The Unintended Consequences of the Iran War

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The joint U.S.-Israeli operation against Iran was meant to be the signature achievement of Prime Minister Netanyahu's career. Despite the absence of an imminent threat or compelling reason to attack, Netanyahu convinced President Trump to ignore all of America's other allies and join a quixotic campaign to transform the Middle East by defeating Israel's chief rival. Unfortunately, the implications of the war, which is still underway and could intensify, are underappreciated, and they could have long-lasting consequences. Three stand out: the war has validated Iran's worst impulses, which in turn could lead to attempts to constrain Israel's freedom of action and strain the U.S.-Israel relationship.

Validating Iran's Worst Impulses

This operation was supposed to end the Iranian regime. When President Trump announced the war, he implored the Iranian people to take over their government, and Israeli officials said the goal was to topple the regime. The reality could not be starker. Despite being bombed thousands of times and facing unprecedented economic pain, the regime has survived and fought back. Iran has retained significant offensive capabilities, caused a massive surge in global energy prices, silenced domestic unrest, and benefited internationally from being the victim of an unjust offensive.

Consider the predicament Iran faced before the February war. It was arguably weaker than at any point since the 1979 revolution. The economy was suffering under the weight of sanctions and mismanagement. Its regional proxy network was significantly degraded by the fall of Syrian leader Bashar al-Assad and the campaigns against Hezbollah and Hamas. Public resentment of the government was at an all-time high and culminated in massive protests in January. In the wake of those protests, the best action the United States and Israel could have taken was to stand aside and let Iran deal with the domestic and international repercussions of its own actions.

Instead, the United States and Israel went to war with Iran and, counterintuitively, created a stronger and more hardline government. Most importantly, Iran's key lesson from the war is that escalation works. The war and its economic impacts have been so unpopular in the United States that they have done great damage to President Trump's political standing and are playing a critical role in the midterm elections. They have also led to erratic decision-making, sometimes resulting in surprising, sweeping concessions. Case in point: in March, at the height of the war, the Trump Administration issued General License U, allowing the sale of Iranian crude worldwide, including to U.S. buyers. This was an unprecedented U.S. concession, going beyond what the Iran nuclear deal provided. As a former negotiator, I once believed that obtaining this concession would require Iran to recognize Israel or make some other commensurate gesture. Instead, the Administration issued the license solely to relieve domestic

energy prices. Purely through escalation, Iran achieved arguably one of the most symbolic U.S. concessions in the history of the Islamic Republic.

Loss of Freedom of Action

Iran's lesson about the value of escalation has a corollary for Israel. Once escalation proved it could impose pain on the global economy, Washington had its own reasons to restrain Israel. For many Israelis, the biggest short-term consequence of the Iran war was President Trump unilaterally reining in Israeli military action in Lebanon to safeguard the June Memorandum of Understanding (MOU) that temporarily paused the war. In June, Trump confirmed that he had personally spoken with Israel and asked it to agree to a ceasefire with Hezbollah. Although Vice President Vance denied that Israel was a party to the MOU, he said Israel had voluntarily offered to "check themselves a little bit in Lebanon." Even after the MOU collapsed, Trump has largely kept Netanyahu leashed.

Trump's constraints may fade after the U.S. and Israeli elections, as Secretary Hegseth's recent visit to Israel indicates, but the implications for Israel will stretch far beyond Lebanon, Trump, and Netanyahu. The Iran war took a theoretical military and economic possibility – impeding commercial traffic in the Strait of Hormuz and targeting Gulf energy infrastructure – and made it a reality and a foundational part of Iran's security doctrine. The threats that Iran poses to Israel are real, but the next time an Israeli prime minister asks an American president to approve an attack on Iran, that president will have to weigh global economic instability against Israeli security. Absent a nuclear breakout, the threat posed by Iran may not outweigh the risk to the global economy. In essence, the Iran war has helped build a partial Iranian security guarantee and made a future war with Iran much more difficult for Israel to justify.

Israel will act when it deems necessary, but it could mean acting alone and without U.S. support.

Strain in the U.S.-Israel Relationship

The Iran war is deeply unpopular in the United States and, along with the war in Gaza, has fundamentally eroded bipartisan support for the U.S.-Israel relationship. From an American perspective, the war has killed at least 18 Americans, injured hundreds more, damaged American credibility, and cost the average American taxpayer approximately $1,200 in war expenses, energy disruptions, and higher prices, all while achieving virtually nothing.

The war has, in particular, created new fissures within the conservative movement. Some anti-war Trump supporters, like Joe Kent and Tucker Carlson, have blamed Israel for the war rather than Trump. The Administration has not helped, periodically citing the defense of Israel as the legal and political justification for the war. In a March 10 letter to the UN Security Council, U.S. Permanent Representative to the UN Michael Waltz wrote that the United States was acting against Iran "in the collective self-defense of Israel." The dynamic was exacerbated in July, when U.S. intelligence services took the unprecedented step of warning Iranian intermediaries that Israel could be targeting their negotiators. Looking back, many observers now believe that Prime Minister Netanyahu's decision to confront President Obama on the Iran

nuclear deal publicly created splits that became an opening for an intensive debate on Israel inside the Democratic Party. Ten years from now, we may look at the war with Iran as a similar trigger inside the Republican Party.

Inside the Democratic Party, the war has also further cemented a shift that began with the Gaza war. Earlier this year, 40 U.S. senators supported a resolution that would have prevented the sale of $295 million in bulldozers to Israel, and 36 senators voted for another resolution that would have prevented the sale of $151.8 million in bombs. Many senators who had previously voted against such resolutions cited the Iran war as the reason for their change in position.

While Israel may choose to act alone against Iran, doing so is highly risky; the country's strategic interests increasingly diverge from those of the United States, yet it remains unprecedentedly reliant on direct U.S. military intervention and emergency stockpiles already depleted by the ongoing conflict. It may also come at the expense of the bilateral relationship. Tragically, the unintended result of the Iran war is that, because of actions by Trump and Netanyahu, Israel may be more vulnerable to future Iranian attacks.

It's Not a Foregone Conclusion

As Israelis and Americans head to the polls later this month, it is important to remember the unintended consequences of the Iran war and what they mean for the future. The vast majority of Israelis supported the war, though many took exception to its execution. And while another round of strikes seems probable, it is unlikely to change the outcome. Five to ten years from now, many Israelis may look back on it as a negative turning point. A war that began as a crowning achievement for Netanyahu, sold as a decisive blow against a weakened foe, will be recognized as a strategic defeat. An emboldened Iran and an isolated Israel are a dangerous combination if conflict comes. The good news is that the decline in the U.S.-Israel relationship is not a foregone conclusion. Beginning to put the relationship on a better footing will require a series of steps, including addressing the horrific situation in Gaza and growing settler violence and expansion in the West Bank, as well as progress towards a Palestinian State and a new Israeli leadership less inclined to insert itself into American politics. However, one important step in this direction would be to quickly end the Iran war, which will continue to put greater strain on the U.S.-Israel relationship.