

The Coming Iranian Black Swan Set to Roil the American Election

By Dr. John C. Hulsman

As the US presidential horserace rounds the final turn, President Obama remains where he has been for most of the year: ahead by a nose. The *RealClearPolitics* survey of the Electoral College—with no tossups—has the White House at just over 300 electoral votes (with 270 being the finishing line). However, there are now 10 states where the polling is consistently within the margin of error, where the slightest of jolts either way could determine the outcome. Heavyweights Florida, Ohio, and Virginia all sit on a knife's edge.

This amounts to worse news for the President than for GOP challenger Mitt Romney, because assuming that nothing of significance will happen on the international or domestic stage until November is to believe in the tooth fairy. And almost anything that seems likely to change things hurts the president. For example, it is far too late in the day for the economy to turn around, in terms of unemployment, GDP growth, or the projected yearly deficit of over \$1 trillion for the fourth straight year. With the President holding on by his fingernails, any further economic erosion of any kind could well spell his doom.

But it is in the oft-neglected field of foreign affairs that a Black Swan has now been clearly sighted: it looks more and more likely that Israel is set to strike the Islamic Republic of Iran, and to do so before America's November election. A game-changing crisis of this sort would affect many things, but amongst them—with the margin of error between the two candidates being infinitesimally small—it would surely go a very long way to determining the outcome of the 2012 election. Ironically foreign policy--which has certainly been the ugly stepsister at the ball up until now in the presidential sweepstakes—may make all the difference come November.

Not So Unforeseeable After All

In March 2012 I wrote an article stating that an Israeli air strike in September of this year was likely, and would have a game-changing effect on the newly emerging multipolar era. It has taken a number of my colleagues (still a minority) until the last few weeks to see the locomotive coming down the tracks that I glimpsed six months ago. What did I see then that so many have failed to take note of until now?

For one thing, I remembered the sage advice of peerless British international relations expert Sir Lawrence Freedman. Paraphrased, it goes something like this; 'Despite their obvious talent for lying, bluffing, and obfuscation, it is a truism of international relations that most decision-makers most of the time mean what they say and say what they mean.' In the case of Israeli Prime Minister Netanyahu and Defense Minister Ehud Barak, the two pivotal Israeli decision makers, they have been nothing if not clear as to what would happen should sanctions and/or negotiations fail to change the mullahs' minds about accelerating their nuclear program. Israel would strike, and sooner rather than later.

I was met by the usual lofty derision by the conventional wisdom-loving commentariat that accompanies any concrete foreign policy assessments (remember this is one of the few professions in the world where people make a living out of dodging definitive analytical statements), 'John, the Israelis cannot possibly mean what they say, would *you* launch a strike against Iran, knowing that it would only set the program back a year or two and that there would be decided blowback coming your way.'

The vast majority of the foreign policy community has forgotten the first grad school rule of foreign policy analysis; Don't imagine what you'd do should you find yourselves in Fidel Castro's position, imagine what Castro would do. There is a canyon of difference between the two. This seminal conceptual mistake explains how this black swan came to be missed by so many.

I would not bomb Iran were I Prime Minister Netanyahu. For one-two year's derailment of the program, I would not risk the dissolution of the sanctions regime. I would not inflame the Arab street, putting pro-Western governments like Egypt, Jordan, and Saudi Arabia in jeopardy. I would not make heroes of the mullahs. But that's just it. I certainly would not; but I am *not* Prime Minister Netanyahu.

This is a man haunted by the ghosts of his father and brother: The former, Benzion, a world expert on Israeli Zionism and a staunch political hawk; The latter, the almost impossibly perfect Yonatan, a man synonymous with Israeli military daring and dash following his death successfully leading an elite Israeli commando raid at Entebbe, Uganda in July 1976. Throw in a spouse reportedly far to his right, and this does not seem to be a man likely under any circumstances to go down in history as the one who allowed a sworn enemy of Israel to acquire a nuclear capability that could wipe the country from the map.

These personal pressures must be tied to Israeli strategic doctrine and the founding of the state itself. It has become a forgotten adage that the common thread linking both is that never again (for obvious historical reasons) will Jews hand their future strategic protection over to any other entity, be they friend or foe. Netanyahu has recently and publicly reminded everyone of this, only to be met by knowing smiles, with most westerners in the room silently thinking, 'He's bluffing.'

But as the Prime Minister has made clear, failure to attack this autumn would mean he has decisively given up the strategic initiative. For the clock is ticking and in Iran's favor. Fordow--until recently Iran's secret nuclear installation buried 290 feet below a mountaintop outside the holy city of Qom--will be buttressed to the point it will be beyond the reach of the Israeli air force by the end of this year.

It is at that point that the Netanyahu government will find itself in existential hell; either at the mercy of urging a notably unenthusiastic ally (the Obama White House) to do the job for them or dangling beneath the sword of Damocles (as they see it) of mullahs

who have openly called for the destruction of the state of Israel. Such an unpalatable position flies in the face of the whole of Israeli strategic doctrine, and indeed the founding ethos of the Israeli state itself.

If the next few weeks do see such an attack, doubtless its outcome and aftermath will mark a dramatic turn in the presidential race. There is little doubt in my mind that Obama—with Florida quite close at present and utterly dependent on Jewish-American voter turnout there—would gulp hard but stand by Israel in its hour of peril (a stance that would have profound and highly negative consequences for US policy in the region). As such, America could be easily and unwillingly ensnared in conflict following such a strike, as several high-level War Games in Washington have illustrated. The standard response would be to think such a bolt from the blue would favor the occupant of the White House, as a traditional rally-round-the-flag sentiment would sweep Obama back into office.

But I am not at all sure this follows. Instead, a war-weary public, resentful of having been dragged into a third Middle East conflict (the US just extricating itself from dreary Iraq and Afghanistan), seeing the price of oil skyrocket following Iranian efforts to mine, disrupt, or merely threaten the Strait of Hormuz, and viewing the obvious wreckage of broader American policy in the region, could quickly turn on the White House, angrily demanding as the economic bill comes due (one which could well send an enfeebled west into serious recession following the oil shock, particularly in Europe) why no one defused this foreign policy grenade years ago.

I think this is a swan that could well bite the current President.

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