

# THE GULF REGIONAL SECURITY AFTER THE JCPOA REVIVAL

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**Abstract:** There is a common belief that Washington and Tehran's return to the Iran's nuclear deal would open a new window of opportunity for regional security talks. However, could other geopolitical developments hamper this possibility? What should regional leaders expect from the JCPOA revival? And how could they link it with building a cooperative security architecture in the region? This brief argues that expectations from the positive impacts of the JCPOA's revival on the regional security system should remain realistic and cautious. It is unlikely that the JCPOA revival would change bigger geopolitical realities and regional leaders' approaches to security building. The way forward is a "Persian Gulf's Ostpolitik", in which leaders on both sides of the Gulf would reset their approaches to regional security in order to make use of the positive climate after the JCPOA revival.

## **Introduction**

The Vienna talks on Iran's nuclear program is bringing Washington and Tehran closer to an agreement to implement their commitments under the Iranian nuclear deal, known as the Joint Comprehensive Plan of Action (JCPOA). This is a crucially important step to protect the region from new volatilities. In parallel, regional diplomatic activities, including between GCC and Iran have surged. The Iran-Saudi and Iran-UAE talks have created a positive political climate, but against initial hopes, have not yet led to any meaningful advances in conflict zones such as Yemen or achieve a political breakthrough in bilateral relations. Moreover, the attacks on Abu-Dhabi in January 2022 and the intensification of the war in Yemen highlighted the limits of current dialogues.

Many believe that Washington and Tehran's return to the deal would open a new window of opportunity for regional security talks. However, could other geopolitical developments hamper this possibility? What should regional leaders expect from the JCPOA revival? And how could they link it with building a cooperative security architecture in the region?

The truth is that the road ahead to building a functioning security system in the Persian Gulf remains bumpy. Expectations from the JCPOA's positive impacts on regional security system should remain realistic and cautious. There are doubts if recent positive diplomatic contacts represent any significant change in regional actors' approach towards a long-term security-building process. Instead, diplomatic efforts seem to be an ad-hoc pragmatic attempt to build an insurance policy against immediate threats. This means that the old playbook of regional powers still applies. The underpinning strategic logic is a mix of complex leverage-taking strategies to weaken rivals' power and add new sources of power to their own. Due to the

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overwhelming security dilemma, actors mutually perceive themselves to be checked by their rivals and thus take further actions to roll back threats.

With this approach in place, the JCPOA revival may even amplify new threat-averse strategies and opportunistic attempts. This brief argues that the JCPOA revival is unlikely to largely change regional dynamics alone. Rather, leaders on both sides of the Persian Gulf need a fresh reset of their approaches to regional security.

### **Insurance Policy as an Incentive for Talk**

When news about growing Gulf-Iran engagement and Saudi-Iran talks mediated by Iraq were confirmed in May 2021, the prospect of a JCPOA revival was still uncertain. The talks showed that regional actors were motivated to hedge and engage Iran directly to avoid being the target of future Iranian attack and were willing to do so within a separate framework from the JCPOA. The Baghdad Summit in late August 2021 underscored this trend and attracted high-level regional participation from Iran, its Arab neighbors, and even Turkey. The talks later continued with more high-level contacts between UAE and Iran. Sheikh Tahnoun bin Zayed al-Nahyan, UAE's National Security Advisor, was received by Iran's new president, Ebrahim Raisi. UAE officials were clear in stating their motivation behind recent contacts. Anwar Gargash, a senior UAE foreign policy adviser, said: "We have taken steps to de-escalate tensions, as we have no interest in a confrontation. The whole region would pay the price of such a confrontation for decades to come."<sup>1</sup>

The assumption in GCC capitals was that in a scenario where the JCPOA fails, Gulf-Iran talks could yield significant crisis management value. As one United States (US) official asserts: "the UAE and Saudis are now understanding the danger that the no-deal scenario poses to them."<sup>2</sup> Saudi Arabia and UAE are on the frontlines of the destabilizing ramifications of a possible JCPOA collapse and both assess that conducting regional talks on a separate track than the JCPOA might better protect them. This outcome was also supported by the U.S. and its Western allies, who will not want to see another disruption to maritime trade and a spike in oil prices.

