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TRANSCRIPT

Babel: Translating the Middle East

“Mohammad Ali Shabani: Iran After October 7”

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FEATURING

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Jon Alterman: It feels to me like everything that's happening in the Middle East now is really happening in the shadow of the attacks of October 7 of last year. From an Iranian perspective, what are the regional impacts of that attack?

Mohammad Ali Shabani: There are vastly different viewpoints of what happened and the effects and meaning of it. From the outset, one can view the attack as heralding some kind of strategic victory for Iran in the sense that it helped preempt, or delay, at least, Israel's sought-after normalization. On the other hand, there was another camp, I think the more dominant one in Iran, which was more interested in pursuing some kind of understanding with the United States. And their key strategic aim remains to secure a semblance of sanctions relief and to put an end to the "maximum pressure" campaign that was imposed by Trump and continued by Biden in many respects.

And just before October 7, in late September, the two sides were finally moving toward really resuming some kind of negotiations, indirectly, to achieve an understanding, and then October 7 happened, which made it politically very difficult, if not toxic, for the Biden team to be perceived as dealing with Iran.

So, there are a variety of viewpoints in Iran. Some viewed it as, at least initially, positive, others saw it kind of as a disaster in the grander scheme of things, because the big fish for them is sanctions relief.

Jon Alterman: And it feels like the chief pressure point that Iran had was Hezbollah. And Hezbollah seems infinitely weaker now than it did a couple of months ago. People were talking about the deterrent impact of Hezbollah and 150,000 rockets and missiles trained on Israel. And Israel seems to have dismantled a lot of Hezbollah's capacity and decapitated a lot of Hezbollah's leadership. Iran has neither been able to respond effectively nor come up with an alternative. Does that also sound right to you?

Mohammad Ali Shabani: There were a lot of misperceptions over the past years. One misperception was this idea of Hezbollah and Israel being peers. Even in the months after October 7, some Lebanese analysts you would speak to had this idea of a "Beirut for Tel Aviv" formula, at least in their minds. And now we see that Hezbollah cannot directly confront a national

military that, at least over the past 12 months, has received almost 23 billion U.S. dollars in aid from the United Sates, right? So, there's a disparity there. Then again, there's another viewpoint that Hezbollah is now really going back to its roots, to its origins, which is to fight an invading force. And this is where they're most comfortable.

I was just on a conversation the other day, and they were saying how difficult it is to contact members of the organization. It's not like before. Over the past decade, with the intervention in Syria, we've seen a ballooning of Hezbollah—the size of its operations making it more vulnerable to infiltration. And Israel, what it did, was to manage successfully, as we saw in the pager operation, to carry out intelligence operations that previously were not possible, partly because when the organization was smaller—when it was operating mainly within Lebanon—it was much easier to maintain rigid standards of internal security, of vetting, et cetera.

Those things slipped. So, with reference to Hezbollah, does it have the same capabilities it had only a few months ago? Obviously, it doesn't. Of course not. Does it serve a deterrent value for Iran? I think, yes. But this is again another misperception. And that is rooted, in the different views of war in the West versus the non-West. I saw somebody tweet something really smart about the different perceptions of war. And he was saying that Western-style warfare is shock-and-awe, and to see these images coming out and huge blows that are very visible, whereas the non-Western view of war is much more attritional.

It's about how warfare is viewed, its timeframe, the nature of it. And one of the reasons why Hezbollah has not hit back as hard as many would have expected it to is probably because its perception of the timeline of war is different from what many assume. And this is the sense that I see many analysts are now getting from the ground, that initially you had the decapitation strikes, you had the pager attacks, you had the walkie-talkie attacks, but those were kind of one-offs, right? How many times can Israel set off capabilities to injure 3,000 members of an organization in one go?

Now that we're seeing the mounting death toll of Israel in the field, we're seeing more and more footage coming out showing that ground fighting is very different from intelligence operations, from aerial strikes, et cetera. And the sense is that Hezbollah is settling in for a long war. And in this long war, Syria, for instance, was previously a liability—

it may come as an asset now because it offers Hezbollah increased strategic depth. And not just Syria, also in Iraq. Many Hezbollah families have moved to Najaf, they moved to Baghdad in recent months.

So, the notion that Hezbollah is on the back foot is accurate. But then to go a bit deeper: does it have the capacity to, in a significant manner, attack Israel, including major urban centers? Absolutely. And that goes back, again, to the deterrent formula from the Iranian perspective.

