

# The BMD Decision and the Global System

By George Friedman | September 21, 2009



The United States announced late Sept. 17 that it would abandon a plan for placing ballistic missile defense (BMD) installations in Poland and the Czech Republic. Instead of the planned system, which was intended to defend primarily against a potential crude intercontinental ballistic missile (ICBM) threat from Iran against the United States, the administration chose a restructured system that will begin by providing some protection to Europe using U.S. Navy ships based on either the North or Mediterranean seas. The Obama administration has argued that this system will be online sooner than the previously planned system and that follow-on systems will protect the United States. It was also revealed that the latest National Intelligence Estimate finds that Iran is further away from having a true intercontinental missile capability than previously thought, meaning protecting Europe is a more pressing concern than protecting the United States.

Poland and the Czech Republic responded with a sense of U.S. betrayal, while [Russia expressed its satisfaction with the decision](#). Russian envoy to NATO Dmitri Rogozin said Moscow welcomes the decision and sees it as an appropriate response to Russia's offer to allow U.S. supplies to flow into Afghanistan through Russia. Later, the Russians added another reward: They tentatively announced the cancellation of plans to deploy short-range ballistic missiles in Kaliningrad, which they previously had planned as a response to the components of the U.S. BMD system planned for Poland and the Czech Republic.

[Polish Despair and Russian Delight](#)

[Polish despair](#) (and Warsaw seemed far more upset than Prague) and Russian satisfaction must be explained to begin to understand the global implications. To do this, we must begin with an odd fact: The [planned BMD system](#) did not in and of itself enhance Polish national security in any way even if missiles had actually targeted Warsaw, since the long-range interceptors in Poland were positioned there to protect the continental United States; missiles falling on Poland would likely be outside the engagement envelope of the original Ground-based Midcourse Defense interceptors. The system was designed to handle very few missiles originating from the Middle East, and the Russians obviously have more than a few missiles.

Given that even small numbers of missiles easily could overwhelm the system, the [BMD system in no way directly affected Russian national security](#): The Russian strike capability — against both Poland and the continental United States — was not affected at all. Indeed, placing the system on ships is no less threatening than placing them on land. So, if it was the BMD system the Russians were upset with, they should be no less upset by the redeployment at sea. Yet Moscow is pleased by what has happened — which means the BMD system was not really the issue.

For Poland, the BMD system was of little importance. What was important was that in placing the system in Poland, [the United States obviously was prepared to defend the system](#) from all threats. Since the system could not be protected without also protecting Poland, the BMD installation — and the troops and defensive systems that would accompany it — was seen as a U.S. guarantee on Polish national security even though the system itself was irrelevant to Polish security.

[The Russians took the same view](#). They cared little about the BMD system itself; what they objected to was the presence of a U.S. strategic capability in Poland because this represented an American assertion that Poland was actively under the defense of the United States. Of particular note from the Russian point of view was that such a guarantee would be independent of NATO. The NATO alliance has seen better days, and the Russians (and Poles) perceive an implicit American security guarantee as more threatening than an explicit one from NATO.

This whole chain of events was an exercise in the workings of the [Post-Post-Cold War World](#), in which Russia is a strong regional power seeking to protect its influence in the former Soviet Union (FSU) and to guarantee its frontiers as well — something that in the West has often been misinterpreted as a neurotic need for respect. Poland is the traditional route through which Russia is invaded, and the Russian view is that governments and intentions change but capabilities do not. Whatever [Washington intends now](#), it is asserting dominance in a region that has been the route for three invasions over the last two centuries. By the Russian logic, if the United States has no interest in participating in such an invasion, it should not be

interested in Poland. If the United States chooses Poland of all places to deploy its BMD when so many other locations were willing and possible, the Russians are not prepared to regard this choice as merely coincidence.

Overall, the Russians desire a new map of the region, one with two layers. First, [Russia must be recognized as the dominant power in the former Soviet Union](#). The United States and Europe must shape bilateral relations with other former Soviet states within the framework of this understanding. Second, Central Europe — and particularly Poland — must not become a base for U.S. power. The United States and Europe must accept that Russia has no aggressive intent, but more to the point, Poland in particular must become a neutral buffer zone between Russia and Germany. It can sign whatever treaties it wants, attend whatever meetings it wishes and so forth, but major military formations of other great powers must remain out of Poland. Russia sees the BMD system as the first step in militarizing Poland, and the Russians have acted accordingly.

