



IRAN'S MOUNTING SECURITY CHALLENGES FOR EUROPE AND THE NEED FOR A PARADIGM SHIFT – DESPITE PEZESHKIAN

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Pezeshkian's Election: Looking beyond European euphoria

Reactions from the media and the bulk of pundits in Europe were euphoric when on 5 July "reformist" Masoud Pezeshkian prevailed over ultra-conservative rival Saeed Jalili in the run-off of Iran's presidential elections. The problem, however, is that Pezeshkian is no reformist – neither part of the Islamic Republic's elite faction that carries that name nor even according to his self-description. Rather, he is a super-loyalist vis-à-vis the real power centre, namely Supreme Leader Ali Khamenei and the Islamic Revolutionary Guards Corps (IRGC), both of which were very pleased with his victory. For Khamenei, who is Iran's real head of state, Pezeshkian is the man of the hour who is expected to advance regime interests at this particular historical juncture far better than Jalili.

Moreover, there was one key dimension missing from many European analyses of these neither-fair-nor-free elections: it was yet another sign of the public's mistrust of the system, as a majority stayed away from the election (Ansari, 2024). Therefore, the regime's expectations of Pezeshkian outweigh those of society. In brief, one can point to the sober take by the former

Iran correspondent for German television Natalie Amiri: “The ‘moderate’ politician Masoud Pezeshkian has won the presidential election in Iran in the second round. [...] the Islamic Republic of Iran needs a new image. Isolated internationally (in relation to the West), economically at the end, although they have Russia and China behind them, the latter are only using the alliance to their own advantage and are not improving the economic situation in the country. The new president is eloquent, openly addresses grievances (during the election campaign) and wants to move closer to the West. That is the new course. Determined by Ayatollah Khamenei, the survivor, for 45 years the regime has managed to survive through cycles, hardliners and ‘reformers’. Deterrence, rapprochement... and the nuclear programme continues” (Amiri, 2024).

THE EU should not be blinded by Pezeshkian’s “friendly face”

Meanwhile, the same euphoria can be observed in European Union (EU) policy circles. A spokeswoman of the EU’s diplomatic service congratulated Pezeshkian on his victory and announced: “We are ready to work with the new government in line with the EU’s policy of critical engagement” (Massrali, 2024). The problem, however, is that the EU does not pursue an Iran policy under the motto of “critical engagement,” but often lacks the critical component (EEAS, 2022; Fathollah-Nejad, 2023). The United States (US) State Department, for its part, is less enthusiastic, soberly noting: “We have no expectation these elections will lead to fundamental change in Iran’s direction or more respect for the human rights of its citizens. As the candidates themselves have said, Iranian policy is set by the Supreme Leader” (Iran International, 2024c; Soltani, 2024).

Shortly afterwards, as Josep Borrell, the outgoing EU High Representative for Foreign Affairs and Security Policy, did not accept the invitation from Tehran to attend the inauguration of the new president, Brussels decided to send Enrique Mora in lieu. According to one senior EU official, “the inauguration of a reformist president” was “important,” after all relations with Iran were “at their lowest point ever” (Iran International, 2024a).

However, the EU should not allow itself to be blinded by Pezeshkian’s election and let wishful thinking prevail over much-needed realism at this key historical juncture in Middle East geopolitics. Moreover, it faces the danger of repeating the same mistake it made during the Hassan Rouhani presidency (2013-2021), which it also glorified beyond recognition (Fathollah-Nejad, 2017). Rouhani and his Foreign Minister Javad Zarif (who served as Pezeshkian’s most prominent running mate during the campaign) did negotiate with the Joint Comprehensive Plan of Action (JCPOA), but the associated expectations of moderation in Iran’s regional posture were ultimately bitterly disappointed. This was because in the shadow and in the wake of this diplomatic opening and process with the West, Tehran’s regional policy – dictated by the above-mentioned power centre and not the government – even turned more expansive, if not aggressive (as in the case of Syria). With Pezeshkian, a *déjà-vu* could be expected.

An increasing security threat to Europe – all the way to the Mediterranean

The EU’s security challenges, if not threats, posed by Tehran are enormous – and even on the rise. First is Iran’s major contribution to the destabilisation of the Middle East, the consequences of which threaten to spill over into Europe – in security terms or via waves of refugees. At present, the focus is set on the war in Gaza, in the context of which Iran, as the leader of the “Axis of Resistance”, is the key opponent for Israel and its Western allies. On top of this come the attacks carried out, in this same context, by Yemen’s Houthis – an “Axis”

member militarily supported by Tehran. Not only have they been targeting Israel, but international commercial shipping and – although less noticed but of great relevance – undersea cables in the Red Sea and in the Strait of Bab al-Mandab that are needed for worldwide internet and telephone connections, including in Europe (Alvares de Souza Soares, 2024).

