

By George Friedman

We are a week away from the 2010 U.S. midterm elections. The outcome is already locked in. Whether the Republicans take the House or the Senate is close to immaterial. It is almost certain that the dynamics of American domestic politics will change. The Democrats will lose their ability to impose cloture in the Senate and thereby shut off debate. Whether they lose the House or not, the Democrats will lose the ability to pass legislation at the will of the House Democratic leadership. The large majority held by the Democrats will be gone, and party discipline will not be strong enough (it never is) to prevent some defections.

Should the Republicans win an overwhelming victory in both houses next week, they will still not have the votes to override presidential vetoes. Therefore they will not be able to legislate unilaterally, and if any legislation is to be passed it will have to be the result of negotiations between the president and the Republican Congressional leadership. Thus, whether the Democrats do better than expected or the Republicans win a massive victory, the practical result will be the same.

When we consider the difficulties President Barack Obama had passing his health care legislation, even with powerful majorities in both houses, it is clear that he will not be able to push through any significant legislation without Republican agreement. The result will either be gridlock or a very different legislative agenda than we have seen in the first two years.

These are not unique circumstances. Reversals in the first midterm election after a presidential election happened to Ronald Reagan and Bill Clinton. It does not mean that Obama is guaranteed to lose a re-election bid, although it does mean that, in order to win that election, he will have to operate in a very different way. It also means that the 2012 presidential campaign will begin next Wednesday on Nov. 3. Given his low approval ratings, Obama appears vulnerable and the Republican nomination has become extremely valuable. For his part, Obama does not have much time to lose in reshaping his presidency. With the Iowa caucuses about 15 months away and the Republicans holding momentum, the president will have to begin his campaign.

Obama now has two options in terms of domestic strategy. The first is to continue to press his agenda, knowing that it will be voted down. If the domestic situation improves, he takes credit for it. If it doesn't, he runs against Republican partisanship. The second option is to abandon his agenda, cooperate with the Republicans and re-establish his image as a centrist. Both have political advantages and disadvantages and present an important strategic decision for Obama to make.

The Foreign Policy Option

Obama also has a third option, which is to shift his focus from domestic policy to foreign policy. The founders created a system in which the president is inherently weak in domestic policy and able to take action only when his position in Congress is extremely strong. This was how the founders sought to avoid the tyranny of narrow majorities. At the same time, they made the president quite powerful in foreign policy regardless of Congress, and the evolution of the presidency over the centuries has further strengthened this power. Historically, when the president has been weak domestically, one option he has had is to appear powerful by focusing on foreign policy.

For presidents like Clinton, this was not a particularly viable option in 1994-1996. The international system was quiet, and it was difficult to act meaningfully and decisively. It was easier for Reagan in 1982-1984. The Soviet Union was strong and threatening, and an aggressive anti-Soviet stance was popular and flowed from his 1980 campaign. Deploying the ground-launched cruise missile and the Pershing II medium-range ballistic missile in Western Europe alienated his opponents, strengthened his position with his political base and allowed him to take the center (and ultimately pressured the Soviets into agreeing to the Intermediate-Range Nuclear Forces Treaty). By 1984, with the recession over, Reagan's anti-Soviet stance helped him defeat Walter Mondale.

Obama does not have Clinton's problem. The international environment allows him to take a much more assertive stance than he has over the past two years. The war in Afghanistan is reaching a delicate negotiating state as reports of ongoing talks circulate. The Iraq war is far from stable, with 50,000 U.S. troops still there, and the Iranian issue is wide open. Israeli-Palestinian talks are also faltering, and there are a host of other foreign issues, ranging from China's increasing assertiveness to Russia's resurgent power to the ongoing decline in military power of America's European allies. There are a range of issues that need to be addressed at the presidential level, many of which would resonate with at least some voters and allow Obama to be presidential in spite of weak political support.

There are two problems with Obama becoming a foreign policy president. The first is that the country is focused on the economy and on domestic issues. If he focuses on foreign policy and the U.S. economy does not improve by 2012, it will cost him the election. His hope will be foreign policy successes, or at least the perception of being strong on national security, coupled with economic recovery or a plausible reason to blame the Republicans. This is a tricky maneuver, but his presidency no longer offers simple solutions.