Jon Alterman: You talked about a sort of Western concept of war, Eastern concept of war. After the Israeli strikes in Iran, the Iranian leadership seemed to advertise a Western type of war response, that Israel will feel something immediate. It felt like it was leaning more toward something on the symmetrical side, which could leave Iran in an escalation problem with Israel. Are you surprised that the Iranian leadership seems to be addressing a challenge from Israel in that sort of urgent, rapid, demonstrative way rather than taking the longer-term view that you just said is more typical of Middle Eastern and Eastern approaches?

Mohammad Ali Shabani: If you look at recent history, over just the recent decade, in Syria alone, I think Iran had absorbed hundreds of attacks, hundreds of aerial assaults. So, the IRGC absorbed these blows because they saw it as exercising strategic patience, to build up capability for that one day. The way Israel has conducted itself since October 7, shows that the previous formula, they want to change it. They want to change the rules of engagement, and Iran has been quite reticent to go along with that. Obviously, it doesn't want any other side to write the rules of engagement.

And the Israeli operations have also compelled Iran to move away from its preferred method of warfare. And in this respect, many analysts have pointed out that whereas the “axis of resistance”—the name Iran has come up with for this regional alliance network spanning from Iraq to Lebanon to Syria to Yemen—was meant to act as a forward defense to provide Iran with plausible deniability to keep the conflict outside its borders, the way Israel has conducted itself is compelling Iran to move toward this more Western shock-and-awe style of warfare. And we've seen this in operations “True Promise 1” and “True Promise 2,” when we had hundreds of ballistic missiles, drones fired at Israel. But again, they were calibrated not to kill. I think there's only been one or two

casualties from both of these incidents. And they were non-combatants within Israel.

So, now Iran is kind of stuck in this formula where it's fighting a war: number one that it doesn't want to fight; number two, in a manner it doesn't want to fight; and number three, if it doesn't fight it the way Israel does, it will be left exposed, in a difficult position both at home and before its regional alliance network. So, probably some of the conversations that are being had in Iran right now are that fighting this war—with its big displays of missile power and drone power in a direct confrontation—is probably not to Iran's benefit, for a variety of reasons that I just outlined, and also essentially because in this game, Israel has the upper hand for the same reason it has the upper hand when it comes to Hezbollah: it is backed by the world's sole superpower with its almost unlimited resources, whereas Iran is not equipped on the same level. So, then the question arises: what kind of confrontation would suit Iran better, and what can Iran do to change the nature and manner of this confrontation back to the terms it prefers?

When it comes to ground fighting, things are very different. Then, the question arises: okay, well, how can Iran engage in that? It can send forces to Lebanon to be embedded with Hezbollah, which is probably happening already. It can mobilize its regional alliance network to open up a second front in the Golan Heights in Syria. We have seen already the presence of Iraqi fighters, Yemeni fighters who have been killed in Lebanon. It's a question of how coordinated would such efforts be; to what scale would they be conducted? And has Iran made the strategic decision, which I think it has the capability to do, to turn southern Lebanon into Afghanistan for Israel?

And it hasn't decided to do so, because Iran does not want an expansion of this conflict. Everything we've seen from Iran since October 7, from the upper echelons of the leadership, is they do not want to be engaged in direct war with Israel, they do not want an expansion of the conflict in Gaza. They failed to stop it from being expanded. They certainly did not want to see the current situation in Lebanon, which has included, as you pointed out rightly, the decapitation of the organization's leadership. So, Iran is stuck with very difficult choices at present.

Jon Alterman: But it seems like Iran wants to be in a battle with a better equipped, I would argue much better trained adversary. It seemed to have, at least strategically, supported the Hamas attacks of October 7; and then to say, well, it doesn't really want to be in a war with Israel—I mean I don't understand how you can have those two things: on the one hand build up this axis of resistance, which is going to target civilians, and on the other hand say, "can't we all just get along."

Mohammad Ali Shabani: I see your point about the inherent dichotomy there. I think the question that needs to be asked is what is the purpose of the axis of resistance? For Iran, at least, the purpose of the axis of resistance has been forward defense to protect the homeland. There has been a lot of debate about the extent to which Iran may or may not have been involved in October 7. So far, the intelligence points to Iran not having been involved.

Jon Alterman: —Tactically. But strategically, yes, tactically, no, right?

Mohammad Ali Shabani: So, it has been involved in providing Hamas with the capabilities to attack Israel. And here we're talking specifically about things like technology transfer and training of personnel—but being involved in making a decision that ultimately has put Iran in this position, I would dispute, because I don't see October 7 as having served Iranian interests for the number one reason that I outlined previously, which is that they want sanctions relief. For them, that's the big picture. To have a single assault by Hamas doesn't really serve the core Iranian objectives. The core Iranian objective, I would argue, is to have some kind of understanding with the United States.

