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IRAN: THE WAR THAT FOLLOWED EUROPE HOME

ALEX VATANKA

27

EXPERT OPINION

Europe did not choose the war with Iran, and most European governments still resist describing themselves as participants in it. But six months of military basing, missile-defense drawdowns, energy shocks, sanctions pressure and planning for possible migration crisis have made that distance harder to sustain.

The question is no longer whether the war matters to Europe; it is whether Europe can define what it wants from the conflict before events - or Washington and Tehran - define Europe's role for it. So far, Europe has mostly reacted: caught between an American administration it does not fully trust but cannot strategically dispense with, and an Iranian regime whose conduct and political order clash sharply with European governments' stated values and security interests.

On August 31, the European Union crossed a line Tehran had spent weeks warning it not to cross. In a statement issued as finance ministers gathered for the G20 meeting in Asheville, North Carolina, Brussels welcomed additional economic pressure on Iran, including the American-led campaign Washington calls Operation Economic Outcast, and pledged to keep working with Washington to maintain it (European External Action Service 2026).

Iran did not treat this as routine. Ismail Baghaei, the Foreign Ministry spokesman, accused the EU of increasingly abandoning its "independence, laws, values and moral standards" in the face of American intimidation. Mohsen Rezaei, the newly installed secretary of Iran's Supreme National Security Council, went further: any country joining the economic campaign would be treated as an enemy. Tehran would first ask it to break with Washington; if it refused, Iran would target its interests (Donya-e Eqtesad 2026; Baghaei 2026; Al Jazeera 2026; Reuters 2026a).

Six months into a war that Europe still insists is not its own, that is no longer an abstract threat. This is an article about a gap that is closing. European governments have spent six months arguing that hosting American forces is not the same as fighting in the Iran war. Iran increasingly no longer accepts the distinction, and the distinction was never going to survive a war that runs long, which, on the evidence of the last six months, this one is going to do (NATO 2026).

The bases, the interceptors, the sanctions, the shipping lanes and the potential refugees Europe has not yet had to absorb are all converging on the same conclusion: Europe is not a bystander to this war. It is infrastructure for it. And infrastructure gets targeted.

Not Europe's war

The distance was there from the start. When EU foreign ministers met in mid-March, Kaja Kallas, the bloc's foreign policy chief, offered what became the defining line: "This is not Europe's war, but Europe's interests are directly at stake." The ambiguity in that sentence has done a lot of work ever since (Council of the European Union 2026).

Spain took the position furthest. Prime Minister Pedro Sánchez reduced Madrid's stance to two words - "no to war" - and told parliament that Europe could not condemn violations of international law in Ukraine while tolerating them elsewhere. "Double standards do not make the world fairer," he said. "They make it less safe" (La Moncloa 2026).

Britain moved differently. Keir Starmer initially stressed that Britain had no role in the February 28 strikes that killed Iran's supreme leader and favored a negotiated settlement instead. Iranian retaliation against Gulf states and facilities housing British personnel changed the calculation. By March 1, Starmer had confirmed that Washington could use British bases for what London called a defensive purpose - striking Iranian missile capability aimed at regional states - and Britain agreed (UK Prime Minister’s Office 2026a).

He was careful with his language: "Our decision that the UK would not be involved with the strikes on Iran was deliberate." By then British Typhoons were flying missions across the region, more jets were headed to Qatar, helicopters to Cyprus, and American aircraft had UK basing access for agreed operations against Iranian missiles (UK Prime Minister’s Office 2026b).

That distinction mattered in London. It mattered considerably less in Tehran. Iran's operating principle has been simple from the first weeks: a facility used to help attack Iran is a facility Iran may attack back. It applied that logic first to American installations in Qatar, Bahrain, Kuwait, Iraq and Jordan. It is now stretching the same logic toward states with no border anywhere near the Gulf (Reuters 2026a).

When Bulgaria weighed hosting additional American tanker aircraft this summer, Baghaei warned Sofia that facilitating US operations would make it an "accomplice of aggressors and lawbreakers." Rezaei then widened the principle again: letting American combat aircraft or missiles transit a country's territory against Iran is itself an act of hostility, whatever the host government calls it. Europe draws a line between hosting American forces and joining their war. Iran has stopped recognizing that line exists (Defense News 2026; Al Jazeera 2026).

The platform behind the war

NATO's own secretary general did more than anyone to expose how thin that line has become. European governments spent months emphasizing the limits of their involvement. By late June Rutte was publicly describing thousands of U.S. missions launched from Europe; at the Ankara summit on July 8 he put the aggregate at “up to 5,000 sorties from European bases” and said the campaign would have been very difficult without Europe serving as “a platform of power projection for the United States” (NATO 2026).

