to expand their national spheres of influence in the Middle East.

Russo-Iranian relations are growing closer. There has been a consistent development of cooperation between the two countries in the last few years, achieving a record of \$4 billion USD in trade movements by the end of 2021. One of the main drivers behind the recent tightening of the Russo-Iranian alliance is the fact that both countries are suffering from economic sanctions. In Moscow's perspective, Iran is a feasible option as an ally for economic opportunities while Russia tries to avoid Western sanctions and the possibility of total international isolation due to its invasion of Ukraine. Iran is especially important for Russia in the current context of the Ukrainian war, as Iran supplies Russia with drones, making Moscow to some extent dependent on Iranian military-industrial capabilities. This developing dependency can strengthen future Russo-Iranian military relations.

For Beijing, Tehran is a useful platform to advance its great-power rivalry with Washington. Chinese policy has historically been to protect its economic interests while keeping a critical distance from the internal concerns of its trading partners. However, as a result of shifting geopolitical dynamics, China is increasing its regional engagements to improve its international image and guarantee energy security for its quickly growing economy, which will likely make Beijing's political role in regional disputes unavoidable. Although Sino-Iranian relations are still primarily driven by economic cooperation in the fields of energy, trade, science, and the military, the political component of their relationship has grown stronger over time, as evidenced by China's proactive advocacy on behalf of Iran in the international arena.

Since 2021, Iran has significantly increased the danger posed by its nuclear program, raising doubts as to whether a diplomatic solution is possible. The nuclear implications on the regional sphere are huge as Iran appears to be near to possessing nuclear weapons, thus disrupting regional stability and safety. Now where Iran is approaching a nuclear tipping point, close to achieving the threshold

of uranium enrichment needed to create atomic weapons, Iran's nuclear activities pose a serious threat to the international community. Iranian current nuclear hedging decreases the likelihood that a diplomatic solution will be reached, while increasing the possibility of escalation on a global level, potentially drawing other countries into a conflict. It is risky for Iran to overestimate the likelihood that Israel or the United States will ever seriously attack Iranian territory. On the Israeli side, the belief that the Iranian nuclear program is an existential threat reinforces the plausible fear that Israel may move beyond small-scale sabotage to a larger military attack on Iran's entire nuclear infrastructure. The Arab states could band together against Iran, pursuing ever-closer ties with the United States, and, if necessary, seeking refuge under the protection of a future Saudi Arabia that possibly possesses nuclear weapons as well. Conversely, the Arab states could refrain from siding with the US and Israel due to regional and domestic loyalties. Whether the Arab reaction to a nuclear Iran will be altered by the recent rapprochement of Tehran and Riyadh orchestrated by Beijing is still uncertain.

This essay will provide an in-depth analysis of Iran's current situation and possible future outcomes. In terms of structure, the essay will be divided into three main chapters: the first one will discuss the internal political and socioeconomic context of Iran covering aspects of the quality of life, the characteristics of the presidency and the parliament, and the paramilitary power, focusing especially on the IRGC, while also presenting the main political trends. Considering that, it will also address the stability of the regime in the context of recent internal events. The second chapter will continue with the Axis of Resistance, focusing on regional conflicts as well as on the Shia Crescent and Iran's regional influence, interests, and stakes in several Middle Eastern countries, and in line with that, examine the future of Iranian proxy warfare. The third chapter will address international issues, paying particular attention to the impact and repercussions of international sanctions, Iran's future aspirations and prospects in terms of nuclear power, the (in)feasibility of a new or modified JCPOA, and the possible international reaction to a future Iranian nuclear club accession. Finally, the essay will close with a review of the most significant takeaways of the work in the conclusion.

CHAPTER 1

INTERNAL POLITICAL AND SOCIOECONOMIC DYNAMICS

This first chapter will explain and contextualize the current internal situation in Iran. First, specific figures will be analyzed in context to give a sense of what daily life is like for the average Iranian citizen today. Next, the most recent wave of protests in Iran will be compared with the 2009 Green Movement, to demonstrate that the most recent protests do not signal the beginning of a regime change in Iran in the short term. Following this contextualization, the key Iranian political institutions will be studied, in this order: presidency, Supreme Leadership, parliament, and IRGC. The analysis of these four key institutions will illustrate the persistent conservative dominance over Iranian society existing alongside an intentionally maintained appearance of quality of democracy. Beginning the work with an internal analysis of Iran before proceeding to study Iran's regional and international agency in geopolitics in the second and third chapters, respectively, will facilitate comprehension of the drivers behind largely aggressive Iranian behavior in the regional and international arenas.

Social discontent

Quality of life indicators

The current Human Development Index (HDI) of Iran is 0.6, which is 0.1 above that of India, equivalent to that of Mexico, 0.1 less than the US, and 0.2 lower than Japan and Germany.¹ However, due to the intense tightening of international sanctions in accordance with UNSC Resolution 1929 since 2010, GDP per capita in Iran has declined dramatically: from \$8,329 USD in 2013 to present day values of \$4,091, which is a drop of over 50% in just one decade.² Comparatively, in 2009 during the Green Movement, GDP per capita was \$5,602.³ Youth unemployment (ages 15-24) is high, at 27.2% in 2021. Male youth unemployment was 22% whereas female youth unemployment was 41.7% in these same years.⁴ Importantly, young women have been a key group involved in the recent 2022 Iranian political protests, whose slogan was: “Women, life, freedom.”

¹⁻³ data.worldbank.org. “Iran, Islamic Rep. | Data,” n.d. <https://data.worldbank.org/country/IR>.

⁴ “Iran - the World Factbook,” www.cia.gov, n.d., <https://www.cia.gov/the-world-factbook/countries/iran/>.

Political protests

Political protests are no rarity in Iran. Political protests occurred repeatedly over economic issues such as unemployment, inflation, and corruption. The 2009 Green movement, which did not ultimately lead to the fall of the regime, was more prolonged than the 2022 protests, which without huge excesses in violence ended by early 2023, and the majority of political prisoners were released from prison this February.⁵ The 2009 Green Movement lasted 235 days, from June 25, 2009 to February 14, 2010,⁶ and resulted a mass exodus of Iranian political dissidents, taking net migration from +127,703 in 2010 to -150,029 in 2011.⁷ Protests occur even during moderate opposition presidencies such as that of Rouhani: Intense, widespread protests in November 2019 arose after a spike in fuel prices, to which the regime responded with an internet shutdown and a violent crackdown against protesters.⁸ Political protests also existed during the loosening of international sanctions before the US withdrew from the JCPOA: In late 2017 through early 2018, an increase in basic food prices accompanied by an increase in the government budget for military activities abroad caused mass protests to break out in Mashhad and spread to the rest of the country over several weeks, eliciting a violent government crackdown.⁹

The most recent protests in Iran began after the September 16, 2022, death of Mahsa Amini and have ended by mid-January 2022. Mahsa Amini belonged to the Sunni Kurdish minority in Iran (10% of Iran's population¹⁰), which consequently as an ethnic group was heavily involved in the 2022 protests. The Sunni Kurds in Iran have lower standards of living than the general population and have historically expressed separatist tendencies and experienced systemic oppression. The recent highly mediatized pardoning of prisoners in conjunction with the organized massive celebrations in Iran to honor the 44th anniversary of the Islamic Revolution has been cited as inten-

⁵ Seth Frantzman, "Why Is Iran Pardoning Protesters? - Analysis," *The Jerusalem Post* / *JPost.com*, February 6, 2023, <https://www.jpost.com/middle-east/iran-news/article-730701>.

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

⁷ *data.worldbank.org*. "Iran, Islamic Rep. | Data," n.d. <https://data.worldbank.org/country/IR>.

⁸ Human Rights Watch, "Iran: No Justice for Bloody 2019 Crackdown," Human Rights Watch, November 17, 2020, <https://www.hrw.org/news/2020/11/17/iran-no-justice-bloody-2019-crackdown>.

⁹ BBC, "Iran Protests: Why Is There Unrest?," BBC News, January 2, 2018, sec. Middle East, <https://www.bbc.com/news/world-middle-east-42544618>.

¹⁰ Miriam Berger and Sanam Mahoozi, "At the Center of Iran's Uprising, Kurds Now Face a Mounting Crackdown," *Washington Post*, October 18, 2022, <https://www.washingtonpost.com/world/2022/10/18/iran-kurds-protests-mahsa-amini/>.

ded to communicate both to the Iranian people and the international community the strength, unity, and confidence of the Islamic Republic looking forward into the future.¹¹

This being said, smaller scale protests in the cities of Qom (Iran's eighth largest city) and Borujerd, which are both located southwest of Tehran, have broken out in the end of February and beginning of March due to intentional, repeated instances of gas poisonings of schoolgirls in their classrooms.¹² Discontent continues to surface in Iran, from both the more secular-liberal and radical factions of society, as in the case of the recent gas poisonings where these factions come into regrettable collision with each other.

The presidency

Beginning the analysis with Khamenei's two-term presidency, the Iranian executive office has followed a pattern intended to project quality of democracy and regime stability both internally and internationally. This pattern serves to appease the more secular factions of Iranian society, as well as the general international community, especially the West. The Iranian presidency has been alternatively occupied by moderate and conservative presidents, with the notable exception of the liberal Khatami presidency, each serving two terms: Khamenei, conservative (1981-1989); Rafsanjani, moderate (1989-1997); Khatami, liberal (1997-2005); Ahmadinejad, conservative (2005-2013), Rouhani, moderate (2013-2021), Raisi, conservative (2021-Present). A more nuanced illustration of the Islamic Republic's recent presidents' political and economic positions can be found in the above diagram. The appearance of stability and democracy afforded by this two-term, alternating-faction presidential model is of such importance to the Iranian regime that even when the Ahmadinejad conspiracy scandal came out in 2011, Khamenei did not terminate his presidency, preferring to let Ahmadinejad finish his second term.¹³

As the Nolan chart portrays, political factions in the Islamic Republic and its opposition are not so simple as conservative Islamists and secular progressives. In fact, the clergy is divided into progressive and conservative factions as well: the more conservative "Combatant Clergy Associa-

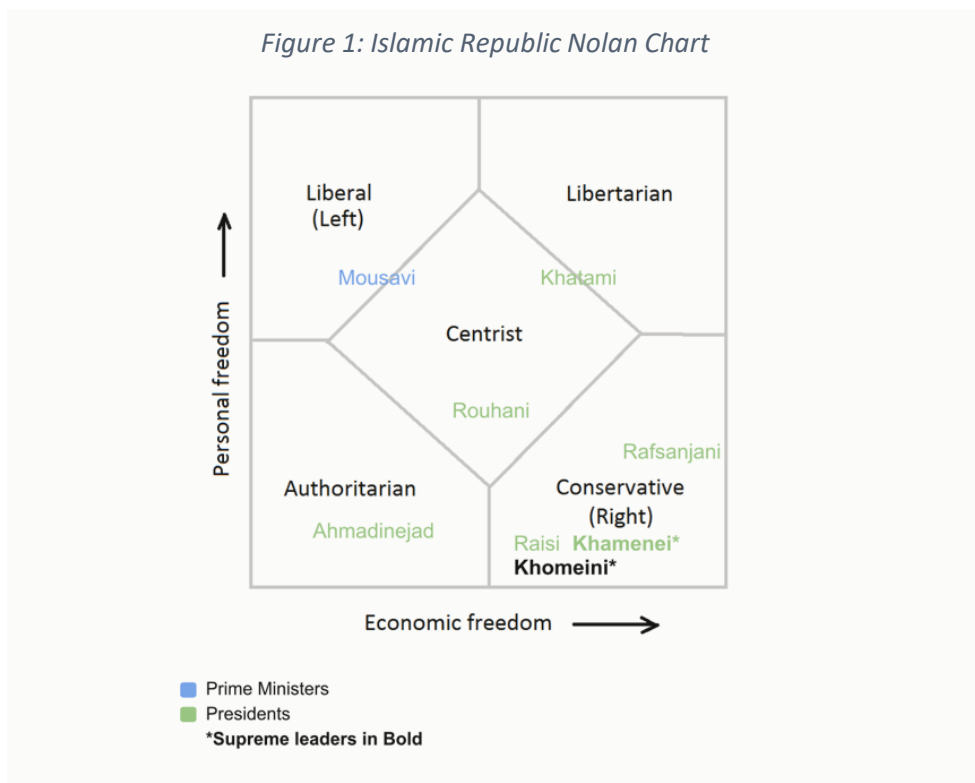
¹¹ Seth Frantzman, "Why Is Iran Pardoning Protesters? - Analysis," *The Jerusalem Post* / *JPost.com*, February 6, 2023, <https://www.jpost.com/middle-east/iran-news/article-730701>.

¹² Agence France-Presse, "Dozens of Schoolgirls in Iran Taken to Hospital after Poisoning," *The Guardian*, March 2, 2023, sec. World news, <https://www.theguardian.com/world/2023/feb/28/iran-schoolgirls-hospital-poisoning-pardis-qom>.

¹³ Karim Sadjadpour, "Opinion | the Rise and Fall of Iran's Ahmadinejad," *Washington Post*, July 13, 2011, sec. Opinions, https://www.washingtonpost.com/opinions/therise-and-fall-of-iransahmadinejad/2011/07/08/gIQACK4ADI_story.html.

tion” which was the party of Khamenei during his presidency and is the current party of Raisi, and the more progressive “Moderation and Development” party established in 2002 to which Rouhani belonged during his presidency. These clerical divisions trace back before 1979, with the intense rivalry between Grand Ayatollah Shariatmadari, Grand Ayatollah Montazeri and Grand Ayatollah Khomeini. Shariatmadari led an Azerbaijani rebellion and firmly opposed the Islamic legitimacy of Velayet-e-Faqih, whereas Montazeri desired to placedemocratic checks such as popular elections on the Supreme Leader.¹⁴

Notably, the most populated quadrant of the Nolan chart is the conservative quadrant, where both Supreme Leaders and two presidents of the Islamic Republic fall. This phenomenon was explained at US Maxwell Air Force Base using the *Policon* model, where the Conservative economic position of distributing state oil profits through low income and unemployment benefits was proven to be the economic policy which most pleased the most sectors of Iranian political society: Libertarian, Socialist [Liberal (Left)], Conservative (Right), and Statist(Authoritarian).¹⁵



¹⁴ Natasha Parnian, “‘Yearning for a Regular Life’: The Failure of Reform in the Islamic Republic,” Oxford Middle East Review, November 24, 2022, <https://omerjournal.com/2022/11/24/yearning-for-a-regular-life-the-failure-of-reform-in-the-islamic-republic/>.

¹⁵ Jonathon Seal, “Game Theory, Predictive Analysis, and Iran,” Maxwell Air Force Base: Air Command and Staff College Air University, 2013, <https://apps.dtic.mil/sti/pdfs/AD1023231.pdf>.