And I think from the Israeli perspective, at least the way things are viewed in Tehran, is that Israel views this relationship with the United States very much in zero-sum terms, that for Netanyahu, for a very long time, his main objective has been to prevent Iran-U.S. rapprochement. So, if you zoom out and you take all of these things into consideration and you ask the question, “Did Iran want October 7?” I would say absolutely not, but then as you rightly point out then you say, "Well, hold on a second, they've been supporting Hamas all this time."

But supporting a group doesn't mean that they can determine in minute detail these actions. The axis of resistance can be both an asset and a liability. So many are arguing now that, "Hold on a second, this regional alliance network that you've been equipping, that you've been trying to coordinate was meant to be forward defense, to keep conflict out of your borders, out of your soil, and the exact opposite is happening right now." This axis is actually inviting conflict toward Iran. And there's a lot of criticism of the current setup inside Iran. There's debate on the deterrent value of the axis.

And then naturally the other question that arises is: if this regional alliance network cannot provide forward defense, what can we do to achieve primary defense? This primary defense is very limited in terms of its ability to compete again with a country that's receiving almost unlimited military and political support from the United States. The $23 billion figure that I mentioned previously, it's almost five times Israel's usual allocation of about $3.8 billion a year.

To put that figure in perspective, that's double Iran's annual military spending—double. Iran's population is eight times that of Israel. In these terms, what can Iran plausibly do to achieve some kind of military balance? And if we have this situation with the axis not providing the forward defense that many had argued, and if we add your point about Hezbollah not providing the deterrence, there's only one natural conclusion: nuclear weapons. And this is where the discussion in Tehran is headed.

Jon Alterman: Or, arguably, a different conclusion is to end the conditions of war that have been in place between Iran and many countries, including the United States since 1979. I mean that's also an alternative.

Mohammad Ali Shabani: You have to look at things from the Iranian perspective. They are now stuck in a conflict with Israel that they do not want, and the way Netanyahu is behaving, he's doing everything he can to get this conflict. They can't stop him from pursuing this conflict. And if you're saying that Iran should change its conduct since 1979, that would mean a complete reorientation of its foreign policy aims.

Jon Alterman: As you pointed out, Iran has backed itself into a corner where it seems to be fighting, losing wars, and sanctioned, and having a weakened economy because it is committed to this zero-sum game with Israel, which has a stronger economy, the backing of the United States, and the presumption of nuclear weapons.

Mohammad Ali Shabani: My bigger point is that this notion that, "Well, Iran could just simply eliminate this foreign policy posture, then everything will be resolved," I think it's more complex than that. And even if you have a successful state, less of the current ideology, you will probably end up in a similar position.

Prior to October 7, in September 2023, there was really a push for engagement with the United States. October 7 negated that, made it far more difficult. And that was not something that was welcomed by Iran.

Jon Alterman: If Iran wants to both sustain the axis of resistance as long as it can and get closer to having a nuclear weapon because this forward defense no longer seems effective, how do you get from those two positions to anything that looks like de-escalation with the United States?

Mohammad Ali Shabani: Right now, there are a variety of camps in Iran that are pursuing different aims at the same time. This may sound very diffuse, but I'll be very specific. Keep in mind, in Iran, nuclear weapons have been taboo. The Supreme Leader, Ayatollah Ali Khamenei, has gone out with a so-called fatwa banning their use and stockpiling—all of those things. Now senior officials are increasingly going out and saying that we can build nuclear weapons and the reason we don't have nuclear weapons is because of a political decision, it's not a technical obstacle.

I think they want to try to use the leverage of a threat of a bomb in a way that we haven't seen before to achieve this de-escalation. Obviously, things can backfire, and the way I see things moving is increasingly toward nuclear weapons. I don't see this happening under Khamenei though. It's probably going to happen after Khamenei, partly because of the fatwa he seems so wedded to. This is one camp.

At the same time, there's another camp still arguing that to achieve our aim, we need engagement with the West. Even amid the current escalation with Israel, even now as we speak, there are voices in Iran,

including the president, including the head of the central bank and the vice president, arguing that, "Hold on a second, our number one priority right now should be the economy." They're talking about ways, for instance, to remove Iran from the blacklist of the FATF. They're arguing that as long as Iran is on the blacklist of the Financial Action Task Force, it's not just about Western sanctions making it basically impossible to engage in any kind of meaningful commercial trade relationship with Western countries, it's also making it very difficult for Iran to engage with China and Russia.