Second, far from the radar of due policy attention, we have witnessed a series of Iranian threats made by top IRGC officials regarding maritime security not in the Red Sea but in the Mediterranean. For instance, in late 2023, Brigadier-General Mohammad-Reza Naqdi, the coordinating commander of the IRGC, threatened to seal off the Mediterranean if the US and its allies continued to commit crimes in Gaza: “They can soon expect the closure of the Mediterranean, [the Strait of] Gibraltar and other waterways.” Referring to Houthi actions, he warned: “Yesterday, the Persian Gulf and the Strait of Hormuz became a nightmare for them, and today they are trapped in the Red Sea” (Reuters, 2023). Later, in early May 2024, the IRGC Commander-in-Chief General Hossein Salami repeated the threat to seal off the Eastern Mediterranean, asserting that Iran was determined to “block the way” of its “enemy” on the eastern flank of the Mediterranean and thereby “expand the battlefield” (Asharq Al Awsat). Meanwhile, a conference held in early March 2024 to mark the 40th anniversary of Imam Hossein University in Tehran, a de facto military academy, offered insights into the Islamic Republic’s evolving strategic thinking. While Salami pompously proclaimed the ambition to “revive the golden age of Islam,” (Asrlran, 2024) his and Khamenei’s advisor, Major-General Yahya Rahim-Safavi, suggested the expansion of Iran’s “strategic depth” by as much as 5,000 kilometres. Not only would that encompass the Red Sea but the Mediterranean – both important “strategic points,” he stressed. Therefore, the IRGC’s navy and air force “will focus on these spots, as the future wars will take place at sea and in the air” (Entekhab, 2023; J. Frantzman, 2024).

In addition, Iran-backed Lebanese Hezbollah has threatened an EU member state in the Eastern Mediterranean. In his 15 June speech, Secretary-General Hassan Nasrallah threatened that Cyprus would become “part of this war” if it were to open its airports and bases to Israel’s military. The day before, Israel had warned that the prospect of an “all-out war” with Lebanon was “very close.” In response to the Hezbollah chief, an EU spokesman expressed the bloc’s solidarity, stating that Cyprus “is a member state of the EU, this means the EU is Cyprus and Cyprus is the EU” (Ebrahim, 2024). In fact, since mid-January, the military retaliation against the Houthi attacks on Red Sea commercial shipping were conducted by United Kingdom (UK) and US warplanes departing two UK military installations that operate as sovereign overseas territories in the EU’s most easterly state. Meanwhile, it is unclear whether the bases were also used to provide Israel with US and UK “lethal cargo” for the war in Gaza, a charge the ministries of defence in Washington and London have refused to confirm (Scharf, 2023; Smith, 2024). Traditionally, the Islamic Republic’s “strategic depth” has primarily included the geographical area of its “Axis of Resistance”, i.e., ranging from Iraq, Syria, Lebanon and the Occupied Palestinian Territories all the way to Yemen and the Strait of Bab al-Mandab. Now the Mediterranean is to be added, according to the IRGC’s top leadership. In fact, a radius of 5,000 kilometres would include almost all of continental Europe and the entire Mediterranean, all the way to Gibraltar. Until now, Iranian officials had spoken of a self-imposed – and neither technical nor permanent – limitation of 2,000 km in their covert military threats against Europe, which would allow Iranian ballistic missiles to reach EU member states in Eastern Europe (especially Greece or Bulgaria). Lighter Iranian warheads with a range of 3,000 km could, however, reach as far as Central Europe, including Vienna (Ben Taleblu, 2023). All of this should raise the EU’s alarm bells.

Third, Iran’s military support for Russia’s war against Ukraine has been on the rise, while it has supported Moscow to illicitly evade Western, including European, oil and gas sanctions (Karnitsching, 2022).

In the wake of the war against Ukraine, this partnership between Iran and Russia has deepened further, as both countries see a common denominator in their resistance against the West. Iran not only supplies Russia with drones (Mason & Holland, 2023), which are used on a large scale against Ukraine to keep the Ukrainian air defences busy and wear them down, but recently even supported Moscow in building a factory in Tatarstan (an autonomous Russian republic west of the Ural Mountains) (Faucon, Bariyo, & Luxmoore, 2024), where Russia can independently manufacture drones and thereby mitigate some of the effects of Western sanctions on the supply of weapons. In return, Iran also militarily benefits from Russia, as it has obtained the S-300 missile defence system or combat helicopters.

