



Break Point: What Went Wrong

By George Friedman

On May 23, we published a Geopolitical Intelligence Report titled "[Break Point](#)." In that article, we wrote: "It is now nearly Memorial Day. The violence in Iraq will surge, but by July 4 there either will be clear signs that the Sunnis are controlling the insurgency -- or there won't. If they are controlling the insurgency, the United States will begin withdrawing troops in earnest. If they are not controlling the insurgency, the United States will begin withdrawing troops in earnest. Regardless of whether the [political settlement] holds, the U.S. war in Iraq is going to end: U.S. troops either will not be needed, or will not be useful. Thus, we are at a break point -- at least for the Americans."

In our view, the fundamental question was whether the Sunnis would buy into the political process in Iraq. We expected a sign, and we got it in June, when Abu Musab al-Zarqawi was killed -- in our view, through intelligence provided by the Sunni leadership. The same night al-Zarqawi was killed, the Iraqis announced the completion of the Cabinet: As part of a deal that finalized the three security positions (defense, interior and national security), the defense ministry went to a Sunni. The United States followed that move by announcing a drawdown of U.S. forces from Iraq, starting with two brigades. All that was needed was a similar signal of buy-in from the Shia -- meaning they would place controls on the Shiite militias that were attacking Sunnis. The break point seemed very much to favor a political resolution in Iraq.

It never happened. The Shia, instead of reciprocating the Sunni and American gestures, went into a deep internal crisis. Shiite groups in Basra battled over oil fields. They fought in Baghdad. We expected that the mainstream militias under the Supreme Council for Islamic Revolution in Iraq (SCIRI) would gain control of the dissidents and then turn to political deal-making. Instead, the internal Shiite struggle resolved itself in a way we did not expect: Rather than reciprocating with a meaningful political gesture, the Shia intensified their attacks on the Sunnis. The Sunnis, clearly expecting this phase to end, held back -- and then cut loose with their own retaliations. The result was, rather than a political settlement, civil war. The break point had broken away from a resolution.

Part of the explanation is undoubtedly to be found in Iraq itself. The prospect of a centralized government, even if dominated by the majority Shia, does not seem to have been as attractive to Iraqi Shia as absolute regional control, which would guarantee them all of the revenues from the southern oil fields, rather than just most. That is why SCIRI leader Abdel Aziz al-Hakim has been pushing for the creation of a federal zone in the south, similar to that established for the Kurdistan region in the north. The growing closeness between the United States and some Sunnis undoubtedly left the Shia feeling uneasy. The Sunnis may have made a down payment by delivering up al-Zarqawi, but it was far from clear that they would be in a position to make further payments. The Shia reciprocated partially by offering an amnesty for militants, but they also linked the dissolution of sectarian militias to the future role of Baathists in the government, which they seek to prevent. Clearly, there were factions within the Shiite community that were pulling in different directions.

But there was also another factor that appears to have been more decisive: Iran. It is apparent that Iran not only made a decision not to support a political settlement in Iraq, but a broader decision to support Hezbollah in its war with Israel. In a larger sense, Iran decided to simultaneously confront the United States and its ally Israel on multiple fronts -- and to use that as a means of challenging Sunnis and, particularly, Sunni Arab states.

The Iranian Logic

This is actually a significant shift in Iran's national strategy. Iran had been relatively cooperative with the United States between 2001 and 2004 -- supporting the United States in Afghanistan in a variety of ways and encouraging Washington to depose Saddam Hussein. This relationship was not without tensions during those years, but it was far from confrontational. Similarly, Iran had always had tensions with the Sunni world, but until last year or so, as we can see in Iraq, these had not been venomous.

Two key things have to be borne in mind to begin to understand this shift. First, until the emergence of al Qaeda, the Islamic Republic of Iran had seen itself -- and had been seen by others -- as being the vanguard of the Islamist renaissance. It was Iran that had confronted the United States, and it was Iran's creation, Hezbollah, that had pioneered suicide bombings, hostage-takings and the like in Lebanon and around the world. But on Sept. 11, 2001, al Qaeda -- a Sunni group -- had surged ahead of Iran as the embodiment of radical Islam. Indeed, it had left Iran in the role of appearing to be a collaborator with the United States. Iran had no use for al Qaeda but did not want to surrender its position to the Sunni entity.