From the standpoint of the Bush administration and the Obama administration early on, the Russian claims to great power status, rights in the former Soviet Union and interests in Poland represented a massive overreach. The perception of both administrations derived from an image developed in the 1990s of Russia as crippled. The idea of Russia as a robust regional power, albeit with significant economic problems, simply didn't register. There were two generations at work. The older Cold War generation did not trust Russian intentions and wanted to create a cordon around Russia — including countries like Georgia, Ukraine and, most important, Poland — because Russia could become a global threat again. The newer post-Cold War generation — which cut its teeth in the 1990s — wanted to ignore Russia and do what it wished both in Central Europe and the former Soviet Union because Russia was no longer a significant power, and the generation saw the need to develop a new system of relationships. In the end, all this congealed in the deployments in Poland and the Czech Republic.

For Russia, [Poland mattered in ways the United States could not grasp](#) given its analytic framework. But [the United States had its own strategic obsession: Iran](#).

### [Iran: The U.S. Strategic Obsession](#)

The Islamic world has been the focus of the United States since 9/11. In this context, the development of an Iranian nuclear capability was seen as a fundamental threat to U.S. national interests. The obvious response was a military strike to destroy Iranian power, but both the Bush and Obama administrations hesitated to take the step.

First, a strike on Iran's nuclear facilities would be no one-day affair. [Intelligence on precise locations had uncertainty built into it](#), and any strike would consist of multiple phases: destroying Iran's air force and navy, destroying Iran's anti-aircraft capability to guarantee total command of the skies, the attacks on the nuclear facilities themselves, analysis of the

damage, perhaps a second wave, and of course additional attacks to deal with any attempted Iranian retaliation. The target set would be considerable, and would extend well beyond the targets directly related to the nuclear program, making such an operation no simple matter.

Second, [Iran has the ability to respond in a number of ways](#). One is unleashing terrorist attacks worldwide via Hezbollah. But the most significant response would be blocking the Strait of Hormuz using either anti-ship missiles or naval mines. The latter are more threatening largely because the clearing operation could take a considerable period and it would be difficult to know when you had cleared all of the mines. Tankers and their loads are worth about \$170 million at current prices, and that uncertainty could cause owners to refuse the trip. Oil exports could fall dramatically, and the effect on the global economy — particularly now amid the global financial crisis — could be absolutely devastating. Attacking Iran would be an air-sea battle, and could even include limited ground forces inserted to ensure that the nuclear facilities were destroyed.

The country most concerned with all of this is [Israel](#). The Iranians had given every indication that they plan to build a nuclear capability and use it against Israel. Israel's vulnerability to such a strike is enormous, and there are serious questions about Israel's ability to use the threat of a counterstrike as a deterrent to such a strike. In our view, Iran is merely creating a system to guarantee regime survival, but given the tenor of Tehran's statements, Israel cannot afford to take this view complacently.

[Israel](#) could unilaterally draw the United States into an airstrike on Iran. Were Israel to strike Iran by any means, it most likely would lack the ability to conduct an extended air campaign. And the United States could not suffer the consequences of airstrikes without the benefits of taking out Iran's nuclear program. Apart from the political consequences, the U.S. Navy would be drawn into the suppression of Iranian naval capabilities in the Persian Gulf whether it wanted to or not simply to keep the Strait of Hormuz open. Even if Iran didn't act to close off the strait, Washington would have to assume that it might, an eventuality it could not afford. So an Israeli attack would likely draw in the United States against Iran one way or another. The United States has had no appetite for such an eventuality, particularly since it considers a deliverable Iranian nuclear weapon a ways off. The U.S. alternative — in both administrations — was diplomatic.

### [Israel and Complications to the Diplomatic Alternative](#)

Washington wanted to create a coalition of powers able to impose sanctions on Iran. At meetings over the summer, the Obama administration appears to have promised Israel "crippling" sanctions to prevent any unilateral Israel action. At an April G-8 meeting, it was decided that Iran must engage in serious negotiations on its nuclear program prior to the next G-8 meeting — on Sept. 24 — or face these sanctions.