With this partnership, both Tehran and Moscow benefit in terms of the technical optimisation of the weapons systems and their strategic use – after all, they have been tested extensively on the battlefields of Syria and now Ukraine. This manifested itself, for example, in Iran's unprecedented direct attack on Israel on 13 April, which showed many parallels to Russian attacks in Ukraine (Kagan, Jhaveri, Ganzeveld, Carl, & Barros, 2024). Furthermore, the deepening military cooperation between Iran and Russia underlines their strategic orientation characterised by their hostility towards the US and its allies (including the EU), on the one hand, and by coordinated military and political efforts to strengthen their regional and global influence, on the other.

Finally, on 31 May 2024, the EU reacted by imposing sanctions on six Iranian individuals and three entities for their role in transferring drones to Russia in support of its war against Ukraine, in transferring drones or missiles to armed groups and entities in the Middle East and Red Sea region, or for their involvement in Iran's drone programme. The three entities include Khatam al-Anbia, the largest corporation in the IRGC's economic empire, as well as the IRGC navy (Council of the EU, 2024). As is often the case with sanctions, however, their implementation is more important than their imposition – see the US extraterritorial sanctions against Iranian oil exports, which the Biden administration has only implemented half-heartedly (Mohammed, Gardner, & Martina, 2024).

Fourth, the Islamic Republic poses a threat to European citizens and those of Iranian descent living in Europe. On the one hand, this pertains to threats and acts of terrorism (planned or carried out) against Iranian dissidents (including European dual nationals), Jewish institutions as well as European politicians seen to have links to Israel. On the other, this includes Iran's hostage and blackmail policy, with its arbitrary arrest of Iranian-European dual nationals to be used as political bargaining chips to extort financial or political concessions from their European governments or free Iranian citizens, directly or indirectly acting for the Islamic Republic's interests, convicted in European courts. As a case in point, EU member states Belgium and more recently Sweden had each released Iranians in the service of the Islamic Republic who had been convicted by the country's respective courts (in the first case, for engaging in the planning of a terrorist attack and, in the second, for the role in the 1988 Great Massacre in Iran that saw the state murder of thousands of dissidents in fake trials) in exchange for the release of their Belgian and Swedish citizens who were kept in Iranian prisons without due process; in other words, as state hostages and bargaining chips (Bazargan, 2024). As a result, and rightly so, this Iranian hostage-and-blackmail policy is seen in Tehran as a great success, aided and abetted by European acquiescence, and is therefore very likely to be continued.

In fact, this Iranian policy and concomitant playbook appears to have been adopted by a country on European soil, namely Belarus, a key ally of Russia. In late June 2024, it was reported that a German citizen was jailed in Belarus and sentenced to death for alleged mercenaryism and terrorism. He later appeared on Belarusian state TV pleading to President Aleksandr Lukashenko to save him and accusing the German government to have abandoned him. In Iran, forced TV concessions of political hostages have been routine. Later, direct consultations between Berlin and Minsk started, with the latter stating that it had a concrete proposal on

how to solve the issue. It is believed that Belarus, acting in the Kremlin's interests, seeks a prisoner swap with the so-called Tiergarten murderer, whom Russian President Vladimir Putin has hailed as "patriot": a Russian citizen sentenced to life by a German court for his 2019 assassination in Berlin's Tiergarten park – upon the order of Russian authorities – of a Georgian citizen of Chechen descent who had fought Russian troops in Chechnya and later claimed asylum in Germany (Morton, 2024; Sawicki, 2024; Zeit Online, 2024).

On 1 August, there was finally a turnaround in the Kremlin's favour – which the Islamic Republic has probably registered with great satisfaction. The largest Western-Russian prisoner swap since the Cold War took place, following 18 months of negotiations: 16 Western prisoners were released, including *Wall Street Journal* correspondent Evan Gershkovich, who was convicted of espionage in Russia; in return, eight Russians were released from prisons in the US and Norway and the EU states of Germany, Poland and Slovenia, including those accused of intelligence activities (Grenall, 2024). Among those released by the West was also the German citizen sentenced to death in Belarus, who was pardoned by Lukashenko just the day before, thus commuting his death sentence into a life sentence (Rainsford, 2024).

