

Transcript – US-Israel Alliance in Crisis: George Friedman Explains

Christian Smith: Hello and welcome to this podcast from Geopolitical Futures. I'm Christian Smith. Reports emerged this week of an explosive conversation between President Donald Trump and Prime Minister Benjamin Netanyahu. The President was not pleased that Israel's renewed attacks on Lebanon over the weekend threatened to collapse the tenuous ceasefire between Iran and the U.S. now, all relationships have their spats, but what does this moment tell us about Israel and America's? Well, on this edition of the podcast, we discuss the US Relationship with Israel, what both sides want out of the war with Iran from here, and the future of Israel's place in the Middle East. And to do so, I am joined by Geopolitical Futures chairman and founder, George Friedman. Hello, George.

George Friedman: Hi, George.

Christian Smith: I want to really, I want to go back to first principles to start off with here. Why does the US Care so much about Israel?

George Friedman: Well, we have to go back to the founding of Israel. The United States voted for the founding, but did not provide very much help to Israel. It was the country that made the most help to Israel was, believe it or not, France. And for the decades before the French were there. What happened was, however, the Suez crisis. The Suez crisis was that Egypt seized control, tried to seize control of the Suez Canal, which would be like taking control of the Hormuz Straits today. The British, the French, and they recruited the Israelis to take back Suez Canal to block Nasser from doing that. After that happened, the Egyptians shifted their interest and the United States, by the way, intervened to stop them. Not to be able to do that. Nasser turned to the Soviets for help and became an ally. So did Syria. So did other countries in the region. So there was a Cold War that extended to the Middle East. And in that Cold War, a number of critical Arab countries were under profound Russian influence. Not control, but influence. The Russians armed them, trained them, and everything else like that. It was after that that the United States really started to turn to Israel because the countries that were allied with us did not have major military force. Israel was a major military power. And so the United States became involved with Israel. So, for example, in 1973, what was

called the Yom Kippur War involved an attack by Egypt and Syria on Israel. The weapons were all Soviet, the training is all Soviet. The planning had a great deal to do with the Soviets. In that war. The United States became a major supplier of goods. This was a short war, a week or so, but massively shifted weapons and everything to Israel. So one of the things to understand is that the US Israeli relationship developed at the height of the Cold War with Russia Having penetrated many of the Middle Eastern countries, particularly Syria and Egypt, critical countries, Egypt became a tool for the United States. It was a way for them to supply weapons, not get involved on the ground, keeping them at bay. With the fall of Soviet Union, that basically remained in place. After that, the United States became more concerned with things like bombing Yugoslavia, things of that sort. Then something happened, 9 11. So the US relationship with Israel did not cool, did not intensify. But after 911 and the attack by Al Qaeda and so on, the United States suddenly was involved in the Middle east, such as with the Iraq war, involvement in Kuwait and everything El in those wars, the Israelis were very useful both in providing intelligence, providing covert operations, and so on and so forth. So during the period after 9 11, the United States itself became dependent to a great extent on Israel, and the relationship maintained itself. Well, we're far beyond that point at this point that the US Commitment to Israel is there. It is not as imperative as it was. And as Trump so nicely pointed out, it's at a point where there's a possibility of a difference in how we relate. But that United States was committed to Israel was not the case until after the Soviets became a major element. And this was part of the Cold War, and Israel was critical. Well, times are going on and other things emerge.

Christian Smith: Listeners will be thinking. One of the things, George, there that you didn't mention is any suggestion that there might be a more than practical, more than realist relationship between the US And Israel, a perhaps an ethical one, if you want to put it that way, a friendship one. There's obviously close relationships between lots of people in both countries. Does that play a role here, do you think?

George Friedman: It certainly played a role at the founding of Israel right after World War II. There was great sympathy for them, and the United States supported it, but it was not a major military ally. It was not the foundation of Israel's security. That didn't emerge until the Soviets took positions. And then we

became deeply militarily involved. So the idea is not that from the very beginning we were militarily involved in defending Israel and so on and so forth. There was great sympathy based on both the Holocaust, based on the fact that there were Jews in the country, and so on and so forth, but there was not controversy over supporting Israel. The controversy of supporting Israel came after the Cold War, the continuation of the relation with Israel, the triggering of the 911 attack, and so on and so forth. So we entered a different dimension. So the idea that the United States voted for in the UN for Israeli Independence, I suspect, had a great deal to do with the mood of the country about Jews, which was positive and wanting to do it. The amount of help given directly by the US Government was not significant. The primary aid came from France.

