

The Oil-Crash Diplomatic Mirage

Official Washington's latest "group think" is that the drop in oil prices will bring Russia and Iran to their knees ready to do whatever the U.S. demands. But this analysis is a miscalculation that could cause President Obama to miss diplomatic opportunities to resolve disputes, says ex-CIA analyst Paul R. Pillar.

By Paul R. Pillar

The steep drop in the price of oil during the latter half of 2014 has generated much comment about how this development has weakened major oil-producing countries and supposedly made their governments more pliable on issues that separate them from other countries. Such commentary flows partly from the tendency of media and the commentariat to over-analyze any major development and to identify winners and losers.

In the current instance it also reflects how people have happily noticed that several of the significant producers whose revenues have been most adversely affected by the price decline are countries commonly identified as adversaries of the United States, including Venezuela, Russia, and Iran. [Edward Luttwak](#) [remarks](#) that the price decline "is knocking down America's principal opponents without us even trying."

The commentary reflects in addition a belief that is in evidence whenever similar hopes are placed on the consequences of someone else's economic pain when that pain is imposed not by the market but instead by sanctions. The belief is that there is a reliable and positive correlation between the other country's economic discomfort and the willingness of its government to make diplomatic concessions.

That belief is mistaken, regardless of whether it is markets or sanctions that have caused the economic and fiscal damage. It is mistaken because the presumed connection between a country's economic discomfort and its regime's diplomatic flexibility considers only one half of the regime's calculations.

The other half concerns whether, and how much, that regime believes it can improve its economic situation by making concessions to its adversaries. If it sees no prospect for improvement, it has no incentive to concede. The point becomes all the clearer when, as with the recent drop in petroleum prices, it is a market that is causing the economic pain. Markets have no mechanism for pain reduction when someone changes a negotiating position or diplomatic posture.

If lower oil prices really are making the leadership of Russia more willing to

make concessions regarding the conflict in eastern Ukraine, what is supposed to happen regarding the prices and the pain if such concessions are made? That car-owners in the West will be so happy about this development that they will start driving more, thus burning more fuel, sending crude oil prices back up, and repairing the damage to Russian finances?

The further, usually implicit, assumption underlying false beliefs about market-induced economic discomfort leading to diplomatic flexibility in cases such as Russia or Iran is that the cumulative effect of *both* sanctions and lower prices will push a regime past some breaking point beyond which it ceases to resist.

The notion of a breaking point has underlain other American foreign policy thinking, which has involved not only economic discomfort but also the infliction of physical pain through kinetic means. The notion was the basis for Operation Rolling Thunder, the Lyndon Johnson administration's prolonged and escalating bombardment of North Vietnam in the 1960s. The notion is somewhat akin to the gambler's fallacy that by persisting and playing a little longer one's results will change for the better.

The Vietnam War example illustrates another part of the logic pertinent to such situations that is essential but commonly overlooked when people place hopes on the consequences of someone else's pain. That part concerns the importance the other side places on the issues that are at stake.

Regimes and nations will endure a great deal of pain on behalf of causes that are very important to them. Moreover, in such bargaining relationships the logic works both ways, and the relative importance to us and to the other guy of the issues at stake is critical, too. If it makes sense for us to think about the other side having a breaking point, then it would make just as much sense for the other side to think about *our* breaking point, even if that point is to be expressed not in intensity of pain at any one moment but instead in impatience and the duration of stalemate.

Even if the idea of a breaking point were valid, we Americans are poorly equipped to identify any such point as it applies to others, including the adversaries most at issue today. Russian Foreign Minister Sergei Lavrov, referring to the oil price drop, said, "We have been in much worse situations in our history, and every time we were getting out of these fixes much stronger. This will happen this time."

He's right about Russian history, which included among other ordeals the incredibly costly fight against the Nazis in World War II. The Iranians also have had their ordeals, with the most salient and costly one for current Iranian leaders being the eight-year war that Saddam Hussein's Iraq launched against

their country.

The false hope being placed on lower oil prices and their presumed effect in softening the positions of adversaries may itself have the damaging effect of discouraging the flexibility that will be needed on the part of the United States to resolve important unresolved issues. Such flexibility, and not just contrition and concession from Vladimir Putin, will be required for even a partial resolution of the prolonged crisis in Ukraine.

An even greater potential for damage concerns the nuclear negotiations with Iran. The hope for a more pained and supposedly more pliable Tehran as a result of reduced oil revenue probably is entrenching further the notion that Iran must make all remaining concessions to reach a deal. That notion, if it persists, is likely to mean the failure of the negotiations and the loss of a golden opportunity to resolve the issue and assure that Iran's nuclear program stays peaceful.

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A 'Cordial Rivalry' for US and Iran?

America's neocons remain dug in against normalizing U.S. relations with Iran – as Israel's hardline leadership still places Iran at the top of its enemies list – but Iranian leaders appear willing to transform decades of anti-U.S. hostility into a “cordial rivalry,” writes Trita Parsi.

