

Transcript – D-Day and the Cycles of American Reinvention

Christian Smith: Hello, and welcome to this podcast from Geopolitical Futures. I'm Christian Smith. Over the weekend, the world marked the 82nd anniversary of the Normandy invasions during the Second World War. D Day was the world's largest amphibious invasion ever. It exemplified what America and its allies were capable of when confronted with an overwhelming threat. And with an America divided and a geopolitical system in flux, Operation Overlord holds many lessons for geopolitics today. So on this episode of the podcast, we look forward to back at D Day, and I am joined by Geopolitical Futures chairman and founder George Friedman to discuss what we can learn from that day 82 years ago and whether the same lessons still hold true. George, hello.

George Friedman: Hi there.

Christian Smith: It has become fairly common refrain, I think, in recent months and years that America is in decline. Many who oppose Trump see his presidency as evidence of this, although obviously that very much depends on your persuasion. And then meanwhile in China, Xi Jinping, in the more recent history, in the last few weeks, really, he's been conducting something of a series of high profile diplomatic meetings, in some ways, as some people have said, to display his diplomatic, his international authority. He's met with people like Vladimir Putin, Kim Jong Un, the Pakistani Prime Minister, the British Prime Minister, and of course, Donald Trump, I suppose. George, I want to ask you whether or not you agree with the suggestion that America is on the way down and China is on the way up.

George Friedman: Well, I lived through the 1970s. I've read about the Civil War, I've read about the Great Depression and America's chaos during that time. And what I see is a normal process in the United States, which to the outside world appears to be a meltdown, but in fact is doing what Americans do best, reinventing themselves. The United States was an invented country. Not only was the Constitution, the founding of this country, an engineering project held at a meeting, but the population of the United States is invented, except for the native Indians. Everyone else came from somewhere else, usually because they were

desperately unhappy where they were. So the population of the United States is invented in that sense. The nation is invented in that sense. And therefore, there's a principle obsolescence must be overcome. Reinvent, reinvent. And when the United States goes through this, and it's a difficult process, obviously the world looks at it and says, the United States is finished. Well, the evidence of our fall is going to be disappointing to people because this is very normal. You go back to the 70s, Vietnam, you go back to the Great Depression, you go back to the Civil War. No one thought we'd Recover. We always do.

Christian Smith: We're going to come on to D Day in a moment. But just pulling at that string, I suppose. It's interesting, just before we started recording, I saw a column in the Financial Times which said that Trump is in danger of turning into Jimmy Carter. Speaking of the 1970s, and obviously that's in relation to Iran back then, obviously. And in the late 60s, listeners will be very aware of the conflict that America was in. A lot of that came around elections. We've got the midterms coming up at this stage. Current polling suggests that we're going to get even more division. George, you wrote in your book *The Storm before the Calm* about this storm that we're coming through at the moment. Is it about to get a lot heavier, do you think?

George Friedman: Certainly. As many times in the past since 80 years, the United States has been involved in various wars, mostly lost, rarely prudent, but carried out for various reasons. So if you believe that this is a stunning moment in American history, radically unprecedented, you have to ignore Afghanistan, you've got to ignore Vietnam, Iraq, you've got to ignore American history for the last 80 years. The oddity here is that Trump ran against that history. He was going to create a new foreign policy for the United States. And his terror is that he's fallen into the same position that George Bush did in Iraq, Lyndon Johnson did in Vietnam and so on. So there is deep continuity in this. But it goes against what he wanted and promised, and that's the fundamental difference.

Christian Smith: Turning now to D Day, to Operation Overlord, George, you wrote a piece this week. It's available at geopoliticalfutures.com I believe it's available for free if you're not a subscriber. So go there, have a look at that. You wrote that Germany's decision to declare war on the US in 1941 goes down in the annals of stupid geopolitical moves.

George Friedman: Right.

Christian Smith: Why is that?

George Friedman: Well, it is altogether possible that Hitler could have taken Russia even after Stalingrad, except that he had now a Western front to look at. Britain alone could not invade France. That simply would not be possible by deciding to declare war on the United States. And it should be remembered the United States did not declare war on Germany. And it's not clear that they could have declared war because the Japanese had attacked us. We were going after the Japanese. The idea of a two front war was not pleasant. And he decided to declare war on the United States. That made D Day possible. The British fought bravely, the Canadians were there, but it was the power of the United States industrially inventing landing craft, for example, and in terms of manpower, that broke them. The Russians could not have defeated Germany alone, I think, okay, but with the Americans driving from the west along with the Brits and the Canadians, he didn't have a chance. And it has to be remembered that the United States did not go to war with Germany, and quite possibly it would not have been able to declare war on Germany. Four days after Pearl Harbor, Hitler decided to declare war on the United States.