Christian Smith: And I just want to look into this a little bit more. So with respect to that relationship now, is there something that makes the relationship now between Israel and the US different to, say, some of America's other allies, let's say Britain or some of the other allies, or even Australia, say some of the allies that have deep historic ties?

George Friedman: Certainly it appears that way to many people. In my mind, I think the relationship between Israel and the United States is both the norm and unsupportable in the present circumstance. We'd have to talk about that. Why? But what I'm seeing is that what Israel is now forced to do is not necessarily in the American interest. For example, in Iran, the acquisition of nuclear weapons by Iran is a major threat to Israel. Of course, it is also a potential threat to the United States because Al Qaeda, the group that attacks the 9 11, they still are there in Iran and they're being protected by it. So if you get a government that is developing nuclear weapons and supporting Al Qaeda, you start to think about what Al Qaeda did in 911 and what would a 911 nuclear attack. So in that sense, there is a common agreement they should not have nuclear weapons. The fundamental issue for Trump, why he blew his top, is that Israel is not simply dealing with Iran, it is trying to do something else. Invading Lebanon and refusing to leave it. Now there's this diversion of interests. And we can talk about that.

Christian Smith: Yeah, absolutely. And I think you've teed us up nicely for later on. We're going to talk about the sort of future relationship between the two countries. Before we get to that, though, let's look at this. This explosion, as we, as you call it, between Trump blowing his top, between Netanyahu and Trump.

Obviously, most people out there will know about this conversation. We mentioned it at the top. How much did their relationship. How much does it actually matter, particularly now when it comes to the war with Iran? They've known each other a long time. They've always seemed to have got on well. Trump even said this week, well, allegedly said this week that it's because of him that Netanyahu is not in prison. How much does this actually matter?

George Friedman: Well, there's always the question of personal relationship between leaders of countries, and that's at least 4% of the issue. The more important question is Israel and the United States had a common interest in getting rid of the nuclear weapons. The United States wound up in a situation where they neither got rid of the nuclear weapons and were violating the fundamental principles of on which Trump ran for president. Stopping these constant wars in the region. He needs to end the war. And to end the war, he has guaranteed to the Iranians that the fighting in Lebanon would cease, that Israel would withdraw from Lebanon. The Israelis, for their reasons, won't do that. So this is a fundamental divergence. The United States wants to get out of this war. The basis for Iran getting out of the war, so they say, is some peace in Iran. Israel cannot absorb, cannot accept the idea of Hezbollah, a terrorist group, as they're called, or non state actor, being on their borders and therefore they're pushing further in. And this is a fundamental difference between what the United States wants to see and what Israel has to do.

Christian Smith: Want actionable insight from geopolitical futures. Introducing geoeconomic lens helping you understand not just what is happening, but how global power dynamics shape economic stability, dependency and opportunity. Explore the first issue for free at geopoliticalfutures.com Lens Hezbollah has obviously been on the border there for a long time now. Why is it different now, do you think?

George Friedman: Hamas fundamentally shocked the Israelis in two ways. Their ability to evade the intelligence capabilities of Israel, dealing tunnels and emerging Israel's. One of the proudest things of Israel is its intelligence service. It completely failed. As a result of that, many, many Israelis were killed by Hamas. This was a reevaluation then on the security of their borders. If it was possible for these groups to attack Israel without any intelligence provided by the Israeli government to send troops to block them, then they're facing a fundamental

problem. And that fundamental problem they have is Israel is an accident waiting to happen in a way. At its widest point, it's 71 miles wide. At its narrowest point, it's 9 miles wide with its back against the Mediterranean. So in other words, Israel is in a very dangerous position. It cannot lose a war. But if the first battle fails and they have only 71 miles in which to retreat at the widest point, they can't ever lose a battle. They have to start the battle. They have to preempt. Okay, One of the things that Israel looks at is they look at the fact that they constantly have to be more powerful than their neighbors. And someone like Hamas, who doesn't play by the rule book, does something differently. So this was one of the foundations of the Gaza attack and the brutality of it. They wanted to make sure that Gaza was a buffer zone. This is also the foundation of their interest in occupying the West Bank. That gives them more room, more room to maneuver. They don't have to go acting. And this is what they're doing in Lebanon. There's a river in Lebanon, the Tanni River. They want to be up there. So what Israel is trying to do after the Hamas attack, and that was the trigger for this, is build borders that are more secure by being farther away, having room for maneuver and so on. Whether the extension of this is enough room to make it literally safer is really a fundamental question. From the American point of view at this point, having gotten involved in Iran not being able to extract itself without the Israelis giving up on the Litany river in Lebanon, there's a fundamental divergence of interest between the two countries where there was a common interest when the war began, of taking out their nuclear power. At this point, the Iranians will only make peace if the Lebanese question is settled and the Israelis feel they can't afford to do that. So now we're in the first really serious crisis between the United States and Israel.

