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The United States told the Iraqi government last week that if it wants U.S. troops to remain in Iraq beyond the deadline of Dec. 31, 2011, as stipulated by the current Status of Forces Agreement between Washington and Baghdad, it would have to inform the United States quickly. Unless a new agreement is reached soon, the United States will be unable to remain. The implication in the U.S. position is that a complex planning process must be initiated to leave troops there and delays will not allow that process to take place.

What is actually going on is that the United States is urging the Iraqi government to change its mind on U.S. withdrawal, and it would like Iraq to change its mind right now in order to influence some of the events taking place in the Persian Gulf. The Shiite uprising in Bahrain and the Saudi intervention, along with events in Yemen, have created an extremely unstable situation in the region, and the United States is afraid that completing the withdrawal would increase the instability.

The Iranian Rise

The American concern, of course, has to do with Iran. The United States has been unable to block Iranian influence in Iraq's post-Baathist government. Indeed, the degree to which the Iraqi government is a coherent entity is questionable, and its military and security forces have limited logistical and planning ability and are not capable of territorial defense. The issue is not the intent of Prime Minister Nouri al-Maliki, who himself is enigmatic. The problem is that the coalition that governs Iraq is fragmented and still not yet finalized, dominated by Iranian proxies such as Muqtada al-Sadr — and it only intermittently controls the operations of the ministries under it, or the military and security forces.

As such, Iraq is vulnerable to the influence of any substantial power, and the most

important substantial power following the withdrawal of the United States will be Iran. There has been much discussion of the historic tension between Iraqi Shia and Iranian Shia, all of which is true. But Iran has been systematically building its influence in Iraq among all factions using money, blackmail and ideology delivered by a sophisticated intelligence service. More important, as the United States withdraws, Iraqis, regardless of their feelings toward Iran (those Iraqis who haven't always felt this way), are clearly sensing that resisting Iran is dangerous and accommodation with Iran is the only solution. They see Iran as the rising power in the region, and that perception is neither unreasonable nor something to which the United States or Saudi Arabia has an easy counter.

The Iraqi government's response to the American offer has been predictable. While some quietly want the United States to remain, the general response has ranged from dismissal to threats if the United States did not leave. Given that the United States has reportedly offered to leave as many as 20,000 troops in a country that 170,000 American troops could not impose order on, the Iraqi perception is that this is merely a symbolic presence and that endorsing it would get Iraq into trouble with Iran, which has far more than 20,000 troops and ever-present intelligence services. It is not clear that the Iraqis were ever prepared to allow U.S. troops to remain, but 20,000 is enough to enrage Iran and not enough to deal with the consequences.

The American assumption in deciding to leave Iraq — and this goes back to George W. Bush as well as Barack Obama — was that over the course of four years, the United States would be able to leave because it would have created a coherent government and military. The United States underestimated the degree to which fragmentation in Iraq would prevent that outcome and the degree to which Iranian influence would undermine the effort. The United States made a pledge to the American public and a treaty with the Iraqi government to withdraw forces, but the conditions that were expected to develop simply did not.

Not coincidentally, the withdrawal of American forces has coincided with tremendous instability in the region, particularly on the Arabian Peninsula. All around the periphery of Saudi Arabia an arc of instability has emerged. It is not that the Iranians engineered it, but they have certainly taken advantage of it. As a result, Saudi Arabia is in a position where it has had to commit forces in Bahrain, is standing by in Yemen, and is even concerned about internal instability given the rise of both reform-minded and Shiite elements at a time of unprecedented transition given the geriatric state of the country's top four leaders. Iran has certainly done whatever it could to exacerbate this instability, which fits neatly into the Iraqi situation.

As the United States leaves Iraq, Iran expects to increase its influence there. Iran normally acts cautiously even while engaged in extreme rhetoric. Therefore, it is unlikely to send conventional forces into Iraq. Indeed, it might not be necessary to do so in order to gain a dominant political position. Nor is it inconceivable that the Iranians could decide to act more aggressively. With the United States gone, the risks decline.

Saudi Arabia's Problem

The country that could possibly counter Iran in Iraq is Saudi Arabia, which has been known to funnel money to Sunni groups there. Its military is no match for Iran's in a battle

for Iraq, and its influence there has been less than Iran's among most groups. More important, as the Saudis face the crisis on their periphery they are diverted and preoccupied by events to the east and south. The unrest in the region, therefore, increases the sense of isolation of some Iraqis and increases their vulnerability to Iran. Thus, given that Iraq is Iran's primary national security concern, the events in the Persian Gulf work to Iran's advantage.

The United States previously had an Iraq question. That question is being answered, and not to the American advantage. Instead, what is emerging is a Saudi Arabian question. Saudi Arabia currently is clearly able to handle unrest within its borders. It has also been able to suppress the Shia in Bahrain — for now, at least. However, its ability to manage its southern periphery with Yemen is being tested, given that the regime in Sanaa was already weakened by multiple insurgencies and is now being forced from office after more than 30 years in power. If the combined pressure of internal unrest, turmoil throughout the region and Iranian manipulation continues, the stress on the Saudis could become substantial.

