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The Strategic Balance between Iran and the United States
after the Targeted Killing of Qasem Soleimani
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The tension between Iran and the United States, which increased following the targeted killing of Qasem Soleimani and the subsequent Iranian response, has reached a level of intensity that has not been seen in years. The conduct of both leaderships following the events attests to the fact that they have no interest in an all-encompassing confrontation with one another. Still, Iran will likely resume an asymmetrical struggle aimed at removing the US presence from the Middle East, and especially from Iraq. Therefore, even if thus far the escalation has been contained, the brinkmanship demonstrated by both the United States and Iran, along with the independent actions of pro-Iranian militia elements, could lead quickly to military escalation between the two countries that could reach the point of a broad conflict. With regard to the nuclear issue, Iranian determination to continue to breach its commitments to the JCPOA, even if Tehran emphasizes that these actions are reversible, along with American adherence to a policy of “maximum pressure” and the hardening of European policy vis-à-vis Iran, means little possibility of reviving the nuclear agreement through renewed negotiations. Even if in the coming months Iran chooses to proceed with relatively moderate action, it is doubtful whether it will accede to the demands of the European partners to the agreement. Consequently, there is greater likelihood that the Iranian nuclear issue will be referred to the Security Council, and this in turn would likely intensify Iran’s determination to resort to more extreme responses.

The targeted killing by the United States of Qasem Soleimani, commander of the Iranian Revolutionary Guards Quds Force, caught the regime in Tehran completely off-guard. Soleimani, a senior figure of the Iranian ruling elite who, more than anyone else, symbolized Iran’s regional accomplishments over the past decade, was killed along with other senior officials of the Revolutionary Guards, the deputy commander of the Shiite militias in Iraq, and the founder of the Hezbollah Battalions (an Iraqi Shiite militia with close ties to Iran). The Iranian situational assessment that the US administration is deterred from conducting military responses out of fear of further deterioration, which was based on the lack of response to Iran’s downing of an American plane in June 2019 and its attack on Aramco Oil Company facilities in Saudi Arabia that same month has completely collapsed.

The United States action required Tehran to respond against US targets directly for the first time, and to claim responsibility for doing so. Amidst much uncertainty as to how the US President might react and the potential for immediate escalation, Iran launched a salvo of ballistic missiles at Iraqi military bases housing American troops. Iran's response demonstrated its ability to fire precision rockets with high destructive capacity on the one hand, and on the other hand – possibly after alerting the Americans indirectly in advance – demonstrated an effort to avoid killing Americans to the extent possible, which enabled the US administration to contain the event. The US administration, which under other circumstances would likely have responded in a severe manner, chose to contain the event and to avoid escalation, especially as the attack did not result in any casualties and, apparently, based on the understanding that Tehran was obligated to respond.

The tension between Iran and the United States that resulted from the targeted killing and the Iranian response has reached a level of intensity that has not been seen in years, and the possibility of additional deterioration to the point of a broad clash in the coming months still exists. Still, the conduct of both leaderships attests to the fact that neither has an interest in a large-scale confrontation.

Against this background, the dilemmas facing Washington and Tehran regarding their policies in the near future can be expected to intensify, particularly because in the aftermath of the recent events, both the United States and Iran are hard-pressed to achieve their strategic aims: the US administration has thus far failed to impose a policy change on Iran in the nuclear realm and the regional context, and Iran, for its part, has not succeeded in softening the US rigid adherence to economic sanctions as a main means of pressure.

The United States

President Trump proved his commitment to his red line: injury to American citizens. Still, he has again clarified that he is not interested in war; the failure to respond to the Iranian attack on the American facilities in Iraq (despite the threat of a response that the United States issued one day earlier) has been interpreted as a desire to prevent escalation. From the perspective of the administration, increasing the sanctions on Iran continues to constitute the major means of its “maximum pressure” policy. At this point, the administration is pushing the European countries that are party to the nuclear agreement – France, Germany, and Britain (the EU-3) – to join in the sanctions on Iran. In its view, their decision to begin promoting the Dispute Resolution Mechanism within the framework of the nuclear agreement is meant to result in the renewal of UN Security Council sanctions against Iran.