Christian Smith: It's a classic topic, isn't it, for alternate history books or TV shows or films. The idea that the US doesn't join the war and what happens. And a number of them have the war kind of continuing in the east in an almost guerrilla or low level way, an unfinished way increasingly, but perhaps not, not dissimilar to what's going on in Ukraine. But George, I mean, if it wasn't such a stupid move, why did they do it?

George Friedman: Well, the fundamental reason was Hitler wanted Japan to attack Russia from the east after Pearl Harbor. He promised them, the Japanese that if they go to war with the United States, tying them down, he would declare war on the United States as well. Okay, Misunderstanding the United States. Fundamentally, both the Japanese misunderstood the United States. We had been going through a terrible depression. There's incredible tension within the United States. Franklin Roosevelt was being called a dictator by many because he was doing all sorts of things against what the Supreme Court said not to do and so on. Okay? And there was a massive movement toward insularity, not having

involvement with the world, all these things. The decision by Japan to attack the United States at Pearl harbor was based on the fact that the United States, instead of going to war, and the United States was worried about Japanese imperialism in Asia. Instead of doing that, okay, the United States cut off supplies of oil to Japan from Indonesia today, cut off supplies of steel flowing to them. Japan is very poor in terms of minerals, and the Japanese back was against the wall. They attacked Pearl harbor believing that the United States would now be forced into negotiation and not go to war. Japanese completely misunderstood the American position. Hitler also misunderstood it. He thought it unthinkable that the United States would engage in a two front war successfully. Lindbergh, who was both an isolationist and friendly to Hitler, visited Hitler in Berlin and he sort of convinced Hitler, I think, that the United States was in no position to be able to go to war. Well, what the attack by Hitler did was end all discussion. We were at war because he chose that the Japanese in the end could not attack Russia, even if they had intended to, because the Americans had immediately tied them up in another war. Hitler could not believe that us could wage a two front war effectively. It was a massive misunderstanding of the United States, which is relevant to the current situation, which is that the Americans were completely divided, tents in many ways seeming to be falling apart and afraid of any involvement in the world. But the Japanese attacked Pearl harbor and the Americans pulled together immediately. The Germans four days later declared war on us. And that meant that Hitler would end his days in a cellar blowing his brains out.

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, economic and opportunity. Explore the first issue for free at geopoliticalfutures.com Lens in many ways, this is, should we say, the classic a country divided is all of a sudden confronted with an external enemy and that's good for it and things come through. Is that what you're sort of saying here?

George Friedman: I'm saying there's something unique about the United States. It was an invented country and it understands obsolescence and reinvention. That's what happened during the Civil War. Far more dangerous than any point in history. But it was affirmed that the federal government dominated states, okay.

And that war was fought. And people would not have believed that 15 years later the US economy would be surging forward, okay? So people who do not live in the United States and do not understand to some extent, and even people living in the United States, the process of reinvention don't understand that reinvention begins with destruction, creative destruction. You must disrupt the old order. And when you're living through it, it always seems, since you weren't alive and last time it happened, that this is the worst time that's ever been in U.S. history. Well, my benchmark is the Civil War or the Great Depression. This ain't nothing compared to that. But it's very interesting that Hitler at that point underestimated the United States dramatically. So did the Japanese. And so now when you take a look at us internally, well, it appears that we're falling apart. No, this is how we operate. And the world is incredibly unsophisticated about the United States. They don't look at American history. They don't take a look at the model that we're following, which is very different from theirs. It's an interesting thing to see, and I've traveled far and wide, a profound inability to grasp that America is not a nation that existed in this same Place for centuries in fundamentally the same way. Britain has changed in many ways, but you're still a monarchy in some sense and everything like that. So when you consider that, then you consider the fact they don't understand us. They're constantly shocked by how rapidly we can come together and how rapidly we can fall apart, but in the end we survive.

Christian Smith: I think it's interesting because many people in the world will often accuse the US of not understanding other parts of the world outside of America. But in many ways this sort of suggests that the reverse is true. That often, well, both things can be true at the same time, but often that many people don't actually understand America itself. Let me ask George, let me push you on this idea of America not being in decline. Say many people would have suggested, if we take for example the Roman Empire, There may have been several times in the Roman Empire's history where people said it wasn't going to decline and fall, but then at some point it did. How do we know that we're not at that point? America's decline has been predicted many times before, but at some point the lesson of history suggests that it will happen.