Fleeting liberalization: The Khatami exception

This recent presidential pattern provides a contrast to the deeper liberalization of the regime and Iranian popular culture during the presidential terms of Rafsanjani but especially Khatami (1989-2005). Abrahamian refers to the Khatami era as a time of political miscalculation by regime top leaders, during which relatively radical liberal institutional reform from within the regime was accomplished and liberal-secular influence over Iranian society was almost consolidated.¹⁶ Abrahamian cites Bush's 2002 "Axis of Evil" speech as the beginning of the end for liberal domination of Iranian politics, reviving the legitimacy of US-antagonistic rhetoric which the regime top leaders employ to justify their more hard-line conservatism.¹⁷ Since Khatami's endorsement of the Green Movement in 2009, there has been a media ban on the use of his name or pictures.¹⁸

Liberal reforms passed into law by the Majles during the Khatami era, long-since undone by conservatives, provide clues into measures the Islamic Republic could revisit and reimplement to improve its international reputation. These reforms included banning all forms of torture, improving the political and human rights of prisoners, democratization of the judicial system, equal rights and treatment for women, and constraints on the Basij militia.¹⁹

Persistent conservatism

The Iranian regime, after the end of the Khatami presidency, has not permitted leaders of the liberal opposition such as Mir-Hossein Mousavi to win the presidency, even at the political cost of repressing the 2009 Green Movement. The opposition ruler allowed to occupy the presidency from 2013 to 2021 for two terms was instead Rouhani, a more moderate figure. While Rouhani achieved the JCPOA in 2015, internally Rouhani did not affect significant political liberal change.²⁰ Rouhani's successor, Raisi, is a hard-line conservative political figure who is intensely loyal to Khamenei and the regime. Raisi is also regarded by the international community as having committed crimes against humanity in the '90s.

¹⁶⁻¹⁷ Ervand Abrahamian, *A History of Modern Iran* (Cambridge; New York; Melbourne: Cambridge University Press, 2008).

¹⁸ Arash Azizi, "Factbox: The Outcome of Iran's 2020 Parliamentary Elections," Atlantic Council, February 26, 2020, <https://www.atlanticcouncil.org/blogs/iransource/factbox-the-outcome-of-irans-2020-parliamentary-elections/>.

¹⁹ Ervand Abrahamian, *A History of Modern Iran* (Cambridge; New York; Melbourn: Cambridge University Press, 2008).

²⁰ Fariba Parsa, "After Eight Years as Iran's President, What Is Rouhani's Record on Women's Rights?," *Middle East Institute*, June 10, 2021, <https://www.mei.edu/publications/after-eight-years-irans-president-what-rouhanis-record-womens-rights>.

The new Raisi presidency will likely, in absence of the death of Khamenei, be renewed by popular vote of poor democratic quality in 2025. Raisi is supported by the regime as the successor for now 83-year-old Khamenei. As depicted in the Nolan chart, Raisi's political and economic views are in line with those of the present and past Supreme Leaders. Khamenei served as the third president of Iran for two terms, from 1981 to 1989. Raisi would be 64 and Khamenei would be 86 (the same age Khomeini was when he died) at end of Raisi's first term, and Raisi would be 68 and Khamenei would be 90 at the end of his (potential) second presidential term.

These numbers indicate that Khamenei's death will very likely occur within one of the two terms of Raisi's presidency, assuming Raisi is reelected. Raisi, being 62 years old at present, is already twelve years older than Khamenei was at the time of his replacement of Khomeini as Supreme Leader in 1989. Raisi's potential future Supreme Leadership will thus be shorter in length than that of his predecessor, having potential long-term implications for regime stability should it come to pass.

As occurred with Khamenei, who was currently in the third year of his second term as president at the time of Khomeini's death and Khamenei's appointment as Supreme Leader, Raisi's presidency, should he be re-elected, could likely be cut short at the time of Khamenei's death for Raisi to be made Supreme Leader, creating the need for new presidential elections in Iran. Under Khamenei's new Supreme Leadership, Khamenei's close political ally Rafsanjani became president in 1989. While Rafsanjani became alienated from Khamenei as he increasingly favoured extreme economic liberty and alliance with China in the late 90s,²¹ his appointment as president in 1989 when he was close with Khamenei can serve as an indicator for Raisi's presidential successor if Raisi does assume the Supreme Leadership. Saeed Jalili, who ran for the presidency in 2021 but withdrew his candidacy after Raisi entered his own, could be a future potential presidential candidate, due to his close relationship with Raisi. Jalili was secretary of Iran's Supreme National Security Council from 2007-2013 under Ahmadinejad and served as Iran's hardliner chief nuclear negotiator with the Western allies during this time. A close ally of the regime, Jalili also ran for the presidency in 2013 against Rouhani. Jalili's potential presidency would bode poorly for the prospects of a future nuclear deal with Iran.²²

²¹ Ervand Abrahamian, *A History of Modern Iran* (Cambridge; New York; Melbourne: Cambridge University Press, 2008).

²² Bahar Makooi, "Who Are the Candidates in Iran's Presidential Election?," FRANCE 24, June 15, 2021, <https://graphics.france24.com/iran-candidates-presidential-election/>.

The Parliament

Elections for the Islamic Consultative Assembly (Majles) are held every four years, with the most recent elections being held in 2020, at the end of Rouhani's second term. In the most recent elections, in 22 of 31 provinces, the opposition refused to endorse any candidates, resulting in a mass voter boycott and the lowest parliamentary elections national turnout in the history of the Islamic Republic: 42.6%. Tehran province's participation was the lowest of all the provinces: 26.2%.²³ The 2020 parliamentary elections turnout was likely reduced by persistent discontent from the 2017-2018 and 2019 mass protests under Rouhani. Khamenei, however, explicitly attributed the low turnout to the severe impact of the COVID-19 pandemic in Iran.²⁴ With heavy reformist boycotting, in Tehran province all 30 parliamentary seats went to conservatives, nationally 230 out of 290 total seats went to conservatives, and only 16 seats went to reformists.²⁵ Comparatively, the 2016 parliamentary elections held in the first term of the Rouhani presidency before the mass protests of 2017-18 and 2019 resulted in a plurality for Rouhani's reformist supporters, with reformists winning all 30 seats for Tehran.²⁶ Bagher Qalibaf, former mayor of Tehran (2005-2017) and IRGC member, was elected speaker of the parliament in 2020 with 230 votes (from the entire conservative sector). Qalibaf was re-elected speaker in 2021 with the same 230 votes, and again in 2022, but then with only 193 votes due to a recent corruption scandal.²⁷

Corruption, clientelism, bonyads, and the IRGC

Since 2009, the clergy has lost power to the IRGC, the Basij militia, and the bonyads.²⁸ The IRGC's ideological purpose is to protect the values of the Islamic Revolution and the regime, internally and externally. The most powerful component of the IRGC is the Quds Force, the IRGC's intelligence organization. Already in 2010, the United States Institute of Peace reported: "The Guards are also Iran's most powerful internal security force, at times cooperating and competing with the ministry of intelligence and other security organizations. The Guard's intelli-

²³⁻²⁵ Arash Azizi, "Factbox: The Outcome of Iran's 2020 Parliamentary Elections," Atlantic Council, February 26, 2020, <https://www.atlanticcouncil.org/blogs/iransource/factbox-the-outcome-of-irans-2020-parliamentary-elections/>.

²⁶ BBC, "Iran Reformists Win All Tehran Seats," BBC News, February 28, 2016, sec. Middle East, <https://www.bbc.com/news/world-middle-east-35681250>.

²⁷ Iran International Newsroom, "Iran Speaker Wins Re-Election as Khamenei Calls for Less Infighting," Iran International, May 26, 2022, <https://www.iranintl.com/en/202205263258>.

²⁸ Natasha Parnian, "'Yearning for a Regular Life': The Failure of Reform in the Islamic Republic," Oxford Middle East Review, November 24, 2022, <https://omerjournal.com/2022/11/24/yearning-for-a-regular-life-the-failure-of-reform-in-the-islamic-republic/>.

gence organization appears to have eclipsed the ministry of intelligence in scope and authority, especially after the disputed 2009 presidential election. Other security organizations such as the Basij and the Law Enforcement Forces have become subordinate to the Guards.”²⁹ The IRGC mobilizes and monitors the Basij militia, which is composed entirely of volunteers.³⁰ The Gashte-Ershad (Morality Police) is closely linked to the Basij militia, who support (and whose family members participate in) the Gashte-Ershad.³¹ Though Basij volunteers are not salaried, clientelism is sustained by “subsidies, favours, bribes, and commissions.”³² Former members of the Basij frequently go into politics after retiring from the militia.³³

IRGC members, beginning with the Ahmadinejad presidency, began to occupy an important share of governmental positions: in the presidential cabinet and the Majles. Additionally, the IRGC role in the economy is enormous. Privatization, begun under Rafsanjani and accelerated during the Ahmadinejad presidency (2005-2013) as a response to increasing Western sanctions, has produced the current situation where an estimated 40% of the Iranian economy is split evenly between the IRGC and the bonyads’ control.³⁴ Ahmadinejad himself was a member of the IRGC.³⁵ The economic policies of the Ahmadinejad presidency were executed under his populist rhetoric.

In Transparency International’s 2022 Corruption Perceptions Index, Iran is ranked as 147 out of 180 (180 being the most corrupt country ranked). While outside the bracket of the most corrupt countries globally, Iran is ranked as slightly more corrupt than Russia (137/180) and significantly more corrupt than China (65/180). Iran’s corruption rank is normal for the MENA region, being only slightly better than those of Afghanistan (150/180) and Iraq (157/180).³⁶

²⁹ Alireza Nader, “The Revolutionary Guards,” *The Iran Primer*, October 11, 2010, <http://iranprimer.usip.org/resource/revolutionary-guards>.

³⁰ Natasha Parnian, “‘Yearning for a Regular Life’: The Failure of Reform in the Islamic Republic,” *Oxford Middle East Review*, November 24, 2022, <https://omerjournal.com/2022/11/24/yearning-for-a-regular-life-the-failure-of-reform-in-the-islamic-republic/>.

³¹ BBC Monitoring, “Who Are Islamic ‘Morality Police’?,” *BBC News*, April 22, 2016, sec. Middle East, <https://www.bbc.com/news/world-middle-east-36101150>.

³²⁻³³ Natasha Parnian, “‘Yearning for a Regular Life’: The Failure of Reform in the Islamic Republic,” *Oxford Middle East Review*, November 24, 2022, <https://omerjournal.com/2022/11/24/yearning-for-a-regular-life-the-failure-of-reform-in-the-islamic-republic/>.

³⁴ Nader Habibi, “How Ahmadinejad Changed Iran’s Economy,” *The Journal of Developing Areas* 49, no. 1 (2015): 305–12, <https://doi.org/10.1353/jda.2015.0044>.

³⁵ BBC, “Profile: Mahmoud Ahmadinejad,” *BBC News*, August 4, 2010, sec. Middle East, <https://www.bbc.com/news/world-middle-east-10866448>.

³⁶ Transparency International, “2022 Corruption Perceptions Index: Explore the Results,” *Transparency.org*, 2022, <https://www.transparency.org/en/cpi/2022>.

Takeaways: Political trends

The quality of life in the current Islamic Republic of Iran is sufficient to prevent the fall of the regime for the short term, but insufficient to ensure political stability. Most Iranians are not fully content with their quality of life, hence the recurrence of popular protests over the years, but are content enough to abandon their protest efforts as soon as the regime tightens its grip via shows of force. The plurality of Iranian society produces political tensions, which are easily exacerbated during times of economic hardship and result in recurrent protests. However, these protests have not to date produced the fall of the regime and will likely not do so either in the short-term, as the Islamic Republic remains adept in the repression of these protests via the use of force.

The Iranian regime counts with a popular support base estimated at 25% concentrated mainly in the more-devout lower classes in urban slums and rural areas. Clientelism targeting veterans of the Iran-Iraq war, IRGC and Basij militias, the Bazaris of the Iranian middle class, and the elites, is the regime's main strategy for retaining popular support outside of its 25% base.³⁷ Iranian elites benefit from their loyalty to the regime in myriad ways: exemptions from mandatory military service for men, preferential access to universities, governmental positions, and economic privileges.³⁸ The Iranian regime will allow the liberal opposition to go far enough in its "opening up" of Iranian politics to appease important sectors of Iranian society such as the more secular intelligentsia and urban middle and upper classes. However, the Iranian regime does not allow this liberalization to get "out of hand" since 2005 and consistently follows periods of moderate progressive reform from within the regime with a period of conservatism and undoing of the permitted liberalization.

The conservative control of Iranian society has been strengthened since Bush's 2002 "Axis of Evil" speech and even more so since Ahmadinejad's economic empowerment of the IRGC and the Bonyads.³⁹ For the past five presidential terms, the Iranian regime has allowed its moderate opposition to win the presidency for alternating intervals, appeasing social unrest and projecting a higher quality of democracy to the international community without meaningfully impacting the regime's control of Iran.

³⁷ Ervand Abrahamian. *A History of Modern Iran* (Cambridge; New York; Melbourne: Cambridge University Press, 2008).

³⁸ Natasha Parnian, "'Yearning for a Regular Life': The Failure of Reform in the Islamic Republic," *Oxford Middle East Review*, November 24, 2022, <https://omerjournal.com/2022/11/24/yearning-for-a-regular-life-the-failure-of-reform-in-the-islamic-republic/>.

³⁹ Ervand Abrahamian. *A History of Modern Iran* (Cambridge; New York; Melbourne: Cambridge University Press, 2008).

Should the regime desire to improve its international reputation while appeasing its more secular constituents domestically, the existing pattern of alternating conservative and moderate presidencies could be maintained and enhanced by the reinstatement of some of the undone reforms of the liberal Khatami era. Real reforms especially in the realm of women's rights could calm the recurrent wave of protests in Iran and abroad, beneficially also reducing the need for the use of force in protest suppression, which has become a highly controversial issue in international relations between Iran and the West. The legal marriage age, today at 13 for girls, could be raised back to 15.⁴⁰ The Basij militia, once again currently involved in human rights violations, especially targeting women, could again be reined in and limited in their harassment of the Iranian public, and legal restrictions on women's personal freedoms and activities could be relaxed. More women could be hired to government positions, as occurred especially during the Khatami era and to a much lesser extent recently under Rouhani.⁴¹

³⁷ Ervand Abrahamian. *A History of Modern Iran* (Cambridge; New York; Melbourne: Cambridge University Press, 2008).

³⁸ Natasha Parnian, "'Yearning for a Regular Life': The Failure of Reform in the Islamic Republic," *Oxford Middle East Review*, November 24, 2022, <https://omerjournal.com/2022/11/24/yearning-for-a-regular-life-the-failure-of-reform-in-the-islamic-republic/>.

³⁹ Ervand Abrahamian. *A History of Modern Iran* (Cambridge; New York; Melbourne: Cambridge University Press, 2008).⁴⁰ "Country Policy and Information Note: Women - Early and Forced Marriage, Iran, May 2022 (Accessible)," gov.uk, May 2022, <https://www.gov.uk/government/publications/iran-country-policy-and-information-notes/country-policy-and-information-note-women-early-and-forced-marriage-iran-may-2022-accessible>.

⁴¹ Fariba Parsa, "After Eight Years as Iran's President, What Is Rouhani's Record on Women's Rights?," *Middle East Institute*, June 10, 2021, <https://www.mei.edu/publications/after-eight-years-irans-president-what-rouhanis-record-womens-rights>.