Christian Smith: So what do you think Israel, given where we are now in the war, in the ceasefire, however you want to call it, what do you think Israel wants to get out of this situation? As you say there, George, they can't really continue attacking Hezbollah without upsetting America. At the same time, they can't really accept the situation according to them, where it is. So what can they do? Where do they go?

George Friedman: Well, this is the problem they have. They had Hamas attack and massive numbers of Israelis were killed in that attack. They were able to do this because they were so close to the Israeli border and intelligence didn't stop

them. So if you're Israel, you've got to push those borders further back. The shocking thing in Israel was they failed to do that and so many Israelis died as a result. So from the Israeli point of view, they can't afford not to have deeper forces. The United States cannot afford to have this war in Iran go on indefinitely. So each country has a reasonable reason for what they're doing. The United States wants to disentangle from Iran. Israel wants to make sure Hamas like attacks never occur again. And this is where the breach comes out. And Trump, in his poetic style, very much made it clear and made it public that he can't go along. So what's happened is we had common interests before, but after the Hamas attack and after the Gaza thing and everything else, Israel had a solution that it had to take the United States has a different imperative. And so the relationship, as frequently happens with nations, seems to be breaking down. And in this particular case, the United States has many interests in the Middle east that unlike during the Cold War, Israel was fundamental to achieving those interests because it carried the load, the military load in that region. It was not Vietnam. They could do it. At this point, they're no longer waging war in the Middle east and therefore the American need changes. So what is happening here is not betrayal. It is not all these moralism. It is the reality of each country has shifted in a way. And obviously Israel must have a relationship with a major nation that provided help. And obviously the United States has been there for a long time. But reality changes geopolitics.

Christian Smith: Just a side question, I suppose. What role do you think the upcoming elections in Israel are going to play this week? We've sort of heard that these are going to happen sometime in either September or October. The Israeli parliament is putting through a bill to reflect that. Are they a big deal? I mean, again, we say Netanyahu, according to some, has avoided his corruption trial and potentially prison as a result of what's been going on. These elections will be a big deal for him in that respect. How do they play into the bigger picture?

George Friedman: It's a big deal under any circumstances. The trial is not the critical thing. I think the fundamental question is how does Israel defend itself? Okay, it extends its borders 50 miles west, east, south. Okay, it's still not enough strategic space if some they're attacked. And if the power of their bordering nations or other Arab nations massively increases as those military powers are increasing. The Israelis face a fundamental problem. Their backs are against the

wall of Mediterranean. They may not be in a position to attack and disrupt a possible attack on their borders. And they still don't have enough strategy depth under these circumstances, a fundamental change may be necessary in Israel if possible. In other words, as that did, starting with Trump's various Abraham Accords. The nation's going and he's brought that back as something there. And this was the idea of an accommodation between Israel, various Arab countries, and so on and so forth. It didn't go forward, not necessarily because of Israel, because many countries were reluctant to join it. But it has to reach an accommodation because it cannot guarantee for all futures that the small country of Israel will always be able to out fight their neighbors. Okay. As wars go on, drones come in, everything happens. Now the question, the fundamental question of Israeli security, they're extending their buffer zones, if you will, but still as countries emerge, I Talk of Turkey, not because it's hostile to Israel or that it's going to attack Israel, but it's a major power and Israel is actually a great power only relative to the weak Arab states. If the Arab states or the Muslim states, if you want to call them, evolve in power and remain hostile to Israel is a great problem. Now, fundamental to this is that Netanyahu is committed to the national defense of Israel and not accommodating the others, the other countries. From my point of view, just looking at it objectively, this is no longer a tenable position, not only because the United States is not going to support it, but because there'd be in all directions, some way they could be hit. They were hit from south, they could be hit from the east, from the west, I should say they could be hit from every direction. So it has to consider a new relationship with the Arab world. Now the question is, will the Arab world consider it at a time when Israel is weak or will they say otherwise? There are many things happening in the Arab world at this point. For example, a relationship developing between Pakistan, Turkey and with Saudi Arabia and Balt. So none of these countries like Hamas or these groups, we have to remember that many of these groups threatening the security of many of these countries potentially. So these non state actors can go in various different ways. But there has to be a fundamental change in the Israeli view of the situation because the situation has changed. It's not because the United States is not supporting it, but there's a fundamental shift taking place. Can they do that? That's the biggest question. Can they reach accommodation with the nations around them? And the Abraham Accords were in principle the instrument for making this happen.

