

The Anatomy Of Regimes In The Greater Middle East:

A Country-Risk Examination Of
The World's Main Energy Reservoir And
The Effects On World Oil & LNG Prices

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As I explained in my presentation to your esteemed Institute in May 2012, the Greater Middle East (GME) is a vast part of the world stretching all the way from **Russia** to the AfPak front, from China's **Central Asian** borders to the Atlantic (including **North Africa**) and from **Egypt** down to the Horn of Africa (HoA). I also explained the "Arab Spring of Revolutions"; but now I call it the "Arab Spring of Mess" because it has only caused a mess wherever it has travelled, particularly to Egypt, Iraq, Lebanon, Libya, Sudan, Syria, Tunisia and Yemen.

I draw your attention the words **taqiya** (a practice to deceive) and **Safawism**, which you can google. Taqiya, an ancient practice developed and integrated into the Twelver Shi'ite sect by **Imam Ja'far al-Sadeq**, No. 6 of the 12 holiest imams in this sect. Ja'farism holds that God is represented to the faithful by the 12 imams. The Ja'faris believe the 12th Imam, al-**Mahdi**, is to return to rule the world in justice. The Supreme Leader of Iran's Safawi theocracy, Ayatullah 'Ali **Khamenei**, **claims that, until then, he is al-Mahdi's representative on Earth.**

Taqiya is what makes the Western powers, the GCC states and Israel suspicious of whatever the theocracy's leaders say about Tehran's nuclear programme which is controlled by the Islamic Revolutionary Guard Corps (IRGC). These states, particularly in the GCC region, are worried also by the fact that Iran sits on fault-lines which cause highly destructive earthquakes. There were two quakes in Iran in April 2013 and one of them hit the Bushehr province where Iran's first nuclear reactor is located, which is far closer to the GCC region than to Tehran.

Imam Ja'far said taqiya "means that, being double-faced with one's own, takes one outside the bounds of faith, but with others is a form of worship". This actually means the objective justifies any means used by those who practice taqiya. Iran's Ja'fari Shi'ite theocracy and its Lebanese unit Hizbullah depend heavily on the practice of taqiya. Tehran keeps denying that its nuclear programme is to produce atomic bombs.

Iran's theocracy leads an axis to control the GME and later the whole world. Syria under 'Alawite dictator Bashar al-Assad is the most important part of this axis as it allows Tehran to have control from the Caspian Sea to the gas-rich east of the Mediterranean Sea. Coupled with its developing alliance with the Muslim Brotherhood (MB) which now rules Egypt, plus its links with al-Qaeda (**a key Qaeda unit is still based in Iran**), Tehran's regional foes believe the dangers emanating from this theocracy are quite serious.

It is believed a fall of Assad in Syria could mean potential collapse of Iran's axis. '**Abdul-Halim Khaddam** (Syria's vice-president until he defected from Assad's regime after the February 2005 assassination of Lebanon's ex-PM Rafiq Hariri – a murder blamed on Hizbullah and Assad's regime) has said **the theocracy is turning Syria into an "Iranian colony"**.

The Anatomy Of The GME Regimes

The society and the ruling class in the GME, as in most other parts of the world, is made up of five basic elements which can make or break any state or national institution. They are in this order of importance: the tribe (or race), the sect, the ideology, geo-politics, and the resources (natural or human). When these elements are balanced by a national institution strong enough to unite and rule the people as well as withstand any shock from within and/or outside the state, the middle class will flourish and end up causing the state to become a pluralistic democracy. When the balance is lost, the institution will collapse and the state can break up. The national shock will have destroyed the institution as well as the middle class.

It takes a very long time for a middle class to develop. But it can be destroyed quickly by a national shock.

The society is affected by five external factors: global politics, global economics, energy diplomacy, the global or regional ecology, and global ethics (morality). Any one or more of these factors can produce the shock that can break up a state. The shock, whether internal or external, can produce what is now called Arab Spring. Tunisia was shaken by an internal shock. Iraq was shaken by a US-led invasion.

The internal shock in Tunisia (as in Egypt, Libya, Syria, Yemen, etc) came from the fact that the ruler had turned the state into a family estate. Sunni Saddam Hussein had destroyed the ruling Arab Ba'th Socialist Party as a secularist/ideological element by turning it into a clannish mafia. 'Alawite Gen Hafez al-Assad had done the same to Syria's ruling Ba'th Party. These are just examples. Husni Mubarak in Egypt or 'Ali 'Abdullah Saleh in Yemen is another.