CHAPTER 2

AXIS OF RESISTANCE AND THE SHIA CRESCENT

The “Axis of Resistance”

The defining and most influential feature of the regional agency of Iran is its proxy wars, which arguably sometimes amounts to demographic reengineering. The “Axis of Resistance,” a broad network of Shia militia proxies led by Iran, share the common aim of containing other regional powers and securing political power base among the Shia minorities of the region.⁴² The IRGC Quds Force is the paramilitary organization responsible for the foreign operations of Iran.⁴³ Helping the Quds Force is Hezbollah: “Iran’s most important and longest-standing nonstate partner and a core member of Tehran’s “Axis of Resistance.”⁴⁴

Hezbollah is a multi-faceted organization that can be best understood for this contexts in its dual nature: Hezbollah is simultaneously a *pan-Shia Iranian* proxy and a distinctively *Lebanese* political party concerned with the wellbeing of *Lebanese* Shia community.⁴⁵ According to Matthew Levitt, “Hezbollah is committed simultaneously to the decrees of Iranian clerics, the Lebanese state, its sectarian Shi’a community, and fellow Shi’a abroad.”⁴⁶ Hezbollah has recently stepped up as an even more important partner for Iran with a newly increased role regional leadership, coordinating the Shia militant proxies or the “Axis of Resistance” on behalf of the IRGC Quds force. Following the assassination of Qasem Soleimani, the officers who filled his place as the leader of the Quds force were members or affiliates of Hezbollah.⁴⁷ Currently, Iran—mainly through Hezbollah—is involved in various regional conflicts in Lebanon, Syria, Iraq, Yemen, Palestine, and Afghanistan. Most of these conflicts are either the consequence of Iran’s competition with Saudi Arabia over regional influence, or of Iran’s existential struggle with Israel.

⁴² Fabrice Balanche, “From Iranian Corridor to the Shia Crescent,” Hoover Institution (Stanford University, August 17, 2018), <https://www.hoover.org/research/iranian-corridor-shia-crescent>.

⁴³ Seth G. Jones, “War by Proxy: Iran’s Growing Footprint in the Middle East,” Center for Strategic and International Studies (Center for Strategic and International Studies, March 2019), <https://www.csis.org/analysis/war-proxy-irans-growing-footprint-middle-east>.

⁴⁴ DIA, “Iran Military Power: Ensuring Regime Survival and Securing Regional Dominance,” Defense Intelligence Agency (Washington, DC: U.S. Government Publishing Office, August 2019), https://www.dia.mil/Portals/110/Images/News/Military_Powers_Publications/Iran_Military_Power_LR.pdf.

⁴⁵⁻⁴⁷ Matthew Levitt, “Hezbollah’s Regional Activities in Support of Iran’s Proxy Networks,” Middle East Institute Policy Center (Middle East Ins., July 2021), <https://www.mei.edu/publications/hezbollahs-regional-activities-support-irans-proxy-networks>.

Lebanon

In the 2022 Lebanese parliamentary elections, Hezbollah's political block lost seats. The 62 seats that Hezbollah's political block won in the Parliament are three seats short of the majority needed for the formation of the government.⁴⁸ Even in southern areas which are strongholds of Hezbollah in Lebanon, for example, a seat previously held by an ally of Hezbollah was occupied in 2022 by a candidate backed by the opposition.⁴⁹ Having said that, while Hezbollah's coalition has lost seats, the number of people voting for Hezbollah has increased in 2022 versus the 2018 elections, indicating a continued strong numerical support for Hezbollah in Lebanon.⁵⁰ As of March 2022, Lebanese Parliament failed to elect a president for eleven times.⁵¹ Furthermore, while Hezbollah's hegemony has been threatened by the 2022 elections, there is not much that the opposition can do to change the Hezbollah-dominant status quo of Lebanese politics. So long as Hezbollah remains armed and supported by Iran, the opposition will very likely have to compromise with the Party of God to avoid grave consequences. More decisive measures from the opposition aimed at disarming Hezbollah or trying to take away any privileges of Hezbollah in Lebanon would likely lead to a coup, with a possibility of Iranian-controlled Shia militias intervening from Syria.⁵²

Iraq

The transition of power after US invasion has increased Shia political agency in Iraq and had the demographic consequence of "Shiatization" in Baghdad.⁵³ The fight against the Islamic State in Iraq served as a unifying factor, giving Iran the opportunity to provide support to the Iraqi Shia militias.⁵⁴ However, the approach to Iran among Iraqi Shia is not uniform. Some but not all Iraqi Shias have nationalistic tendencies, and still others are divided by religious loyalties.⁵⁵

⁴⁸ Amatzia Baram, "Breaking Away from Iran (Part 1): Lebanon," GIS, July 4, 2022, <https://www.gisreportsonline.com/r/lebanon-hezbollah/>.

⁴⁹ Laila Bassam and Timour Azhari, "Hezbollah-Backed List Loses South Lebanon Seat to Opposition-Candidate and Hezbollah Officials Say," *Reuters*, May 15, 2022, sec. Middle East, <https://www.reuters.com/world/middle-east/hezbollah-backed-list-loses-south-lebanon-seat-opposition-candidate-hezbollah-2022-05-15/>.

⁵⁰ UNDP, "2022 Lebanese Parliamentary Elections: Key Results" (UNDP, December 1, 2022).

⁵¹ Anna Foster, "Lebanon MPs Sit in as 11th Vote for President Fails," *BBC News*, January 20, 2023, sec. Middle East, <https://www.bbc.com/news/world-middle-east-64344481>.

⁵² Amatzia Baram, "Breaking Away from Iran (Part 1): Lebanon," GIS, July 4, 2022, <https://www.gisreportsonline.com/r/lebanon-hezbollah/>.

⁵³ Fabrice Balanche, "From Iranian Corridor to the Shia Crescent" (Hoover Institution, August 17, 2018).

⁵⁴ *Ibid.*

⁵⁵ *Ibid.*

Currently, there are three broad groups in the Iraqi Shia militia umbrella organization, Hashd al Sha'abi: Firstly, the groups loyal to the Supreme Leader of Iran; secondly, the groups loyal to Iranian-Iraqi Ayatollah Sistani who implicitly rebukes Velayat-eFaqih; and lastly, groups loyal to Iraqi nationalist political leader Muqtada al-Sadr, who offersthe Iraqi Shia a path beyond religious authority and opposes Iran's interference in Iraq.⁵⁶

The 2021 elections demonstrated that popular support for Iran's interference in Iraqi government is low, even among the Iraqi Shia minority. In the 2021 Iraqi parliamentary elections, the Iraqi nationalist "Shia Alliance Towards Reform" party led by al-Sadr won the largest number of seats (73 of 329), while the pro-Khamenei Shia militias lost 26 of their 48 previous seats.⁵⁷ To reverse these outcomes, the IRGC Quds Force used intimidation and violence in Iraq to force the Sunni and Kurdish seat winners to abandon original alliance withthe Sadrists and secure the resignation of al-Sadr himself, along with all of his 73 followers that were elected in 2021.⁵⁸ After a long year of uncertainty, an Iranian-backed parliamentarycandidate, Mohammed al-Sudani, was appointed prime minister, completing the takeover of Iraq's government by the pro-Iranian coalition. Due to the importance of Iraq to Iran for strategic and economic reasons, it is only to be expected in future Iraqi parliamentary elections that Iran will do everything in its power to make the outcome favorable to its supporters.⁵⁹

Afghanistan

The biggest concern of Iran in Afghanistan presently is that the political and economic fragilityin Afghanistan might provide a fertile soil for the growth of the Islamic State, a threat more imminent to Iran than the Taliban.⁶⁰ While Iran does not want to endorse a complete monopolyof power by the Taliban, the fear of the possible Islamic State emergence from a power vacuum in Afghanistan makes the Taliban a preferable option for Iran out of the two extremist groups,given Iran's long border with,Afghanistan.⁶¹ Additionally, Iran's biggest freshwater lake—the Humun lake—is fed by Helmand River that originates in Northeastern Afghanistan.⁶² The water issue is one of the major sources of tension between Tehran and theTaliban, yet is an impetus for cooperation as well.

⁵⁶ Seth G. Jones, "War by Proxy: Iran's Growing Footprint in the Middle East," CSIS (Center for Strategic and International Studies, March 2019), <https://www.csis.org/analysis/war-proxy-irans-growing-footprint-middle-east>.

⁵⁷⁻⁵⁹ Amatzia Baram, "Breaking Away from Iran (Part 2): Iraq," *GIS* (GIS, July 5, 2022), <https://www.gisreportsonline.com/r/iran-iraq-politics/>.

⁶⁰⁻⁶¹ A. Farid Tookhy, "Iran's Response to the Taliban's Comeback in Afghanistan" (US Institute of Peace, August 2022).

⁶² Grant Farr, "Iran and Afghanistan: Growing Tensions after the Return of the Taliban," *E-International Relations*, August 23, 2022, <https://www.e-ir.info/2022/08/23/iran-and-afghanistan-growing-tensions-after-the-return-of-the-taliban/>.

In Afghanistan, Iran is increasingly prioritizing its own national security over its self-appointed role as the protector of the pan-Shia community. Historically, Iran cooperated with the anti-Taliban forces during the 2001 US invasion of Afghanistan and helped to build the regime that emerged in afterwards.⁶³ Since then Iran opted for “a Janus-faced policy in Afghanistan, establishing cordial relations with the Western-backed government in Kabul on the one hand and providing measured military support and sanctuary to segments of the Taliban on the other.”⁶⁴ Since 2007, the IRGC Quds Force has been providing the Taliban with weapons while also assisting them with logistics and training.⁶⁵

After the US retreat from Afghanistan in 2021 and subsequent Taliban takeover, Tehran has opted to dialogue with the Taliban, while denying the Taliban government any formal recognition.⁶⁶ Iran went as far as to justify the violence Taliban has conducted against the Shia communities in Afghanistan before, while also calling Taliban an indigenous movement distinguishing it from the Islamic State.⁶⁷

Iran considers the Taliban presently to be a minority government that must provide inclusivity for all of Afghanistan’s ethnic groups before it can be officially recognized by Tehran.⁶⁸ Iranian cooperation with the Taliban is problematic, since the Taliban’s ideology is hostile towards Shia Muslims, who are considered idolators under Deobandism (a conservative Islamic fundamentalist current, mixed with tribal customs of the Pashtuns).⁶⁹ However, the Taliban is not the only Sunni organization that is supported by Iran, another example being the Palestinian Islamic Jihad.⁷⁰ Iran’s strategy of accepting Taliban as a repercussion against the Islamic State in Afghanistan may backfire by leaving an open space for rival nations such as Turkey to provide support for the minorities abused by the Taliban in Afghanistan.⁷¹

⁶³ Nader Uskowi *Temperature Rising: Iran’s Revolutionary Guards and Wars in the Middle East* (2018; repr., Rowman & Littlefield Publishers, 2019), 129–38.

⁶⁴ A. Farid Tookhy, “Iran’s Response to the Taliban’s Comeback in Afghanistan” (US Institute of Peace, August 2022).

⁶⁵ Nader Uskowi, *Temperature Rising: Iran’s Revolutionary Guards and Wars in the Middle East* (2018; repr., Rowman & Littlefield Publishers, 2019), 129–38.

⁶⁶⁻⁶⁷ A. Farid Tookhy, “Iran’s Response to the Taliban’s Comeback in Afghanistan” (US Institute of Peace, August 2022).

⁶⁸ Matthew Levitt, “Hezbollah’s Regional Activities in Support of Iran’s Proxy Networks” (Middle East Institute Policy Center, July 2021).

⁶⁹ Grant Farr, “Iran and Afghanistan: Growing Tensions after the Return of the Taliban,” *E-International Relations*, August 23, 2022, <https://www.e-ir.info/2022/08/23/iran-and-afghanistan-growing-tensions-after-the-return-of-the-taliban/>.

⁷⁰ Seth G. Jones, “War by Proxy: Iran’s Growing Footprint in the Middle East,” *Center for Strategic and International Studies* (CSIS, March 2019), <https://www.csis.org/analysis/war-proxy-irans-growing-footprint-middle-east>.

⁷¹ A. Farid Tookhy, “Iran’s Response to the Taliban’s Comeback in Afghanistan” (US Institute of Peace, August 2022).

Syria

In Syria, the rebellion against the Assad regime was perceived by many Shias as a threat to their community in the Middle East as a whole.⁷² It did not take long before Hezbollah intervened in Damascus and the village of Homes to protect the Shias there and secure the boarder of Lebanon against the potential spread of the conflict.⁷³ Taking into consideration that 80% of people who fled Syria as of 2015 were Sunni Muslims (many of whom will not be able to return due to destruction of their homes in strategic Sunni enclave locations), the demographic consequences of the Syrian conflict favored Iranian regional influence.⁷⁴ The IRGC Quds Force worked alongside Hezbollah to form Syrian Shia militias allied with Iran. By 2014, some of these new militias started calling themselves Hezbollah fi Suriya (Hezbollahin Syria).⁷⁵ According to Levitt, “The Hezbollahization of these groups, in name, structure, and allegiance, signifies a major accomplishment for Tehran, allowing Iran to preserve harder-core influence and more effectively project power within Syria.”⁷⁶ For almost a decade, Israel has been conducting airstrikes against Iranian-led weapon transfers and IRGC-QF bases aimed at containing Iran’s encroachment in Syria. An Israeli rocket whose target was probably a logistics center of an IRGC building hit Damascus on February 19, 2023.⁷⁷ The Damascus attack marks an escalation of a previously low-intensity conflict, indicating the newly increased level of perceived threat to Israel posed by the Syrian Shia militias.⁷⁸

With its current economic capacity, Iran seems to be overreaching when it comes to extending its support and influence with its regional allies. In Damascus, during the peak 2022-2023 winter season, Iran doubled the oil price of its exports to Syria, completely eliminating longstanding subsidies to reach current market price (more than \$70 USD per barrel).⁷⁹ This move produced the worst oil crisis in Syria since the start of the civil war, and may eventually lead in the medium term to Syria turning for oil to Iran’s regional rivals, such as the UAE and Saudi Arabia.⁸⁰ However, a serious long-term fallout between Syria and Iran remains unlikely. The military presence of Iran

⁷²⁻⁷⁴ Fabrice Balanche, “From Iranian Corridor to the Shia Crescent” (Hoover Institution, August 17, 2018).

⁷⁵⁻⁷⁶ Matthew Levitt, “Hezbollah’s Regional Activities in Support of Iran’s Proxy Networks” (Middle East Institute Policy Center, July 2021).

⁷⁷ Al-Jazeera, “Five Killed in Israeli Air Strikes on Syria’s Capital, Damascus,” Al-Jazeera, February 19, 2023, <https://www.aljazeera.com/news/2023/2/19/israeli-raids-kill-five-in-syrias-damascus-report>.

⁷⁸ Suleiman Al-Khalidi, “Israeli Missile Strikes Building in Central Damascus, Five Dead,” *Reuters*, February 19, 2023, sec. Middle East, <https://www.reuters.com/world/middle-east/israeli-missile-strikes-building-central-damascus-several-casualties-witnesses-2023-02-18/>.