The basic problem the Saudis face is that they don't know the limits of their ability (which is not much beyond their financial muscle) to manage the situation. If they miscalculate and overextend, they could find themselves in an untenable position. Therefore, the Saudis must be conservative. They cannot afford miscalculation. From the Saudi point of view, the critical element is a clear sign of long-term American commitment to the regime. American support for the Saudis in Bahrain has been limited, and the United States has not been aggressively trying to manage the situation in Yemen, given its limited ability to shape an outcome there. Coupled with the American position on Iraq, which is that it will remain only if asked — and then only with limited forces — the Saudis are clearly not getting the signals they want from the United States. In fact, what further worsens the Saudi position is that they cannot overtly align with the United States for their security needs. Nevertheless, they also have no other option. Exploiting this Saudi dilemma is a key part of the Iranian strategy.

The smaller countries of the Arabian Peninsula, grouped with Saudi Arabia in the Gulf Cooperation Council, have played the role of mediator in Yemen, but ultimately they lack the force needed by a credible mediator — a potential military option to concentrate the minds of the negotiating parties. For that, they need the United States.

It is in this context that the crown prince of the United Arab Emirates (UAE), Sheikh Mohammed bin Zayed al-Nahyan, will be visiting Washington on April 26. The UAE is one of the few countries on the Arabian Peninsula that has not experienced significant unrest. As such, it has emerged as one of the politically powerful entities in the region. We obviously cannot know what the UAE is going to ask the United States for, but we would be surprised if it wasn't for a definitive sign that the United States was prepared to challenge the Iranian rise in the region.

The Saudis will be watching the American response very carefully. Their national strategy has been to uncomfortably rely on the United States. If the United States is seen as unreliable, the Saudis have only two options. One is to hold their position and hope for the best. The other is to reach out and see if some accommodation can be made with Iran. The tensions between Iran and Saudi Arabia — religious, cultural, economic and political — are profound. But in the end, the Iranians want to be the dominant power in the Persian Gulf, defining economic, political and military patterns.

On April 18, Iranian Supreme Leader Ayatollah Ali Khamenei's adviser for military affairs, Maj. Gen. Yahya Rahim Safavi, warned Saudi Arabia that it, too, could be invaded on the same pretext that the kingdom sent forces into Bahrain to suppress a largely Shiite rising there. Then, on April 23, the commander of Iran's elite Islamic Revolutionary Guard Corps, Maj. Gen. Mohammad Ali Jaafari, remarked that Iran's military might was stronger than that of Saudi Arabia and reminded the United States that its forces in the region were within range of Tehran's weapons. Again, the Iranians are not about to make any aggressive moves, and such statements are intended to shape perception and force the Saudis to capitulate on the negotiating table.

The Saudis want regime survival above all else. Deciding between facing Iran alone or reaching an unpleasant accommodation, the Saudis have little choice. We would guess that one of the reasons the UAE is reaching out to Obama is to try to convince him of the dire consequences of inaction and to move the United States into a more active role.

A Strategy of Neglect

The Obama administration appears to have adopted an increasingly obvious foreign policy. Rather than simply attempt to control events around the world, the administration appears to have selected a policy of careful neglect. This is not, in itself, a bad strategy. Neglect means that allies and regional powers directly affected by the problem will take responsibility for the problem. Most problems resolve themselves without the need of American intervention. If they don't, the United States can consider its posture later. Given that the world has become accustomed to the United States as first responder, other countries have simply waited for the American response. We have seen this in Libya, where the United States has tried to play a marginal role. Conceptually, this is not unsound.

The problem is that this will work only when regional powers have the weight to deal with the problem and where the outcome is not crucial to American interests. Again, Libya is an almost perfect example of this. However, the Persian Gulf is an area of enormous interest to the United States because of oil. Absent the United States, the regional forces will not be able to contain Iran. Therefore, applying this strategy to the Persian Gulf creates a situation of extreme risk for the United States.

Re-engagement in Iraq on a level that would deter Iran is not a likely option, not only because of the Iraqi position but also because the United States lacks the force needed to create a substantial deterrence that would not be attacked and worn down by guerrillas. Intruding in the Arabian Peninsula itself is dangerous for a number of reasons, ranging from the military challenge to the hostility an American presence could generate. A pure naval and air solution lacks the ability to threaten Iran's center of gravity, its large ground force.

Therefore, the United States is in a difficult position. It cannot simply decline engagement nor does it have the ability to engage at this moment — and it is this moment that matters. Nor does it have allies outside the region with the resources and appetite for involvement. That leaves the United States with the Saudi option — negotiate with Iran, a subject I've written on before. This is not an easy course, nor a recommended one, but when all other options are gone, you go with what you have.

The pressure from Iran is becoming palpable. All of the Arab countries feel it, and

whatever their feelings about the Persians, the realities of power are what they are. The UAE has been sent to ask the United States for a solution. It is not clear the United States has one. When we ask why the price of oil is surging, the idea of geopolitical risk does come to mind. It is not a foolish speculation.

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