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Furthermore, President Raisi sees the restoration of relations with Arab states as part of his foreign policy agenda to circumvent the JCPOA's domination in Iranian politics. If Tehran finds it feasible that it would gain political and economic benefits from a better relationship with its Arab neighbors in the Gulf, then it will become more politically costly for it to target these countries in retaliation for its confrontation with the West. Iran may also be more hesitant to antagonize Iraq if it continues to play an essential mediating role that supports Raisi's regional priorities, possibly increasing Iran's incentives to reign in militia groups and attacks on US forces in Iraq. Moreover, Iranians are hoping to further economic integration with the region to safeguard their economy from the possibility of future US sanctions.

In this context, the Saudi-UAE talks with Iran are only an "insurance policy" motivated by the fear of JCPOA collapse and do not correspond to a significant shift in approaches towards regional security or revisiting of threat perceptions. As a result, it has sparked a level of political pragmatism and limited flexibility, with such an insurance policy aiming to act in parallel to building up new deterrence capabilities. However, it is not a substitute to it, nor does it represent any noticeable change of attitude. The limits of this approach were best revealed after the Houthis' January 2022 attack on Abu-Dhabi. When this insurance policy failed to protect Abu-Dhabi, it negatively impacted the prospects of UAE-Iran talks. It led a high-level Iranian visit to Abu-Dhabi to be postponed while pushing the UAE towards stronger military ties with Israel.

### **Why the Post-JCPOA Revival Might Not Lead to Calm in the Region**

The unclear efficiency of the above insurance policy increases the chance of heightened tensions in the region if the Vienna talks break apart. However, many experts have claimed that the JCPOA's revival might initially create a favorable political climate, rebuild trust, and ease the security environment.<sup>3</sup> In the condition that the JCPOA implementation is coupled with the fruits of existing regional dialogues, then it could form the first major step to trigger a more extensive regional reconciliation process. But, there are reasons to believe that the deal could, in fact, have the opposite effect too and contribute to a more complex situation in which the potential of new escalations increases. At least, three factors could contribute to rising escalations.

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First, the exaggerated expectations of the JCPOA might end up ignoring its critical security values and building up new dissatisfactions. The nuclear deal is in response to the immediate non-proliferation risk of the Iranian nuclear program. The deal, if successfully restored, is only designed to prevent a regional atomic race and a conflict based on Tehran's attempt to be a nuclear state. But it does not transform the bigger geopolitical realities of the Persian Gulf. Like other strategic nuclear arms control agreements in history, the broader power politics and mutual threat perception among actors will not be reshaped by a single nuclear deal. Instead, it should be only assessed as the first stage of such a process.<sup>1</sup>

Trump belligerently attempted to change this fact by imposing on Iran one of the most severe non-military coercive campaigns in the modern history of international relations, known as "maximum pressure." The aim was to force Tehran to join an alternative comprehensive deal covering every regional dispute. This approach was divorced from the region's larger geopolitical dynamics and thus raised regional tensions to the brink of war. Studies of previous failures have shown that such grand bargain approaches and demands of revolutionary shifts in regional security systems are rarely a successful path toward rebuilding security architecture.<sup>4</sup>

Second, Saudi Arabia and UAE, on top of the other Arab states of the Gulf, are concerned that the JCPOA can activate a similar moment to 2015 when Iran adopted an emboldened regional policy. The deal would unlock Iran's potential on the economic, political, and security fronts. In Saudi Arabia's perspective, this opening for Iran is a threat as it believes that Tehran will use the benefits of the deal to fund its regional-backed proxies.<sup>5</sup> Meanwhile, US commitments to the region have declined below even the 2015 levels. The Biden administration increased its consultations with Arab monarchies, including convening the US-GCC working group on Iran to address such concerns.<sup>6</sup> President Raisi, too, has recognized the repercussions of regional objections to the deal and reached out to a number of Arab capitals on the status of the nuclear talks. Nonetheless, neither of these initiatives have altered Saudi and Emirati concerns. The reason is that the JCPOA is not primarily designed to remedy the Arab states' core threat perceptions towards Iran.

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1- For example, Strategic Arms Limitations Talks (SALT1) played a similar initiation role in the Helsinki Process.

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The traditional understanding among Arab monarchies is that Tehran's regional policy is driven by its ambitions of becoming a regional hegemon and that the JCPOA's revival would only assist in that regard. This view pushes the Arab states of the Gulf to conclude that a preemptive coercive strategy should remain on the table to tackle the threat. Also, the lack of a regionally agreed roadmap that would explain the next cooperative steps beyond the JCPOA contributes to relying on old models based on building defensive alliances and new leverages. However, the logic behind all these policies continues to follow the approach of a zero-sum game.