⁷⁹⁻⁸⁰ Benoit Faucon, “WSJ News Exclusive | Iran Restricts Supply of Cheap Oil to Syria, Leaving Ally in Crisis,” *The Wall Street Journal*, January 15, 2023, <https://www.wsj.com/articles/iran-restricts-supply-of-cheap-oil-to-syria-leaving-ally-in-crisis-11673755436>.

in Syria mainly through Hezbollah in eastern, southern and north-western parts of the country and several suburban areas near Damascus is expansive.⁸¹ Additionally, in the past 10 to 15 years, Iran has proved to be Syria's most reliable international partner.⁸² Nevertheless, in Syria Iran has recently prioritized its own national economic interests over a long-standing regional loyalty.

Containing Iran: Israel, Saudi Arabia, and the Gulf

The proxy war between Iran and Saudi Arabia can be seen, from the point of view of Iran, in light of "Salafi/Wahhabi expansionism that stands against all kinds of Shiite communities in the region".⁸³ Saudi Arabia, on the other hand, considers Iran's ideological power a dangerous influence on the Shia minority within its borders.⁸⁴ The manifestation of the rivalry between the two countries can be most clearly seen in the Yemeni conflict. With the spread of the Arab Spring, the perceived threat of increased influence of Iran in Yemen and Iraq led the Saudi monarchy (and later the other Gulf countries) to directly enter the war in Yemen.⁸⁵ The Saudis fear the establishment of the Shia state across the Gulf.⁸⁶ However, Saudi Arabia has not been able to efficiently contain the Iranian threat: "the Saudis have seen none of their policy preferences accomplished, despite tremendous expenditures."⁸⁷ Iran's objective in Yemen is not only to expand its influence over the Yemeni Shia, but also to increase its influence in the Red Sea—around 5 million barrels of oil pass through the Bab al-Mandab Strait daily.⁸⁸ The IRGC Quds Force, alongside Hezbollah, is providing the Houthis with training and weapons.⁸⁹ Iranian ballistic missiles in particular are used to attack the territory of Saudi Arabia and UAE.⁹⁰

⁸¹ Al-Jazeera, "Five Killed in Israeli Air Strikes on Syria's Capital, Damascus," Al-Jazeera, February 19, 2023, <https://www.aljazeera.com/news/2023/2/19/israeli-raids-kill-five-in-syrias-damascus-report>.

⁸² Edward Yeranian, "Iran-Syria Friction on Economic Issues Appears to Strain Ties," Voice of America, February 4, 2023, <https://www.voanews.com/a/iran-syria-friction-on-economic-issues-appears-to-strain-ties/6947913.html>.

⁸³⁻⁸⁶ Ramazan İzol and Murat Cingöz, "Iran-Saudi Arabia Rivalry and the Yemeni Crisis" (Journal of History School, December 11, 2022), <https://dergipark.org.tr/en/download/article-file/2824268>.

⁸⁷ Bruce Riedel, "The Houthis after the Yemeni Cease-Fire," Brookings, January 27, 2023, <https://www.brookings.edu/blog/order-from-chaos/2023/01/27/the-houthis-after-the-yemeni-cease-fire/>.

⁸⁸ Seth G. Jones, "War by Proxy: Iran's Growing Footprint in the Middle East," *Center for Strategic and International Studies* (Center For Strategic and International Studies, March 2019), <https://www.csis.org/analysis/war-proxy-irans-growing-footprint-middle-east>.

⁸⁹ Matthew Levitt, "Hezbollah's Regional Activities in Support of Iran's Proxy Networks" (Middle East Institute Policy Center, July 2021).

⁹⁰ Seth G. Jones, "War by Proxy: Iran's Growing Footprint in the Middle East," *Center for Strategic and International Studies* (Center For Strategic and International Studies, March 2019), <https://www.csis.org/analysis/war-proxy-irans-growing-footprint-middle-east>.

The Saudi-Iranian rivalry has meaningfully impacted the region. While the war in Yemen had a great cost for the Gulf Countries, with the Qatar Diplomatic Crisis being one of the strongest examples of the tensions, it also led to rapprochement between the Gulf and the Israelis, whose will for cooperation against the Iranian threat can be seen through the Abraham Accords, as well as dialogue between Saudi Arabia and Israel. However, recent developments, such as the re-assumption of Saudi-Iranian diplomatic relations, have halted the development of any regional anti-Iranian containment bloc.⁹¹ In March 2023, after seven years of alienation, Iran and Saudi Arabia agreed to re-establish diplomatic relations with each other in a deal mediated by China.⁹² With Iran and Saudi Arabia ready to reopen their respective embassies, Iran is stepping out from its long international and regional isolation, and in exchange has agreed to halt its attacks on Saudi Arabia, with a guarantee that the Houthi rebels will do so as well.⁹³

When it comes to Israel, the new strategic and economic possibilities and hope to the possible diplomatic normalization between the Saudis and the Israelis in the future were opened by the Abraham Accords. However, while the Saudi monarchy has common interests with Israel to contain Iran's regional influence, the full normalization of diplomatic relations might still rely on the Saudi's demand for the creation of the state of Palestine.⁹⁴ It is expected that Iran, Hamas, Hezbollah and other organizations might use Saudi recognition of Israeli to undermine the legitimacy of the monarchy.⁹⁵ With the ascension of Prime Minister Netanyahu in Israel, the growing tension and violence between Israel and the Palestinians as of March 2023 makes the rapprochement between Saudi Arabia and Israel even less likely.⁹⁶

Even within the success of the Abraham Accords, the Emiratis are cautious when it comes to military cooperation with Israel. "While Israel probably sees the UAE's geographical proximity to Iran as an incentive to seek deeper military cooperation with the Emiratis, the leadership in Abu Dhabi seems to consider the same proximity as a reason to refrain from further military partnering

⁹¹⁻⁹³ Stephen Kalin Cloud Benoit Faucon, Vivian Salama and David S., "Saudi Arabia, Iran Restore Relations in Deal Brokered by China," *WSJ*, March 10, 2023, <https://www.wsj.com/articles/saudi-arabia-iran-restore-relations-in-deal-brokered-by-china-406393a1>.

⁹⁴ Fiona MacDonald, "Israel Steps up Talks with Saudi Arabia over Ties to Combat Iran," *Bloomberg*, February 17, 2023, <https://www.bloomberg.com/news/articles/2023-02-17/israel-steps-up-talks-with-saudi-arabia-over-ties-to-combat-iran#xj4y7vzkg>.

⁹⁵ Nawaf Obaid and Nimrod Novik, "Israel and Saudi Normalization - Opinion," *The Jerusalem Post*, February 14, 2023, <https://www.jpost.com/opinion/article-731475>.

⁹⁶ Michael Crowley, Vivian Nereim, and Patrick Kingsley, "Saudi Arabia Offers Its Price to Normalize Relations with Israel," *The New York Times*, March 10, 2023, sec. U.S., <https://www.nytimes.com/2023/03/09/us/politics/saudi-arabia-israel-united-states.html?referringSource=articleShare>.

with Israel.”⁹⁷ Furthermore, the UAE has reopened its embassy in Iran in 2022 and has been pursuing economic cooperation with Tehran.⁹⁸ For example, a chunk of the undeclared Iranian oil imports that reach China passes through the UAE.⁹⁹

Takeaways: Iran’s regional influence and the Shia Crescent

The influence of Iran in the region is increasing and is likely to continue to do so at least in the short term. After the Houthi takeover of Sana’a in 2014, Iran now controls four Arab capitals: the other three being Beirut, Baghdad and Damascus.¹⁰⁰ Furthermore, the recent resumption of diplomatic relations between Tehran and Riyadh, as well as the lack of similar advancements between Saudi Arabia and Israel, debilitate the anti-Iranian bloc in the region, making the containment of Iran even less likely.¹⁰¹ It is arguably a mistake to perceive the Levant as a Sunni dominated area due to expansive deserts that, while Sunni majority, are barely inhabited: “assessing the numerical weight—rather than geographical expanse—of different Levant communities better explains the limited strength of Sunni Arabs in the region.”¹⁰² The Iraq War of 2003 and the Syrian civil war are prime examples of successful demographic reengineering aimed at securing the “Shia Crescent” as a basis of support for Iran.¹⁰³ The outcome of both conflicts shifted the power dynamics in favor of the Shia, often because of Iranian support, and increased Iranian influence in both countries.

When it comes to Afghanistan, the policy choice of Tehran so far is to try to counter the threat of the Islamic State without legitimizing or excessively aiding the Taliban. Iran’s main concern is the

⁹⁷ Leonardo Jacopo and Maria Mazzucco, “The Abraham Accords Two Years On: From Ambition to Reality,” *Real Instituto Elcano*, August 17, 2022, <https://media.realinstitutoelcano.org/wp-content/uploads/2022/08/ari58-2022-mazzucco-alexander-abraham-accords-two-years-on-from-ambition-to-reality.pdf>.

⁹⁸ Stephen Kalin Cloud Benoit Faucon, Vivian Salama and David S., “Saudi Arabia, Iran Restore Relations in Deal Brokered by China,” *WSJ*, March 10, 2023, <https://www.wsj.com/articles/saudi-arabia-iran-restore-relations-in-deal-brokered-by-china-406393a1>.

⁹⁹ Bourse & Bazaar Foundation, “China-Iran Trade Report (December 2022),” Bourse & Bazaar Foundation (Bourse & Bazaar Foundation, February 7, 2023), <https://www.bourseandbazaar.com/china-iran-trade-reports/december-2022>.¹⁰⁰ Ariane Tabatabai and Dina Esfandiary, “Sana’a: Iran’s Fourth Arab Capital?,” *Lawfare*, January 10, 2016, <https://www.lawfareblog.com/sanaa-irans-fourth-arab-capital>.

¹⁰¹ Michael Crowley, Vivian Nereim, and Patrick Kingsley, “Saudi Arabia Offers Its Price to Normalize Relations with Israel,” *The New York Times*, March 10, 2023, sec. U.S., <https://www.nytimes.com/2023/03/09/us/politics/saudi-arabia-israel-united-states.html?referringSource=articleShare>.

¹⁰²⁻¹⁰³ Fabrice Balanche, “From Iranian Corridor to the Shia Crescent” (Hoover Institution, August 17, 2018).

radicalization on its eastern border - the possibility of the emergence of the Islamic State. As Iran does not want the Taliban to emerge with the monopoly of power either, Tehran is unlikely to aim for complete stability in Afghanistan, while at the same time trying to prevent complete chaos that would provide a power vacuum for the rise of the Islamic State. The Iranian approach of dialogue with Taliban means decreased support by Iran for Shia communities in Afghanistan, which have historically been discriminated by the Taliban. While this might result in a relative diminishment of Iran's role as the protector of the Shia in Afghanistan, Iran is gaining more power in Yemen, where the Houthis are still holding the upper hand. The Yemen conflict poses a major threat to Saudi Arabia, which is afraid of establishment of the Shia state next to its borders.

When it comes to the popular support for Iran in the region, the results are mixed. However, due to its hard power, Iran has been able to prevail even in the cases where the local elections turned out against it. While the recent elections of Iraq showed decreased popular support for the pro-Iranian coalition, it also demonstrated that Iran is willing to use coercion and brute power, which nobody in Iraq was able to withstand, in order to secure its influence. In Lebanon, Hezbollah's coalition has lost seats during the last elections, but the overall number of votes for the party has increased. As of now, Lebanon has failed to elect a president for eleven times in a row, signaling the division in the parliament. And even if an anti-Hezbollah government is somehow formed, there is not a lot an opposition government could do to promote change, as long as Hezbollah is armed and supported by Iran. Lastly, in Syria, the IRGC Quds Force and Hezbollah hold sway in vast areas of the country. While the recent fallout between Syria and Iran due to the latter increasing oil prices might be a sign that Iran is overstressing its resources, it is unlikely that it will deeply affect the relationship with Syria, as Iran has proved to be the most trusted ally of the Assad regime for decades.

Iran's grasp on the Shia Crescent seems to be increasing rather than decreasing. Even the regional threats such as the rapprochement between the Israel and its Arab neighbours seem to be insufficient to counter Iran's influence, especially in the light of a rapprochement between Saudi Arabia and Iran mediated by China. While the threat of Iran led Israel and the Persian Gulf countries to a path of closer cooperation, it is unlikely that the Gulf nations would endorse any radical move regarding Iran on Israel's part. With UAE not endorsing an attack against Iran, Qatar building bridges with Tehran, and the legitimacy problems posed by the Saudi cooperation with Israel, the latter is unlikely to receive any real support on the offensive against Iran. In the end, it is safe to conclude that Iran's influence in the Shia Crescent be increasing in the short term.

CHAPTER 3

INTERNATIONAL ISSUES

War in Ukraine

The war in Ukraine continues to influence the Axis of Resistance and Iran's grasp over the Shia Crescent and to contribute to Iran's ascendance in the international arena. Not only does the war better enable Iran to undermine the Western sanctions, it also provides the Islamic Republic with an important ally and an investor in Moscow, a Russian market for Iranian weapons, and opportunities to test Iranian drones in battle.¹⁰⁴

To secure this closer relationship with Moscow, Tehran took a decisive step: "By actively supporting Russia's war of aggression, Iran has taken itself out of a large bloc of countries, nominally led by China, that have adopted an ambiguous position towards the conflict."¹⁰⁵ With even China trying to balance the support of its old strategic partner Russia with avoiding the consequences of being cut off from the global market, Iran has stood out in openly supporting Russia.¹⁰⁶ The Iranian strategy is at odds with the approach of many other Middle Eastern states, which initially avoided explicitly taking sides in the conflict, and now increasingly support Ukraine. While Israeli Prime Minister Benjamin Netanyahu is known to have a good personal relationship with Vladimir Putin, in the context of Tehran's rapprochement with Moscow, Israel is taking steps towards providing support to Ukraine and is even reportedly considering supplying the "David's Sling" air defense system to Ukraine, which Israel refused to do before.¹⁰⁷ Additionally, while the GCC countries had originally taken a similar approach as China—neither aligning themselves with Russia, nor NATO—this establishment has been recently shifting.¹⁰⁸ In February 2023, all the Gulf States voted in favor of the demand for Russia to leave Ukrainian territory in the UN General Assembly resolution.¹⁰⁹

¹⁰⁴ Peter Beaumont, "Iran Becoming Global Drone Producer on Back of Ukraine War, Says US," *The Guardian*, February 14, 2023, sec. World news, <https://www.theguardian.com/world/2023/feb/14/us-says-iran-becoming-a-drone-leader-as-russia-uses-its-craft-in-ukraine>.

¹⁰⁵⁻¹⁰⁶ Jacopo Scita, "When It Comes to Iran, China Is Shifting the Balance," Bourse & Bazaar Foundation, December 13, 2022, <https://www.bourseandbazaar.com/articles/2022/12/13/when-it-comes-to-iran-china-is-shifting-the-balance>.

¹⁰⁷ Nada Ahmed, "Russia's Triangular Trap?," Carnegie Middle East Center (carnegie-mec.org), February 28, 2023), <https://carnegie-mec.org/diwan/89150>.

