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Ayatollah Ali Khamenei has never been a gambling man. Since becoming Iran’s “Supreme Leader” in 1989, he’s sought to preserve the status quo by eschewing transformative decisions. But as unprecedented political and economic pressures—including sanctions against Iran’s Central Bank and a looming EU oil embargo—push his back against the wall, Khamenei increasingly has two paths to deliverance: a nuclear compromise, or a nuclear weapon. Each could be perilous for him, and the regime.

Khamenei’s aversion to compromise is well-established. He’s long asserted that Washington’s underlying goal in Tehran is not behavior change but regime change, and yielding to coercion would only project weakness and invite greater pressure from Washington. Just as Perestroika hastened the demise of the USSR, Khamenei believes that compromising on revolutionary ideals could destabilize the foundations of the Islamic Republic.

Contemporary history has validated his worldview. In Khamenei’s eyes, Libyan dictator Muammar Ghaddafi’s abdication of his nuclear program in 2006 was precisely what made him vulnerable to the 2011 NATO intervention which ended his regime, and his life. Pakistan’s 1998 nuclear weapons tests, on the other hand, helped turn foreign pressure and sanctions into foreign engagement and incentives.

While Khamenei may shun compromise, however, his path to a nuclear weapon would be a perilous one. To begin, overt signs of weaponization—including the expulsion of nuclear inspectors or the enriched of weapons-grade uranium—would likely trigger U.S. or Israeli military action. Unless Khamenei wants to provoke a military attack on Iran for domestic expediency—which is improbable but not implausible—he will continue to favor a deliberate, incremental approach.

Time, however, is arguably no longer on Khamenei’s side. He must calculate whether his regime can sustain severe and escalating economic pressure for the duration of time it will take them to acquire a nuclear weapon. Despite media hype, if Tehran were to decide tomorrow that it wants to weaponize, it is, according to best estimates, at least two years away—and likely more—from the finish line.

What’s more, Khamenei must also take into account the fact that Iran’s nuclear facilities have likely been penetrated by foreign intelligence agencies. Unforeseen roadblocks—including computer viruses, “accidental” explosions, mysterious assassinations, and defections—could likely set back Iran’s nuclear clock even further.

Faced with this seemingly binary choice, how will Khamenei decide?

It has been correctly observed that the few instances in which Iran has compromised on revolutionary rigidity, or shown signs of conciliation vis-à-vis the United States, have been when the regime has perceived “existential angst”.

Today Iran is once again subject to enormous pressure, but two factors are different.

First, in previous instances in which Iran felt a need to compromise, oil prices were below \$25 barrel. Today they hover over four times that amount, which softens the blow of sanctions.

Second, the instances in which Iran has compromised in the past were spearheaded not by the obstinate Khamenei, but by wily former president Hashemi Rafsanjani. In the last few years, however, Khamenei has purged Rafsanjani and his more pragmatic acolytes from positions of authority and surrounded himself with sycophants who share his rigid worldview.

That said, it’s possible that in the near term Khamenei will calculate that the costs of continued intransigence are too high, and he will attempt a tactical and temporary compromise in order to stave off pressure and sew divisions within the P5+1, namely to peel China and Russia away from the U.S. and EU.

There are currently no indications, however, to believe that international pressure will compel Khamenei to make the types of meaningful and binding compromises on its nuclear program—which would likely include capping enrichment at 5 percent, sending out stockpiles of low enriched uranium (LEU), and agreeing to an intrusive inspections regime—that would reassure the United States and placate Israel.

It’s oft asserted that in order to persuade Tehran not to pursue a nuclear weapon, Washington must reassure Khamenei that the U.S. merely seeks a change in Iranian behavior, not a change of the Iranian regime. While this makes sense in theory, in practice it’s complicated by Khamenei’s deep-seated conviction that U.S. designs to overthrow the Islamic Republic hinge not on military invasion, but on cultural and political subversion intended to foment a soft or “velvet” revolution from within. The following Khamenei speech on state television, in 2005, is both representative and revealing of his world view:

More than Iran’s enemies need artillery and guns, they need to spread cultural values that lead to moral corruption.... I recently read in the news that a senior official in an important American political center, said: “Instead of bombs, send them miniskirts.” He is right. If they arouse sexual desires in any given country, if they spread unrestrained mixing of men and women, and if they lead youth to behavior to which they are naturally inclined by instincts, there will no longer be any need for artillery and guns against that nation.

Khamenei’s vast collection of writings and speeches make clear that he fears American cultural WMDs and soft power more than bunker busters and aircraft carriers. In other words, Tehran is threatened not only by what America does, but what America represents. For this reason Khamenei has asserted that “the conflict and confrontation [between Washington and Tehran] is something natural and unavoidable.” Herein lays our policy conundrum: No nuclear deal with

Tehran can be made *without* Khamenei, but it appears almost equally unlikely that any deal can be made *with* him.

Where does this leave us?

Shortly before his death, the great American diplomat and Cold War scholar George Kennan—reflecting on 70 years of experience in foreign affairs—observed that “Whenever you have a possibility of going in two ways, either for peace or for war, for peaceful methods or for military methods, in the present age there is a strong prejudice for the peaceful ones. War seldom ever leads to good results.”

We should keep Kennan’s words in mind while at the same time being sober about the nature of the regime in Tehran, and the challenges it poses. Realistically, the utility of continued dialogue and negotiations will not be to resolve our differences with Tehran, but to prevent our cold conflict from turning hot. The Obama administration’s unprecedented and unreciprocated overtures to Iran also help expose the fact—both to the outside world and the Iranian people—that Tehran is the intransigent actor in this equation, not Washington. This has served to strengthen both the breadth and the depth of our international coalition.

The goal of coercive diplomacy should be to significantly slow Iran’s nuclear progress, and contain their regional political influence, until the regime is eventually forced to change—or is changed-- under the weight of its own internal contradictions and economic malaise. When this might happen is entirely unpredictable, but the events in the Arab world over the last two years are a reminder of Trotsky’s old maxim about dictatorships: “While they rule their collapse appears inconceivable; after they’ve fallen their collapse appeared inevitable.”