Rutte was not trying to implicate Europe. He was defending it. Trump had complained that European allies were contributing too little, and Rutte was pointing to how much they had quietly provided under bilateral basing arrangements that predate the war by decades. He made the same case again at the Ankara summit in July, arguing that European allies had, taken together, honored their agreements with Washington.

Italy illustrates the ambiguity more cleanly. Rutte said about 500 U.S. aircraft had taken off from American bases in Italy “to support Epic Fury,” but Rome pushed back, saying it had authorized only technical, logistical and other non-kinetic activity and had rejected requests that exceeded those limits (Internazionale 2026).

What reassures Washington unsettles Tehran. If thousands of sorties against Iran are launching from European runways, the claim that Europe sits outside the war becomes difficult to sustain - for Iran, and eventually for European publics asking the same question.

Not every one of those flights drops a bomb. Many, if not most, are refueling, transport, surveillance or logistics missions, and NATO basing arrangements do not grant Washington identical rights everywhere.

Spain proved that emphatically. Madrid first refused to let Rota and Morón support Iran-war operations, then went further. On March 30, Defense Minister Margarita Robles announced that Spain would deny the United States both its bases and its airspace for anything connected to the conflict. "We don't authorize either the use of military bases or the use of airspace" for Iran-war operations, she said, and American aircraft already staged in Spain were required to leave (Reuters Connect 2026).

Spain showed that a European ally can say no. The open question is how many would still say no if Washington's need became acute enough to make refusal costly.

A strategy of spreading the cost

Iran cannot defeat the United States militarily, and it knows it. What it can do is widen the war's cost until the states enabling American power start asking each other whether the price is worth it. The Gulf states learned this first: a base that reassures its host in peacetime becomes something to shoot at in war. Hormuz then extended the same logic from military geography to economics. Iran did not need to close the strait. It needed only to make transit risky enough that insurers, shippers and energy markets began pricing Iranian coercion into every voyage.

By mid-2026, underwriters were charging war-risk premiums running into eight figures for a single Gulf transit, according to Lloyd's List — a cost ultimately carried by European importers, refiners and, further down the chain, drivers and factories (Lloyd’s List 2026).

Rezaei's economic-pressure threat extends that same principle one stage further. If sanctions become Washington's primary weapon, he has suggested, participating in them may itself be treated as participation in the war - with retaliation against economic interests, and in an extreme scenario, an attempt to choke off Gulf oil exports even through routes built to bypass Hormuz (Reuters 2026a; Al Jazeera 2026).

Some of this is bluff. Iran cannot simply shut down the Gulf economy, and six months of disruption have not moved Washington off its terms; markets adapt, and Iran itself absorbs enormous damage from the disruption it creates. But coercion does not need to work outright to be useful. It only needs to make the adversary's coalition expensive enough to argue among itself. That is the bet Tehran is placing on Europe.

Borrowing against Ukraine

The Iran war did not arrive into a quiet European security environment. It arrived while NATO was still running its largest continental military effort since the Cold War, built around Russia's 2022 invasion of Ukraine and the air defenses, long-range strike systems, drones and ammunition it demanded. The Iran war began drawing on the same stockpiles.

Patriot interceptors are the clearest case. By late August, US Patriot inventories in Europe had fallen to levels American officials described to the Associated Press as "beyond critical," after heavy expenditure against Iranian missiles compounded transfers already committed to Ukraine (Associated Press 2026a).

Ukraine felt the shortage directly. After a major Russian strike on Kyiv in late July, President Volodymyr Zelensky said Ukraine had failed to intercept most incoming ballistic missiles for one reason: it had run out of interceptors.

Reuters reported that only one of 27 ballistic missiles in that attack was intercepted and that Patriot interceptors previously earmarked for Ukraine had been diverted to U.S. forces and allies in the Persian Gulf region. He had seen the problem coming almost as soon as the Iran war started. "There is nothing good for Ukraine in the war in the Middle East," he said in Paris in March, because global attention was shifting away from Kyiv (Reuters 2026b; Reuters 2026c).

Iranian commentary has drawn the same conclusion from the other direction. Iranian outlets increasingly describe Russia and China as the war's quiet beneficiaries: every interceptor consumed in the Gulf, every squadron redirected toward the Middle East, every month spent replenishing American stocks is a month of thinner margins in Europe or Asia. Tehran does not need to help Russia take another kilometer of Ukrainian territory for Moscow to benefit. A NATO with fewer interceptors, and a Washington dividing its highest-end assets across three theaters, produces the same strategic effect on its own.