¹⁰⁸ Jacopo Scita, "When It Comes to Iran, China Is Shifting the Balance," Bourse & Bazaar Foundation, December 13, 2022, <https://www.bourseandbazaar.com/articles/2022/12/13/when-it-comes-to-iran-china-is-shifting-the-balance>.

¹⁰⁹ Nada Ahmed, "Russia's Triangular Trap?," Carnegie Middle East Center (carnegie-mec.org), February 28, 2023), <https://carnegie-mec.org/diwan/89150>.

As Russia tries to withstand the Western sanctions and growing international isolation, the economic cooperation options for Moscow are decreasing, making Iran an attractive solution to the problem.¹¹⁰ In July 2022, Putin visited Tehran and met with Khamenei and Raisi. As part of the visit, Russia's Gazprom signed with the National Iranian Oil Company a memorandum of understanding to invest approximately \$40 billion USD for Iranian oil and gas projects and technological cooperation, importantly including "the development of the Kish and North Pars gas fields and also six oil fields [and] the completion of liquefied natural gas (LNG) projects and construction of gas export pipelines."¹¹¹ This deal is the largest single FDI agreement in the history of the Islamic Republic.¹¹² The fact that this MOU was agreed upon implies a major shift. Prior to the war in Ukraine, Russia was hesitant to endanger its Western projects by strengthening ties with a sanctioned Iran.¹¹³ As Russia's setbacks in the war in Ukraine have made it more dependent on the support provided by Iran, the latter has benefited from the war through the shift of Western focus away from Tehran, "giving the Islamic Republic breathing room to pursue sanctions evasion, a confrontational foreign policy, and other activities that the West would have otherwise devoted additional resources toward containing."¹¹⁴ A good example of this would be Chinese imports of undeclared Iranian oil that will be discussed in more detail later in the report.¹¹⁵

Iran is becoming a global producer of cheap and lethal drones.¹¹⁶ Not only did the war in Ukraine open the market for the Iranian weapon exports, the practical use of the drones in Ukrainian territory by Moscow is providing Tehran with valuable insights to improve their development of drones in the future.¹¹⁷ Furthermore, Russia appears to be sending US- and NATO-provided weapons found on the battlefield to Iran, which will probably be used in Iran for the purpose of reverse-engineering.¹¹⁸

¹¹⁰ Michael Young, "Enemies of Each Other's Enemies" (Carnegie Middle East Center, December 12, 2022).

¹¹¹ Reuters, "Iran and Russia's Gazprom Sign Primary Deal for Energy Cooperation," *Reuters*, July 19, 2022, sec. Energy, <https://www.reuters.com/business/energy/iran-russias-gazprom-sign-primary-deal-energy-cooperation-2022-07-19/>.

¹¹² Seth Frantzman, "Russia's Gazprom Signs Major Deal in Iran Worth Billions," *The Jerusalem Post* | JPost.com, July 19, 2022, <https://www.jpost.com/middle-east/iran-news/article-712520>.

¹¹³ Michael Young, "Enemies of Each Other's Enemies" (Carnegie Middle East Center, December 12, 2022).

¹¹⁴ Anas Al Qaed, "Iran's Indispensable Role for Russia in the Ukraine War," *Gulf International Forum*, February 20, 2023, <https://gulfif.org/irans-indispensable-role-for-russia-in-the-ukraine-war/>.

¹¹⁵ Bourse & Bazaar Foundation, "China-Iran Trade Report (December 2022)," Bourse & Bazaar Foundation (Bourse & Bazaar Foundation, February 7, 2023), <https://www.bourseandbazaar.com/china-iran-trade-reports/december-2022>.

¹¹⁶⁻¹¹⁷ Peter Beaumont, "Iran Becoming Global Drone Producer on Back of Ukraine War, Says US," *The Guardian*, February 14, 2023, sec. World news, <https://www.theguardian.com/world/2023/feb/14/us-says-iran-becoming-a-drone-leader-as-russia-uses-its-craft-in-ukraine>.

¹¹⁸ Natasha Bertrand, "Russia Has Been Sending Some US-Provided Weapons Captured in Ukraine to Iran, Sources Say | CNN Politics," *CNN*, March 10, 2023, <https://edition.cnn.com/2023/03/10/politics/russia-iran-ukraine-weapons/index.html>.

EU energy crisis

Partly because the war in Ukraine has pushed Russia closer to Iran, a rapprochement between the EU and Iran is unlikely. While the EU sanctions on Russia due to the ongoing war in Ukraine have thus eliminated nearly half of the total EU energy supply, forcing the EU to find alternative sources of energy in 2022 and 2023,¹¹⁹ the EU is unlikely to turn to Iran for energy for the same reasons that it refuses to buy oil from Russia. As Iran continues to support Russia in the war in Ukraine, the EU is already issuing sanctions against Iranian weapon manufacturers.¹²⁰ Consequently, relying on Iran for energy while refusing to buy from Russia would be self-contradictory. In the end, the Ukraine War has decisively pushed Iran and Russia closer together, which only serves to push Iran and the EU farther apart.

While Iran possesses the second-largest gas reserves in the world and the fourth-largest oil reserves,¹²¹ Iran since 2018 has lacked the foreign investment needed to exploit them. While Western aligned companies doubled FDI in Iran from 0.5% of GDP in 2015 to a peak of 1% of GDP in 2017 following the signing of the JCPOA, these levels quickly dropped subsequent to US withdrawal from the pact and increased Western sanctioning, bringing 2021 FDI levels to just 0.4% of GDP.¹²² Foreign investors, even the Chinese, are hesitant to fund medium and long-term projects¹²³ given the instability of relations with Iran in the context of the nuclear program, Axis of Resistance, and international sanctions. The withdrawal of French and Chinese investors from the development of the last South Pars phase since 2018 required Iran to scale back the project's capacity from 730 billion cubic feet/year of natural gas to just 180 bcf/year, a quarter of the original plan, which is all domestic funding Iranian PetroPars private company can manage.¹²⁴

An important recent caveat to Iran's struggle to secure the necessary FDI for infrastructure to exploit its fossil fuel resources is new Russian investment. However, as Russia is now stepping in to finance the development of the infrastructure necessary for the extraction of the fossil fuels,¹²⁵

¹¹⁹ European Council, "Where Does the EU's Gas Come From?," www.consilium.europa.eu, February 7, 2023, <https://www.consilium.europa.eu/en/infographics/eu-gas-supply/>.

¹²⁰ United States Institute of Peace, "E.U. Sanctions Iran for Providing Drones to Russia," *The Iran Primer*, February 27, 2023, <https://iranprimer.usip.org/blog/2023/feb/27/eu-sanctions-iran-providing-drones-russia>.

¹²¹ U.S. Energy Information Administration, "International - U.S. Energy Information Administration (EIA)," www.eia.gov, n.d., <https://www.eia.gov/international/overview/country/IRN>.

¹²² data.worldbank.org. "Iran, Islamic Rep. | Data," n.d. <https://data.worldbank.org/country/IR>.

¹²³ Tabatabai, Ariane, and Dina Esfandiary. *Triple-Axis*. Bloomsbury Publishing, 2018.

¹²⁴⁻¹²⁵ Reuters, "Iran and Russia's Gazprom Sign Primary Deal for Energy Cooperation," *Reuters*, July 19, 2022, sec. Energy, <https://www.reuters.com/business/energy/iran-russias-gazprom-sign-primary-deal-energy-cooperation-2022-07-19/>.

the EU is perhaps now even more unlikely to turn to Iran for energy. Whether Russian investment in Iranian fossil fuel infrastructure can be sustained at sufficient levels remains to be seen. The existing sanctions on Russia and Iran leave the new partners without vital technologies and resources for infrastructure development, and Russia is a competitor to Iran in the fossil fuel sector, especially in the light of EU sanctions on Russia oil exports.¹²⁶ Russian crude oil is increasingly imported by Eastern instead of Western countries, especially China, at low prices, taking over a larger share of Iran's principal fossil fuel export market.¹²⁷ Nevertheless, Russia and Iran now find themselves in a situation where they need to rely on each other more than ever due to their aforementioned increasing international economic and political isolation.

Sanctions

The Iranian economy ails heavily under international sanctions. As explained in Chapter 1, Iranian GDP per capita in 2021 was under half its 2013 high.¹²⁸ Protests in Iran are recurrent and frequently coincide with periods of economic hardship. The Iranian government subsidizes necessary daily goods such as food staples and fuels for its local population, but frequently reduces or removes subsidies to free up government budget for military activities abroad. The 2023-24 Iranian budget which Raisi submitted to the Majles for approval includes a 5% increase in real terms for defence spending, accompanied by a 10% decrease in development spending, used for infrastructure.¹²⁹ Official Iranian inflation stood at 43% in 2021 according to the World Bank,¹³⁰ with some domestic sources reporting current 2023 inflation over 50%.¹³¹ At Iran's peak GDP per capita year in 2013, inflation stood at 37%.¹³² The 2023-24 budget proposal allows for a 20% nominal increase in the salaries of government workers, which with current inflation levels is a significant pay decrease in real terms.¹³³ Higher inflation coupled with such a severe drop in income for the Iranian population shows the real damage international sanctions continue to inflict.

¹²⁶ Meredith, Sam. "Europe Is Set to Ramp up Its Oil War against Russia-and Markets Are Bracing for More Disruption." CNBC, Feb. 3, 2023. <https://www.cnbc.com/2023/02/03/europe-is-set-to-ramp-up-its-oil-war-against-russia-with-products-ban.html>.

¹²⁷ Michael Young, "Enemies of Each Other's Enemies" (Carnegie Middle East Center, December 12, 2022), <https://carnegie-mec.org/diwan/88610>.

¹²⁸ data.worldbank.org. "Iran, Islamic Rep. | Data," n.d. <https://data.worldbank.org/country/IR>.

¹²⁹ Henry Rome, "Iran's New Budget Perpetuates Economic Challenges," The Washington Institute, January 12, 2023, <https://www.washingtoninstitute.org/policy-analysis/irans-new-budget-perpetuates-economic-challenges>.

¹³⁰ data.worldbank.org. "Iran, Islamic Rep. | Data," n.d. <https://data.worldbank.org/country/IR>.

¹³¹ "Inflation Rising to Well over 50% in Iran," Iran International, February 22, 2023, <https://www.iranintl.com/en/202302220413>.

¹³² data.worldbank.org. "Iran, Islamic Rep. | Data," n.d. <https://data.worldbank.org/country/IR>.

¹³³ Henry Rome, "Iran's New Budget Perpetuates Economic Challenges," The Washington Institute, January 12, 2023, <https://www.washingtoninstitute.org/policy-analysis/irans-new-budget-perpetuates-economic-challenges>.

However, having suffered since its inception under international sanctions, intensified since UNSC Resolution 1929 since 2010, the Iranian economy has become increasingly resilient. Iran, used to being on the outskirts of the international order, has adapted to survive under the harsh conditions in myriad ways: smuggling, technological advancements, and trade with Russia and China. Persistent smuggling, alongside with the decrease of Western scrutiny due to the war in Ukraine, help Iran to periodically eschew the sanctions. Smuggling, under the heavy international sanctions regime and Sharia imports bans on items such as makeup and alcohol, has thrived in the Islamic Republic. Smuggling in narcotics is a major source of funding for the IRGC.¹³⁴ Iranian industries, especially the tech industry, have also become increasingly vibrant and self-sufficient in absence of multinational conglomerate competition. Pardis Technology Park located 50 km east of Tehran has been dubbed the Iranian Silicon Valley.¹³⁵ Iranian native startups provide similar services to Airbnb and Amazon.¹³⁶

Additionally, complex products such as domestic aircrafts, advanced weapons, and even nuclear plants are increasingly built in Iran with Iranian technology, instead of with parts imported from the global powers. The regime proudly reports these achievements in national press, alleging them as proof of Islamic and Iranian victory over Western sanctions.¹³⁷ Another way that the international sanctions are failing can be seen in the remnants of the Iranian drones from the Ukrainian battlefield. The investigation of the remains of Iranian drones that Russia used in the war against Ukraine revealed that the weapons were constructed from parts mostly made in the United States since 2020.¹³⁸ Over 70 manufacturers from 13 different countries were identified, with around 82% of the components having been made in the US.¹³⁹ Taking into account the heavy sanctions against Iran that are aimed at preventing exactly such imports as these, it is unknown how the US technology has been imported to Iran. Quds Aviation Industries (QAI) —a key Iranian company formed under the IRGC that has manufactured two types of drones sold to Russians— has been sanctioned for years, and still managed to expand the production of drones.¹⁴⁰ In January

¹³⁴ Ibid.

¹³⁵⁻¹³⁶ Ariane Tabatabai and Dina Esfandiary, *Triple-Axis* (Bloomsbury Publishing, 2018). ¹³⁷ Tasnim News Agency, “Iran Begins to Mass-Produce Jet Trainer,” Tasnim News Agency, March 11, 2023, <https://www.tasnimnews.com/en/news/2023/03/11/2865604/iran-begins-to-mass-produce-jet-trainer>.

¹³⁸⁻¹³⁹ John Ismay, “Iranian Weapons Built with Western Semiconductors despite Sanctions,” *The New York Times*, November 22, 2022, sec. U.S., <https://www.nytimes.com/2022/11/22/us/drones-russia-iran.html>.

¹⁴⁰ David E. Sanger, Julian E. Barnes, and Eric Schmitt, “US Scrambles to Stop Iran from Providing Drones for Russia - the Boston Globe,” *BostonGlobe.com* (Boston Globe, December 28, 2022), <https://www.bostonglobe.com/2022/12/28/world/us-scrambles-stop-iran-providing-drones-russia/>.

2023, the US issued a new wave of sanctions targeting the supply of Iranian drones to Russia, building on the sanctions issued in November 2022, this time aimed at six executives and board members of QAI.¹⁴¹

Furthermore, while it would be an overstatement that the US sanctions of Iranian oil exports are failing completely, Iran continues to export oil in high quantities. “The numbers are far below the over 2.5 million barrels per day the Persian Gulf nation was exporting in early 2018—before the Trump administration withdrew the US from the international nuclear deal with Tehran and imposed unilateral sanctions — but they are much higher than those at times during 2020 when exports fell to less than 500,000 barrels per day.”¹⁴² Compared to the value of China’s crude oil imports from the UAE and Malaysia—\$4.14 and \$4.27 billion USD in December 2022 respectively— the \$12 million USD of Chinese oil imports from Iran can be considered negligible.¹⁴³ However, as China has used UAE and Malaysia to import undeclared Iranian oil before, it is safe to assume that a share of the oil which China imported from the UAE and Malaysia in 2022 was originally from Iran.¹⁴⁴ The value of China-Iran trade has also risen by around \$1 billion USD in 2022 compared to 2021, which does not include the undeclared oil imports from Iran and reflects mainly the growth in Chinese exports to Iran.¹⁴⁵

The nuclear question

Iran’s current nuclear capacity

Currently, Iran can achieve the level of uranium enrichment necessary for a nuclear weapon in under a week, but it would take six to 24 months of testing before the weapon could be used effectively. As the first nuclear plant construction with only Iranian technology is projected to be completed in 2030, there is potential that in the long-term, Iran could start exporting nuclear plants. However, this possibility will heavily depend on internal Iranian politics and international developments.