The Gulf States insist on asking their rival, Iran, to simultaneously leave behind all of its most potent sources of leverage, such as halting the nuclear program, drawing back from supporting regional proxies, and reducing missile stockpiles. They furthermore insist on minimizing Iran's gains from the JCPOA's revival by propagating the negative side of sanction relief. With the aim of pressuring Iran's key regional ally in Lebanon, Hezbollah, Riyadh cut its financial aid to Beirut. In parallel, Saudi Arabia and UAE seek to boost their deterrence leverage by building new alliances with like-minded states such as Israel, strategic maneuvering with China to pressure the US for more support,<sup>7</sup> and securing new arms deals.<sup>8</sup> Israel, too, sees warming relations with the Gulf States to counter possible Iranian power projection in the post-JCPOA revival time.<sup>9</sup> These are all motivating factors for Iranian responses.

Third, the politics on the Iranian side does not seem to be very supportive of a major reconciliation after the JCPOA revival. Tehran does not see the current strategic environment as the right time for major concessions on key elements of its national power, i.e., missile forces and regional non-state actors. The perception of strategic encirclement on the Iranian side has been growing. Turkey's bold move in the Caucasus in supporting Azerbaijan in the Nagorno-Karabakh conflict and the gradual formation of a new sphere of competition in Afghanistan, coupled with the fast-changing security landscape of the Gulf, contribute to reinforcing such an assessment. Iranian debates around the Ukrainian crisis seem to be reiterating once again the vital value of keeping offensive deterrence capability. As a result, Tehran might see the JCPOA revival as its "maximum resistance" harvest time and an opportunity to further activate its regional outreach on the diplomatic front and support its backed groups to compensate for what it assumes to have lost over the last couple of years.

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Divergent assessment between Iran and the Gulf states about the status of the security environment after the JCPOA revival makes new rounds of competition and higher tensions a probable scenario. Both sides' assumptions are defensive in nature and derived from their increasing threat perceptions after the revival of the deal. Yet fear of these threats and the perceived opportunity in the great powers' struggles in the Ukrainian crisis, risk encouraging preemptive offensive policies that raise tensions. This scenario can particularly become stronger if new rounds of Saudi-Iran talks continue to produce few results in terms of reviving diplomatic relations and creating tangible ways to shield the actor's interest. Indeed, how JCPOA impacts regional dynamics would depend on how regional leaders interpret the opportunities and risks presented by the deal and the volatility in the global security environment.

**The Game Changer: Israeli-Iranian Friction**

The GCC-Israel normalization is another point of future friction that complicates the dynamics of regional security after the revival of the JCPOA. The shadowboxing between Tel-Aviv and Tehran across the Middle East in which both sides opportunistically pose costs on each other in low-intensity gray zones is nothing new. However, worryingly, the last two years have witnessed both the domains and geographical areas of the Israeli-Iranian conflict grow from escalating confrontations in Syria, nuclear sabotage, and assassinations to cyber-attack against civilian infrastructures and maritime sabotage in the Red Sea and the Gulf of Oman.<sup>10</sup> The golden question is if the Abraham accords will open a new theater of conflict in the Gulf.

So far, the Abraham accords assisted Tel-Aviv to openly formalize its longstanding covert security ties with the Gulf states of Bahrain and UAE. Sheikh Mohammed Bin Zayed reiterated his common threat perception with Israel's President Isaac Herzog, saying, "We share a common view of the threats to regional stability and peace, particularly those posed by militias and terrorist forces."<sup>11</sup> Following the Houthi attacks on Abu Dhabi in January, Israeli Prime Minister Naftali Bennett offered help to the Gulf nation against shared regional threats. The tensions opened the path for Israel to join the US-led International Maritime Exercise 2022 (IMX 22) for the first time publicly alongside Saudi Arabia, with whom it has no diplomatic ties.<sup>12</sup> Wall Street Journal reported that the growing security cooperation could

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include selling advanced Israeli air-defense systems, joint development of drones designed to combat threats at sea, and intelligence issues.<sup>13</sup> Though the scale of arms sales to UAE is not clear, normalization has raised Tel-Aviv's confidence to a level that it is even seeking a NATO-like security partnership with the Gulf states.<sup>14</sup>

The degree to which Tehran sees these developments as threatening and the way it formulates its response is critical to the future of the regional security system. From Tehran's perspective, the status quo, which envisions a minimum Israeli presence in the Persian Gulf, is in Iran's favor. Iranian Foreign Minister Hossein Amir-Abdollahian told his Emirati counterpart in a call that "Efforts should be made to prevent initiators of tension from establishing a foothold in the region." Many in Tehran are coming to believe that Tel-Aviv aims to fill the strategic vacuum that may emerge with U.S. disengagement from the region. Regardless of the accuracy of this assessment, Tehran has begun to fear that Israel is legitimizing itself as the strong man capable of being the Gulf states' future security guarantor. Iranians further perceive the Abraham accords will gradually end up into an anti-Iranian alliance and a vehicle to maintain the US favored security architecture in the region.