There are many experts who are in the industry in Iran, who argue that one of the main obstacles to trade with China is FATF. So, these are not mutually exclusive processes. There are different camps in Iran that are pushing and pulling to go in different directions, and there are even some who are trying to thread the needle by having these debates about nuclear weapons being made increasingly public and going out and saying that the main obstacle to a nuclear weapon is it's not technical, it's a political decision.

In this respect, I should also point out that the camp that is not in favor of nuclear weapons argues that by pursuing such capabilities, essentially a nuclear arms race will be initiated in the region, and at the end of that arms race what will happen is that Iran will, through the nuclearization of the Middle East, lose the advantages inherent in its geography and its demography, et cetera.

There are a variety of viewpoints, but your point about how you compute the diverging tendencies right now, one in favor of weaponization of the nuclear program, looking at the region, looking at the axis, looking at forward defense, and on the other hand, seeking kind of de-escalation. It's very difficult.

Jon Alterman: Where do you see power devolving in Iran? The Supreme Leader, Ali Khamenei is 85, although he seems to be in relatively robust health, he's still 85. One hears increasingly about the Revolutionary Guard emerging as a sort of Praetorian guard taking power, the clerical establishment diminishing in influence. If that happens, does that create a moment of flexibility? Is there a more transactional leadership, that Iran becomes less ideological, more interest-based?

Or, in your sense, does the Revolutionary Guard have its own ideology, relatively consistent—and I would imagine some people think that Iran with a stronger Revolutionary Guard voice in leadership would actually be more combative because of its ties through the Quds Force to all sorts of axis resistance movements throughout the region. If we look at a five-year horizon, what do you think we should be looking for in terms of foreign policy direction and how power is distributed in Iran?

Mohammad Ali Shabani: The question of leadership succession is always looming large. Of course, the million-dollar question is what happens when Khamenei goes? Nobody really has an answer to that. Procedurally, we do have some insight into how leadership succession is meant to work, but nobody really knows the details, nobody knows the list of names.

There are a variety of ways that Iran can move forward. One aspect could be that simply another leader is named, and those who go down that route argue that it is either going to be a strong leader, somewhat similar to what we have now, or that the Revolutionary Guard—and I would caution the notion of the IRGC being a monolith, but still, let's say the Revolutionary Guard is a somewhat coherent entity—would prefer somebody weak. A weak leader who is more easily influenced, more easily managed. That's the argument about replicating what we've seen so far since 1979, which is to have a single Supreme Leader.

Another argument that's been made repeatedly over the past 20 years is to change the institution of the guardian jurist, the Vilayat-e Faqih, and turn it into a council. And when you turn it into a council, then the question is, who's going to be part of that council? Which political faction will be represented? There's even talk about, "Well, hold on. Maybe existing institutions can be reformed," right? So, let's say the Supreme National Security Council, the current top decision-making council, which gathers the country's civilian and military leadership—can that be reformed in some kind of way to be turned into a leadership council, right?

So, then the argument could be that if you go with a council model, you will have more stability because, obviously, there are more decision-makers involved. You become more impervious to any high-profile assassination attempt, et cetera.

But if you zoom out even more and we look at the bigger picture here, at what direction is Iran really moving? And this goes back to what I

argued previously. I understand this notion that Iran under the monarchy was fundamentally completely different. I would argue that if you look at the real underlying core aims of Iran in the region, on the surface the ideology may seem different, but I think the interests haven't really changed. And some people in Iran see Iran going full circle.

So, what did we have under the Shah? It was a secular government, a secular state, basically pursuing a form of nationalism with a Muslim identity. What we're seeing in Iran is kind of a return to that, where the state is more nationalist and less interfering in people's personal lives when it comes to things like religion. So, let me give you an anecdote.

At least in Tehran, in the capital, based on what I'm hearing, in the past two months or so the state has completely given up on hijab enforcement. It's gone. It's mind-blowing that people, they ditched the veil, walking out with crop tops, at least in northern Tehran, and the so-called "guidance patrol" are doing nothing. Outside Tehran is a different question. And for me, at least, these scenes are shocking because I've seen the amount of resources they put into things like hijab enforcement.