¹⁴¹ Daphne Psalidakis and Arshad Mohammed, “New U.S. Sanctions Target Supply of Iranian Drones to Russia,” *Reuters*, January 6, 2023, sec. Aerospace & Defense, <https://www.reuters.com/business/aerospace-defense/us-targets-supply-iranian-drones-russia-new-sanctions-2023-01-06/>.

¹⁴² Srinivas Mazumdar and Nik Martin, “How Iran Is Boosting Oil Exports despite US Sanctions – DW – 02/01/2023,” *dw.com* (DW, February 1, 2023), <https://www.dw.com/en/how-iran-is-boosting-oil-exports-despite-us-sanctions/a-64562167>.

¹⁴³⁻¹⁴⁵ Bourse & Bazaar Foundation, “China-Iran Trade Report (December 2022),” Bourse & Bazaar Foundation (Bourse & Bazaar Foundation, February 7, 2023), <https://www.bourseandbazaar.com/china-iran-trade-reports/december-2022>.

Construction began on Iran's first completely Iranian technology nuclear power plant in Karoon in December 2022, located in the southwest region of the country in the Khuzestan province.¹⁴⁶ The new Iranian Karoon project is worth \$2 billion USD, and its expected completion date is 2030,¹⁴⁷ coinciding with full expiration of the JCPOA. Khuzestan province borders Iraq and Bushehr province, where Iran's foreign-built Bushehr nuclear plant has been under construction since 1974, but consistently operational at varying levels only since 2011.¹⁴⁸ In 2016, construction on two additional reactors at the Bushehr site began with Russian technology, with expected completion still three years out and projected for 2026, importantly one year after many provisions of the JCPOA will expire.¹⁴⁹ Construction on the clandestine Fordow site in Qom, south of Tehran, was begun in 2006 with Russian assistance and became operational in 2011 at low levels.¹⁵⁰ The 2015 JCPOA signage halted activities at Fordow, transforming the center into a research facility. However, since November 2019, uranium enrichment has been resumed at Fordow in response to US JCPOA unilateral withdrawal.¹⁵¹ The new Karoon plant, the initial Bushehr plant, and the clandestine Fordow plant, and other Iranian nuclear facilities in Isfahan, Arak and Natanz are all well-dispersed in the Iranian territory, requiring multiple strikes for their destruction. The Fordow site was even constructed beneath a mountain for additional protection from attacks. While minor Israeli strikes have been undertaken for decades against Iran's nuclear program, against both personnel and facilities (the most recent attack was on Isfahan in 2023), no major attack had occurred to date.¹⁵² The looming risk of a major Israeli attack on Iranian nuclear facilities, nevertheless, persists.

Iran has cranked up uranium enrichment significantly in the past year. The Iranian Atomic Energy Organization on November 22, 2022, announced the commencement of uranium enrichment to the 60% level at the underground Fordow facility. As of January 2023, according to the European Parliamentary Research Service, Iran enriched more than 70kg of uranium to 60% U-235, which

¹⁴⁶⁻¹⁴⁷ AP and TOI staff, "Iran Starts Construction on \$2 Billion Nuclear Power Plant Karoon, State Media Says," [www.timesofisrael.com](https://www.timesofisrael.com/iran-starts-construction-on-new-nuclear-power-plant-karoon-state-media-says/), December 3, 2022, <https://www.timesofisrael.com/iran-starts-construction-on-new-nuclear-power-plant-karoon-state-media-says/>.

¹⁴⁸⁻⁹ Nuclear Threat Initiative, "Bushehr Nuclear Power Plant (BNPP)," The Nuclear Threat Initiative, n.d., <https://www.nti.org/education-center/facilities/bushehr-nuclear-power-plant-bnpp/>.

¹⁵⁰ Reuters Staff, "Factbox - Iran's Fordow Plant," Reuters, May 24, 2012, sec. World News, <https://www.reuters.com/article/uk-nuclear-iran-fordow-plant-idUKBRE84N0M120120524>.

¹⁵¹ Parisa Hafezi, "Iran Fuels Centrifuges, Resumes Uranium Enrichment at Fordow," Reuters, November 6, 2019, sec. Emerging Markets, <https://www.reuters.com/article/us-iran-nuclear-uranium-idUSKBN1XG2WN>.

¹⁵² Raffi Berg, "Iran Says Drone Attack on Military Site in Isfahan Was Thwarted," *BBC News*, January 29, 2023, sec. Middle East, <https://www.bbc.com/news/world-middle-east-64445306>.

could be brought to weapons-grade 90% U-235 in under a week.¹⁵³ A NATO brief asserted stockpiles of 92kg of 60% enriched uranium at the same time of this report in November 2022.¹⁵⁴ Since late February 2023, Iranian uranium enrichment as high as 84% has been alleged by the IAEA.¹⁵⁵ According to this international agency, 25kg of 90% enriched uranium is sufficient to produce one nuclear bomb.¹⁵⁶ While the precise figures cannot be known at present, these estimates show that Iran could produce the material required for two to three atomic weapons in just a few days.

As put by IAEA director general Rafael Grossi to the EU Parliament in January 2023, “Iran now has more than enough high enriched uranium to make a bomb. That does not mean it has a bomb, but it does have the material for it.”¹⁵⁷ Producing enough enriched material is only the first step in crafting an atomic weapon. After the fabrication phase, the uranium must be integrated into a missile head. Next, the nuclear device must be detonated in testing, ideally multiple times for “smaller, more efficient designs.”¹⁵⁸ This caveat is important in the case of Iran, whose missile heads and stockpiles of enriched uranium are both smaller in size. The testing required for Iran to develop an accurate atomic weapon would thus almost certainly alert the international community. Missile testing with an inert warhead would be the final step for Iran to achieve an atomic weapon.¹⁵⁹ However, given the context of Iran’s extensive military experience with missiles, this final stage of testing would likely go unnoticed and not alert the international community to the imminent danger. The aforementioned NATO brief states: “These additional steps might take 18 to 24 months, although one reputable American analyst thinks Iran could do it in six months.”¹⁶⁰

¹⁵³ Beatrix Immenkamp and Julie Claustre, “EU Relations with Iran” (European Parliamentary Research Service, February 1, 2023), [https://www.europarl.europa.eu/RegData/etudes/BRIE/2023/739317/EPRS_BRI\(2023\)739317_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/BRIE/2023/739317/EPRS_BRI(2023)739317_EN.pdf).

¹⁵⁴ Mark Fitzpatrick, “NDC - News- the Iran Nuclear Deal: Consequences of Moribund Diplomacy,” www.ndc.nato.int, February 17, 2023, <https://www.ndc.nato.int/news/news.php?icode=1802#>.

¹⁵⁵ Maziar Motamedi, “Iran Denies Enriching Uranium to 84 Percent Purity amid IAEA Row,” www.aljazeera.com, February 20, 2023, <https://www.aljazeera.com/news/2023/2/20/iran-denies-enriching-uranium-to-84-percent-purity-amid-iaea-row>.

¹⁵⁶ Kelsey Davinport and Daryl Kimball, “With Further Nuclear Moves, Iran Seeks to Leverage Promised Sanctions Relief | P4+1 and Iran Nuclear Deal Alert | Arms Control Association,” www.armscontrol.org, July 9, 2019, <https://www.armscontrol.org/blog/2019-07-09/p4-plus-1-iran-nuclear-deal-alert>.

¹⁵⁷ Rafael Grossi, “Exchange of Views with the European Parliament,” January 24, 2023, https://www.europarl.europa.eu/cmsdata/263378/AFET_SEDE_20230124_speaking%20points_DG%20Grossi_IAEA.pdf.¹⁵⁸

¹⁵⁹ Kelsey Davinport and Daryl Kimball, “With Further Nuclear Moves, Iran Seeks to Leverage Promised Sanctions Relief | P4+1 and Iran Nuclear Deal Alert | Arms Control Association,” www.armscontrol.org, July 9, 2019, <https://www.armscontrol.org/blog/2019-07-09/p4-plus-1-iran-nuclear-deal-alert>.

¹⁶⁰ Mark Fitzpatrick, “NDC - News- the Iran Nuclear Deal: Consequences of Moribund Diplomacy,” www.ndc.nato.int, February 17, 2023, <https://www.ndc.nato.int/news/news.php?icode=1802#>.

Civil nuclear industry development

Due to high regional instability, and the regime's desire to further sway the balance of power in the Middle East in Tehran's favor, it remains highly unlikely that Iran would export a nuclear plant to any of its regional allies, even if Iran obtained the capability to do so in the future. While Saudi Arabia intensely desires a nuclear program to balance Iran, Saudi Arabia turns to its Western allies, especially the US, when pursuing such ends.¹⁶¹ Even in the context of the recent Saudi-Iranian rapprochement brokered by China, the essential interests of both countries should prevent their future collaboration on the nuclear front.

Iran's position as a competitor to Russia or China in 'exporting' nuclear plants to non-Western countries is nevertheless possible in the long term. As early as 2009, Iran and Venezuela were reportedly collaborating towards the establishment of a peaceful Venezuelan nuclear program, principally in the area of uranium location and extraction in Venezuela.¹⁶² Russia made a 2008 proposal to construct a nuclear power plant in Venezuela through Atomstroyexport, the same company which completed the Iranian Bushehr construction.¹⁶³ Iranian-Venezuelan relations weakened after Rouhani replaced Ahmadinejad, due to Rouhani's desire to broker a nuclear deal with the West. However, in Rouhani's second term, Iran revitalized diplomatic and economic ties with Venezuela. Under Raisi, Iranian relations with Venezuela are again strong. Being two sanctioned countries, Iranian-Venezuelan trade alleviates economic pressure on both economies and involves collaboration in fossil fuels and Iranian defense exports to Venezuela.¹⁶⁴ While no news on nuclear developments in Venezuela have followed since the initial exploratory phases in 2008-9, the possibility of Iranian nuclear plant exportation to Venezuela in the future cannot be discarded, especially given increasing Iranian technological independence in the nuclear field, the persistence of international sanctions against the government of Maduro, and the good health of foreign relations between Iran and Venezuela. Iranian nuclear plant exports, if they occur at all, would be in the long term.

¹⁶¹ Michael Crowley, Vivian Nereim, and Patrick Kingsley, "Saudi Arabia Offers Its Price to Normalize Relations with Israel," *The New York Times*, March 10, 2023, sec. U.S., <https://www.nytimes.com/2023/03/09/us/politics/saudi-arabia-israel-united-states.html?referringSource=articleShare>.

¹⁶² Teresa Cespedes, "Chavez Says Iran Helping Venezuela Find Uranium," Reuters, October 17, 2009, sec. World News, <https://www.reuters.com/article/uk-venezuela-iran-uranium-idUKTRE59G1ZL20091017>.

¹⁶³ Nima Gerami and Sharon Squassoni, "Venezuela: A Nuclear Profile," Carnegie Endowment for International Peace, December 18, 2008, <https://carnegieendowment.org/2008/12/18/venezuela-nuclear-profile-pub-22568>.

¹⁶⁴ Eric Lob, "Iran-Venezuela Relations: Presidents, Postures, and Pressures," Middle East Institute, August 22, 2022, <https://www.mei.edu/publications/iran-venezuela-relations-presidents-postures-and-pressures>.

The JCPOA

JCPOA prospects

Recently only China out of the P-5 seems to endorse the negotiations. Russia ceased to actively strive for the agreement since the outbreak of the Ukrainian war, and the Western negotiators seem to be unable to reach a consensus with Tehran. Furthermore, it is highly unlikely that the JCPOA could be concluded without the US. The implementation of the JCPOA would likely heavily depend on the internal US politics, where the Iranian nuclear question is a divisive partisan matter. If the JCPOA negotiations fail completely, there is a real possibility of military confrontation with Iran from the Israelis.

There are three main issues preventing the consensus on the JCPOA. The first problem that Iran has so far been unwilling to concede on is the demand that the International Atomic Energy Agency (IAEA) investigate Iran's past nuclear activities in the undeclared sites.¹⁶⁵ Tehran demands that the IAEA halt its investigations, yet the West cannot influence the actions of the independent UN agency.¹⁶⁶ Secondly, there is a disagreement over the listing of the IRGC as a Foreign Terrorist Organization by the Trump administration, and although Biden's team has proposed to delist IRGC list twice, the delisting has not occurred to date.¹⁶⁷ This issue only stands to be worsened by the EU Parliament's adoption of a January 2023 proposal to add the IRGC, Quds Force, and Basij militia to the EU list of terrorist organizations.¹⁶⁸ Lastly, in light of Trump's withdrawal from the JCPOA, Iran is asking for the guarantee that JCPOA sanction relief will endure beyond Biden's presidency, however, Biden's administration cannot assure long-term continuity of the agreement, as it would be unconstitutional in the US bipartisan democracy.¹⁶⁹ Two of Iran's three demands, being the halting of IAEA investigations in Iran, and a guarantee against another US withdrawal, can thus not be legally granted by the West under current international and internal US law. Nevertheless, the third main demand, the delisting of the IRGC as a Foreign Terrorist Organization, could be more easily, and legally, granted. Additionally, the human rights abuses of

¹⁶⁵ International Crisis Group, "Is Restoring the Iran Nuclear Deal Still Possible?," www.crisisgroup.org, September 12, 2022, <https://www.crisisgroup.org/b87-middle-east-north-africa/gulf-and-arabian-peninsula/iran/restoring-iran-nuclear-deal-still>.

¹⁶⁶ Ibid.

¹⁶⁷ Ibid.

¹⁶⁸ Beatrix Immenkamp and Julie Claustre, "EU Relations with Iran" (European Parliamentary Research Service, February 1, 2023), [https://www.europarl.europa.eu/RegData/etudes/BRIE/2023/739317/EPRS_BRI\(2023\)739317_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/BRIE/2023/739317/EPRS_BRI(2023)739317_EN.pdf).

¹⁶⁹ International Crisis Group, "Is Restoring the Iran Nuclear Deal Still Possible?," www.crisisgroup.org, September 12, 2022, <https://www.crisisgroup.org/b87-middle-east-north-africa/gulf-and-arabian-peninsula/iran/restoring-iran-nuclear-deal-still>.

the Iranian regime in the context of women's rights, the arrests of Western-Iranian dual-national activists and journalists, and the use of force in suppressing the 2022-2023 political protests have created additional tensions with the West. These controversies difficult nuclear negotiations and make diplomatic engagement with Iran less popular with key Western publics, such as in the US, France, and the UK. While some dual nationals such as the French-Iranian journalist Farida Adelkhah were importantly released by the Iranian regime to appease Western governments, others are still detained in Iranian prisons.¹⁷⁰

In general, since the outbreak of the Ukrainian war, JCPOA negotiations have stalled. Russia, who played a positive role in the JCPOA negotiations in 2021, became a hindrance to the negotiations in 2022, as it refuses to isolate the diplomatic talks from its tensions with the West.¹⁷¹ When negotiations produced a near-final agreement in March 2022, Raisi was easily swayed by last-minute Russian interference and the agreement was not signed.¹⁷² As Russia became more dependent on the Islamic Republic, it also became less capable of criticizing Iran or pushing it to accept a deal.¹⁷³ Additionally, while Moscow still does not want an Iran armed by nuclear weapons, the Iranian hedging strategy might be perceived by Moscow as a useful way to provide a distraction to the West from Russia, disincentivizing Russia to renew the JCPOA.¹⁷⁴ In September 2022, the final JCPOA text based on the European offer failed again, with both Tehran and the West accusing each other for not being seriously committed to go through with the deal.¹⁷⁵ A NATO policy brief from February 2023 reports that in early November 2022, US President Biden privately referred to the JCPOA as “dead,” meanwhile the EU High Representative for Foreign Affairs and Security policy is still actively pressing for a JCPOA renewal.¹⁷⁶ The Iranian Foreign minister met with the EU High Representative for Foreign Affairs and Security Policy in December 2022 in Baghdad, with hopes of concluding the deal. The Baghdad meeting proved to

¹⁷⁰ Seth Frantzman, “Why Is Iran Pardoning Protesters? - Analysis,” *The Jerusalem Post* / *JPost.com*, February 6, 2023, <https://www.jpost.com/middle-east/iran-news/article-730701>.