The above scenario is estimated to be a long-term threat to the Islamic Republic more than an immediate threat.<sup>15</sup> But in any case, Tehran wishes to deter it. However, the main challenge is Iran's instrumental constrain to resolving the issue. Iranian brinkmanship strategy to pressure UAE, Bahrain, and Saudi Arabia has failed, and did not result in the Gulf states making any meaningful hedging towards Iran and instead led them to unite with Israel. Ironically, despite these failures, given the lack of tangible political initiative and since military assets are Iran's main leverage, it is hard to imagine that the Islamic Republic will choose a different path for its response.

If normalization evolves into a solid anti-Iranian military-security alliance, it will be counterproductive to regional security. It motivates Tehran to launch measures to balance the alliance, such as more offensive capabilities to penetrate missile shields and exporting them to regional clients. Tehran may assume that it should raise the cost of normalization with Israel for Arab monarchies. Thus, it may give the green light for more Houthi strikes on UAE and Saudi Arabia. The prevailing dynamic of alliance-building and counter-alliance measures would



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become the core of future frictions in the Persian Gulf. It essentially damages hope for the emergence of a regional inclusive and cooperative security architecture.

### **Ostpolitik in the Persian Gulf: A way forward**

Noticeable improvements in regional security might only happen when leverage-taking is suspended at least temporary. Parties should recognize the realities of the status quo until a new order emerges. The Persian Gulf needs its own version of Ostpolitik, the politics of rapprochement used by West Germany to engage with Eastern Europe through the seventies.<sup>2</sup> A political space can appear if all sides acknowledge the other's regional role, security concerns, and fears. However, with no change of approach towards rivals, the course of tensions will reproduce in one way or another. Temporary adherence to the status quo is in no way equal to acceptance of a dominant actor, instead, it gives diplomacy a path to proceed. It helps concentrate on stabilizing existing fault lines rather than adding new areas of competitions or depleting the other's core leverages.

On the same basis, more efforts should be made to facilitate a mutual understanding among Gulf countries and Iran on each other's threat perceptions and deterrence strategies. This is a fundamental step. A 'strategic empathy' is what the region needs. This can minimize worst-case assumptions and pave the way for the kind of restraint that may help the talks extend to sensitive areas of defense and military strategy.

The Iran-Saudi and UAE-Iran dialogues and a JCPOA revival should be seen as an opportunity to form longer-term contact bodies. The momentum should particularly be used to establish more creative mechanisms such as a Saudi-Iran 'Threat Reduction working Group' and a similar body with UAE-Iran. Such a mechanism would forge strategic empathy and ignite

2- Ostpolitik refers to the West Germany's Chancellor Willy Brandt recognition of East Germany and new political borders of post-WWII in 1969. The decision was taken while reunification was still the West Germany's main national security issue. As Brandt called it, Ostpolitik was recognition of the "reality" and acceptance of the "status quo." The policy paved the way for reconciliation with Eastern Europe and Moscow Treaty in 1970. It proved to be the best option to secure a long-term strategy which made possible the non-violent revolution of 1989 and a speedy diplomatic agreement over German unification in 1991. See: Julia Von Danenberg. (2008). The Foundations of Ostpolitik: The Making of Moscow Treaty Between West Germany and the USSR. Oxford University Press.

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limited confidence-building measures to defuse mutual threat perceptions gradually. In more advanced stages, such talks can lead to region-wide conventional arms control talks to create a non-threatening balance of power for all actors. This looks to be long term goal especially given the pressure which will be on the arms control globally due to the war in Europe. At the same time, ad-hoc mechanisms and project-based cooperation on non-traditional security areas should be used as early venues of cooperation. These areas can bring short-term fruits towards a positive political environment and make the process sustainable. These early stages of regional cooperation need strong support from international institutions like the United Nations, Organisation of the Islamic Conference (OIC), E.U., and NATO.

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