Although the US administration has proven that it is willing to take military action, the major question remains unanswered: was the killing of Soleimani an isolated incident, or will the administration respond similarly to other Iranian actions and/or to actions of Iran's allies, even if they do not claim American casualties? Moreover, will the administration now begin promoting ongoing military action in order "to take care of" Iran's regional deployment, regardless of Iranian provocations vis-à-vis the United States? While Soleimani's killing will not necessarily result in an overall change in US strategy, it is important to recognize that the United States' success in launching this significant action and avoiding deterioration of the situation in the process, may encourage the US administration to take decisive action if it feels that such action is necessary. US Secretary of State Mike Pompeo's statement that the US action enhanced US deterrence not only against Iran reflects recognition of the need to restore United States credibility, and this was apparently one of the considerations leading up to the dramatic killing of Soleimani.

Iran

The incident of Soleimani's killing should be considered in conjunction with a number of other developments – some related and others circumstantial – that confront the Iranian leadership with a complex and challenging reality in several contexts.

- a. *The nuclear realm*: On a date that was determined ahead of time (which happened to immediately follow the killing of Soleimani), Iran declared the fifth stage in a series of responses to the US sanctions. This action includes renouncing all restrictions on enrichment stipulated in the nuclear agreement, albeit at this stage with no obligations regarding the concrete nature of the actions it will take. At least on a declarative level, this act constitutes an annulment of the agreement, although this was not explicitly stated and Iran continues to display a willingness to reverse course if the sanctions against it are lifted. In actuality, Iran is allowing itself maneuverability so as to avoid taking severe action in the short run that could result in a severe response on the part of the United States.

Still, the significance of such an action and the potential severity it entails has already resulted in a decision by Germany, Britain, and France to refer the Iranian violations to the Joint Commission, as stipulated by the Dispute Resolution Mechanism, the section of JCPOA designed to settle disputes between the signatory parties. This measure, which the European countries currently regard as a basis for diplomatic efforts toward possible negotiations with Iran regarding the components of the agreement, may result in the issue's referral to the Security Council and the re-imposition of overarching sanctions on Iran. This European action ended the strategy pursued by Iran until then, which sought to ensure the

European countries' support of its positions and to distance these countries from the policy of President Trump. Although there is currently no European support for US policy and Europe is driven by an interest in advancing a foundation for US-Iranian dialogue, the most recent measure increases the possibility of profound change in their policies.

In any event, despite the pressure exerted and other measures undertaken on the part of the European states, Iran does not appear to intend to change its policy whereby it will reverse the measures it has taken so far only in exchange for eased conditions. Although President Trump repeatedly emphasizes his desire to renew the negotiations and achieve an "improved" agreement, and insists that he seeks policy change but not regime change in Iran, he has not demonstrated a willingness to relax the sanctions. It is also doubtful that he can do so during an election year in the United States.

- b. *The regional arena:* For a number of months, beginning even before Soleimani's killing, Iran has faced processes that challenge its ability to continue to promote its policy under current circumstances and conditions. First and foremost, Iraq, which is Iran's most important regional security and strategic asset, has seen intensifying public demands, accompanied by large-scale demonstrations, calling for reduced Iranian influence and the dismissal of the reportedly corrupt senior regime officials with close ties to Tehran. Until the recent events, the Shiite population in Iraq was split between supporters of Iran and supporters of the demonstrators. Today, as a result of the killing of Soleimani and the mounting tension between the United States and Iran, there are heightened calls within the Shiite camp demanding the American forces' withdrawal from the country, although many also continue to demand a reduction in Iranian influence.
- c. *The American presence in Iraq* has become a particularly complex issue. Iran regards the withdrawal of American troops from Iraq as a fulfillment of the policy led by Soleimani and a response to the long-time assessment that the American military presence on the border with Iran constitutes a security threat and an obstacle to Iranian influence. In past years, during the joint fight against the Islamic State, Iran valued the American contribution and cooperated with the US by means of the militias they trained and armed. However, today, with the destruction of the Islamic State and the reduced threat it poses, there is a clear Iranian interest in the withdrawal of US forces from Iraq.

The Trump administration, which from the outset viewed the American presence in the Middle East as an unnecessary burden, could, under other circumstances, have supported the withdrawal of its forces from Iraq. However, in the situation

that has emerged since the killing of Soleimani, it has no interest in handing Tehran a victory. Moreover, the US defense establishment regards the continued struggle against the Islamic State and the training of the Iraqi military as an asset, as do the rest of the coalition in the fight against the ISIS, first and foremost, European states. Europe fears the possibility of the United States deciding to leave Iraq, out of its own desire or due to Iraqi pressure. The Iraqi government is therefore positioned between a rock and a hard place: the Prime Minister, who heads an interim government until elections or until another political solution is found that is acceptable to the Iraqi public, cannot support US forces remaining in Iraq in light of the fierce confrontation between the Americans and the Iranians that has developed on Iraqi soil, as well as the clash with the pro-Iranian Shiite militias. On the other hand, as the American withdrawal from Iraq signifies a victory for Iran, he would prefer, albeit without saying so publically, for the US forces to remain.