¹⁷¹ Hanna Notte, “Don’t Expect Any More Russian Help on the Iran Nuclear Deal,” *War on the Rocks*, November 3, 2022, <https://warontherocks.com/2022/11/dont-expect-any-more-russian-help-on-the-iran-nuclear-deal/>.

¹⁷² International Crisis Group, “Is Restoring the Iran Nuclear Deal Still Possible?,” www.crisisgroup.org, September 12, 2022, <https://www.crisisgroup.org/b87-middle-east-north-africa/gulf-and-arabian-peninsula/iran/restoring-iran-nuclear-deal-still>.

¹⁷³⁻¹⁷⁴ Hanna Notte, “Don’t Expect Any More Russian Help on the Iran Nuclear Deal,” *War on the Rocks*, November 3, 2022, <https://warontherocks.com/2022/11/dont-expect-any-more-russian-help-on-the-iran-nuclear-deal/>.

¹⁷⁵ Maziar Motamedi, “Where Does the Iran Nuclear Deal Stand Right Now?,” www.aljazeera.com, February 23, 2023, <https://www.aljazeera.com/news/2023/2/20/what-exactly-happened-to-the-iran-nuclear-deal>.

¹⁷⁶⁻¹⁷⁷ Mark Fitzpatrick, “NDC - News- the Iran Nuclear Deal: Consequences of Moribund Diplomacy,” www.ndc.nato.int, February 17, 2023, <https://www.ndc.nato.int/news/news.php?icode=1802#>.

be unsuccessful yet again, with Iran reiterating its two original demands which the West cannot legally grant: guarantees against another US withdrawal and a halting of IAEA investigations of past undeclared nuclear activities in Iran.¹⁷⁷ Additionally, the position of the EU High Representative is not necessarily in line with that of the E3, who despite having published two joint statements in February¹⁷⁸ and March 2023¹⁷⁹ criticizing Iran's violation of the 2015 agreement and calling for further IAEA action, have not clarified their position on the JCPOA renewal.

However, the recent news of high uranium enrichment in Iran led to an intensification of diplomatic exchanges with Iran, signalling an attempt to revive the JCPOA negotiations.¹⁸⁰ For example, the Sultan of Oman is expected to visit Tehran soon with an aim to hold talks on the stalled JCPOA.¹⁸¹ Oman has acted as an intermediary between Washington and Tehran in the last two decades.¹⁸² Furthermore, China seems to be in favor of reviving the JCPOA talks as well. During the visit of Raisi to Beijing in February 2023, Xi Jinping reassured Raisi that China will support Iran in negotiations on the nuclear deal, despite negotiations being in a complete stalemate.¹⁸³ However, China seems to be benefiting from the status quo of the unsolved JCPOA problem: as has been mentioned before, through the importation of undeclared Iranian crude, China has established a source of cheap oil for itself while at the same time providing a source of income for Tehran and avoiding the potential destabilization of the Iranian regime that could be caused by Iran's economic isolation.¹⁸⁴ In that sense, the only reasonable answer to why China is trying to revitalize the JCPOA negotiations again is Beijing's perception that the failure of the diplomatic approach to the nuclear problem is seriously affecting the established regional equilibrium which might potentially be collapsing.¹⁸⁵ While China's dedication to the restoration of the JCPOA demonstrated in Raisi's visit to Beijing and the upcoming visit of the Sultan of Oman to Tehran might be indicators that efforts to revive JCPOA talks persist, the potential of these efforts is still unclear, as official JCPOA negotiations have not resumed as of March 2023.

¹⁷⁸ Ministère de l'Europe et des Affaires étrangères, "Statement by France, Germany, the United Kingdom and the United States on the IAEA's Latest Report on Iran's Nuclear Program (3 Feb. 2023)," France Diplomacy - Ministry for Europe and Foreign Affairs, February 3, 2023, <https://www.diplomatie.gouv.fr/en/country-files/iran/news/article/statement-by-france-germany-the-united-kingdom-and-the-united-states-on-the>.

¹⁷⁹ Foreign, Commonwealth & Development Office, "E3 Statement to the IAEA Board of Governors on the Joint Comprehensive Plan of Action, March 2023," GOV.UK, March 8, 2023, <https://www.gov.uk/government/speeches/e3-statement-to-the-iaea-board-of-governors-on-the-joint-comprehensive-plan-of-action-march-2023>.

¹⁸⁰ Jacopo Scita, "Can China Be the JCPOA's Last Hope?," *thediplomat.com*, February 23, 2023, <https://thediplomat.com/2023/02/can-china-be-the-jcpoas-last-hope/>.

¹⁸¹⁻¹⁸² Iran International, "Sultan of Oman to Travel to Iran Regarding Nuclear Talks: MP," Iran International, February 22, 2023, <https://www.iranintl.com/en/202302227372>.

¹⁸³⁻¹⁸⁵ Jacopo Scita, "Can China Be the JCPOA's Last Hope?," *thediplomat.com*, February 23, 2023, <https://thediplomat.com/2023/02/can-china-be-the-jcpoas-last-hope/>.

Whatever the other international developments yield, the JCPOA is highly unlikely to be concluded without the US. In Baghdad 2022, the Iranian Foreign minister demanded of the EU Foreign Representative a guarantee in the renewed JCPOA against another US withdrawal.¹⁸⁶ Iran insists on a JCPOA that not only includes the US but ensures the US will not exit it. Unfortunately for the JCPOA negotiations, even the US president does not have the legal power to ensure that the US will not exit the JCPOA. In the US, the JCPOA is an intensely partisan issue, mostly favored by the Democrats and mostly rejected by the Republicans. A Democrat US president, though not necessarily Biden, would have to be in the White House to first negotiate and sign the JCPOA. Since December 2021, Biden’s approval ratings have fallen below 50%. As of March 5, 2023, Biden stood at 42% approval. Comparatively in the 2020 election, Biden won with 51% of the US popular vote.¹⁸⁷

Figure 2: US 2024 Presidential Elections Scenarios

2024	Democrat President	Republican President
Republican Congressional Control	JCPOA can be signed; fails to pass	No JCPOA
Split Congressional Control	JCPOA can be signed; fails to pass	No JCPOA
Democrat Congressional Control	JCPOA can be signed; passes successfully	No JCPOA

¹⁸⁶ Mark Fitzpatrick, “NDC - News- the Iran Nuclear Deal: Consequences of Moribund Diplomacy,” www.ndc.nato.int, February 17, 2023, <https://www.ndc.nato.int/news/news.php?icode=1802#>.

¹⁸⁷ IPSOS, “Biden Approval Polling Tracker,” Reuters, March 8, 2023, <https://www.reuters.com/graphics/USA-BIDEN/POLL/nmopagnqapa/>.

Biden's re-election is not a given, though the 80-year-old president officially launched his campaign for re-election in late April. From the Republican party, former president Donald Trump will run again in 2024, having announced his candidacy in fall 2022.¹⁸⁹ A Republican US president would likely be unwilling to negotiate or sign a renewed JCPOA. In addition to the presidential issue, with the Democrats currently controlling the Senate and the Republicans controlling the House, albeit in both cases by a narrow margin, the 2024 congressional elections would have to preserve the Democrat's majority in the Senate and create a new Democrat majority in the House in order for the JCPOA to pass into US law. The volatility and polarization of the current US political system makes only one of six electoral scenarios where the JCPOA can be signed and passed into US law before the end of 2025. Given Biden's falling approval ratings, now well below 50%, Biden's re-election seems less than certain, and such political polarization as the US faces currently renders improbable a total Democrat sweep of the executive and legislative branches of government. Far more probable are the scenarios in which the JCPOA can be negotiated and signed by a Democrat president but fails to pass in a Republican or split Congress, or where a JCPOA is not negotiated or signed at all by a Republican president. In the least likely scenario that a Democrat wins the US presidency in 2024, and the Democrats also secure control of the Congress, the odds bode well that US participation in the JCPOA will last at least until 2028. However, Iran's long-term approach to the JCPOA may very well mean that even this period of four-year relative security regarding US participation is insufficient incentive to secure the renewal of the nuclear deal.

Overall, prospects for the JCPOA renewal bode poorly. Of the P-5, only China seems to be recently enthusiastically endorsing JCPOA renewal.¹⁹⁰ Of Iran's three main demands—no more IAEA investigations into undeclared past nuclear activities, guarantees against US withdrawal, and the removal of IRGC from international terrorist lists—the first demand cannot be granted at all, the second demand cannot be granted but can be reasonably assured for the next four years in just one of six possible US electoral scenarios in 2024 (being a full Democrat sweep of the executive and legislative branches, which is unlikely), and merely the third demand can likely be

¹⁸⁸ Christopher Cadelago et al., "Biden May Not Run — and Top Dems Are Quietly Preparing," Politico, February 22, 2023, <https://www.politico.com/news/2023/02/22/bidenworld-joe-may-not-run-2024-00083905>.

¹⁸⁹ Domenico Montanaro, "2024 Republican Presidential Candidates: A List of Who Is or May Be Running," NPR, March 8, 2023, <https://www.npr.org/2023/03/08/1160113954/2024-republican-presidential-candidates-who-is-running-tracker#scott>.

¹⁹⁰ Jacopo Scita, "Can China Be the JCPOA's Last Hope?," *thediplomat.com*, February 23, 2023, <https://thediplomat.com/2023/02/can-china-be-the-jcpoas-last-hope/>.

fully granted. It is likely that the JCPOA will not be signed before the November 2024 US elections. If the JCPOA were to be signed, it would likely occur in late 2024 or early 2025, in order to give US participation in the agreement maximum lifespan, and to boost Raisi's potential candidacy for the Supreme Leadership.¹⁹¹ Both the US and Iranian current presidents will face re-election in 2024 and 2025, respectively. This timing will coincide neatly with the ending of some of the main provisions of the JCPOA in 2025, which as an agreement will expire fully in 2030. Regardless, it appears more likely than not that the JCPOA will not be renewed at all.

International reactions to an Iranian nuclear club accession

As JCPOA talks stall, Iran has cranked up uranium enrichment significantly in the past year. At present, Iran could produce the material required for two to three atomic weapons in a few days. Currently, Iran's nuclear program is the most advanced it has ever been in the country's history.¹⁹² While it seems that Iran is mainly using its nuclear program for leverage in negotiations with the West, there is some possibility, though small, that Iran would aim at obtaining a nuclear weapon. Considering the reoccurring protests and Iran's perception that the West would support regime change in Iran, Tehran might see a nuclear club accession as the only way to preserve their existing political system.¹⁹³ Furthermore, the new market for weapons that Russia offers Iran due to the war in Ukraine might lead Tehran to believe that Russia's support would mitigate Western pressure, which could make the current moment a "good" time for Iran to pursue a nuclear weapon, if Iran wishes to do so.¹⁹⁴

In the past six months, the nuclear risk posed by Iran has increased and will continue to do so in the areas of: expansion of enrichment at Fordow uranium enrichment facility, growth of highly enriched uranium stockpiles, and the increasing nuclear monitoring gap. The increasing nuclear risk posed by Iran renders the international status quo increasingly unsustainable.¹⁹⁵ As mentioned before, it is likely that some actors like China have already recognized the seriousness of the situation and will act upon it, as it can be seen by Xi's expressed dedication to the restoration of

¹⁹¹ Vali Nasr, "Why Raisi Is the West's Best Hope for a Deal with Iran," *Foreign Policy*, June 23, 2021, <https://foreignpolicy.com/2021/06/23/ebrahim-raisi-iran-nuclear-deal/>.

¹⁹² Davenport, Kelsey. "The Iranian Nuclear Crisis: Time for Plan B | Arms Control Association." *www.armscontrol.org*, December 2022. <https://www.armscontrol.org/act/2022-12/features/iranian-nuclear-crisis-time-plan-b>.

¹⁹³ Holly Dagues, "Iran's Nuclear Program Is Advancing. So Too Should Negotiations.," *Atlantic Council*, March 2, 2023, <https://www.atlanticcouncil.org/blogs/iransource/irans-nuclear-program-is-advancing-so-too-should-negotiations/>.

¹⁹⁴⁻¹⁹⁵ Davenport, Kelsey. "The Iranian Nuclear Crisis: Time for Plan B | Arms Control Association." *www.armscontrol.org*, December 2022. <https://www.armscontrol.org/act/2022-12/features/iranian-nuclear-crisis-time-plan-b>.

the JCPOA during Raisi's visit to Beijing.¹⁹⁶ Whether it will be in the framework of the JCPOA, or another new diplomatic approach, the need to reengage Iran in negotiations is pressing.¹⁹⁷

As can be seen above, the world's response to the threat of Iran's enrichment has been undecisive and relatively soft, provoking great anguish in Israel.¹⁹⁸ In order to disincentivize Israel from pursuing military action, the US is trying to send a threatening message to Tehran about the possibility of military action: the Israel Defense Forces and the US Central Command has conducted the largest-ever joint exercise in Israel and the eastern Mediterranean in January 2023.¹⁹⁹ The possibility of the military confrontation with Iran cannot be completely ruled out. First of all, it is likely that rather than allowing Iran to develop a nuclear weapon during his administration, Biden would rather use military force.²⁰⁰ Additionally, due to the "black spots" in the current monitoring system, it is possible that Iran "could misjudge the leeway it has to maneuver and cross a line that triggers U.S. or, more likely, Israeli military action." The threat of premature use of force from Israel against Iran is further increased by the shortening of the window for disruption of Iranian nuclear weapon acquisition, considering high uranium enrichment and the significant protection which covert facilities could afford an Iranian nuclear weapon once assembled.²⁰¹

Under Netanyahu, Israel's stance on Iran achieving nuclear weapons is clear. In his address to the Iranian people in March 2023, Netanyahu said that "a horrible nuclear war" will follow if Tehran is not stopped in its nuclear advancements.²⁰² Furthermore, Netanyahu was angered by the comment of Rafael Grossi that a military attack on Iranian nuclear facility is illegal under international law.²⁰³ Netanyahu has also warned that other regimes will rush to arm themselves in response to the threat posed by Iran, leading to the "the criss-crossing of the Middle East with

¹⁹⁶ Jacopo Scita, "Can China Be the JCPOA's Last Hope?," *thediplomat.com*, February 23, 2023, <https://thediplomat.com/2023/02/can-china-be-the-jcpos-last-hope/>.