George Friedman: Well, but you put our current situation in context. The Civil War did not destroy us. The Great Depression did not destroy us. 80 years in a cold War, fearing a Soviet nuclear attack on the United States didn't do it

compared to all those periods. All right, and the Vietnam War, for example, that tore this country apart in many ways. And in that same period, having this Arab oil embargo that crashed economy, the Japanese auto industry, undermining the American auto industry, all sorts of things. Okay, so you benchmark the current situation against prior situations from which we emerged very, very more powerfully than before. So I take a look at what we've done in the past. I take a look at the continuity of American culture. And so from my point of view, when I compare this to Civil War, when I compare this to the Great Depression, when I compare this to the 70s, even an anti war movement tearing country apart and people shooting at Kent State and killing students who are demonstrating National Guard, When I compare all these things, this is pretty moderate. When you're living through it, it seems like hell. But if you've had the luxury of living through the previous one, this doesn't count.

Christian Smith: Looking back at d day again, 82 years ago, as we say, it showed America's ability to react and react strongly to threats, to challenges that it faced, as it has done throughout its history. Many people though, would say that it's not the same country it was back then with the same capacity and the same capacity for unity that it was that however you want to look at it, whether it's culturally, whether it's economically, whether it's whatever, it's changed, and it wouldn't be able to do the same thing again.

George Friedman: Well, that'd be interesting. In the 1970s, the tensions within the United States, hey, hey, LBJ, how many kids did he kill? Today, the hatred between the left and the right was at least as intense as it is today. So when you take a look at something, some problem, you benchmark it. But given the fact that very few people outside the United States, even in the United States, understand American history, understand that the way that Roosevelt was seen by many is as Trump is seen now. They despised him. They saw him as a dictator. He violated the Constitution. He tried to stuff the Supreme Court. Okay, when you look at all these things, you have to say, well, if we manage to survive that, why won't we survive this? Also, they do not understand how healthy this is. In a way, this is the way the United States was created out of a revolution, without any idea of what they're going to find and wind up doing in the end, and winning and losing. We reinvent ourselves. The process of reinvention, when you're living through it, looks like hell, but we emerge from it. Unlike European countries who reinvent

themselves by destroying each other in wars and then trying to struggle back, the United States holds its own events and compare it to the previous ones. There is no basis for saying that this time it can't happen, because I regard this compared to the 70s, compared to the Civil War, of course, compared to the Great Depression, relatively much less tense.

Christian Smith: With the Second World War, with Japan and Germany, the US in some ways, there had an enemy to sort of unite against. Do you think the US Again, needs an enemy to be strong? I mean, one could look at what's going on in Iran, although obviously that's just on a much lesser scale in America.

George Friedman: Wars that are imposed on us create massive solidarity. Wars that were elective, that we chose to enter always created great divisions. Okay? So when we decided to go into Vietnam, there were tremendous divisions. When we decided to go into Iraq, there were divisions. When we decided to go into any war, there were divisions and there was anger and so on and so forth. So once again, we're doing that. So wars that are imposed upon us create solidarity. Wars that we initiate create division. And it just goes over and over. Now, when you take a look at the Level of tension. And remember before we went into World War II, there was profound tension in the United States between isolationists and people who want to get involved in the war. Okay. So you simply take a look at history, take a look at how the United States evolves through these crises and say, well, this may be the last one, but if you got through the Civil War and came back together, there's something there. So it's important to benchmark. And it's very hard to benchmark because when you're living through this, it seems like the worst time in your life. And it may well be the worst time in your life, but not in your dad's life.

Christian Smith: So what's the way through it now then?

George Friedman: Well, the normal process, which was predictable that it'd be in this decade because it's a 50 year cycle that I can't explain why there is one, but there is one. There'd be great social tension, great anger at the time, distrust of the government, a belief that the President is insane, and they or may all have been okay. Remember, Abraham Lincoln at the time was regarded by many in the north and all the south as an illiterate idiot, as unsophisticated and incapable of carrying out the war. So what we have to experience now is the storm. We're in

the middle of the storm that's appearing to be ripping the country apart with a President who appears to be out of control. I will not say he'll go down a history as Lincoln, but seems to be going that way. What is about to happen and what we have to start thinking about is the calm. Because historically, every 50 years, going back to Andy Jackson, all the way back there under Andrew Jackson, we had him destroying the bank of America, which was only investing in the east coast because we bought Louisiana for the French Louisiana Purchase and no money was flowing there. When the Supreme Court ordered him not to dispossess Indians in Georgia, he said, supreme Court has ruled. Let the Supreme Court enforce it. I'm not going to. So if you go into American history, there have been Donald Trumps scattered around in various ways, okay? And again, I can't emphasize much how this nation totally invented, has in it a fundamental idea, Nah, this is obsolete. Let's move forward, invent something new. That's our culture. It is not British culture, It's certainly not French culture. So it is very different. But to see that, you really have to go back and take a look at really hard times.