None of the Arab Spring's hits has caused a change to a definitive situation. All it has done thus far is causing the ruler to be toppled (or be side-lined as in the case of Bashar al-'Assad) and a set of transitional phases – mostly upheavals - to begin. No one knows what the definitive change will be like in any part of the GME or even beyond this part of the world.

The Arab Spring has simply shaken the foundations of a state and toppled the super-structure. No one knows what shape this part of the world will assume when the definitive change has taken place. The states as we know them will be changed. Some will be broken up into different entities. Others will become larger by merging with entities from a neighbouring state, and so forth.

All the rulers toppled so far had caused the Arab Spring to destroy the institutions through which they controlled the state.

In Iran, run by a Shi'ite theocracy, the ruler claims he represents God on Earth and he controls the state and its huge regional ambitions through the Safawi ideology. The Safawi empire was created in 1501 AD and its theocracy only lasted one generation – after which the latter fell into a long-lasting cycle of deterioration (as explained in [rim6IranSafawidsHistoryJun28-04](#)). It is said Iran's current theocracy would not survive beyond Ayatullah 'Ali Khamenei.

The Iran of 2020 is perceived as becoming a net oil importer. Saudi Arabia, now heading the Sunni front of the Muslim world, will have to make sure that the Shi'ite theocracy will have vanished from Iran. Otherwise Iran could get Saudi Arabia to be partitioned, with a Shi'ite ruler in the eastern part of this country to become an oil exporting theocrat with a Safawi ideology which will later destroy his state.

The British empire policed the Persian Gulf from the late 1700s to World War-II. But its circumstances were so diminished after the war that it soon left all its military bases east of Suez. As Britain receded in the Middle East, the US role there grew — especially after successive energy crises engineered by OPEC states alerted Washington to its growing dependence on foreign oil.

The US had to assure the security of petroleum (oil & LNG) passing through the Strait of Hormuz, maintaining a continuous naval presence in and around the Gulf and periodically deployed ground forces to protect fragile oil-producing states.

The US-led invasion of Iraq in March 2003 and the Saddam dictatorship's subsequent fall gave the Kurds in the north the opportunity to realise a long-held dream of ruling themselves. Now, Iraqi Kurdistan has turned out to be one of the world's most prolific petroleum provinces attracting the biggest IOCs.

The virus of **federalism – or separatism** - there is spreading to the rest of Iraq to the extent that the country looks likely to be split into at least three entities – a Kurdish state allied to Turkey in the north, a Sunni Arab state with vast shale oil and gas in the centre (bordering and carrying the virus to Iran in the east and to Syria in the west), and a Shi'ite Arab theocracy – or rather Shi'ite Arab democracy - in the petroleum-rich south bordering Kuwait and Saudi Arabia.

The Anatomy Of The American Energy Revolution & Global Implications

The US energy revolution combines alternative fuel sources made competitive, rock fracturing (fracking) and other technologies for the world's second-largest non-conventional petroleum wealth (next to China's), and energy efficiency which is a major alternative source of fuels (including a fuel-efficient transport sector cutting national demand for gasoline). This is about to spread to the rest of the world.

Historically, natural resources (notably including **salt**) helped produce the European Spring long before the industrial revolution. Among many other things, salt helped create trading empires (Venice and France not to be excluded) and eventually helped cause the French revolution. The combination of geo-politics and natural resources helped enlarge several empires through colonies across the globe. Now, **US-led multinationals are beginning to spread to modern colonies** being developed in the five continents through such technologies as fracking, commodities like LNG and so forth.

This means **the US military will not leave the GME alone**. The Pentagon is shifting weight to the Asian/Pacific front but will leave residual units on both sides of the Hormuz Strait. There will be emphasis on those spots where US-led multinationals and appliers of modern technology in military defence need to stay. But **what will change from today's criteria for whom to defend are the targets against which the Pentagon strategists will concentrate**.

Western analysts are right in saying “nothing lasts forever”. Yet it is wrong to assume that a “combination of energy independence and economic necessity will lead Washington to become more insular in its outlook, the same way London did” after World War-II. Also wrong is the assumption that, “with less need for foreign oil and an increasingly urgent requirement to rein in federal borrowing”, the US will leave the GME. **There are no longer geographically “distant places” in any part of the globe**.

Dead wrong is this paragraph: “With the prospect of OPEC-induced energy shortages off the table, at least in America, political leaders are sure to begin asking why the US Navy is carrying the burden of making sure China has secure sources of oil”. China will have many modern colonies inside it for US-led multinationals in the coming decades; and so will India.

