

By George Friedman

The Iranians have now agreed to talks with the P-5+1, the five permanent members of the U.N. Security Council (the United States, the United Kingdom, France, Russia and China) plus Germany. These six countries decided in late April to enter into negotiations with Iran over the suspected Iranian nuclear weapons program by Sept. 24, the date of the next U.N. General Assembly meeting. If Iran refused to engage in negotiations by that date, the Western powers in the P-5+1 made clear that they would seriously consider imposing much tougher sanctions on Iran than those that were currently in place. The term "crippling" was mentioned several times.

Obviously, negotiations are not to begin prior to the U.N. General Assembly meeting as previously had been stipulated. The talks are now expected to begin Oct. 1, a week later. This gives the Iranians their first (symbolic) victory: They have defied the P-5+1 on the demand that talks be under way by the time the General Assembly meets. Inevitably, the Iranians would delay, and the P-5+1 would not make a big deal of it.

Talks About Talks and the Sanctions Challenge

Now, we get down to the heart of the matter: The Iranians have officially indicated that they are prepared to discuss a range of strategic and economic issues but are not prepared to discuss the nuclear program — which, of course, is the reason for the talks in the first place. On Sept. 14, they hinted that they might consider talking about the nuclear program if progress were made on other issues, but made no guarantees.

So far, the Iranians are playing their traditional hand. They are making the question of whether there would be talks about nuclear weapons the center of diplomacy. Where the West wanted a commitment to end uranium enrichment, the Iranians are trying to shift the discussions to whether they will talk at all. After spending many rounds of discussions on this subject, they expect everyone to go away exhausted. If pressure is coming down on them, they will agree to discussions, acting as if the mere act of talking represents a massive concession. The members of the P-5+1 that don't want a confrontation with Iran will use Tehran's agreement merely to talk (absent any guarantees of an outcome) to get themselves off the hook on which they found themselves back in April — namely, of having to impose sanctions if the Iranians don't change their position on their nuclear program.

Russia, one of the main members of the P-5+1, already has made clear it opposes sanctions under any circumstances. The Russians have no intention of helping solve the American problem with Iran while the United States maintains its stance on NATO expansion and bilateral relations with Ukraine and Georgia. Russia regards the latter two countries as falling within the Russian sphere of influence, a place where the United States has no business meddling.

To this end, Russia is pleased to do anything that keeps the United States bogged down in the Middle East, since this prevents Washington from deploying forces in Poland, the Czech Republic, the Baltics, Georgia or Ukraine. A conflict with Iran not only would bog down the United States even further, it would divide Europe and drive the former Soviet Union and Central Europe into viewing Russia as a source of aid and stability. The Russians thus see Iran as a major thorn in Washington's side. Obtaining Moscow's cooperation on removing the thorn would require major U.S. concessions — beyond merely bringing a plastic "reset" button to Moscow. At this point, the Russians have no intention of helping remove the thorn. They like it right where it is.

In discussing crippling sanctions, the sole obvious move would be blocking gasoline exports to Iran. Iran must import 40 percent of its gasoline needs. The United States and others have discussed a plan for preventing major energy companies, shippers and insurers from supplying that gasoline. The subject, of course, becomes moot if Russia (and China) refuses to participate or blocks sanctions. Moscow and Beijing can deliver all the gasoline Tehran wants. The Russians could even deliver gasoline by rail in the event that Iranian ports are blocked. Therefore, if the Russians aren't participating, the impact of gasoline sanctions is severely diminished, something the Iranians know well.

Tehran and Moscow therefore are of the opinion that this round of threats will end where other rounds ended. The United States, the United Kingdom and France will be on one side; Russia and China will be on the other; and Germany will vacillate, not wanting to be caught on the wrong side of the Russians. In either case, whatever sanctions are announced would lose their punch, and life would go on as before.

There is, however, a dimension that indicates that this crisis might take a different course.

The Israeli Dimension

After the last round of meetings between Israeli Prime Minister Benjamin Netanyahu and U.S. President Barack Obama, the Israelis announced that the United States had agreed that in the event of a failure in negotiations, the United States would demand — and get — crippling sanctions against Iran, code for a gasoline cutoff. In return, the Israelis indicated that any plans for a unilateral Israeli strike on Iran's nuclear facilities would be put off. The Israelis specifically said that the Americans had agreed on the September U.N. talks as the hard deadline for a decision on — and implementation of — sanctions.

Our view always has been that the Iranians are far from acquiring nuclear weapons. This is, we believe, the Israeli point of view. But the Israeli point of view also is that, however distant, the Iranian acquisition of nuclear weapons represents a mortal danger to Israel — and that, therefore, Israel would have to use military force if diplomacy and sanctions don't work.

For Israel, the Obama guarantee on sanctions represented the best chance at a nonmilitary settlement. If it fails, it is not clear what could possibly work. Given that Supreme Leader Ayatollah Ali Khamenei has gotten his regime back in line, that Iranian President Mahmoud Ahmadinejad apparently has emerged from the recent Iranian election crisis with expanded

clout over Iran's foreign policy, and that the Iranian nuclear program appears to be popular among Iranian nationalists (of whom there are many), there seems no internal impediment to the program. And given the current state of U.S.-Russian relations and that Washington is unlikely to yield Moscow hegemony in the former Soviet Union in return for help on Iran, a crippling sanctions regime is unlikely.