The bill comes due at home

Europe's exposure is not only military. It is showing up in prices. Europe’s benchmark Dutch TTF gas price more than doubled within days of the war’s opening shock, peaking at €65.79 per megawatt-hour on March 3, as Gulf energy flows were disrupted and Qatari LNG production was halted after Iranian strikes. EU gas storage was only about 30 percent full, roughly nine percentage points below the same point a year earlier (Reuters 2026d).

The European Commission’s spring forecast instead provides a firmer baseline: it raised expected 2026 inflation to 3.1 percent for the EU and 3.0 percent for the euro area, while cutting 2026 growth forecasts to 1.1 percent and 0.9 percent respectively. A separate Commission scenario for a prolonged energy disruption put EU inflation at 3.5 percent in 2027 (European Commission 2026; Joint Research Centre 2026).

By March, euro-area inflation had climbed to 2.5 percent, with energy prices up 4.9 percent. The European Central Bank held its policy rates unchanged on March 19 rather than proceeding with any pre-committed cut, warning that the war had increased upside risks to inflation and downside risks to growth. European chemical producers, among the industries most exposed to higher energy and feedstock costs, subsequently raised prices as margins came under pressure (Reuters 2026e; European Central Bank 2026; Reuters 2026f).

None of this shows up in a headline about basing agreements or missile interceptors. It shows up in a German factory's electricity bill and a British household's heating bill, and it will keep showing up for as long as Hormuz remains a place where Iran, not the market, sets the price of passage.

The Russian dividend

All of this leaves Vladimir Putin in an enviable position. Russia did not start the Iran war and cannot direct its course, but nearly every month it continues hands Moscow some marginal advantage. American attention is divided. Western interceptor stocks are strained. Higher oil prices pad Russian export revenue at the margins even as sanctions and Ukrainian strikes continue to erode Russia's energy sector. And Washington must weigh, simultaneously, how much military capacity it can afford to keep in Europe, the Middle East and the Indo-Pacific at once.

None of these advantages alone changes the trajectory of the war in Ukraine. Together, they matter - and they arrive at a moment when the Pentagon is already reviewing the future of the roughly 80,000 American troops stationed in Europe, a review that touches not just headcount but the access, basing, overflight and intelligence arrangements through which American power on the continent actually functions (Reuters 2026g).

The slow fuse

There is also a migration risk, and it has not detonated yet, which is not the same as saying it has been defused or that it will. The United Nations refugee agency estimated in March that some 3.2 million people had been temporarily displaced inside Iran, with most moving from Tehran and other major cities toward northern and rural parts of the country; only around 1,300 people a day were crossing into Turkey, and on some days more returned to Iran than left it. EU asylum applications are, for now, actually down this year by roughly a fifth EU first-time asylum applications were 29 percent lower in June 2026 than in June 2025, and European authorities maintain that no mass Iranian refugee exodus is underway (UNHCR 2026; Associated Press 2026b; Eurostat 2026).

Still, Europe should recognize that pattern, because it has seen it before. The Syrian war began in 2011; the migration wave that reshaped European politics did not peak until 2015, after neighboring states had absorbed the displaced for years first.

Officials already worry about the same delay repeating. "If Tehran, a city of ten million people, doesn't have water, they're going to go somewhere," I told the Associated Press in March, a scenario that becomes more plausible with every week that Iranian infrastructure remains a target (Associated Press 2026c).

A humanitarian official working the crisis put the stakes more bluntly still: the region faces "grave humanitarian consequences right at a time where humanitarian funding has been completely slashed."

European governments and agencies are making contingency plans, while the 2016 EU-Turkey migration arrangement is also due for renewal this year — not because a crisis has arrived, but because European officials increasingly doubt they will get much warning before one does (Associated Press 2026b).

When the Gulf gets too dangerous

There is a further question few in Europe have confronted directly: what happens if the Gulf itself becomes too dangerous for the United States to keep fighting from. Washington has run this war largely from a dense network of bases ringing Iran, and those bases provide enormous advantages - short flight times, established logistics, intelligence infrastructure, local airspace access. They are also within Iranian missile range, and Iran learned early that while it could not stop American strikes, it could make host governments pay for hosting them (Reuters 2026a).

Gulf governments have no wish to sever their security relationships with Washington. But they also have airports to keep operating, investors to reassure, desalination plants to protect and populations that would rather not live underneath exchanges of ballistic missiles. The longer this runs as a war of attrition, the more attractive it becomes for Washington to move some of its supporting weight - tankers, bombers, logistics aircraft, munitions stocks, command functions - farther from Iran's reach (Reuters 2026a).