US President Joe Biden described the prisoner exchange as a "feast of diplomacy", but at the same time made clear that the released persons had been sentenced to long prison terms in "show trials". German Chancellor Olaf Scholz was similarly ambivalent. With regard to the Tiergarten murderer, he said: "No one made this decision easy to deport a murderer sentenced to life only after a few years of imprisonment." At the same time, after the meeting with the released prisoners, he described the exchange as the correct decision: "And if you had any doubts, then you lose them after talking to those who are now free" (Rheinische Post, 2024). According to a German TV correspondent in Moscow, however, Germany had thereby proven to be susceptible to blackmail, and German citizens would now be placed in jeopardy abroad (N-TV, 2024). Hence, it seems a process of authoritarian learning can be witnessed, with Iran's arguably highly successful hostage and blackmail policy being successfully imitated by Russia and its chief European ally Belarus.

However, at least in the Iranian case, such European servitude and betrayal of the rule of law towards this criminal praxis has been unnecessary. Instead of acting bilaterally, another path should have been taken long ago: a joint EU stance against this Iranian hostage and blackmail policy, not only condemning this inhumane practice in the strongest possible terms in a collective manner, but also threatening Tehran with tangible political, diplomatic and economic consequences – and being prepared to implement them – in case of Iranian intransigence.

What a new EU Iran policy could look like

All these Iranian security threats and challenges require a paradigm shift in the EU's Iran policy, which is long overdue (Fathollah-Nejad, 2018 & 2023). Now, Iranian threats against maritime security in the Mediterranean are adding a new urgency. At its core, the aim would be to counter the Iranian perception of a weak and conciliatory EU, thus changing the regime's cost-benefit calculation that would lead to Iranian course corrections vis-à-vis Europe and its interests. This paradigm shift could include the following components:

Don't confuse quantity with quality: impose and enforce sanctions that hurt Iran's power élite

In our debate on Iran sanctions, we tend to confuse quantity with quality: while we have the former, we do not necessarily have the latter. Europe could set up its Iran sanctions regime so robustly that it hurts the Islamic Republic's power élite. The half-dozen or so EU sanctions packages imposed in the wake of the autumn 2022 revolutionary "Woman, Life, Freedom" movement were designed precisely in such a way not to hurt the Iranian establishment (Röttgen, 2023). This could also include an EU listing of the IRGC as a terrorist organisation, which, contrary to various claims, would be legally possible – only the political will is lacking

(Märtin, 2024). In other words, sanction central figures and institutions of the power élite, instead of only second- or third-rate ones.

There is one main reason for the noticeable European reluctance on sanctions so far: the EU's obsession with Iran's nuclear issue and the fear that harsh sanctions would discourage the Iranian leadership from returning to the negotiating table are too great. However, there is a failure to recognise that the decision for or against nuclear diplomacy is largely determined by the economic interests of the Islamic Republic's power élite. When an easing of sanctions is needed in order to stabilise the regime, Tehran signals a willingness to negotiate – as seen in the run-up to the 2015 nuclear deal and now with Pezeshkian. It is precisely for this reason that the 2019 US designation of the IRGC as a Foreign Terrorist Organisation has not buried an Iranian desire to resume nuclear diplomacy in the future.

In addition, the E3 (Germany, France and the UK) could activate the JCPOA's so-called "snap-back" mechanism due to Iran's violation of the agreement because of the escalation of its nuclear programme. This would automatically reintroduce comprehensive United Nations (UN) sanctions. The mere threat of this could be effective, as the Islamic Republic has feared this step for years, as it would also cut into the economic sinecures of the élite.

And, finally, the EU could prevent Iranian oil from reaching Europe indirectly (Iran Chamber of Commerce, Industries, Mines and Agriculture, 2023; Tehran Times, 2024). In early July 2024, Iranian Oil Minister Javad Owji stated that Iran was exporting crude to 17 countries, including European ones whose names he did not mention, however (Iran International, 2024b).

End the obsession with the nuclear issue – the West's key strategic blunder

Largely neglected, Europe's focus on the nuclear issue carries significant strategic disadvantages. It allows the Islamic Republic to set the pace through its strategy of "nuclear escalation", while Europe or the West are condemned to a reactive role. The aim of this Iranian strategy – prior to the 2015 JCPOA as well as today – is to induce alarmism in the West so that it will rush to the negotiating table as rapidly as possible to deliver concessions to Iran.