On the surface of formal geo-politics, however, **China and India may become fierce competitors in assuring the safety of the supply of liquid petroleum out of Hormuz**. But below that surface, things will work differently. **That is if both China and India will have remained united by 2030** as they are today.

Iraq's Likely Effects On OPEC & Oil Pricing

Before I go any further in my presentation, I put a question mark about the future of OPEC as an organisation to defend world crude oil prices. Among the many factors to my question is **Iraq which until 2012 was projected as a potential supplier of over 13 million b/d of conventional crude oil to the world and itself by 2017-20**. This Baghdad ambition was in late 2012 cut to 9 million b/d, and since then Iraq's **Kurdistan has been projected as a potential supplier of more crude oil and natural gas than other parts of Iraq, with the country likely to be partitioned at least in economic terms**.

Iraq's crude oil exports in May 2013 are expected to average over 2.5 million b/d, excluding 70,000 b/d of crudes and condensate from Kurdistan which are to average 70,000 b/d. Under this year's federal budget, Iraq's 2013 crude oil exports must average 2.9 million b/d, including 250,000 b/d from Kurdistan. But the volume from Kurdistan, which suspended exports through the federal system in late 2012, will depend on a comprehensive agreement between Baghdad and the Kurdistan Regional Government (KRG); and this is a very complicated issue. **Erbil, the "temporary" capital of Kurdistan**, does not trust the Shi'ite dominated and Iran-guided central government of Iraq and so are the persons in charge of other provinces in this country.

Kurdistan's parliament in early May 2013 passed a law establishing the legal framework for **the Kurdish region's "economic independence within the federal system"**. That was meant to be an ultimatum for Baghdad to stop delaying payments due to IOCs operating in Kurdistan, while the central government in Baghdad said a financial solution with Erbil required an amendment to the 2013 federal budget which had to be approved by the central parliament. The central parliament was not likely to take up this matter before June.

The KRG, meanwhile, has been committed to Turkey to raise its crude oil production to 2.2 million b/d by 2020, with direct exports via Turkish territory by then already set to average 2 million b/d. Ankara and Erbil are negotiating agreements which will allow the supply plan and the **export of 14 BCM/year of natural gas by pipelines to be built**. These will affect Iraq's federal system, with Sunni and Shi'ite Arab provinces wanting autonomy similar to KRG's (see ood4IrqFedApr29-13), which makes independent experts wonder how Baghdad will be committed to OPEC's supply discipline in future. I shall be ready to provide any further explanation of this matter in the Q&P section of this seminar.

Another of the points I am ready to explain in the Q&A section is that on May 2, Israel's air force bombed targets in Syria involving advanced Russian SAM-7s bound for Iran's Lebanese Shi'ite unit Hizbullah in Lebanon being sent on Tehran's orders. On May 4, a prominent Lebanese military expert told al-'Arabiya these SAMs, which were destroyed in the raid on a convoy moving close to Syria's side of the Beqa', on Lebanon's eastern border, could have put the Jewish state's air power in jeopardy.

On May 11, GME military experts claimed that special units of Iran's IRGC were taking a major part of President Assad's chemical weapons stocks to both their country and a Hizbullah base in the Beqa' – where an underground corridor links that area to a South Lebanon bunker north of the Litani River which has missiles which can hit deep into Israel in the event of a major war. And on May 4, the Guardian newspaper of London reported that Iran had offered Israel an alliance between the Shi'ite theocracy and the Jewish state.

Dated Brent in 2013-14 will be moving within the \$90-110/barrel range, which is supportive of non-conventional oil and gas resource developers in Argentina Australia, Canada, China, the US and other parts of the world. This is in view of an improvement in the US economy, a less severe financial crisis in the eurozone and reduced GDP growth in China – both positive and negative factors which will balance each other. The prospects for oil prices in 2014-15 will depend more on these factors as well as on an improvement in the supply of crude oil to Cushing, Oklahoma, which is the delivery point for WTI. Again, I shall explain this point in detail in the Q&A section.

As for LNG, which is the global aspect of the natural gas business, its premium-based pricing in Asia in the future should depend on a proper market mechanism to be created in the region. A NYMEX-type of mechanism in Tokyo will go a long way to eliminating the high premium which Asian buyers pay for their LNG imports. A key factor to this will be the emergence of new world leaders in the LNG export business. Now, Qatar is the largest exporter of LNG in the world. But I believe that, eventually, it will be over-taken by Australia and/or North America (the USA/Canada). Again, I shall be pleased to elaborate on this subject or any related issues in the Q&A section of our meeting today.