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. George, you wrote in your book about these two cycles, the 80 year cycle and the 50 year cycle coming together in this current moment and something new emerging out the other side, as you were suggesting there, you were sort of, you forecast that this was going to come to a hit around now, around the late 2000 and twenties in particular. Are you getting any more of an indication what the calm might now look like?

George Friedman: Well, certainly we're going to be seeing the calm because what normally happens in these things, and it happened, you know, in prior times, the divisions in the country, a new force arises. Okay, so after World War II, instead of being an isolationist country, we universally accepted the idea that we are going to be having to be a global power. Instead of attacking the Depression, the things that would happen in the depression, the differences, we celebrate it. So what happens is that there is a destructive president and sometimes in his time he can also become constructive. I don't know that Trump will be doing that, but a new regime emerges and creates a very different reality. Based on the fundamental problems I've written that I think the fundamental problem in the

United States economically in the next few years will be the fact that people are living older, consuming and not producing. And the birth rate is for falling. A huge demographic problem that has to be solved and may be solved by AI to some extent, by material science and all those things. But you take a look, you're looking at the entry into that and you take a look at the various technologies and cultural changes that are taking place. And you've seen this happen lots of times in US History. You'll see it working. So about now, the comms should start emerging. I suspect that will be with the election in next October for this Congress and albeit so what's building up is massive resistance to Trump, even among those who were supporters because they opposed this war, and that the process will again resume in the same way that in the 1980s under Reagan, all the things that happened in the 70s became obsolete. A whole new tax structure, everything was put in place. So he did something outrageous, Reagan did. He lowered the tax rate on rich people. As a result, they invested in the dot coms and created what could not have been created with the previous tax code. So I think is both a lucky country and one built by the founders to go through this. And every time we did this, we thought it was the end.

Christian Smith: I suppose what is different about this particular moment is interesting is that, you know, the US Sort of emerged as the world's leading power after the First World War, maybe after the Second World War, depending on how you want to look at it. But it always had the other side of the other side being the Soviet Union. Until the early 90s, it always had that. That sort of balance. If you want to look at it like that, if we just take it back to the top and we mentioned how does that change things for the US how does that threaten if it might not be number one anymore, or if it is, it might be closely followed by China, or does that not really matter?

George Friedman: I grew up in Cold War. It was a terrible time. It was a time when first there was a Korean War, Vietnam War. The European empires collapsed and we were fighting the Russians, the Soviets, for control to keep them communism from spreading. I counted up the minimum number. 86,000 American soldiers died in the Cold War. Okay. So when you look at that period of time, okay, it was not easy to get through. But after the one thing the United States can do is recognize the end of a period. The Cold War was all about keeping the Russians from occupying Western Europe. We did two things for that. We created an

economic system along with the Marshall Plan to enrich Europe and stabilize it. We deployed massive forces in Europe to defend Europe so they couldn't spread. But the Russian threat is gone. If they cannot occupy after four years a smaller country like Ukraine, they're not going to threaten Western Europe. So it's obsolete to think of Russia in those terms. Okay. But people still do, particularly Europeans. They are very concerned about what Russians will do when it's obvious they couldn't even do that. The Americans very rapidly accept the reality that's there. Part of American culture is accepting the novel and have a different view. We don't want to be in the Eastern Hemisphere. We were there for one reason, to block the Soviets. It's not that we loved the Europeans or had any commitment to them. It was that if Western Europe were occupied, Russian naval forces would be on the Atlantic and that would be a threat to the United States. So it was a cheap way to do it. The idea that the United States has an obligation to take care of Europe, for example, at a time when its economy, the eu, is larger than that of China and they choose not to enlist in their armies and so on and so forth. No, that's your problem now. We're not worried about the Russians. And under Trump, we do not want to be hostile to the Chinese. So that took place and how that will evolve, we'll see. But The United States is deeply focused on the homeland and on the Western Hemisphere. So the idea that the United States wanted to be number one, have all those casualties, fight all those wars, be torn apart, spend the riches of the country on defense, that's an illusion. That was never a happy time for Americans. It was perhaps a happy time for the Europeans, but not for us. So it is natural for us to radically reshape the way we behave and reinvent our foreign policy, whereas for much of the rest of the world, locked into place by their cultures and reality and so on and so forth. The idea of a rapid turnaround. Well, there have been many rapid turnarounds. For example, we were talking about World War II. The turnaround time after the Japanese hit Pearl harbor was about two hours before the country dropped isolationism and everybody was enlisting. So we readily can endure dramatic radical change and endorse it. That's very different than other countries.

Christian Smith: George, as always, thanks very much for your time. Thanks out there for listening as well. We'll be back again soon with another podcast from Geopolitical Futures. In the meantime, go to geopoliticalfutures.com to read George's writing about D Day and all our other analysts work. Thanks very much. Bye bye.

George Friedman: Thank you.

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