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Axis of what now?

With their deterrence strategy in ruins, Iran's leaders may face a historic choice: double down, or open up

With the Twelve-Day War over, Iran now finds itself in an extremely dangerous situation. The country has been humiliated and left licking its wounds. But it has also shown resilience and could now even be more determined to achieve its goals. There is a significant risk that the battered country could become increasingly unpredictable, making the need for a new strategy toward Iran essential to prevent this.

It is still unclear how successful the bombing of Iran's nuclear facilities was. A more optimistic outlook suggests that its nuclear programme has been put back by years; a more cynical view estimates it to be just a few months. The programme has always had two aspects to it: one technical and one political. And while the war may have brought the technical side to a halt, it has only advanced the political one.

The ultimate survival insurance

Until recently, US intelligence believed that Iran's leadership had decided not to pursue nuclear weapons. But the war has now provided an incentive. From the regime's point of view, the rational thing to do would be to build a bomb — the ultimate survival insurance and a way to get itself out of its geopolitical tailspin.

Suspending its cooperation with the International Atomic Energy Agency (IAEA) was just the first step. Withdrawing from the non-proliferation treaty could soon follow. In any case, Tehran is deliberately keeping its nuclear programme shrouded in secrecy... a terrifying prospect for the West.

But the end of the war is also a moment of truth for the Islamic Republic. Never before has the country been in such a precarious situation in terms of its security policy. Its deterrence strategy built over decades is now in ruins. Iran has been completely displaced from the Levant and, in turn, from the ideological battle for Palestine that is so vital to the country's

regime. The much-talked-about 'axis of resistance' and its 'unity of fronts' has been shattered. Not a single Iranian ally has rushed to Tehran's aid. Even its 'turn to the East' policy – promoting closer ties with China and Russia within a vision of an authoritarian anti-Western coalition – has hardly yielded anything concrete for the country in its time of need. The bitter realisation of this war is one of profound isolation.

What makes Iran so dangerous is not its strength, but its weakness.

And this loneliness is a prime breeding ground for revenge. The aim of the war was not only to take out Iran's nuclear programme. According to the Israeli prime minister and numerous Western politicians, a regime change in Tehran was also a key objective. This is now proving to be an obstacle to any sort of diplomacy. The US withdrawal from the 2015 Iran nuclear deal had already deepened suspicions in Tehran. Israel's latest attacks, supported by the United States and taking place amid ongoing negotiations, have likely pushed this mistrust to new heights. In a world without rules, any country that challenges the hegemon ideologically and geopolitically may have only one path left: the North Korean one.

When it comes to shaping Iran policy, there are now two options for the West, or rather for the US following Europe's self-inflicted irrelevance: the first is to try to back the weakened country further into the corner, applying maximum pressure in the spirit of Trump's doctrine of peace through strength. Since backing down would be tantamount to ideological self-abandonment for Tehran, such a policy would inevitably lead to the next war or, albeit less likely, to the hoped-for regime change. Whether this scenario would unfold as smoothly as the last war is far from certain. A regime in survival mode would have further levels of escalation at its disposal that it has consciously avoided so far.

Putting external pressure on the regime would have a paradoxical effect: while the aim would be to stop Iran from building a nuclear bomb, from Tehran's point of view, it would only boost its incentive to do so. What makes Iran so dangerous is not its strength, but its weakness.

A historic compromise?

But the West does have another option: rather than pushing the country further away, it should focus its efforts on helping Tehran find a way out of its strategic impasse. Realistically, the Islamic Republic is no longer a

military threat in its current condition — neither to Israel nor to the West. Unless it manages to get its hands on a nuclear bomb, that is. Iran's domestic policy is already facing major upheavals. There's nothing to stop it from becoming more radical and moving towards the North Korean model. But right now, Iran may be more receptive than ever to a grand bargain, a historic compromise that could fundamentally change its foreign policy direction.

Supreme Leader Ali Khamenei was nowhere to be seen during the war, as he was hiding in a bunker, waiting for the end to come. While the regime may now be hailing its resistance to the attacks as a victory, there is no denying that it failed to protect its people from foreign aggression. At the age of 86, Khamenei is unlikely to recover from this defeat. Everything points to change. The question is: which way will it go?

Outside pressure will make the regime – even under new leadership – highly dependent on the powerful, albeit weakened, Revolutionary Guards. This will probably speed up efforts to develop the bomb, while simultaneously exacerbating internal political repression. During the war, opposition figures and would-be collaborators were arrested en masse, as the regime plunged into paranoia.

The West's theory of change under the maximum pressure option is: the more isolated the regime is and the harsher the sanctions are, the more likely a popular uprising is to change the regime. But history shows that it doesn't always turn out this way. The 1979 revolution took place after a period of unprecedented economic growth and global integration. Sanctions may well weaken the regime, but they weaken society much more so, perhaps to a point where people cannot bring about fundamental change.

Who could be better to help 'saudify' Iran's policy towards the West than US President Donald Trump?

For all its resilience, Iran's leadership is no monolith. Should the US offer Iran a genuine grand bargain – lifting all sanctions and readmitting it to the global economy in exchange for international oversight of its nuclear programme – the country's future leaders might be forced to rethink their choices. The radicalisation of foreign and domestic policy may currently appear to many within the regime to be the only option, but it is not without risk. If it fails, a new war is inevitable. And all bets are off for how that would turn out. But if the outside pressure is turned down a notch, the time for internal reforms could come.

> The savvier regime loyalists are surely aware of how much further the elite have drifted away from the people. All regimes ultimately succumb to resistance from their own population.

Just look at Saudi Arabia: the kingdom's rulers recently pushed through comprehensive reforms. The Crown Prince has moved away from hard-line Islamism, as large sections of the populace had hoped for, without jeopardising the royal family's political dominance. Unlike the Islamic Republic, Saudi Arabia is now an autocracy by consent. The ideological transformation that actually strengthened the regime in the land of Iran's former chief rival for regional dominance is unlikely to have gone unnoticed in Tehran.

Riyadh could serve as a role model not only for Iran, but also for the West. Saudi Arabia has reinvented itself through foreign policy — extending an olive branch to its long-time rival, Iran. Arab-Iranian rapprochement is now a reality. Although largely unnoticed in the West, Iran has undergone a regional process of civilisation and integration. From a Saudi point of view, the experiment was a success: when the worst-case scenario actually happened – war between Israel and Iran – Tehran did not hit back at the Gulf States allied with the US. This shows two things: Tehran is smart enough not to shoot itself in the foot. And it is able to overcome long-standing ideological conflicts pragmatically.

Who could be better to help 'saudify' Iran's policy towards the West than US President Donald Trump? The Twelve-Day War, as he called it, was a clear relapse into old American habits. But the end of the war, which Washington brought about very quickly, has made it clear just how much risk-averse Trump ultimately is. No new 'forever war' with no end in sight. Making peace with Iran – just like easing sanctions on Syria – is not something to entrust to ideologues. It requires someone who can combine maximum disruption with maximum pragmatism. Nixon once visited China — why can't Trump go to Tehran?



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