By Trita Parsi

On Christmas Eve, Iran's Supreme Leader Ali Khamenei took to Twitter to score some points against America. Hashtagging #Ferguson and #Gaza, he tweeted that if “Jesus were among us today he wouldn't spare a second to fight the arrogant&support the oppressed.” He also shot off a few tweets hashtagging #BlackLivesMatter. Four days later, he commemorated the Wounded Knee massacre by asking on Twitter if killing millions of Native Americans and enslaving Africans constitute “American values”?

Coming in the midst of Iran's negotiations with the P5+1 (the Permanent members of the UN Security Council plus Germany) as well as President Barack Obama ending decades of enmity with Cuba and the peculiar “non-coordination” between

the U.S. and Iran against Islamic State fighters in Iraq, Khamenei's tweets raise the question: What does Iran really want with America?

After Havana, does Tehran want to be next? Does it seek to end the enmity with America, or just lower its intensity? Or do the leaders in Iran fear not having America as an enemy?

Many in Washington have argued that Iran is addicted to its enmity with the U.S. "It's a pillar of the revolution," one often hears. Coming to terms with America would be the end of the Islamic Revolution. Yet, many of those voices also categorically rejected the idea that Iran would engage the U.S. in bilateral negotiations, have its foreign minister become email pals with Secretary John Kerry, or have its President tweet Happy Rosh Hashanah greetings to Jews worldwide.

A simplistic, one-dimensional (mis)understanding of the Iranian leadership generated crude and ultimately erroneous predictions of Iranian behavior. The surprising flexibility of the Iranian decision-makers could not be captured since Washington's read of Tehran was surprisingly inflexible. Rather than categorical rejection of ties with the U.S. or open desire for such a relationship, the truth may simply be that Tehran itself did not know until recently what path to pursue in regards to Washington.

About three years ago, a debate emerged within Iran's security establishment on redefining Tehran's relations with the Great Powers, particularly the U.S. A realization had occurred that due to geopolitical changes in the region, some form of a relationship with Washington was necessary the question was the parameters of that relationship and the manner it would come about.

It was an intense debate; perhaps the most important and difficult one the leaders of the Islamic Republic have experienced since the Iraq-Iran war. With the fast-changing situation in the region, the debate never reached a finale. There are some indications, however, that Tehran has come closer to a conclusion in the past few weeks.

On Dec. 17, the secretary of the Supreme National Security Council, Ali Shamkhani, told the Financial Times that even if a nuclear deal is reached, the U.S. and Iran can still not cooperate in the region. But, Shamkhani explained, the two "can behave in a way that they do not use their energy against each other." This is a critical statement that sheds light on where the debate in Tehran is tilting. Rather than partnership, Tehran is offering a truce.

A top Iranian official explained it to me a year ago: Iran's relationship with the United States would at best be a cordial rivalry, not an alliance or

partnership. But the operative term is *cordial*, not rivalry. Just as Shamkhani hinted, contrary to their past behavior, the U.S. and Iran would not be challenging or undermining each other. There can even be tactical and strategic collaboration between the two, although Tehran likely will prefer to keep that behind-the-scenes. Or as in Shamkhani's interview, flat out deny that collaboration is in the cards.

But why can't Tehran shred its past objections and opt for a less conflicted approach to America? This is where the value of rivalry comes in. Iran does not aspire to be just a normal power. Both the current regime, as well as the regime of the Shah, seeks a strong regional leadership role. While the Shah used Persian nationalism internally, and an alliance with the U.S. and Israel externally to become the undisputed power of the region, the Khomeini regime's instruments have been political Islam and rejection of America's presence in the region.

If Tehran joined the American camp, it would become a normal power whose influence would be determined solely by its economic and military prowess. This wouldn't take Iran very far, Tehran fears. It would at best be a second-tier state, below the United States.

By keeping its rivalry with the U.S. alive and challenging America's vision for the region, Iran would catapult itself into a higher level of regional influence, Tehran believes. By positioning itself as a rival, Iran would approach the U.S. as an equal, rather than compete with Israel, Turkey, and Saudi Arabia for the role of America's most valuable proxy in the region.

Keep this in mind next time Ayatollah Khamenei takes to Twitter to challenge the U.S. or point out America's double standards. In an era where the U.S. and Iran may secretly collude against Sunni jihadists, where trade between the two may flow once again, and where quiet collaboration between the two may become commonplace to stabilize regional hotspots, the optics of rivalry must desperately be kept alive where it matters the most. On Twitter that is.

Trita Parsi is an award-winning author of two books, Treacherous Alliance – The Secret Dealings of Israel, Iran and the US (Yale University Press, 2007) and A Single Roll of the Dice – Obama's Diplomacy with Iran (Yale University Press, 2012). [This article originally appeared at Middle East Eye.]

A Special Look-back at 2014

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