The second problem is that his presidency and campaign have been based on the general principle of accommodation rather than confrontation in foreign affairs, with the sole exception of Afghanistan, where he chose to be substantially more aggressive than his predecessor had been. The place where he was assertive is unlikely to yield a major foreign policy success, unless that success is a negotiated settlement with the Taliban. A negotiated settlement will be portrayed by the Republicans as capitulation rather than triumph. If he continues on the current course in Afghanistan, he will seem to be plodding down an old path and not pioneering a new one.

Interestingly, if Obama's goal is to appear strong on national security while regaining the center,

Afghanistan offers the least attractive venue. His choices are negotiation, which would reinforce his image as an accommodationist in foreign policy, or continued war, which is not particularly new territory. He could deploy even more forces into Afghanistan, but then would risk looking like Lyndon Johnson in 1967, hurling troops at the enemy without a clear plan. He could, of course, create a massive crisis with Pakistan, but it would be extremely unlikely that such an effort would end well, given the situation in Afghanistan. Foreign policy presidents need to be successful.

There is little to be done in Iraq at the moment except delay the withdrawal of forces, which adds little to his political position. Moreover, the core problem in Iraq at the moment is Iran and its support of disruptive forces. Obama could attempt to force an Israeli-Palestinian settlement, but that would require Hamas to change its position, which is unlikely, or that Israel make massive concessions, which it doesn't think it has to do. The problem with Israel and the Palestinians is that peace talks, such as those under Clinton at Camp David, have a nasty tendency to end in chaos.

The European, Russian and Chinese situations are of great importance, but they are not conducive to dramatic acts. The United States is not going to blockade China over the yuan or hold a stunning set of meetings with the Europeans to get them to increase their defense budgets and commit to more support for U.S. wars. And the situation regarding North Korea does not have the pressing urgency to justify U.S. action. There are many actions that would satisfy Obama's accommodationist inclinations, but those would not serve well in portraying him as decisive in foreign policy.

The Iranian Option

This leaves the obvious choice: Iran. Iran is the one issue on which the president could galvanize public opinion. The Republicans have portrayed Obama as weak on combating militant Islamism. Many of the Democrats see Iran as a repressive violator of human rights, particularly after the crackdown on the Green Movement. The Arabian Peninsula, particularly Saudi Arabia, is afraid of Iran and wants the United States to do something more than provide \$60 billion-worth of weapons over the next 10 years. The Israelis, obviously, are hostile. The Europeans are hostile to Iran but want to avoid escalation, unless it ends quickly and successfully and without a disruption of oil supplies. The Russians — like the Iranians — are a thorn in the American side, as are the Chinese, but neither would have much choice should the United States deal with Iran quickly and effectively. Moreover, the situation in Iraq would improve if Iran were to be neutralized, and the psychology in Afghanistan could also shift.

If Obama were to use foreign policy to enhance his political standing through decisive action, and achieve some positive results in relations with foreign governments, the one place he could do it would be Iran. The issue is what he might have to do and what the risks would be. Nothing could, after all, hurt him more than an aggressive stance against Iran that failed to achieve its goals or turned into a military disaster for the United States.

So far, Obama's policy toward Iran has been to incrementally increase sanctions by building a weak coalition and allow the sanctions to create shifts in Iran's domestic political situation. The

idea is to weaken President Mahmoud Ahmadinejad and strengthen his enemies, who are assumed to be more moderate and less inclined to pursue nuclear weapons. Obama has avoided overt military action against Iran, so a confrontation with Iran would require a deliberate shift in the U.S. stance, which would require a justification.