The crippling sanctions foreseen were some sort of interruption of the flow of gasoline into Iran, which imports 40 percent of its supply despite being a net exporter of crude. Obviously, in order for this to work, all of the G-8 nations (and others) must participate, particularly Russia. Russia has the capacity to produce and transport *all* of Iran's needs, not just its import requirements. If the Russians don't participate, there are no sanctions.

The Russians announced weeks ago that they opposed new sanctions on Iran and would not participate in them. Moreover, they seemed to flout the ineffectiveness of any U.S. sanctions. With that, the diplomatic option on Iran was off the table. Russia is not eager to see Iran develop nuclear weapons, but it sees the United States as the greater threat at the moment. Moscow's fundamental fear is that the United States — and Israel — will dramatically strengthen Ukraine, Georgia and other states in the FSU and on its periphery, and that Russia's strategic goal of national security through pre-eminence in the region will be lost.

From the Russian point of view, the U.S. desire for Russian help with Iran is incompatible with the U.S. desire to pursue its own course in the FSU and countries like Poland. From the U.S. point of view, these were two entirely different matters that should be handled in a different venue. But Washington didn't get to choose in this matter. This was a Russian decision. The Russians faced what they saw as an existential threat, believing that the U.S. strategy threatened the long-term survival of the Russian Federation. The Russians were not prepared to support a U.S. solution for Iran without American support on Russian concerns. The Americans ultimately did not understand that the Russians had shifted out of the era in which the United States could simply dictate to them. Now, the United States had to negotiate with the Russians on terms Moscow set, or the United States would have to become more directly threatening to Russia. Becoming more threatening was not an option with U.S. forces scattered all over the Middle East. Therefore, the United States had to decide what it wanted.

American attention in the run-up to the Oct. 1 talks with Iran was focused by Israel. The Obama administration had adopted an interesting two-tier position on Israel. On the one hand, it was confronting Israel on halting settlement activity in the West Bank; on the other hand, it was making promises to Israel on Iran. The sense in Israel was that the Obama administration was altering Washington's traditional support for Israel. Since Iran was a critical threat to Israel, and since Israel might not have a better chance to strike than now, the Obama administration began to realize that its diplomatic option had failed, and that the decision on war and peace with Iran was not in its hands but in Israel's, since Israel was prepared to act unilaterally and draw the United States into a war. Given that the Obama diplomatic initiative had failed and that the administration's pressure on Israel had created a sense of isolation in Israel, the situation could now well spiral out of control.

Although all of these things operated in different bureaucratic silos in Washington, and participants in each silo could suffer under the illusion that the issues were unrelated, the matters converged hurriedly last week. Uncertain what leverage it had over Israel, the United

States decided to reach out to the Russians. Washington sought a way to indicate to the Russians that it was prepared to deal with Russia in a different way while simultaneously giving away as little as possible. That little was the redeployment of BMD components originally planned for Poland and the Czech Republic to ships. (Money already has been allocated to [upgrade additional Atlantic-based Aegis warships](#) to BMD capability.) Whatever the military and engineering issues involved, whatever the desire not to conflate U.S. strategic relations with Israel with pressure on the settlement issue, whatever the desire to “reset” relations without actually giving the Russians anything, the silos collapsed and a gesture was made.

From the Russian point of view, the gesture is welcome but insufficient. They are not going to solve a major strategic problem for the United States simply in return for moving the BMD. For that, the United States got access to Afghanistan through Russia if desired, and [the removal of missiles in Kaliningrad](#). The Americans also got a different atmosphere at meetings between U.S. President Barack Obama and Russian President Dmitri Medvedev at the United Nations next week. But the sine qua non for Russian help on Iran is Russia’s sphere of influence in the FSU. The public relations aspect of how this sphere is announced is not critical. That the U.S. agrees to it is.

This is the foreign policy test all U.S. presidents face. Obama now has three choices.