Christian Smith: George, a few countries signed the Abraham Accords with Israel. Trump has suggested in the last week or so, I believe that Saudi Arabia should do the same. Do you think that will happen?

George Friedman: The problem here is this. Israel, after the attack on Hamas by Hamas, had to do something. If the United States suddenly found a force coming into main and massacring many people there, we would do something. This is a natural thing. The only thing they can think of doing is, is arming their borders and pushing them forward from the Arab side, accommodating them by doing this. They're invading Lebanon at this point, they can't make that deal. Israel feels it can't make the deal of pulling back. So something has to give. The United States does not want to be in a position of sending troops to defend Israel. They've never done that. They gave weapons and so on. But no troops. So how does Israel and Saudi Arabia guarantee that in their future both sides will accommodate each other? Saudi Arabia is not a problem. Saudi Arabia is not hostile to Israel. It's worked with Israel in many ways. The fundamental problem is they don't control the non state actors. So the non state actors, the Hezbollah, they're not a state, they're called a terrorist group. They're a force separate. Okay. Hamas was that okay. So reaching accommodation with the Arab states would require the Arab states to control these non state actors. That's dangerous for these states to do. These non state actors can turn on them as well. So it is a very messy situation for all concerned. So the Saudis certainly would be happy to join the accords. They've already talked about it. So would many other countries. They don't want this. But how do you deal with countries that give havens to Hezbollah, Hamas, all of these forces? Okay, that's Iran. And just as we got involved in the Iraq war as a response to 9 11, the United States does not want to get involved in that war. But because of the nuclear issue, Trump did get involved. For some reason, he thought he could rapidly intimidate or overrun the Iranians. He was wrong. And he now faces great difficulties. And he wants the Israelis to get out of Lebanon without giving any guarantees because he can't

Christian Smith: take a moment to follow and rate us on your preferred podcast platform. If you're already watching on YouTube, don't forget to like and subscribe. I mean, you're sort of painting a picture there, George, of a bunch of different countries which are all being pulled and pushed in directions, and the Venn diagram between them perhaps doesn't really exist. Israel has in many ways

been at war since it was founded, and it particularly has been at war since 2023, since October 7th. Is it destined, and this is somewhat of a classic question about the Middle east in the 20th and 21st century. Is it destined to be at war or on the brink of war for eternity?

George Friedman: Well, I don't think that the neighbors that it has want war. Syria did. Syria is a very different place. Turkey coming down and attacking Israel is not going to happen. Its borders are fairly secure. So I think there is a possibility of peace. The one thing that has to happen is the state actors must be fully responsible in the Arab world and capable of suppressing the non state actors. Is that possible? Well, it would be dangerous and cost many lives in these Arab countries. So Israel is in Lebanon to destroy Hezbollah there and also to get this buffer zone. At the same time, the Arabs have many other interests other than destroying Israel. Okay? And this is where the United States can come in. It's the only country that the Saudis and the Israelis trust. Okay? So this is where it can be negotiated. Now the problem is that the United States wants to be in that position. Trump clearly wants to be in a position of creating a more peaceful Middle East. But the question is who's going to give? Who is going to give and how much price will they pay? Will Saudi Arabia take on all these non state actors and fight because they're dangerous? Can Israel stop fighting these non state actors, so on? So the real issue here is I think the nation states themselves. Syria, for example, is having very good relations now with Israel. Egypt signed a peace accord with them years ago. Can these other nations guarantee to the Israelis that the non state actors will not be given homes in themselves? Iran is the fundamental nation. It gives home to all these Hezbollah, Al Qaeda, so on. And so for the Houthis, they are sponsors them in many ways. What I think Trump basically wanted was to destroy the regime, destroy these forces and make accommodation. That he failed to do so that was his intent. That he may not have thought it through is altogether possible. But right now he's got the problem of the Straits of Hormuz. Is he going to capitulate on that and then leave this non state actors in Iran in triumphant position? And so he's in a very tight spot that he's moved himself into. And at the same time for Israel, so long as these non state actors are there, they've got to do everything they can to defend themselves. Okay, the example of Maine is a relevant one. Or what if the Cubans invaded Florida? So things like that. So yeah, the Israelis are doing what they have to do and willing to alienate the United States if they have to. Because what is the

