

Opportunities and Risks with Iran's New Government

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Brief Analysis

Three experts discuss the domestic and foreign implications of Masoud Pezeshkian's presidential election victory—including the need to temper any expectations that he is able or willing to pursue substantial change.

On July 16, The Washington Institute held a virtual Policy Forum with Holly Dagnes and Saeid Golkar. Dagnes is a nonresident senior fellow with the Atlantic Council's Middle East Programs, where she oversees the publications IranSource, MENASource, and The Iranist. Golkar is an associate professor of political science at the University of Tennessee-Chattanooga and a senior advisor at United Against Nuclear Iran. The event was moderated by Patrick Clawson, the Institute's Morningstar Senior Fellow and director of its Viterbi Program on Iran and U.S. Policy. The following is a rapporteur's summary of their remarks.

Patrick Clawson

Masoud Pezeshkian's success in the second round of Iran's presidential election was a unique outcome. His margin of victory was 2.8 million votes, but most of this gap was attributable to overwhelming support in five ethnic minority provinces: three Azeri, one Kurdish, and one Baluch. His runoff opponent, Saeed Jalili, won the majority of the Persian vote and dominated in cities such as Mashhad and Isfahan, though results in Tehran were mixed. In other words, the outcome stemmed as much from ethnic factors as from Pezeshkian's reformist stance (though these elements are frequently intertwined in Iran). This makes the contest somewhat of an outlier in the history of Iranian elections.

Holly Dagnes

Because round one saw the lowest voter turnout in the Islamic Republic's forty-five-year history, many believe that Pezeshkian was allowed to run in round two because reformist candidates typically drive higher voter participation. The initial plunge in turnout reflected widespread public disillusionment with the regime, exacerbated by two years' worth of crackdowns following the 2022 "Women, Life, Freedom" movement. Many Iranians saw no meaningful difference between the four initial candidates, spurring calls for a boycott via hashtags such as "No to Vote" and "Election Circus."

In the subsequent one-on-one round, however, additional voters were motivated to participate for fear that Jalili would turn Iran into a more isolated and hardline state similar to North Korea or Taliban-ruled Afghanistan. For many, voting for Pezeshkian was an exercise in reluctantly choosing the lesser of two evils rather than embracing his platform.

Regarding potential U.S. policy implications, one must keep in mind that Tehran's antagonism at home and abroad has only increased since President Biden took office, evidenced by its assistance to Russia's war against Ukraine, its repression of mass protests, its indirect support and direct military actions during the Gaza war, and other activities. The Biden administration has never formulated a clear, overarching Iran policy. Most observers now recognize that returning to the nuclear deal is an insufficient goal on its own—any deal that Washington strikes with Tehran must address other issues such as foreign militia proxies, ballistic missiles, and human rights violations.

Despite Pezeshkian's victory, the regime will likely hold off on any negotiations for the time being to see who wins the White House in November. Ultimately, Ayatollah Ali Khamenei is the key decisionmaker, while the president plays a subordinate role. Khamenei also still aims to elevate young, hardline leaders within the regime, further decreasing the odds that Pezeshkian will play a significant role in decisions related to the nuclear program, the missile program, or the Supreme Leader's eventual succession. As for Hezbollah and the wider "axis of resistance," Pezeshkian's public stance toward such groups has not departed from the regime's current practice. Supporting foreign militias is a core aspect of Tehran's foreign policy and can be expected to remain so during his tenure.

Another factor to keep an eye on is how his government responds to domestic protests. The trajectory since as far back as December 2017 suggests that recurrent large-scale demonstrations are here to stay so long as the regime fails to sufficiently address systemic mismanagement, corruption, and repression. Despite the talk of potential reform under Pezeshkian, his platform does not substantively address these core issues. Iranians are unhappy with the status quo, and acts of civil disobedience—primarily driven by members of Gen Z—have continued, as seen in the round-one election boycott.

Saeid Golkar

The regime's decision to allow Pezeshkian to participate in and win this emergency presidential election is intriguing given that the Guardian Council disqualified him from running in the parliamentary election just a few months prior. Only Khamenei's direct intervention enabled him to qualify for the presidential ballot.

In round one, internal dynamics within the Islamic Revolutionary Guard Corps indicated that their support was divided between Jalili and fellow hardline candidate Muhammad Baqer Qalibaf. Most senior IRGC commanders subtly endorsed Qalibaf, viewing Jalili as closed-minded and unreliable. Yet the remainder of the upper echelon pushed for Jalili, as did the younger generation of commanders and the paramilitary Basij. Some IRGC members even supported Pezeshkian, viewing Jalili as unreliable and Qalibaf as corrupt.

Pezeshkian's runoff victory was partly due to voter mobilization driven by fear and ethnic motivations. Accordingly, outside observers should temper their expectations for any significant policy changes. Pezeshkian's background as a soldier and his obedience to Khamenei have seemingly left him without a clear political vision of his own, unlike reformist predecessors such as Mohammad Khatami (who promoted political development) and Hassan Rouhani (who advocated negotiations with the West).

Moreover, presidents have limited power in the Islamic Republic's political structure by definition. The post is heavily influenced by the Supreme Leader and the IRGC. Pezeshkian can therefore be expected to adhere to established regime policies and focus on implementation of existing, approved ideas rather than innovation; otherwise, he will risk losing the IRGC and Khamenei's protection.

The type of government he forms could still have certain foreign policy implications. In all likelihood, he will seek to appoint ministers who adhere to

the Islamic Republic's general principles—that way, they will have a better chance of making it through the multiple rounds of vetting required for cabinet formation and receiving support from the crucial trio of Qalibaf (as speaker of parliament), the IRGC, and Khamenei. These considerations will limit his ability to shape the cabinet's ultimate makeup.

Pezeshkian has not yet talked about what stance he will take toward the United States. During the campaign, he mentioned favoring a “good neighbor” approach to regional relationships. Yet anti-American and anti-Israeli sentiment are core parts of the regime's identity, so Pezeshkian is unlikely to change them substantively. At most, he may engage with the West on certain regional issues, but presumably without delving into larger policy issues.

On the domestic front, the IRGC will likely continue to involve itself in domestic politics and shape the government's policy, as seen most prominently under the late Qods Force commander Qasem Soleimani. The Guards will support and protect Pezeshkian, but only so long as he protects their interests. In that sense, the new president will have to choose between supporting the Guards and Khamenei or supporting the Iranian people. He will probably start by trying to make everyone happy, but this approach is not sustainable—tensions between different power centers and segments of society will eventually resurface.

As for the nuclear program, Tehran's pursuit of nuclear weapons will continue regardless of elections and changing governments. The regime may push to sign another deal with the United States in order to obtain short-term relief from sanctions and other pressures, but its long-term drive toward weapons will persist. The only factor that might change this calculus is stronger outside pressure from the West; failing that, the regime will see no obstacles to eventual weaponization.

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