The second factor that must be considered is Iran's goal in Iraq. The Iranians, who hated Hussein as a result of the eight-year war and dearly wanted him destroyed, had supported the U.S. invasion of Iraq. And they had helped the United States with intelligence prior to the war. Indeed, it could be argued that Iran had provided exactly the intelligence that would provoke the U.S. attack in a way most advantageous to Iran -- by indicating that the occupation of Iraq would not be as difficult as might be imagined, particularly if the United States destroyed the Baath Party and all of its institutions. U.S. leaders were hearing what they wanted to hear anyway, but Iran made certain they heard this much more clearly.

Iran had a simple goal: to dominate a post-war Iraq. Iran's Shiite allies in Iraq comprised the majority, the Shia had not resisted the American invasion and the Iranians had provided appropriate support. Therefore, they expected that they would inherit Iraq -- at least in the sense that it would fall into Tehran's sphere of influence. For their part, the Americans thought they could impose a regime in Iraq regardless of Iran's wishes, and they had no desire to create an Iranian surrogate in Baghdad. Therefore, though they may have encouraged Iranian beliefs, the goal of the Americans was to create a coalition government that would include all factions. The Shia could be the dominant group, but they would not hold absolute power -- and, indeed, the United States manipulated Iraqi Shia to [split them further](#).

We had believed that the Iranians would, in the end, accept a neutral Iraq with a coalition government that guaranteed Iran's interests. There is a chance that this might be true in the end, but the Iranians clearly decided to force a final confrontation with the United States. Tehran used its influence among some Iraqi groups to reject the Sunni overture symbolized in al-Zarqawi's death and to instead press forward with attacks against the Sunni community. It goes beyond this, inasmuch as Iran also has been forging closer ties with some Sunni groups, who are responding to Iranian money and a sense of the inevitability of Iran's ascent in the region.

Iran could have had two thoughts on its mind in pressing the sectarian offensive. The first was that the United States, lacking forces to contain a civil war, would be forced to

withdraw, or at least to reduce its presence in populated areas, if a civil war broke out. This would leave the majority Shia in a position to impose their own government -- and, in fact, place pro-Iranian Shia, who had led the battle, in a dominant position among the Shiite community.

The second thought could have been that even if U.S. forces did not withdraw, Iran would be better off with a partitioned Iraq -- in which the various regions were at war with each other, or at least focused on each other, and incapable of posing a strategic threat to Iran. Moreover, if partition meant that Iran dominated the southern part of Iraq, then the strategic route to the western littoral of the Persian Gulf would be wide open, with no Arab army in a position to resist the Iranians. Their dream of dominating the Persian Gulf would still be in reach, while the security of their western border would be guaranteed. So, if U.S. forces did not withdraw from Iraq, Iran would still be able not only to impose a penalty on the Americans but also to pursue its own strategic interests.

This line of thinking also extends to pressures that Iran now is exerting against Saudi Arabia, which has again become a key ally of the United States. For example, a member of the Iranian Majlis recently called for Muslim states to enact political and economic sanctions against Saudi Arabia -- which has condemned Hezbollah's actions in the war against Israel. In the larger scheme, it was apparent to the Iranians that they could not achieve their goals in Iraq without directly challenging Saudi interests -- and that meant mounting a general challenge to Sunnis. A partial challenge would make no sense: It would create hostility and conflict without a conclusive outcome. Thus, the Iranians decided to broaden their challenge.

The Significance of Hezbollah

Hezbollah is a Shiite movement that was created by Iran out of its own needs for a Tehran-controlled, anti-Israel force. Hezbollah was extremely active through the 1980s and had exercised economic and political power in Lebanon in the 1990s, as a representative of Shiite interests. In this, Hezbollah had collaborated with Syria -- a predominantly Sunni country run by a minority Shiite sect, the Alawites -- as well as Iran. Iran and Syria are enormously different countries, with many different interests. Syria's interest was the domination and economic exploitation of Lebanon. But when the United States forced the Syrians out of Lebanon -- following the assassination of former Prime Minister Rafik al-Hariri in February 2005 -- any interest Syria had in restraining Hezbollah disappeared. Meanwhile, as Iran shifted its strategy, its interest in reactivating Hezbollah -- which had been somewhat dormant in relation to Israel -- increased.