The US/G-7 & Saudi Factors To The Global Energy Perspective

At least for the short term, Iran's theocracy, meanwhile, is no longer a factor of importance to the global energy perspective. The US in 2013 is expected to be the world's biggest producer of petroleum liquids – over-taking Russia and Saudi Arabia. But Saudi Arabia is a key player in the Group of 20 (G-20) world powers as the Sunni/Wahhabi kingdom is the member which the G-7 (leading the world's economy) regards as being in charge of the global energy supply perspective. This is because, apart from having the world's largest reserves of conventional oil, Saudi Arabia has more than 470 TCF of shale and tight gas resources plus a very large resource base for tight oil.

In view of Riyadh's importance to the G-20, opinions expressed by Saudi petroleum sector officials concerning the global energy perspective are taken seriously. Addressing the Centre for Strategic & International Studies (CSIS) in Washington, Saudi Petroleum & Mineral Resources Minister **'Ali al-Na'imi** on April 30 said: "Newly commercial reserves of shale or tight oil are transforming the energy industry in America - and that's great news. It is helping to sustain the US economy and create jobs at a difficult time. I welcome these new supplies into the global oil market".

Na'imi, however, said it was not realistic to believe this would help the US eliminate oil imports - a goal some Americans argue energy independence is crucial for its security. Na'imi noted: Despite the domestic production gains, US imports of Middle East oil in the second half of 2012 were higher than at any time since the 1990s.

More important, Na'imi said **Saudi Arabia was not planning to raise its crude oil production capacity beyond the current level of 12.5 million b/d until 2040**. That was because Saudi Arabia did not expect world demand for its crude oil will have risen beyond its present capacity. He said: The shale revolution in the US and other parts of the world "reinforces the idea that fossil fuels are the [global] energy source that have truly endured. They have the capacity to sustain us well into the future... Wind and other relatively expensive [energy] alternatives will also be part of the mix. But in terms of cost, reliability, and effectiveness, fossil fuels stand alone".

Na'imi stressed that the US "will continue to meet domestic demand by utilising a range of different sources, including from the Middle East. This is simply sound economics... I believe this talk of ending reliance [on the Middle East] is a naïve, rather simplistic view".

Na'imi said Saudi Arabia remained able to sustain its oil reserves at the current 266 billion barrels and forecast this could increase, especially if technology for extracting tight and shale oil and gas improved. But he corrected comments by another top Saudi official, former intelligence chief Prince Turki al-Faisal, on Saudi oil development plans.

In an April 29 speech at Harvard University, Prince Turki said Saudi Arabia was "set to" raise crude oil production capacity to 15 million b/d. But Na'imi said: "We have no plans [for that]. We don't really see a need to build a capacity beyond what we have today". Prince Turki's aide later said the royal had meant Saudi Arabia "could" take that step if it felt the need.

Other Key Issues & Developments To Watch

The dangers ahead include an electronic warfare involving the security of IT systems in the GME. Saudi officials have charged that Iran has been engaged in such warfare against the Wahhabi

kingdom. Qatari officials have made the same charges. This is an important new issue in the GME. **Iran says Israel and the US are attacking it electronically as well.**

In the field of information technology (IT), **security of computerised data** - be they for energy/petroleum supply or purchase systems, for nuclear energy or development/maintenance of atomic weapons systems, or for any other purposes – **has become a top priority which has to be made available at any cost.** So spending on cloud computing, mobilisation, data and social businesses has become a priority.

When the regional division of US-based industry analyst IDC polled chief IT security officers (CISOs) on the areas of technology where they plan to focus their spending, there were four main areas which came up: cloud computing; mobilisation; big data; and social business.

There are likely to be a lot of developments in each of these areas over the coming years, but there will also be a lot of activity around security as a result. Applications will move to the cloud and the networks which keep the biggest firms or state organisations running can be accessed by any employee anywhere in the world. As geographical limitations become irrelevant, this will present many new ways for malicious hackers to steal, destroy and manipulate other people's data.

Recent attacks on the IT systems of Saudi Aramco, Qatar's RasGas and Iran's nuclear programme have shown that these security threats are no idle paranoia. Companies of all sizes must not only protect themselves, but are advised also to begin to accept that breaches are bound to happen. CISOs must be prepared to react in a measured way when hackers do get in, as the price of unprecedented advances will be inevitable damage.