1. He can make the deal with Russia. But every day that passes, Russia is creating the reality of domination in the FSU, so its price for a deal will continue to rise from simply recognizing their sphere of influence to extending it to neutralizing Poland.
2. He can select the military option of an air campaign against Iran. But this means accepting the risk to maritime traffic in the Persian Gulf and the potentially devastating impact on the global economy if oil exports through the Strait of Hormuz are impacted significantly.
3. He can wait to see how things unfold, and place overwhelming pressure on Israel not to attack. But this means finding a way to place the pressure: Israel in 2009 does not have the dependence on the United States it had in 1973.

### The Importance of Poland

Ultimately, the question of Iran is secondary. The question of U.S.-Russian relations is now paramount. And ultimately, policymakers don’t really have as much freedom to make choices as they would like. Under any of these scenarios, the United States doesn’t have the power to stop Russian dominance in the FSU, but it does have the ability to block further Russian expansion on the North European Plain. Preventing an amalgamation between Russia and Europe is a fundamental interest to the United States; neutralizing Poland and depending on

Germany as the Russian-European frontier is not inviting — especially as [Germany has no interest in reprising the role it played from 1945 to 1991](#).

The United States has an Iran crisis, but it is not its fundamental geopolitical problem. Interestingly, the Iran crisis is highlighting the real issue, which is Russia. It is Russia that is blocking a solution to Iran because Russian and American interests have profoundly diverged. What is emerging from Iran is the issue of Russia. And obviously, when Russia becomes an issue, so does Poland. If the United States acts to limit Russia, it will act in Poland, and not with BMD systems.

The Obama administration's decision to withdraw BMD is insufficient to entice Russia into assisting with Iran. An agreement to respect Russian rights in the FSU would be sufficient (and in a way would merely recognize what is already in place). Obama might quietly give that assurance. But if he does, the United States will not add Poland to the pile of concessions. The greater the concessions in the FSU, the more important Poland becomes. The idea of conceding both Russian hegemony in the FSU and the neutralization of Poland in exchange for Russian pressure on Iran is utterly disproportionate.

The United States has already completed delivery of 48 late-model F-16C/Ds with advanced offensive capabilities to Poland. That matters far more to Polish national security than BMD. In the U.S. tradition with allies — particularly allies with strong lobbies in the United States, where the Polish lobby is immense — disappointment on one weapon system usually results in generosity with other, more important systems (something the Poles must learn).

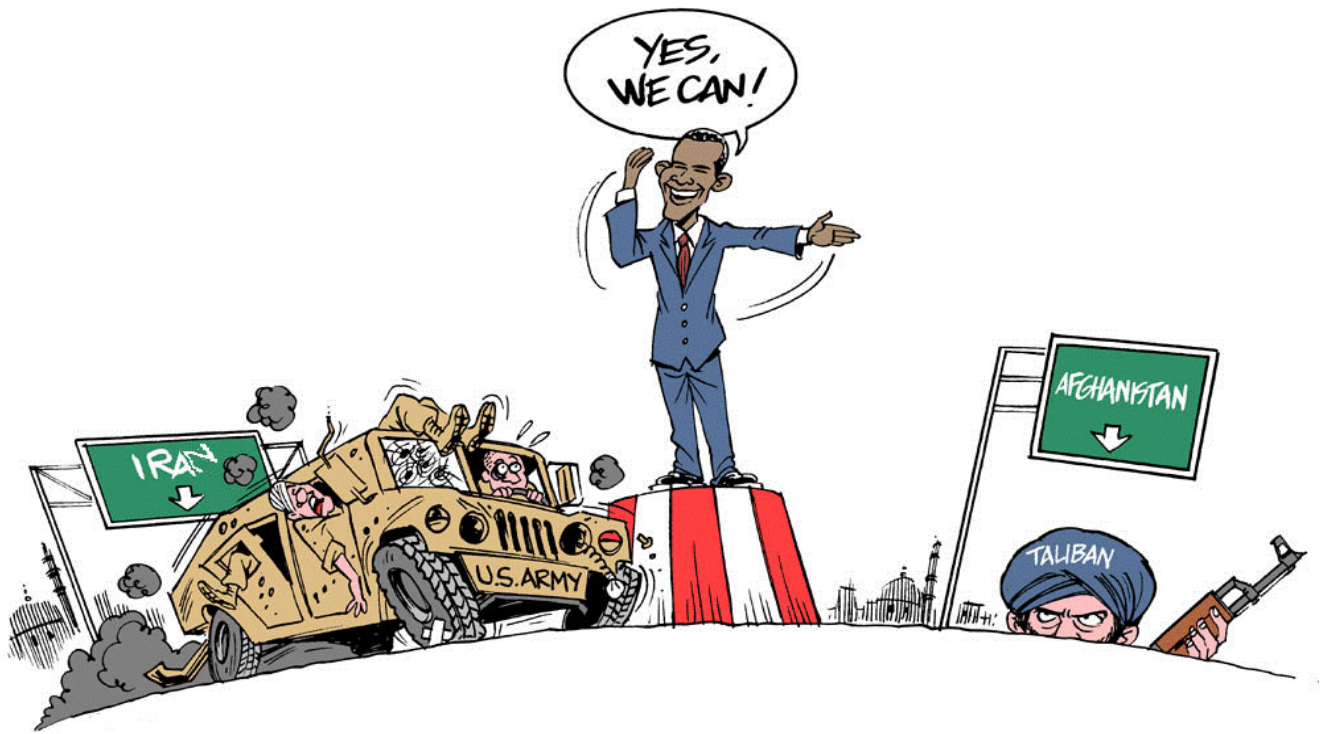
As the United States has a strong military option in Iran, redrawing the map of Europe to avoid using that option — regardless of Polish fears at the moment — is unlikely. Moreover, Washington also could decide to live with an Iranian nuclear capability without redrawing the map of Europe. Ultimately, the United States has made a gesture with little content and great symbolic meaning. It is hoping that the Russians are overwhelmed by the symbolism. They won't be.