Hezbollah's interest in being reactivated in this way was less clear. Hezbollah's leaders had aged well: Violent and radical in the 1980s, they had become Lebanese businessmen in the 1990s. They became part of the establishment. But they still were who they were, and the younger generation of Hezbollah members was even more radical. Hezbollah militants had been operating in southern Lebanon for years and, however relatively restrained they might have been, they clearly had prepared for conventional war against the Israelis.

With the current conflict, Hezbollah now has achieved an important milestone: It has fought better and longer than any other Arab army against Israel. The Egyptians and Syrians launched brilliant attacks in 1973, but their forces were shattered before the war ended. Hezbollah has fought and clearly has not been shattered. Whether, in the end, it wins or loses, Hezbollah will have achieved a massive improvement of its standing in the Muslim world by slugging it out with Israel in a conventional war. If, at the end of this war, Hezbollah remains intact as a fighting force -- regardless of the outcome of the campaign in southern Lebanon -- its prestige will be enormous.

Within the region, this outcome would shift focus way from the Sunni Hamas or secular Fatah to the Shiite Hezbollah. If this happens simultaneously with the United States

losing complete control of the situation in Iraq, the entire balance of power in the region would be perceived to have shifted away from the U.S.-Israeli coalition (the appearance is different from reality, but it is still far from trivial) -- and the leadership of the Islamist renaissance would have shifted away from the Sunnis to the Shia, at least in the Middle East.

Outcomes

It is not clear that the Iranians expected all of this to have gone quite as well as it has. In the early days of the war, when the Saudis and other Arabs were condemning Hezbollah and it appeared that Israel was going to launch one of its classic lightning campaigns in Lebanon, Tehran seemed to back away -- calling for a cease-fire and indicating it was prepared to negotiate on issues like uranium enrichment. Then international criticism shifted to Israel, and Israeli forces seemed bogged down. Iran's rhetoric shifted. Now the Saudis are back to condemning Hezbollah, and the Iranians appear more confident than ever. From their point of view, they have achieved substantial psychological success based on real military achievements. They have the United States on the defensive in Iraq, and the Israelis are having to fight hard to make any headway in Lebanon.

The Israelis have few options. They can continue to fight until they break Hezbollah -- a process that will be long and costly, but can be achieved. But they then risk Hezbollah shifting to guerrilla war unless their forces immediately withdraw from Lebanon. Alternatively, they can negotiate a cease-fire that inevitably would leave at least part of Hezbollah's forces intact, its prestige and power in Lebanon enhanced and Iran elevated as a power within the region and the Muslim world. Because the Israelis are not going anywhere, they have to choose from a limited menu.

The United States, on the other hand, is facing a situation in Iraq that has broken decisively against it. However hopeful the situation might have been the night al-Zarqawi died, the decision by Iran's allies in Iraq to pursue civil war rather than a coalition government has put the United States into a militarily untenable position. It does not have sufficient forces to prevent a civil war. It can undertake the defense of the Sunnis, but only at the cost of further polarization with the Shia. The United States' military options are severely limited, and therefore, withdrawal becomes even more difficult. The only possibility is a negotiated settlement -- and at this point, Iran doesn't need to negotiate. Unless Grand Ayatollah Ali al-Sistani, the top Shiite cleric in Iraq, firmly demands a truce, the sectarian fighting will continue -- and at the moment, it is not even clear that al-Sistani could get a truce if he wanted one.

While the United States was focused on the chimera of an Iranian nuclear bomb -- a possibility that, assuming everything we have heard is true, remains years away from becoming reality -- Iran has moved to redefine the region. At the very least, civil war in Lebanon (where Christians and Sunnis might resist Hezbollah) could match civil war in Iraq, with the Israelis and Americans trapped in undesirable roles.

The break point has come and gone. The United States now must make an enormously difficult decision. If it simply withdraws forces from Iraq, it leaves the Arabian Peninsula open to Iran and loses all psychological advantage it gained with the invasion of Iraq. If American forces stay in Iraq, it will be as a purely symbolic gesture, without any hope for imposing a solution. If this were 2004, the United States might have the stomach for a massive infusion of forces -- an attempt to force a favorable resolution. But this is 2006, and the moment for that has passed. The United States now has no good choices; its best bet was blown up by Iran. Going to war with Iran is not an option. In Lebanon, we have just seen the value of [air campaigns](#) pursued in isolation, and the United States does not have a force capable of occupying and pacifying Iran.

As sometimes happens, obvious conclusions must be drawn.