MEED on May 3 reported that regional firms had raised budgets for IT security by about 20% this year. The publication, which presented an interesting study in its May 3 issue, said: "The challenge now is to spend that money wisely".

For example, **un-named foreign states were blamed for targeting Saudi Aramco in an attack in August 2012. A virus called Shamoon, delivered via email, infiltrated 30,000 PCs and destroyed data on computers and servers. The attack failed to reach its ultimate goal, which was to stop the flow of Saudi oil.** So CISOs participating in this seminar are advised to read this study in MEED's May 3 issue. I go no further than this in my presentation as the APS newsletters have begun to focus on this matter in its weekly reports.

The Syrian war, Iran's nuclear and GME/global ambitions and the future of the Asia/Pacific region are to be high on the agenda of talks between Presidents Barack Obama and Vladimir Putin on the margins of the mid-June G8 summit meeting in Dublin. This is a meeting to watch closely as it could affect the future of the world, mainly the GME and Asia/Pacific regions.

Finally, I focus on **the situation in Iran.** Its theocracy has been militarised by the IRGC, which critics describe as being excessively corrupt. The IRGC, for example, is said to have links with the drugs cartels of Latin America and involved in the smuggling of weapons into states and movements included in the US list of terrorist regimes and non-state organisations.

Khamenei claims to represent God on Earth through his Safawi theory that he is the envoy of **al-Mahdi.** Against him, however, stands **Esfandiar Rahim-Masha'ie** who heads Iran's nationalist current and insists that the theocracy is coming to an end.

One of the crucial dates for this power-struggle between Khamenei's Safawis and the Persian nationalists is June 14, 2013, when a presidential election in Iran is due to be held.

Many of the leading candidates to the presidency have yet to declare themselves. But Masha'ie, whose daughter is married to the son of nationalist President Mahmoud Ahmadi-Nejad, is a Machiavellian strategist and promoter of a cult which has attracted many Iranians. **Masha'ie is determined to defeat not only Khamenei but the whole of the Safawi theocracy.** Last week, he was yet to declare his candidacy for the post of president - as by law Ahmadi-Nejad cannot have a third term in office.

Masha'ie is part of a plan by Ahmadi-Nejad to extend his influence after he is out of office. The prospect has angered those opposed to Ahmadi-Nejad, who have been mobilising to prevent a Masha'ie candidacy as part of one of the fiercest pre-election power-struggles Iran has seen since the early 1979 fall of the Pahlavi monarchy. Their battle is backed by Khamenei, who is said to be fed up with Ahmadi-Nejad's repeated disobedience.

Khamenei is hoping the vote will erase the memory of the flawed election of June 12, 2009, when he backed Ahmadi-Nejad against accusations of rigging which sparked the worst street unrest since early 1979. Khamenei has three main concerns for the poll: a peaceful vote, a high turn-out and a loyal winner. For this to succeed, he needs a credible contest at a time when Iran is under intense international pressure over its nuclear programme and global ambitions.

Masha'ie and Ahmadi-Nejad have capitalised on sensitivities surrounding the poll, making it clear they will not go quietly and raising fears the election could once again be marred by unrest. They have vowed to stand against any violation in the vote process, a clear warning to their opponents who include members of the Guardians Council (a constitutional body which vets the candidates to any election and the decisions of the parliament), the legislature called Islamic Consultative Majlis, the powerful judiciary and the IRGC.

The IRGC has become a huge business empire which includes many companies, industries, shipping firms, banks, etc. So apart from being the elite in Iran's military establishment, the IRGC businesses constitute what one critic calls a "parallel economy which keeps growing" while the country's formal economy is imploding.

However, the IRGC command is split with one faction still backing Ahmadi-Nejad. The latter faction is said to be as corrupt as the other members of the IRGC command. Counting on the support of this IRGC faction, Masha'ie and Ahmadi-Nejad plan to make public dossiers of alleged corruption by the Khamenei camp.

This is a life-and-death struggle for Masha'ie and Ahmadi-Nejad. They know that their opponents have decided to terminate their political life with the end of Ahmadi-Nejad's second and final presidential term.