For their part, the Russians are hoping the Americans panic over Iran. The fact is that while Russia is a great regional power, it is not *that* great, and its region is not that critical. The Russians may be betting that Obama will fold. They made the same bet on John F. Kennedy. Obama reads the same reports that we do about how the Russians believe him to be weak and indecisive. And that is a formula for decisive — if imprudent — action.

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# Obama's Move: Iran and Afghanistan

By George Friedman | September 28, 2009



During the 2008 U.S. presidential campaign, now-U.S. Vice President Joe Biden said that like all U.S. presidents, [Barack Obama would face a foreign policy test](#) early in his presidency if elected. That test is now here.

His test comprises two apparently distinct challenges, one in Afghanistan and one in Iran. While different problems, they have three elements in common. First, they involve the question of his administration's overarching strategy in the Islamic world. Second, the problems are approaching decision points (and making no decision represents a decision here). And third, they are playing out very differently than Obama expected during the 2008 campaign.

[During the campaign, Obama](#) portrayed the Iraq war as a massive mistake diverting the United States from Afghanistan, the true center of the "war on terror." He accordingly promised to shift the focus away from Iraq and back to Afghanistan. Obama's views on Iran were more amorphous. He supported the doctrine that Iran should not be permitted to obtain nuclear weapons, while at the same time asserted that engaging Iran was both possible and desirable. Embedded in the famous argument over whether offering talks without preconditions was appropriate (something now-U.S. Secretary of State Hillary Clinton

attacked him for during the Democratic primary) was the idea that the problem with Iran stemmed from Washington's refusal to engage in talks with Tehran.

[We are never impressed with campaign positions](#), or with the failure of the victorious candidate to live up to them. That's the way American politics work. But in this case, these promises have created a dual crisis that Obama must make decisions about now.

## Iran

Back in April, in the midst of the financial crisis, Obama reached an agreement at the G-8 meeting that [the Iranians would have until Sept. 24 and the G-20 meeting to engage in meaningful talks](#) with the five permanent members of the U.N. Security Council plus Germany (P-5+1) or face intensely increased sanctions. His administration was quite new at the time, so the amount of thought behind this remains unclear. On one level, the financial crisis was so intense and September so far away that Obama and his team probably saw this as a means to delay a secondary matter while more important fires were flaring up.