choice, if the United States could create some sort of relationship with the Arab countries, that they would be willing to take action against these groups, including those in Iran. This is why Iran is the pivotal place. Then the Israelis could step back and would be forced to step back by the United States. So the critical issue is that this is not nations talking to nations. These are non state actors, Hezbollah and all these others, Hamas. And they're under no one's control and no one wants to pay the price of controlling them. So that really is the answer to the question. If Israel is allowed to destroy Hezbollah, then they can withdraw. They don't really need to be at the Lithuanian River. But The Arab states can't tolerate that because they've invaded one of their countries. Can the Arab states take the actions to destroy these non state actors? Only at a high cost could the United States destroy them. Look at what's going on in Iran. So the point is there is a solution. I don't think the Arabs are committed to being hostile to Israel. We can see that with the Abraham Accords. I don't think Israel is committed. And in this election, there's a question by every Israeli. If we change our foreign policy and accept the borders we're in without dealing with Hezbollah, Hamas and all the future Hamas, it'll repeat itself. This is what keeps Netanyahu in power. He has the only solution that appears viable. On the other hand, it isolates Israel from much of the world, isolates it from the Arab world and in many ways creating more dangers to itself. So each of these countries is in a very delicate position and nobody wants to politically take the risk or militarily take the risk. That has to be done. The United States is the only country that can negotiate this. But it appears to be non negotiable. And Trump, try as he will with the Abraham Accords, simply can't do it. And this is the problem. The problem is not that everybody is evil, stupid, whatever you want. The problem is the problem, which is as I've described it.

Christian Smith: To finish, George, let's return to that question of the US Israeli relationship and what we touched on earlier. Do you think the US And Israel will always be allies? And I suppose more than that, do you think we'll always see them in the same sort of relationship they have now, with the US Being a major benefit, benefactor, supplier of arms, in particular to Israel?

George Friedman: The major interest of the United States, not just Trump's, but the American interest, is to get out of the entanglements of constant warfare in the Eastern hemisphere and concert in the Western. They're doing that. They've

already fundamentally changed the relationship they had with Europe. The European American relationship is not what it was before. The Europeans are bitter about this. The United States doesn't care. Okay? This is not merely Trump's personality. This is a reality. For 80 years we've been involved in wars in the Eastern Hemisphere. We didn't win them. We suffered many casualties. I've counted over 86,000 Americans killed in the Cold War, Vietnam and South Korea and all these wars. And the United States wants to get away from this. If the United States can pull back from Europe, from NATO, from the fundamental relationships it had 80 years, the United States can pull back in Israel, too. So the Israelis have to understand that the United States commitment to Israel was based on the Cold War, and it was very useful during the Cold War. But at this point, it's become a burden they don't really want to share. Now, what Trump has shown, as I think most American presidents would at this point do not, with the panache of Trump, is disengage. So can the United States step back from Israel? If we can step back from Western Europe, we can certainly step back from Israel. And this is the other crisis of Israel. If the United States step back, it is even more vulnerable and there's even less desire in the Arab world to bring these forces under control. So the United States remains there, but it either exercises one last push before pulling back or changes this fundamental principle of foreign policy disengagement of the Eastern Hemisphere, which is something Trump ran on. And that I think is fundamental not to be there. So the actually precise answer I'll give you is I don't know. This is one of those things you can't figure out, because this question is a political question, not a geopolitical one. What are the forces inside the United States that are being applied what are the forces inside of Iran that are being applied inside of Israel, inside of Lebanon? All these things. And how far will people go? So can Israel survive? Yes, only if it maintains its major military power and it has it, but not if another country becomes more powerful and still has hostile relations with Israel. So all of these countries are in a terrible position. And that normally happens when the geopolitical system shifts and the geopolitical system shifted in Europe and now it's shifting in the Middle east and something very new will come out, what it will be like. It'd be tragic. It'd be wondrous. I don't know.

Christian Smith: Well, let's leave it there. George, as always, thanks very much for being on the podcast. Thank you out there for listening as well. We'll see you

again next week, but until then, goodbye. You can find all of our expert geopolitical analysis@geopoliticalfutures.com.