That points toward Europe, which already has the bases, the bilateral agreements and decades of infrastructure connecting the two theaters. Rutte has already told us 5,000 sorties have flown from European soil (NATO 2026).

The question Europe has not yet had to answer is what happens when that number is 10,000, or when a Gulf capital decides some missions are too politically dangerous to launch from its own territory and asks Washington to fly them from Britain, Germany, Italy, Romania or Bulgaria instead - and Tehran declares that whichever runway it flies from is now part of the battlefield (NATO 2026; Defense News 2026).

Can Europe say no?

Spain has shown the legal and political answer can be yes. But Europe is not only Spain. Britain made the opposite choice, permitting American use of its bases for missions London insists are defensive while denying it has joined the war. Germany, Italy and other allies have allowed substantial American activity under long-standing arrangements while carefully avoiding the word "participation." Rutte's own sortie count suggests that, in practice, Europe's answer so far has looked far closer to yes than no (Reuters Connect 2026; UK Prime Minister’s Office 2026b; Internazionale 2026).

The real test comes if operations become unambiguously offensive and sustained, at which point this stops being a technical question about basing agreements and becomes a political argument about obligations NATO itself does not formally impose. Iran sits outside NATO territory; Article 5 does not require Spain, Germany or Italy to help the United States bomb it, and Rutte himself has stressed that NATO as an alliance is not running the Iran campaign - that access rests on bilateral deals with individual allies. But formal obligation is only half the story (NATO 2026).

European governments depend on American capability to deter Russia: troops on the eastern flank, intelligence, nuclear deterrence, missile defense, reinforcement capacity.

That dependence gives Washington leverage of its own. Trump has already voiced anger at allies he believes have done too little on Iran, even as Rutte works to convince him the broader contribution has in fact been substantial. Picture that argument recurring during the next major Iranian escalation, with a European government insisting American aircraft may defend Poland from Russia but may not cross its territory to strike Iran. Legally, those are separate questions. An American president under pressure may not treat them that way (Reuters 2026g).

Iran understands exactly where that leaves Europe, which is why Tehran celebrates every European refusal - Spain's denial of its airspace, Bulgaria's hesitation over tanker aircraft - while singling out states that facilitate American operations for warning. Iran does not have the power to break NATO apart. It has the power to make Europeans choose, repeatedly, in public, under pressure - and choosing is a cost in itself.

The war Europe cannot keep at arm's length

Europe still occupies an uncomfortable middle ground. It opposes an Iranian nuclear weapon and has few illusions about the regime in Tehran. It has condemned Iranian strikes on Gulf states and commercial shipping, imposed its own sanctions, and now backs Washington's bid to tighten Iran's economic isolation further (European External Action Service 2026; Council of the European Union 2026).

At the same time, most European governments never wanted this war, do not consider themselves belligerents, and are increasingly uneasy that American strategy has produced exactly the instability diplomacy was supposed to prevent. Tehran calls that hypocrisy. Europeans call it a distinction. Six months in, that disagreement is getting harder to sustain - and Iran's own posture is hardening rather than softening, with Iranian strategic commentary now talking openly of striking at attack preparations before they mature, not merely retaliating after the fact (Associated Press 2026d).

The November 3 U.S. midterm elections have already become part of the war's political context. On September 9, Trump said he expected the war to end "immediately after" the election; Reuters noted that the conflict had entered its seventh month amid voter frustration over the war and the cost-of-living crisis. What happens after November is inherently uncertain, but the election itself is now part of Washington's public framing of the conflict (Reuters 2026h).

What can be documented now is the pressure already building on Europe: the Pentagon is reviewing U.S. force posture and access rights across the continent; Patriot stocks in Europe are strained; and Washington has publicly complained about allies that restricted basing or overflight. Those are present constraints, not forecasts about what a post-midterm administration or Congress will do (Reuters 2026g; Associated Press 2026a).

If the conflict reaches its first anniversary, European governments will be confronting it not as a temporary external shock but as a persistent security condition affecting defense planning, energy policy, industrial capacity and migration preparedness. The gap between calling it "someone else's war" and absorbing its costs will then be harder still to maintain.

Kallas was right in March: this was not Europe's war. Six months later, the harder question is whether Europe can still afford to say so.

The central fact is that Europe's claim to stand outside the war is being overtaken by the war's effects. European territory is already supporting U.S. operations; European air-defense stocks and energy markets are already absorbing costs; and European governments are already making contingency plans for consequences that may not remain confined to the Middle East. Whether they call those actions participation, support or simply the execution of bilateral obligations, the material exposure is the same. Six months in, Europe has not become a belligerent as a bloc — but it has become part of the strategic geography of the war, and that is the reality Tehran, Washington and European capitals are now acting around.

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