¹⁹⁷ Davenport, Kelsey. "The Iranian Nuclear Crisis: Time for Plan B | Arms Control Association." *www.armscontrol.org*, December 2022. <https://www.armscontrol.org/act/2022-12/features/iranian-nuclear-crisis-time-plan-b>.

¹⁹⁸⁻¹⁹⁹ Lazar Berman, "Even 84% Enrichment Doesn't Make It Any Easier for Israel to Move West on Iran," *www.timesofisrael.com*, March 8, 2023, <https://www.timesofisrael.com/even-84-enrichment-doesnt-make-it-any-easier-for-israel-to-move-west-on-iran/>.

²⁰⁰⁻²⁰¹ Davenport, Kelsey. "The Iranian Nuclear Crisis: Time for Plan B | Arms Control Association." *www.armscontrol.org*, December 2022. <https://www.armscontrol.org/act/2022-12/features/iranian-nuclear-crisis-time-plan-b>.

²⁰² Tovah Lazaroff, "Netanyahu: 'Horrible Nuclear War' Will Break Out, If Iran Isn't Stopped," *The Jerusalem Post* (The Jerusalem Post, March 9, 2023), <https://www.jpost.com/middle-east/article-733901>.

²⁰³ Miriam Berger and Sanam Mahoozi, "At the Center of Iran's Uprising, Kurds Now Face a Mounting Crackdown," *Washington Post*, October 18, 2022, <https://www.washingtonpost.com/world/2022/10/18/iran-kurds-protests-mahsa-amini/>.

nuclear trip wires.”²⁰⁴ An example of such “criss-crossing” as feared by Netanyahu can already be found in Saudi Arabia, whose efforts to establish a civil nuclear program can be perceived as a step to obtain a nuclear weapon, provoked by Iran’s approximation to a nuclear club accession.²⁰⁵ The decided resumption of diplomatic relations between Saudi Arabia and Iran mediated by China can also be seen as an attempt by both Saudi Arabia and China to avoid Iranian nuclear proliferation.²⁰⁶ For the Iranian rapprochement with Saudi Arabia to be effective in the long term, Iran’s nuclear problem will have to be addressed.²⁰⁷

In the end, no global power wants another nuclear weapon in an already unstable Middle East. China has tried to address the issue though expressing its dedication to the JCPOA during Raisi’s visit to Beijing, as well as through mediating between Iran and the Saudis. The US is simultaneously attempting to dissuade Israel against military action in Iran, and to dissuade Iran from nuclear overstepping through the message of US joint military action in Israel. Israel, on the other hand, is unambiguous about its future actions should Iranian proliferation be achieved, warning the world unequivocally against the possibility of an ugly nuclear war and further proliferation in the Middle East.

²⁰⁴ Tovah Lazaroff, “Netanyahu: ‘Horrible Nuclear War’ Will Break Out, If Iran Isn’t Stopped,” *The Jerusalem Post* (The Jerusalem Post, March 9, 2023), <https://www.jpost.com/middle-east/article-733901>.

²⁰⁵ Michael Crowley, Vivian Nereim, and Patrick Kingsley, “Saudi Arabia Offers Its Price to Normalize Relations with Israel,” *The New York Times*, March 10, 2023, sec. U.S., <https://www.nytimes.com/2023/03/09/us/politics/saudi-arabia-israel-united-states.html?referringSource=articleShare>.

²⁰⁶⁻²⁰⁷ Phil Stewart, Michelle Nichols, and Phil Stewart, “Analysis: China Role in Saudi, Iran Deal a Tricky Test for U.S.,” *Reuters*, March 11, 2023, sec. World, <https://www.reuters.com/world/china-role-saudi-iran-deal-tricky-test-us-2023-03-10/>.

Takeaways: Iran emerging - a nuclear threat and an ally to Russia

The war in Ukraine is driving Iran and Russia closer together both militarily and economically. The war in Ukraine will improve Iran's proxy warfare: it allows Iran to test its weapons in action, and Russian shipments to Iran of US weapons collected in Ukrainian battlefields are providing Iran with vital technological parts and know-how through reverse-engineering.²⁰⁸ Economically, Russia's Gazprom's recent \$40 billion USD deal²⁰⁹ with Iran may replace the lost Western FDI needed to fully exploit Iran's fossil fuel reserves, even as Russia increasingly competes with Iran for the Chinese energy import market in the context of the sharp decline in EU fossil fuel imports from Russia.²¹⁰ The EU energy crisis, however, will not lead to a rapprochement of the EU and Iran. Western investors, unlike Gazprom, will not engage in long-term commitments in Iran, especially after the US 2018 unilateral withdrawal from the JCPOA.

Iran suffers under international sanctions: GDP per capita has dropped by half in the last decade.²¹¹ Increased trade with China and Russia, in addition to smuggling and an advanced tech industry, have increasingly allowed Iran to persist economically even under heavy international sanctions. The outbreak of the war in Ukraine has also facilitated Iranian evasion of the sanctions. Combined with the positive effects of cooperation with Russia on Iran's weapon production,²¹² Tehran will be able to provide better armament to its proxy militias in the region. While Russia was suffering setbacks in Ukraine in 2022, Iran, alongside its proxies Hezbollah and Hamas, have been concerned about the possible implications of Russia's weakness to Iran's advances in Syria.²¹³ Russia and Israel had long held an agreement that allowed Israel to attack inside Syria, without a military

²⁰⁸ Natasha Bertrand, "Russia Has Been Sending Some US-Provided Weapons Captured in Ukraine to Iran, Sources Say | CNN Politics," CNN, March 10, 2023, <https://edition.cnn.com/2023/03/10/politics/russia-iran-ukraine-weapons/index.html>.²⁰⁹ Seth Frantzman, "Russia's Gazprom Signs Major Deal in Iran Worth Billions," The Jerusalem Post | JPost.com, July 19, 2022, <https://www.jpost.com/middle-east/iran-news/article-712520>.

²¹⁰ "Energy Statistics - an Overview," ec.europa.eu, n.d., https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Energy_statistics_-_an_overview#Final_energy_consumption.

²¹¹ "Iran, Islamic Rep. | Data," data.worldbank.org, n.d., <https://data.worldbank.org/country/IR>.

²¹² Peter Beaumont, "Iran Becoming Global Drone Producer on Back of Ukraine War, Says US," *The Guardian*, February 14, 2023, sec. World news, <https://www.theguardian.com/world/2023/feb/14/us-says-iran-becoming-a-drone-leader-as-russia-uses-its-craft-in-ukraine>.

²¹³ Seth J. Frantzman, "Russia Defeat in Ukraine May Influence Iran Proxies War on Israel - Analysis," The Jerusalem Post (The Jerusalem Post, September 15, 2022), <https://www.jpost.com/middle-east/iran-news/article-717203>.

clash with Russia, who also has its forces in the country.²¹⁴ However now that Russia is indebted to Iran, the later might ask for Russia's support in Syria which might also include the potential of Russia providing help to Hezbollah.²¹⁵ In the end, if the Ukrainian war is to end in the short term, it is likely that Russia with Iran will suffer international isolation, however, so long as the war persists, Iran is to gain more opportunities for financial and military development.

When it comes to Iran's nuclear capabilities, Iran's breakout period for weapons-grade uranium stands under a week at present.²¹⁶ However, it would take Iran anywhere from six to 24 months to produce an effective atomic weapon.²¹⁷ Nevertheless, even in the context of a JCPOA renegotiation, the nuclear know-how Iran has acquired recently cannot be undone, and Iran's breakout period cannot be extended to its full 2015 length. Iran is not ready to export nuclear plants in the short term, but the possibility cannot be ruled out in the long term. Iranian JCPOA renegotiations have been characterized by seemingly confident stubbornness rather than desperation. Iran has three demands: no more IAEA investigations into past Iranian nuclear activities in the undeclared sites, the removal of the IRGC from international terrorist lists, and JCPOA guarantees against another US unilateral withdrawal.²¹⁸ Of these three demands, only the second can be legally conceded. Of the P-5 plus one, only China is recently endorsing the JCPOA enthusiastically.²¹⁹ The Western members (US and E3) have increasingly criticized Iran for human rights violations and incompliance with the 2015 agreement. Since the outbreak of the war in Ukraine, Russia became less dedicated to the JCPOA, partly because of its inability to criticize and pressure Iran due to Moscow's dependency on Tehran's drone supplies, and partly because Russia perceives Iranian hedging to be politically more beneficial to Russia than an actual nuclear deal.²²⁰ With US endorsement of the JCPOA intensely dependent on internal politics, and Iranian consideration of the JCPOA intensely dependent on US involvement, any JCPOA signage will

²¹⁴⁻²¹⁵ Ehud Eilam, "The Friction between Israel and Russia, Following the War in Ukraine," Real Clear Defence, March 1, 2023, https://www.realcleardefense.com/articles/2023/03/01/the_friction_between_israel_and_russia_following_the_war_in_ukraine_884516.html.

²¹⁶ Rafael Grossi, "Exchange of Views with the European Parliament," January 24, 2023, https://www.europarl.europa.eu/cmsdata/263378/AFET_SEDE_20230124_speaking%20points_DG%20Grossi_IAEA.pdf.²¹⁷ Mark Fitzpatrick, "NDC - News- the Iran Nuclear Deal: Consequences of Moribund Diplomacy," www.ndc.nato.int, February 17, 2023, <https://www.ndc.nato.int/news/news.php?icode=1802#>.

²¹⁸ International Crisis Group, "Is Restoring the Iran Nuclear Deal Still Possible?," www.crisisgroup.org, September 12, 2022, <https://www.crisisgroup.org/b87-middle-east-north-africa/gulf-and-arabian-peninsula/iran/restoring-iran-nuclear-deal-still>.

²¹⁹ Jacopo Scita, "Can China Be the JCPOA's Last Hope?," thediplomat.com, February 23, 2023, <https://thediplomat.com/2023/02/can-china-be-the-jcpoas-last-hope/>.

²²⁰ Hanna Notte, "Don't Expect Any More Russian Help on the Iran Nuclear Deal," War on the Rocks, November 3, 2022, <https://warontherocks.com/2022/11/dont-expect-any-more-russian-help-on-the-iran-nuclear-deal/>.

likely occur, if at all, after the 2024 US November elections and likely by early 2025 at latest to ensure maximum lifetime of US JCPOA participation. However, it seems more likely than not that the JCPOA will not be renewed at all. Faced with a post-JCPOA Iran, there is a real potential of an Israeli attack on Iran,²²¹ which could plausibly lead to US military support for Israel and a prolongation and expansion of the conflict. China's recent support for the JCPOA²²² can be seen as an indicator of real international fear in the face of the strong potential for an Israeli attack as a response to increasingly ambitious Iranian nuclear hedging.

²²¹ Tovah Lazaroff, "Netanyahu: 'Horrible Nuclear War' Will Break Out, If Iran Isn't Stopped," The Jerusalem Post (The Jerusalem Post, March 9, 2023), <https://www.jpost.com/middle-east/article-733901>.

²²² Jacopo Scita, "Can China Be the JCPOA's Last Hope?," thediplomat.com, February 23, 2023, <https://thedi diplomat.com/2023/02/can-china-be-the-jcpoas-last-hope/>.

CONCLUSION

While Iran is affected by international sanctions and internal instability, the Islamic Republic is well-adapted to survive under both international and domestic pressure. Iran successfully mitigates the effects of the sanctions through smuggling, domestic industry, trade with Russia and China, and reliance on the informal economy. The Iranian regime balances internal political tensions by allowing the moderate opposition to participate in politics just enough to keep the more secular sectors of Iranian society satisfied while the conservative establishment retains real power. Protests are common in Iran due to fluctuating economic conditions which exacerbate political tensions produced by the plurality of Iranian society. When protests occur, the Islamic Republic uses force to quell them. The quality of life in Iran is low enough for the persistence of societal discontent, however, common as protests are internally, they have not yet managed to overthrow the current regime and are unlikely to do so in the short term.

On the regional front, Iran has been providing military and monetary support to its proxies constituting “The Axis of Resistance.” The main regional goal of Iran is to create a Shia support base while at the same time containing other regional powers such as Saudi Arabia and Israel. While in Afghanistan, Iran has chosen to prioritize Iranian national security and contain the possible emergence of the Islamic State, which might result in the diminishment of Iran’s role as a historical Shia protector, Iran has been expanding its influence in other areas in the region. So far, with the help of its proxies, Iran has successfully extended its reach over four Arab capitals – Baghdad, Beirut, Damascus, and Sana’a. Iran’s military presence in Lebanon and Syria is a threat to Israel, while Houthi advancement in the Yemeni civil war poses a security problem for Saudi Arabia. However, despite the common threat of Iran, Israel and Saudi Arabia have been unable to achieve a consensus. While the Abraham Accords marked a step towards possible rapprochement between Israel and the Gulf States, the recent reassumption of diplomatic relations between Saudi Arabia and Iran mediated by China made the normalization between the Saudis and Israel in the short term less likely. Furthermore, neither the Saudis nor the UAE would likely endorse Israeli military action against Iran. In the end, it is safe to assume that Iran’s grasp on the Shia crescent will be increasing in the short term.

In addition, the war in Ukraine has improved Iran’s internal, regional, and international prospects considerably. Russia’s need for weapons opened a new market for Iranian drones, allowing Iran to test its weapons in action, cooperate with Moscow and improve its technological capacity. The

war also distracted the Western powers, making it easier for Iran to eschew the international sanctions, and made Russia more willing to invest in Iran. Iran's rapprochement with Russia will impede any possible cooperation between Iran and the West, which contributes to the ongoing stalemate in JCPOA negotiations. With Russia holding less bargaining power over Iran due to Moscow's need for weapons and the Western powers criticizing Iran over the human rights violations, out of the P-5 plus one only China has recently shown support for JCPOA negotiations. Out of the three demands expressed by Iran: the cessation of the IAEA investigation into Iran's past activities in the undeclared nuclear sites, the removal of the IRGC from the list of international terrorist groups, and the guarantees against US future withdrawal from the agreement, only the second one can be legally granted by the Western negotiators. With US endorsement of the JCPOA depending on its internal politics, the third condition of Iran cannot be guaranteed by the Biden administration. The JCPOA would most likely be signed, if at all, after the US 2024 presidential elections in order to ensure that the US will remain in the deal for the maximum duration of time. However, taking into account how important it is for Iran that the US does not pull out of the deal, it is likely that the JCPOA will not be signed at all. With Iran currently capable of reaching the uranium enrichment required to achieve a nuclear weapon in under a week, there is a real possibility of military action against Iran on the part of Israel. While the US is trying to dissuade Israel from taking unilateral actions, it is likely that the Biden administration would rather use force than allow Iran to obtain the nuclear weapon during his term, resulting in a possible US-Israeli military cooperation against Iran.

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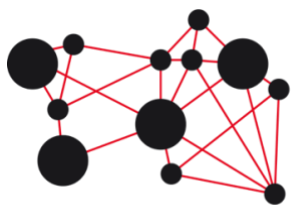
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