But there was more operating than that. Obama intended to try to bridge the gap between the Islamic world and the United States between April and September. In his speech to the Islamic world from Cairo, he planned to show a desire not only to find common ground, but also to acknowledge shortcomings in U.S. policy in the region. With the appointment of special envoys George Mitchell (for Israel and the Palestinian territories) and Richard Holbrooke (for Pakistan and Afghanistan), Obama sought to build on his opening to the Islamic world with intense diplomatic activity designed to reshape regional relationships.

It can be argued that the Islamic masses responded positively to Obama's opening — it has been asserted to be so and we will accept this — but the diplomatic mission did not solve the core problem. Mitchell could not get the Israelis to move on the settlement issue, and while Holbrooke appears to have made some headway on increasing Pakistan's aggressiveness toward the Taliban, no fundamental shift has occurred in the Afghan war.

Most important, no major shift has occurred in Iran's attitude toward the United States and the P-5+1 negotiating group. In spite of Obama's Persian New Year address to Iran, the Iranians did not change their attitude toward the United States. The [unrest following Iran's contested June presidential election](#) actually hardened the Iranian position. Mahmoud Ahmadinejad remained president with the support of Supreme Leader Ayatollah Ali Khamenei, while the so-called moderates seemed powerless to influence their position. Perceptions that the West supported the demonstrations have strengthened Ahmadinejad's hand further, allowing him to paint his critics as pro-Western and himself as an Iranian nationalist.

But with September drawing to a close, talks have still not begun. Instead, they will begin Oct. 1. And last week, the Iranians chose to announce that not only will they continue work on their nuclear program (which they claim is not for military purposes), they have a second, hardened

[uranium enrichment facility near Qom](#). After that announcement, Obama, British Prime Minister Gordon Brown and French President Nicolas Sarkozy held a press conference saying they have known about the tunnel for several months, and warned of stern consequences.

This, of course, raises the question of what consequences. Obama has three choices in this regard.

First, he can impose [crippling sanctions against Iran](#). But that is possible only if the Russians cooperate. [Moscow has the rolling stock and reserves to supply all of Iran's fuel needs](#) if it so chooses, and Beijing can also remedy any Iranian fuel shortages. Both Russia and China have said they don't want sanctions; without them on board, sanctions are meaningless.

Second, [Obama can take military action against Iran](#), something easier politically and diplomatically for the United States to do itself rather than rely on Israel. By itself, Israel cannot achieve air superiority, suppress air defenses, attack the necessary number of sites and attempt to neutralize Iranian mine-laying and anti-ship capability all along the Persian Gulf. Moreover, if Israel struck on its own and Iran responded by mining the Strait of Hormuz, the United States would be drawn into at least a naval war with Iran — and probably would have to complete the Israeli airstrikes, too.

And third, Obama could choose to do nothing (or engage in sanctions that would be the equivalent of doing nothing). Washington could see future Iranian nuclear weapons as an acceptable risk. But the Israelis don't, meaning they would likely trigger the second scenario. It is possible that the United States could try to compel Israel not to strike — though it's not clear whether Israel would comply — something that would leave Obama publicly accepting Iran's nuclear program.

And this, of course, would jeopardize Obama's credibility. It is possible for the French or Germans to waffle on this issue; no one is looking to them for leadership. But for Obama simply to acquiesce to Iranian nuclear weapons, especially at this point, would have significant diplomatic and domestic political ramifications. Simply put, Obama would look weak — and that, of course, is why the Iranians announced the second nuclear site. They read Obama as weak, and they want to demonstrate their own resolve. That way, if the Russians were thinking of cooperating with the United States on sanctions, Moscow would be seen as backing the weak player against the strong one. The third option, doing nothing, therefore actually represents a significant action.

## Afghanistan

In a way, the same issue is at stake in Afghanistan. Having labeled Afghanistan as critical — indeed, having campaigned on the platform that the Bush administration was fighting the wrong war — it would be difficult for Obama to back down in Afghanistan. At the same time,

the U.S. commander in Afghanistan, Gen. Stanley McChrystal, has reported that without a new strategy and a substantial increase in troop numbers, [failure in Afghanistan is likely](#).

The number of troops being discussed, 30,000-40,000, would bring total U.S. and NATO forces in Afghanistan to just above the number of troops the Soviet Union deployed there in its war (just under 120,000) — a war that ended in failure. The new strategy being advocated would be one in which the focus would not be on the defeat of the Taliban by force of arms, but the creation of havens for the Afghan people and protecting those havens from the Taliban.