Masha'ie and Ahmadi-Nejad developed their close political bonds over decades of friendship further strengthened by the marriage of Masha'ie's daughter to Ahmadi-Nejad's son. They have appeared together in campaign mode at public gatherings. Masha'ie on April 8 said: "We have to prepare ourselves for a new brilliant era in the country", in clear reference to the presidential election. And Masha'ie has been appealing to younger and poorer voters as well as reformists by courting film stars and highlighting his nationalist credentials. On the other hand, Masha'ie has had to back-track on **comments describing the magnificence of pre-Islamic Iran** after he was attacked by hardline Safawi opponents as promoting Persian culture at the expense of the theocracy.

Yet if allowed to run, Masha'ie could capitalise on Ahmadi-Nejad's standing in the rural society which has grown rapidly in recent years. Ahmadi-Nejad is also continuing his policy of cash hand-outs to the poor in the rural areas and in the urban centres.

The president's Safawi opponents charge that Masha'ie leads what they term a "deviant current" or "cult" which uses magic and superstition to make political decisions. The political movement of Masha'ie, however, combines radical religious and nationalist beliefs aiming to eventually take over what he calls "the management of the world". But independent Iranian analysts say this is just a "trick" to expose Khamenei's "global ambitions" and thus make the world powers suspicious of whatever the theocrats and their aides say.

Masha'ie and Ahmadi-Nejad have made it known nationally that they are connected to al-**Mahdi**, a child who went into occultation in Samarra' (north of Baghdad) in 941 AD. Masha'ie's alleged connection to al-Mahdi is a trick to counter allegations from Khamenei's camp that the "deviant current" is actually "against [Shi'ite] Islam".

Masha'ie, described as “Ahmadi-Nejad's political mentor”, has made the latter use the word “spring” as frequently as he can in his recent speeches. Thus Ahmadi-Nejad has lately been inserting “**long live the Spring**” in his speeches – referring of the “Arab Spring of Revolutions”.

Iranian society, particularly the rural one, is traditionally rich in the culture of subtleties. When Ahmadi-Nejad mentions the “Spring”, this is immediately taken to mean a revolution in the offing for Iran. Such tricks, including the frequent reference to al-Mahdi, have added to the anger of the Safawi theocrats, particularly Khamenei. But they have also been the cause of Khamenei's worries that he has to tread carefully in dealing with Masha'ie's tactics.

As election day looms, Ahmadi-Nejad's opponents are hoping to prevent Masha'ie from standing. Registration for candidates were to take place on May 7-11. After that, the Guardians Council, opposing both Masha'ie and Ahmadi-Nejad, were to verify the candidates' commitment to the theocracy and loyalty to Khamenei.

If Masha'ie is approved, mainly out of fears that he could be more dangerous if he is forced out of the political arena, there remain opportunities for his opponents to prevent his success. Although the Interior Ministry accountable to Ahmadi-Nejad is responsible for running the election and counting votes, the Guardians Council must then approve the results. But not approving a Masha'ie win could mean war between the two rival camps.

In another bid to block a Masha'ie win, forces loyal to Khamenei's candidates have set up a “coalition for progress” consisting of Tehran Mayor Muhammad-Baqer **Qalibaf**, top Khamenei adviser and ex-foreign minister 'Ali-Akbar **Velayati** (who as foreign minister had dialogues with top US diplomats), and ex-parliament speaker Gholam-'Ali Haddad '**Adel** (whose daughter is married to **Khamenei's favourite son Mujtaba**, a “corrupt” man being groomed to succeed his father). These three – who have taken frequent opinion polls to gauge who is more popular – have vowed that only one of them will run to avoid splitting the vote against Masha'ie or any other candidate backed by Ahmadi-Najad.

The reformists – an anti-Safawi faction purged from politics and heavily repressed since they were swept from the streets of Tehran and Iran's other cities in the 2009 unrest – may have a chance to introduce a candidate. But they are not likely to field someone senior enough to be able to defeat the Safawis' chosen candidate. If a strong reformist contender emerges, however, his candidacy could paradoxically work to Masha'ie's advantage.

In a choice between a reformist and Masha'ie, Khamenei would choose Masha'ie. Khamenei has more serious ideological differences with the reformists, because they are quietists.

The reformists follow the quietist school in Ja'fari Shi'ism which forbids the theologians from ruling the people or be involved in the affairs of state.

Yet Iranian analysts close to Khamenei's circle say there is no way that the supreme leader would allow Masha'ie to run for president since the latter has vowed publicly that he will see the end of the Safawi theocracy. One Iranian analyst points to “secret Israeli and US connections” of Masha'ie and fellow nationalists strongly opposed to the rule of Safawi theologians. The same analyst predicts “much turbulence to take place” in Iran before, during and after the June 14 elections.

Thank you.

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