- d. *The downing of the Ukrainian plane:* Unfortunately for Iran, the recent events coincided with the downing of a Ukrainian passenger plane by the Revolutionary Guards air defense system. This event, which is an extremely serious blow to civil aviation, exacerbated the situation when the high number of Iranian citizens among the casualties became clear. The regime's conduct in guiding the Revolutionary Guards, who attempted to cover up their direct responsibility for the downing of the plane until they were forced to acknowledge it, demonstrated to the world and the Iranian public the nature of the regime and highlighted the ongoing distrust of the leadership. The demonstrations that erupted in protest over the downing of the plane, particularly in Tehran's universities as well as in other cities, once again proved that large parts of the Iranian public view the regime as the source of their difficulties and take advantage of every possible opportunity to take to the streets to protest against it, despite the high price for doing so (as illustrated during the previous waves of protests, in which hundreds of protesters were killed). Against the background of the demonstrations and in light of the challenge facing the regime, Supreme Leader Ali Khamenei personally led the Friday prayers in Tehran for the first time in eight years, expressing complete support for the Revolutionary Guards. Khamenei characterized the Revolutionary Guards as "fighters without borders" and referred to the United States, Europe, and Israel as enemies of Iran seeking to harm it in all areas. He again rejected the possibility of negotiations with the United States and characteristically blamed external parties for all of Iran's ills. In the meantime, Iran is already paying an initial price for the events: the cancellation of most foreign flights to Tehran. This is a major blow to tourism, which is an important source of income for the country.

The Gulf States

Recent events have also had an impact on Iran's allies in the region, as well as on the United States allies in the Gulf. The Gulf states have an interest in weakening Iran, and Soleimani's killing serves this interest. Nonetheless, they are still concerned that in the confrontation between the United States and Iran, they will be the first to pay the price; as long as they are not certain that the US administration will be committed to their security if they are the target of an Iranian attack, the trend that began prior to the targeted killing, mainly, striving for calm, will continue – including through dialogue with Iran in order to prevent sliding into an undesired clash.

Hezbollah

Soleimani's killing is a major blow to Hezbollah in Lebanon, as he was the architect of the ties that were forged between Iran and the organization. He played a major role in planning and implementing the organization's training and armament enterprise, including its precision missile project. Moreover, the killing occurred as Hezbollah faces growing hardship in light of pressures on the organization at home and from abroad – particularly due to its reduced financial resources (the economic sanctions imposed on its patron Iran, and those imposed directly on Hezbollah) and the bitter sociopolitical crisis underway within Lebanon. Despite Nasrallah's bellicose rhetoric and his commitment to Iran, Hezbollah's direct involvement in exacting retribution against the United States is questionable. Its conduct against the background of the recent events supports the assessment that Hezbollah has no interest in a military confrontation with Israel at the current time. Similarly, Nasrallah's statements of January 5 and 12 – that Iran would be the one to respond to the killing of Soleimani, and that it would be Iran that would take action against the United States – should be understood in this context.

Scenarios

The United States and Iran have both entered a politically sensitive period. President Trump is in the midst of a reelection campaign, and in Iran elections for the Majlis are scheduled to be held in February, with presidential elections the following year. President Trump, who is also entangled in impeachment proceedings, will have difficulty making any conciliatory gesture to Iran after the targeted killing of Soleimani, which was the subject of fierce criticism among Democrats, and his series of threats toward Tehran. In Iran, the political system led by Khamenei is trying to ensure its hold on the conservative camp, and after a series of appointments of conservative figures to key positions last year, it is striving to undermine the possibility of reformists elected to the parliament by removing their candidacy. The Iranian leader has stressed repeatedly that he will not allow negotiations with those responsible for the killing of Soleimani or for the damage caused to Iran by economic warfare.

