

**“THE GEOPOLITICS OF THE GULF REGION AFTER A SUCCESSFUL
(OR FAILED) JCPOA NEGOTIATIONS”
SUMMARY OF A WEBINAR HELD BY
GULF INTERNATIONAL FORUM
21 APRIL 2022**



OVERVIEW

As the Middle East awaits the outcome of the Vienna talks on reviving the Joint Comprehensive Plan of Action (JCPOA) between Iran and the P5+1, Gulf states and other powers in the Middle East engage in multi-party consultations on the future of the region.

All regional parties are preparing for a new geopolitical stage to be set when, or if, Iran re-joins the regional economy and any changed stipulations of a new JCPOA.

Should these talks succeed, Iran will likely seek to maintain (or even grow) its influence in the region, while enhancing its trade and economic relations. Various GCC states have anticipated this shift in the geopolitical conditions by opening talks with Tehran. In late 2021, the UAE’s national security adviser, Sheikh Tahnoun bin Zayed Al Nahyan, visited Tehran while the Saudis and Iranians have had an ongoing direct dialogue for a year in Baghdad.

For its part, the United States has played a role in improving cross-regional talks as well. U.S. Secretary of State Antony Blinken recently visited Morocco, Algeria, Bahrain, UAE, and Israel. Blinken sequentially met with the foreign ministers of the UAE, Morocco, Bahrain, and Israel in Tel Aviv, and leaders of Iraq, UAE, Jordan, and Egypt met in Aqaba a day before. The war in Ukraine has also introduced new possibilities for improved regional relations, as it disrupts energy, trade, and economies in general.

However, should the JCPOA talks prove unsuccessful, the Gulf states may be more hesitant to continue their de-escalation efforts with Iran. Growing normalization with Israel could also impact some GCC relations with Iran, regardless of whether a new JCPOA is agreed or not.

Finally, ongoing proxy conflicts between Iran, the United States, Saudi Arabia, and Israel, especially in Syria, Iraq and Lebanon, have left the geopolitics of the region in an even more complicated position, with a strong potential for change in historic alignments and rivalry in the

region.

Whether a new JCPOA is signed or not, the Gulf states will see a direct impact on the geopolitics of the region, with the balance of power potentially shifting and creating a potential for increased conflict.

A GIF webinar moderated by former US Ambassador Patrick Theros, and comprised of three well informed regional experts, provided some important observations regarding an evolving situation that will await the region and beyond whether an agreement is reached or not.

SUMMARY OF COMMENTS BY THE PANELLISTS

1. **DR. KRISTIAN COATES ULRICHSEN** (*Baker Institute Fellow for the Middle East, Rice University; Non-Resident Senior Fellow, Gulf International Forum*)
 - While the GCC has reconciled itself with the fact that JCPOA is being seen and dealt with from the prism of US domestic policy, it has to be acknowledged that there is no uniform GCC view regarding this matter but perhaps as many as 6 different views with each GCC country giving priority to its political considerations on this matter.
 - More specifically, it is important to distinguish between the kind of security concerns which the Iran poses for countries like Bahrain, UAR and Saudi Arabia (KSA) as opposed to the countries like Kuwait, Oman and Qatar who are more politically and economically inclined towards Iran.
 - There are areas of general concern shared between the 6 GCC states like Iran's regional and missile policies, which in any event are not part and parcel of the current talks.
 - This has meant that a number of countries like UAE and KSA have initiated their own line of direct talks with Iran, as witnessed already by some 5 rounds of bilateral talks that have taken place in Baghdad under the auspices of the Iraqi government between Iran and KSA with more talks expected to resume shortly.
 - One consequence of all these episodes is the fact that both UAE and KSA have now decided to play 'hardball' with the US believing that they are now in a position of advantage, especially in the aftermath of the Ukraine war when they have paid no heed to US demands that they should increase their oil productions in order to maintain stable global energy prices.
 - Another important factor in the current GCC calculations is the fact that some of the Gulf States are now in concert with Israel

following the consummation of the Abraham Accords – something that had not existed in 2015.

- It follows that the importance of JCPOA for the Gulf States, who are taking the longer view of what needs to be done with Iran, is not that great at this time given the fact that any reached agreement will not have the protection of a treaty and as such could be abrogated once again in the event of a Republican takeover of the White House in 2024 just as it was in 2018.

2. **DR. BANAFSEH KEYNOUSH** (*President of MidEast Analysts, Fellow at the International Institute for Iranian Studies, a non-resident scholar at the Middle East Institute, and a team member at the Carnegie-funded Sectarianism, Proxies and De-sectarianisation Project*)

- The foreign policy of the Islamic Republic of Iran (IRI), irrespective of JCPOA, enjoys a certain level of continuity.
- As a result, even if an agreement is reached on JCPOA, one can possibly expect better behaviour but no major shift in actual policy.
- Moreover, the IRI will avoid “irrationality” irrespective of how the talks proceed, bearing in mind that even if an agreement is reached, the situation will not in any way provide comfort to Iran’s overall security concerns.
- The agreement will not affect IRI-KSA rivalry in the region, given that over the years the US has tried to create an imbalance in the balance of power between Tehran and Riyadh.
- As a result, the region has had to deal with the consequence of what might be described as “fragmented multilateralism” amongst a series of countries that are no more than middle powers competing in a troubled region.
- Much like the ‘fragmented diplomacy’ that has gone on between IRI and KSA, the signing of JCPOA will not in any real way change security issues for any of the regional states.
- Recent courting of the Assad regime by the UAE and Egypt in trying to bring Syria back into the Arab fold is unlikely to affect Assad’s ties with either Iran, Hezbollah or Russia.
- As for reaching a deal on JCPOA, neither China nor Russia have a preference as neither perceive any threats coming to them from Iran.
- However, the Ukraine war has complicated matters in the Gulf, given the reality that if the Ukrainians had not given up their nuclear weapons, the Russian invasion would not have taken place.

3. **DR. DAVID POLLOCK** (*The Bernstein Fellow and Director of Project Fikra, The Washington Institute*)

- More recently, in dealing with questions of security, there have been more initiatives coming from the region than from the outside (i.e., by the US or others).
- The Biden Administration came in with the intention of reviving the JCPOA and is now somewhat surprised by the long delay and the complex uncertainties it is facing at this time.
- Alongside this is the reality that the JCPOA does not in the end matter so much as it did in 2015 because:
 - 1. The IRI's technical advances means that Iran has reached the position of a 'threshold nuclear state' (like Japan or Germany) - something that is incapable of being rolled back.
 - 2. How much revenue Iran had and how much it funded its proxies is less of a question today, as getting around the sanctions Iran has managed to survive and keep up with its activities.
- So, if a deal is reached, while Iran is likely to get more money, that is unlikely to make a decisive change in its behaviour - an understanding that is now gaining ground in the region as well.
- Finally, reaching a deal is also unlikely to affect the question of arms race in the region amongst all the key players.
- For Israel, odds are that even in the event of a no deal, some kind of a military response against Iran has become very unlikely.
- Consequently, given the current circumstances, there is a need for Plan B which neither the US nor Israel currently have for dealing with the current situation.
- For the IRI, being a threshold nuclear state (something that they would never contemplate using) offers a measure of security and deterrence against hostile powers - something that could possibly entice it to taking more risks in the region.
- However, given that the current cease-fire in Yemen- something that could not have been achieved without Iranian support, its continuation could help reduce regional conflict.

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