A move to the defensive when time is on your side is not an unreasonable strategy. But it is not clear that time is on Western forces' side. Increased [offensives are not weakening the Taliban](#). But halting attacks and assuming that the Taliban will oblige the West by moving to the offensive, thereby opening itself to air and artillery strikes, probably is not going to happen. And while assuming that the country will effectively rise against the Taliban out of the protected zones the United States has created is interesting, it does not strike us as likely. The Taliban is fighting the long war because it has nowhere else to go. Its ability to maintain military and political cohesion following the 2001 invasion has been remarkable. And betting that the Pakistanis will be effective enough to break the Taliban's supply lines is hardly the most prudent bet.

In short, Obama's commander on the ground has told him the current Afghan strategy is failing. He has said that unless that strategy changes, more troops won't help, and that a change of strategy will require substantially more troops. But when we look at the proposed strategy and the force levels, it is far from obvious that even that level of commitment will stand a chance of achieving meaningful results quickly enough before the forces of Washington's NATO allies begin to withdraw and U.S. domestic resolve erodes further.

Obama has three choices in Afghanistan. He can continue to current strategy and force level, hoping to prolong failure long enough for some undefined force to intervene. He can follow McChrystal's advice and bet on the new strategy. Or he can withdraw U.S. forces from Afghanistan. Once again, doing nothing — the first option — is doing something quite significant.

### The Two Challenges Come Together

The two crises intermingle in this way: Every president is tested in foreign policy, sometimes by design and sometimes by circumstance. Frequently, this happens at the beginning of his term as a result of some problem left by his predecessor, a strategy adopted in the campaign or a deliberate action by an antagonist. How this happens isn't important. What is important is that Obama's test is here. Obama at least publicly approached the presidency as if many of the problems the United States faced were due to misunderstandings about or the

thoughtlessness of the United States. Whether this was correct is less important than that it left Obama appearing eager to accommodate his adversaries rather than confront them.

No one has a clear idea of Obama's threshold for action.

In Afghanistan, the Taliban takes the view that the British and Russians left, and that the Americans will leave, too. We strongly doubt that the force level proposed by McChrystal will be enough to change their minds. Moreover, [U.S. forces are limited](#), with many still engaged in Iraq. In any case, it isn't clear what force level would suffice to force the Taliban to negotiate or capitulate — and we strongly doubt that there is a level practical to contemplate.

In Iran, Ahmadinejad clearly perceives that challenging Obama is low-risk and high reward. If he can finally demonstrate that the United States is unwilling to take military action regardless of provocations, his own domestic situation improves dramatically, his relationship with the Russians deepens, and most important, his regional influence — and menace — surges. If Obama accepts Iranian nukes without serious sanctions or military actions, the American position in the Islamic world will decline dramatically. The Arab states in the region rely on the United States to protect them from Iran, so U.S. acquiescence in the face of Iranian nuclear weapons would reshape U.S. relations in the region far more than a hundred Cairo speeches.

There are four permutations Obama might choose in response to the dual crisis. He could attack Iran and increase forces in Afghanistan, but he might well wind up stuck in a long-term war in Afghanistan. He could avoid that long-term war by withdrawing from Afghanistan and also ignore Iran's program, but that would leave many regimes reliant on the United States for defense against Iran in the lurch. He could increase forces in Afghanistan and ignore Iran — probably yielding the worst of all possible outcomes, namely, a long-term Afghan war and an Iran with a nuclear program if not nuclear weapons.

On pure logic, history or politics aside, the best course is to strike Iran and withdraw from Afghanistan. That would demonstrate will in the face of a significant challenge while perhaps reshaping Iran and certainly avoiding a drawn-out war in Afghanistan. Of course, it is easy for those who lack power and responsibility — and the need to govern — to provide logical choices. But the forces closing in on Obama are substantial, and there are many competing considerations in play.

Presidents eventually arrive at the point where something must be done, and where doing nothing is very much doing something. At this point, decisions can no longer be postponed, and each choice involves significant risk. Obama has reached that point, and significantly, in his case, he faces a double choice. And any decision he makes will reverberate.