Under these circumstances, the region can expect more controlled confrontation between the United States and Iran, especially through provocative measures by Iranian allies – the Shiite militias in Iraq, Afghanistan, Yemen – whenever possible, without claiming direct responsibility and while blurring the connection to Iran in the event of injury to Americans. This will also be part of an attempt to achieve the goal of pushing the United States out of the region, particularly out of Iraq. Even if at the moment the escalation is contained, the high tension level and the mutual policy of walking on the verge of military confrontation can lead the involved parties into a downward military spiral within a short timeframe, to the point of a broad confrontation.

In the nuclear realm, Iran is subject to contradictory interests. On the one hand, it seeks to progress in its nuclear program, in part in order to accumulate bargaining chips for the future – if and when negotiations on this issue resume. On the other hand, the harsh American sanctions and the European threat to join the United States, with an emphasis on possibly renewing the Security Council sanctions, constitute a significant threat to Iran. Consequently, and in light of the statement by President Hassan Rouhani that Iran is currently enriching more uranium than prior to the nuclear agreement, it appears that Iran intends on continuing its defiant efforts in response to the continued sanctions. Their cumulative significance is a shortening of the timeframe for producing fissile material as specified in the agreement, and perhaps also progress toward military-grade enrichment, in the event that a decision is made to pursue this goal.

Iran has two extreme options. One is to take dramatic measures to reduce IAEA supervision and perhaps also to actualize the threat of withdrawing from the Nuclear Non-Proliferation Treaty (NPT). This would create a global crisis that will obligate all the relevant parties to mobilize themselves to stop such an effort. The other is to agree to negotiations with the United States, mediated by a third party or even direct, without full compensation by the American administration, even before the elections in the United States. Both of these extreme options are inconsistent with the conduct of the Iranian regime thus far. Abandoning the NPT will be viewed as extremely serious by the international system, including Russia and China, and Russia may view such a development as an opportunity to become the ultimate mediator, which would rescue Trump from the complete failure of his policy vis-à-vis Iran. Iran, for its part, can always reverse its decision to withdraw from the treaty (it has 90 days after announcing its withdrawal to do so) and its other commitments. The primary danger of such a measure from Iran's perspective was and remains the uncertainty regarding Trump's behavior (and that of Israel), as well as concern that radical steps on its own part will result in one or both parties attacking its nuclear facilities. With regard to negotiations, this option could prove beneficial to Iran in light of President Trump's clear desire to present an

achievement prior to the presidential elections. However, the Iranian leader evinces a fundamental distrust of the American administration and is also guided by considerations of national honor and the fear he expresses publically of resuming negotiations from a point of weakness – as well as by the hope that the presidential elections in the United States will result in a Democratic administration that is more positive toward Iran. Consequently, the prospects for this option are slim.

In any event, Iranian determination to continue abandoning its commitments under the nuclear agreement, even if Tehran stresses that the violations are reversible, alongside American adherence to its policy of “maximum pressure” and the recent measures taken by the European parties that indicate a hardening in their policy toward Iran, means that the probability of restoring the nuclear agreement as part of renewed negotiations is low to medium. Even if in the coming months Iran chooses to take relatively moderate steps, it is doubtful whether it will be able to accede to the European demands. Therefore, it is more likely that the issue will be referred to the Security Council, which in turn will increase Iran’s determination to pursue a radical response.

Conclusion

Iran sustained an extremely heavy blow with the targeted killing of Qasem Soleimani, the architect of its regional strategy and one of the most senior members of the Iranian leadership. In particular, the United States restored the image of its deterrence, and overturned the Iranian situational assessment that has guided its provocative actions over the past year.

The US administration has a great deal of patience, and although it has not achieved its major goal of negotiations resulting in a new nuclear agreement, it can point to the severe economic hardships it has caused Iran and the resulting protests among the Iranian public, which blames the Iranian regime and not the United States. In any event, international affairs have never been the focus of the American election agenda.

In Iran, the regime may have hardened its opposition to negotiations following the killing of Soleimani unless sanctions are lifted, and even then, they would be conducted in a broad framework, as opposed to bilaterally with Washington. However, the Iranian regime is paying a high price, and its distance from the Iranian public continues to widen. Consequently, it is relying primarily on a policy of oppression and a willingness to use means of force against the public, alongside running a carefully controlled election campaign.

The bottom line is that although both sides are interested in avoiding a military conflict, they are walking a fine line. If one of them stumbles, especially Iran, the result could be – already in the coming year – a broader conflict than that which has recently been evident.