

Iran, Iraq and Embracing the Devil

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Just as imbalances arise in economics, so they do in geopolitics. Its power weakened, the US now faces a difficult choice in the Mideast, where its best option is now to strike a deal with the regional player it most demonizes, Iran.

That thesis was put forward by George Friedman, the founder and CEO of the global political, economic and military consulting firm STRATFOR, which is based in Austin, TX. Friedman spoke on April 23 at the Strategic Investment Conference in San Diego, which was sponsored by Altegris Investments and Millennium Wave Investments.

The evolution of US Mideast policy

Before 9/11, the central goal of US foreign policy was to prevent a single power from dominating the Eurasian region, because – in terms of its population, resources and technology – that region is more powerful than the US, according to Friedman. In the First World War and World War II, the US fought to prevent German and Soviet domination of the region, and the Cold War was an effort to prevent Soviet growth.

Since the collapse of the Soviet Union in 1989, no major power has posed a threat to the US in that region, Friedman said. The US fought a number of smaller wars – in Kuwait, Bosnia, Somalia, and Kosovo – but, nonetheless, it remained primarily focused on the overarching goal and coherent strategy of protecting the Eurasian region.

Since 9/11, a completely new goal emerged – to prevent terrorist attacks however possible. That strategy, according to Friedman, suffers from two weaknesses: it is unattainable, and it focuses all US resources into a single region, in order to fight wars against various Islamic forces, under the assumption that concentration will not jeopardize US forces elsewhere.

This new, flawed strategy, Friedman said, created an opportunity for Vladimir Putin, who now believes he can reverse the consequences of the collapse of the Soviet region. The US could not respond to Putin's actions in Georgia because its forces are concentrated in the Mideast, fighting the war on terror.

Three major balances of power now shape the dynamics of the Eurasian region – the conflict between Pakistan and India, the Arab-Israeli conflict, and the most fundamental conflict, the one between Iran and Iraq.



The Iranian conundrum

“The US had good reasons to invade Iraq,” Friedman said, but our key assumption – that the destruction of the Iraqi government would lead to the formation of a new and capable pro-American one – was incorrect. The Iraqi power vacuum has strengthened Iran, making it the most powerful force the US must face in the region. Nobody in the Persian Gulf, Friedman said, will be able to check Iranian aggression if the US leaves the region.

The US is committed to leaving Iraq, though, and that commitment creates a policy dilemma. If we leave Iraq, Friedman said, the future of the oil reserves in northeast Iraq would be in the hands of the Iranian National Guard.

Nuclear weapons are not the key issue, Friedman said, even though he claimed the US does not have the ability to bomb Iran’s nuclear facilities. Israel, he added, cannot bomb them either, because it is too far away and lacks the proper strike aircraft.

If the US were to attack Iranian nuclear facilities, the Iranian army would still be intact, and tensions in the region would ultimately escalate to the point where Iran would block the Persian Gulf and disrupt oil supplies. The flow of oil dictates policy options for the US, according to Friedman.

Given the US’ constraints and the problems it will face if and when it withdraws from Iraq, it has only one option.

It must strike a deal with Iran.

That is not so far-fetched, Friedman said, since such an agreement has two important historical precedents. After the start of World War II, the US decided the only way to stop Hitler was to ally itself with Stalin, who Roosevelt considered a homicidal maniac. That decision met strong opposition, including from the Catholic Church, due to Stalin’s killing of many Catholics in the Ukraine.

Similarly, in 1971, Nixon formed an alliance with China and Mao Tse Tung, despite the fact that China had been and was continuing to supply North Vietnam with weapons, which were used against Americans in the Vietnam War. One year before that decision, Nixon had called Mao the “most dangerous man in the world,” Friedman said.

Oil forms the basis of a common interest between the US and Iran: both want to see oil flows continue. While Iran wants to a slightly different structure and distribution of profits than prevails now, Friedman said, the US doesn’t care about the distribution of profits; it just wants to see that oil continues to be available at a reasonable price.

Similarly, both the US and Iran are at war with Shi’ites, and, Friedman said, “nothing binds two countries like a common enemy.”



The US asserts that the Iranian president, Ahmadinejad, is crazy, just as we once did Mao and Stalin, Friedman said. Nonetheless, Friedman argued, we should discount much of what Ahmadinejad says, since his rhetoric is designed to garner political support among Iranians. "People like to hear him say that Iran is like the wrath of God clearing the world of evils," Friedman said, "just like southern Methodists."

Iran is extremely conservative in its foreign policy, according to Friedman, since it has not conducted direct military actions and instead supports the terrorist group Hezbollah, which is 1,000 miles away. Iran views the US as an extremely powerful and dangerous regime, Friedman said, a view it sees confirmed by the US response to 9/11, which Iran considered highly disproportionate. (Iran is fond of noting that the 3,000 people killed on 9/11 is a small fraction of the number killed in automobile accidents since, Friedman said.)

Stalin, interestingly, similarly said that Roosevelt was dangerous, and the Chinese said the same of the US under Nixon, according to Friedman.

"When you see how the other side views us, you see the basis of negotiations," Friedman said. "Iran is clearly aware that the US is dangerous and that we are unpredictable and irrational."

A diplomatic solution has to emerge, Friedman said, although he did not discuss any of the specific terms he foresees in such an agreement.

Friedman said he is aware of conversations between the US and the Iranians that support his thesis.

"This is quite a dangerous situation," Friedman said. "If negotiations fail, the US faces the unpalatable choice of withdrawing from Iraq or, if it stays, facing further destabilization from Iran that might lead to the closing of the Straits of Hormuz."

"Obama will be smacked from the right at a time when he is most vulnerable," Friedman said. "One way or another, this poses a serious problem. The chess game plays out this way or it gets real ugly, real fast."

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