In fact, the "nuclear scare" constitutes a central means of intimidation for both Moscow and, more recently, Tehran (Hodges, 2024). Similar to Russia's nuclear blackmail attempts in the midst of the war on Ukraine, the Islamic Republic is using the spectre of a "nuclear Iran" as an important means of exerting pressure on the West to prevent it from taking a more robust stance against it (Bayat, 2024).

Putting Iran diplomacy on a broader footing

Given the strategic blunder of the obsession with the nuclear issue and the wider threats posed by Tehran's policies, any negotiations with the Islamic Republic should be conducted more broadly and comprehensively than before. This means putting the range of Iranian challenges outlined above on the diplomatic agenda.

Understand the collateral damage of a renewed nuclear-only deal

A renewed nuclear deal would include the easing of sanctions against Iran. The question concerns where Iran's resulting economic dividends will go. The experience in the wake of the JCPOA's implementation in January 2016 suggests that its economic dividends – mostly derived from revitalised oil exports and trade with Europe and elsewhere – (1) benefit predominantly state and semi-state entities, in short the regime, given the

political economy of the Islamic Republic – and does not trickle down into wider sections of the population, with the risk of sparking a new wave of social frustration as a result of a widening income gap – or, in other words, Iran experiencing exclusive instead of inclusive economic growth; and (2) are used by Iran's rulers for the benefit of their own priorities, for example: (a) to strengthen the repressive apparatus; (b) to contain the revolutionary process by financially co-opting employees of the vast state apparatus who might consider taking the side of the people; (c) to fund Iran's missile, drone and nuclear programmes, all controlled by the IRGC; and (d) to finance the "Axis of Resistance", thereby accelerating regional destabilisation, with unforeseeable consequences for the Middle East and Europe.

Putting Iran's policy on a robust footing: deterrence and imposition of costs

It is essential that the EU swiftly develops a deterrent against Iranian threats. In addition to transatlantic coordination, in which the US would form the military backbone, elements of European deterrence would include the threat and subsequent implementation of downgrading diplomatic and economic relations with Tehran in the event of Iranian defiance, the imposition of sanctions on the power élite, and the activation of the JCPOA's "snap-back" mechanism – in other words, the use of all its instruments of power. In short, costs must be clearly conveyed to Iran's leadership, along with the political will to impose them.

Crucially, the most effective means of power at Europe's disposal, the "snap-back" mechanism, will expire quite soon – i.e., in January 2026, ten years after the implementation of the JCPOA, at a time when UN Security Council Resolution 2022 endorsing the latter will also end (Arms Control Association, 2022). Until then, the European signatory states would be able to reinstate UN sanctions as a result of a "significant non-fulfilment of the obligations under the JCPOA." Under the JCPOA, any of the signatories, i.e., including the E3, has the right to lodge a complaint with the UN Security Council for non-compliance with the JCPOA provisions, thereby initiating a 30-day procedure to reinstate the multilateral sanctions against Iran that were suspended by UN Security Council Resolution 2231. In such a case, even the veto powers Russia and China cannot block this. There are sufficient grounds for determining an Iranian violation, such as the enrichment of uranium to almost weapons-grade levels in February 2023 (Gambrell, 2023; Henderson, 2023).

Transatlantic coordination needed – so that Europe is taken seriously by Tehran

In order to exert decisive influence on Tehran's behaviour and reduce the security threats Europe faces, the EU ultimately lacks the means of power that are available to the US: namely, dominance in the banking and financial system as well as in the military sphere. The leadership of the Islamic Republic knows this very well: as a result, it allows itself a great deal against Europe, but is much more cautious towards the US. Meanwhile, Tehran's traditional objective is to divide the West, coaxing Europe to form a counterweight to the US in order to mitigate pressure against it.

Despite much talk of a Western community of values and interests, there have been hardly any efforts on the European side to coordinate with Washington regarding Iran strategy or policy. And this did not happen under either Trump or Biden. Regardless of the question of who will be the next US president, there would be enough common denominators across the Atlantic regarding Iranian challenges that could form the basis of a transatlanticisation of Iran policy.

No diplomacy on the back of civil society: do no harm to the revolutionary process

Given the Islamic Republic's profound loss of popular legitimacy, a deal that ultimately ends up benefitting the authoritarian state could be seen as a stab in the back of the Iranian democracy movement. In this vein, the president of the Munich Security Conference Foundation, who called Iran and Ukraine the two biggest geostrategic challenges in 2023, argued that in the face of popular protests, the EU should not exercise restraint in imposing tougher sanctions on Tehran for its serious human-rights violations, regardless of the prospect of renewed diplomacy (Bayat, 2023; Ischinger, 2023).

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