The most obvious justification would be to claim that Iran is about to construct a nuclear device. Whether or not this is true would be immaterial. First, no one would be in a position to challenge the claim, and, second, Obama's credibility in making the assertion would be much greater than George W. Bush's, given that Obama does not have the 2003 weapons-of-mass-destruction debacle to deal with and has the advantage of not having made such a claim before. Coming from Obama, the claim would confirm the views of the Republicans, while the Democrats would be hard-pressed to challenge him. In the face of this assertion, Obama would be forced to take action. He could appear reluctant to his base, decisive to the rest. The Republicans could not easily attack him. Nor would the claim be a lie. Defining what it means to almost possess nuclear weapons is nearly a metaphysical discussion. It requires merely a shift in definitions and assumptions. This is a cynical scenario, but it can be aligned with reasonable concerns.

As STRATFOR has argued in the past, destroying Iran's nuclear capability does not involve a one-day raid, nor is Iran without the ability to retaliate. Its nuclear facilities are in a number of places and Iran has had years to harden those facilities. Destroying the facilities might take an extended air campaign and might even require the use of special operations units to verify battle damage and complete the mission. In addition, military action against Iran's naval forces would be needed to protect the oil routes through the Persian Gulf from small boat swarms and mines, anti-ship missile launchers would have to be attacked and Iranian air force and air defenses taken out. This would not solve the problem of the rest of Iran's conventional forces, which would represent a threat to the region, so these forces would have to be attacked and reduced as well.

An attack on Iran would not be an invasion, nor would it be a short war. Like Yugoslavia in 1999, it would be an extended air war lasting an unknown number of months. There would be American POWs from aircraft that were shot down or suffered mechanical failure over Iranian territory. There would be many civilian casualties, which the international media would focus on. It would not be an antiseptic campaign, but it would likely (though it is important to reiterate not certainly) destroy Iran's nuclear capability and profoundly weaken its conventional forces. It would be a war based on American strengths in aerial warfare and technology, not on American weaknesses in counterinsurgency. It would strengthen the Iranian regime (as aerial bombing usually does) by rallying the Iranian public to its side against the aggression. If the campaign were successful, the Iranian regime would be stronger politically, at least for a while, but eviscerated militarily. A successful campaign would ease the U.S. withdrawal from Iraq, calm the Saudis and demonstrate to the Europeans American capability and will. It would also cause the Russians and Chinese to become very thoughtful.

A campaign against Iran would have its risks. Iran could launch a terrorist campaign and attempt to close the Strait of Hormuz, sending the global economy into a deep recession on soaring oil prices. It could also create a civil war in Iraq. U.S. intelligence could have missed the fact that the Iranians already have a deliverable nuclear weapon. All of these are possible risks,

and, according to STRATFOR's thinking, the risks outweigh the rewards. After all, the best laid military plan can end in a fiasco.

We have argued that a negotiation with Iran in the order of President Richard Nixon's reversal on China would be a lower-risk solution to the nuclear problem than the military option. But for Obama, this is politically difficult to do. Had Bush done this, he would have had the ideological credentials to deal with Iran, as Nixon had the ideological credentials to deal with China. But Obama does not. Negotiating an agreement with Iran in the wake of an electoral rout would open the floodgates to condemnation of Obama as an appeaser. In losing power, he loses the option for negotiation unless he is content to be a one-term president.

I am arguing the following. First, Obama will be paralyzed on domestic policies by this election. He can craft a re-election campaign blaming the Republicans for gridlock. This has its advantages and disadvantages; the Republicans, charging that he refused to adjust to the electorate's wishes, can blame him for the gridlock. It can go either way. The other option for Obama is to look for triumph in foreign policy where he has a weak hand. The only obvious way to achieve success that would have a positive effect on the U.S. strategic position is to attack Iran. Such an attack would have substantial advantages and very real dangers. It could change the dynamics of the Middle East and it could be a military failure.

I am not claiming that Obama will decide to do this based on politics, although no U.S. president has ever engaged in foreign involvement without political considerations, nor should he. I am saying that, at this moment in history, given the domestic gridlock that appears to be in the offing, a shift to a foreign policy emphasis makes sense, Obama needs to be seen as an effective commander in chief and Iran is the logical target.

This is not a prediction. Obama does not share his thoughts with me. It is merely speculation on the options Obama will have after the midterm elections, not what he will choose to do.

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