Obama's assurances notwithstanding, there accordingly is no evidence of any force or process that would cause the Iranians to change their minds about their nuclear program. With that, the advantage to Israel of delaying a military strike evaporates.

And the question of the quality of intelligence must always be taken into account: The Iranians may be closer to a weapon than is believed. The value of risking delays disappears if nothing is likely to happen in the intervening period that would make a strike unnecessary.

Moreover, the Israelis have Obama in a box. Obama promised them that if Israel did not take a military route, he would deliver them crippling sanctions against Iran. Why Obama made this promise — and he has never denied the Israeli claim that he did — is not fully clear. It did buy him some time, and perhaps he felt he could manage the Russians better than he has. Whatever Obama's motivations, having failed to deliver, the Israelis can say that they have cooperated with the United States fully, so now they are free by the terms of their understanding with Washington to carry out strikes — something that would necessarily involve the United States.

The calm assumptions in major capitals that this is merely another round in interminable talks with Iran on its weapons revolves around the belief that the Israelis are locked into place by the Americans. From where we sit, the Israelis have more room to maneuver now than they had in the past, or than they might have in the future. If that's true, then the current crisis is more dangerous than it appears.

Netanyahu appears to have made a secret trip to Moscow (though it didn't stay secret very long) to meet with the Russian leadership. Based on our own intelligence and this analysis, it is reasonable to assume that Netanyahu was trying to drive home to the Russians the seriousness of the situation and Israel's intent. Russian-Israeli relations have deteriorated on a number of issues, particularly over Israeli military and intelligence aid to Ukraine and Georgia. Undoubtedly, the Russians demanded that Israel abandon this aid.

As mentioned, the chances of the Russians imposing effective sanctions on Iran are nil. This would get them nothing. And if not cooperating on sanctions triggers an Israeli airstrike, so much the better. This would degrade and potentially even effectively eliminate Iran's nuclear capability, which in the final analysis is not in Russia's interest. It would further enrage the Islamic world at Israel. It would put the United States in the even more difficult position of having to support Israel in the face of this hostility. And from the Russian point of view, it would all come for free. (That said, in such a scenario the Russians would lose much of the leverage the Iran card offers Moscow in negotiations with the United States.)

Ramifications of an Israeli Strike

An Israeli airstrike would involve the United States in two ways. First, it would have to pass through Iraqi airspace controlled by the United States, at which point no one would believe that the Americans weren't complicit. Second, the likely Iranian response to an Israeli airstrike would be to mine the Strait of Hormuz and other key points in the Persian Gulf — something the Iranians have said they would do, and something they have the ability to do.

Some have pointed out that the Iranians would be hurting themselves as much as the West, as this would cripple their energy exports. And it must be remembered that 40 percent of globally traded oil exports pass through Hormuz. The effect of mining the Persian Gulf would be devastating to oil prices and to the global economy at a time when the global economy doesn't need more grief. But the economic pain Iran would experience from such a move could prove tolerable relative to the pain that would be experienced by the world's major energy importers. Meanwhile, the Russians would be free to export oil at extraordinarily high prices.

Given the foregoing, the United States would immediately get involved in such a conflict by engaging the Iranian navy, which in this case would consist of small boats with outboard motors dumping mines overboard. Such a conflict would be asymmetric warfare, naval style. Indeed, given that the Iranians would rapidly respond — and that the best way to stop them would be to destroy their vessels no matter how small before they have deployed — the only rational military process would be to strike Iranian boats and ships prior to an Israeli airstrike. Since Israel doesn't have the ability to do that, the United States would be involved in any such conflict from the beginning. Given that, the United States might as well do the attacking. This would increase the probability of success dramatically, and paradoxically would dampen the regional reaction compared to a unilateral Israeli strike.

When we speak to people in Tehran, Washington and Moscow, we get the sense that they are unaware that the current situation might spin out of control. In Moscow, the scenario is dismissed because the general view is that Obama is weak and inexperienced and is frightened of military confrontation; the assumption is that he will find a way to bring the Israelis under control.

It isn't clear that Obama can do that, however. The Israelis don't trust him, and Iran is a core issue for them. The more Obama presses them on settlements the more they are convinced that Washington no longer cares about Israeli interests. And that means they are on their own, but free to act.

It should also be remembered that Obama reads intelligence reports from Moscow, Tehran and Berlin. He knows the consensus about him among foreign leaders, who don't hold him in high regard. That consensus causes foreign leaders to take risks; it also causes Obama to have an interest in demonstrating that they have misread him.

We are reminded of the 1962 Cuban Missile Crisis only in this sense: We get the sense that everyone is misreading everyone else. In the run-up to the Cuban Missile Crisis, the Americans didn't believe the Soviets would take the risks they did and the Soviets didn't believe the Americans would react as they did. In this case, the Iranians believe the United States will play its old game and control the Israelis. Washington doesn't really understand that Netanyahu may

see this as the decisive moment. And the Russians believe Netanyahu will be controlled by an Obama afraid of an even broader conflict than he already has on his hands.

The current situation is not as dangerous as the Cuban Missile Crisis was, but it has this in common: Everyone thinks we are on a known roadmap, when in reality, one of the players — Israel — has the ability and interest to redraw the roadmap. Netanyahu has been signaling in many ways that he intends to do just this. Everyone seems to believe he won't. We aren't so sure.

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