So, if the state is moving toward increasing nationalist predisposition, if they're moving toward less enforcement of religious affairs, private religious affairs, we're really going back to the Shah's era. What I mean by nationalist predisposition is that in Iran increasingly, we have what they call an Iranian-Islamic identity. That Iran is seen as distinguished from other Muslim states. That there's a very strong nationalist, pro-Persian component to it, Shia component. At the same time, you know, there is an Islamist nature to the state ideology, and they're trying to find a different way. How will this spell out in terms of foreign policy orientation?

I think, if they can find a way to coexist with other major powers and then negotiate, at least informal understandings that allow them to expend more of their energy within the country's borders, that's a win-win for everybody. Do I foresee post-Khamenei Iran signing a grand peace deal with Israel? No, probably not. But does Israel want that? Does Israel need that? I think not, probably. They're happy living with some kind of cold peace. A kind of understanding that this is our domain, this is your domain, and we're going to find a way to not be at each other's throats.

Jon Alterman: As a final question, let me ask about the Israel question, the regional question. Regional states seem to be simultaneously exploring closer ties with Israel, at least in the medium and long-term, and some sort of reduction in tensions with Iran. We saw Saudi Arabia doing naval exercises with Iran, which is mind-blowing. Is this a sustainable trend? Is this a trend that Iran actually wants to encourage, as some of your comments might suggest? Or does this just represent hedging on the part of Gulf States who are hedging between Iran and Israel, between the United States and China and Russia? Is this just one big hedge?

Mohammad Ali Shabani: Many see Saudi Arabia's maneuvering toward normalization with Israel in the context of normalization with Iran, and the conclusion they are drawing is that Muhammad bin Salman calculated that to be able to normalize with Israel, he first needs to normalize with Iran. So, they see what you're saying, an element of hedging.

There's also an understanding of MBS as being, in many ways, an inward-looking actor. Somebody who's, again, a nationalist leader. Who has a number one priority, and that priority is Vision 2030. And at any expense, he will pursue it because he sees it as vital to the interest of the Kingdom and its future. And this is why he's become much more flexible in Yemen, where he's willing to live with the Houthis, he's willing to live with Iran. With reference to how Iran views these developments, as I said previously, there was a camp in Iran that viewed October 7, at least initially, as a win because it prevented Saudi-Israel normalization, which was viewed as very negative. But there are also other camps in Iran, which see the bigger fish being some kind of understanding with the United States, that they see sanctions relief as the number one objective.

So, zooming out again and asking your core question here, "How does Iran view the kind of Arab-Israel normalization process? The longer-term trend in the coming years?" I think they do see Saudi Arabia moving toward some form of understanding with Israel, but they see normalization with Iran as a prerequisite for that. So, it's not going to be a net loss for Iran.

They see the Gulf countries feeling exactly as you pointed out, stuck trying to hedge between the major powers—Russia, China, and the United States. They also see Turkey, they see Iran, they see Israel. And I think one, for at least the Saudis, one really key moment that shaped a lot of their current behavior is what happened in September 2019, when the oil facilities came under attack. And this notion that the United States was committed to Saudi security, they would rush in and help, it didn't materialize, and they were stuck on their own.

Jon Alterman: And that was, of course, an Iranian attack on Saudi Arabia, which Iran initially denied and said it was the Houthis.

Mohammad Ali Shabani: They denied (laughs). There's a dispute about where the missiles were actually even fired from. The point there being that the U.S. security commitment didn't, you know, materialize. So, that's just partly why they now want to have stronger commitments to the defense of the kingdom. The point being that they see these chips moving, and they see a lot of hedging, as you rightly point out. But I think they also understand that there's a realization among the Gulf countries that they can't change their geography. That even though they may not like Iran and its current state, its political system, they have to find a way to coexist with it.

And I think one pioneer in this regard has been the UAE. When Trump left the nuclear deal, the Iran nuclear deal, in 2018, they cheered him on. Three years later, they're among the first in the GCC to reach out to Tehran, and the United States followed. So, I think there's an aspect of hedging, but I think really there's also a different understanding of regional dynamics and the limits of U.S. commitment. And this changes things a lot because they understand the United States is not going to be there forever.

From their perspective, I think for anybody's perspective, if you look at things rationally, there's not really much in the Middle East for the United States. The number one priority for the United States has always been China. That's the peer competitor. If you look at the region, there are not really crucial, core U.S. interests there. Right now, even oil—even people who keep being stuck on oil— the United States is now the

net oil exporter. The main export of Saudi Arabia is the oil price. So, I think the calculations in the region are changing.

Jon Alterman: Mohamad Ali Shabani, thank you very much for joining us on Babel.

Mohammad Ali Shabani: Thank you for having me.

(END.)