

By George Friedman

Israeli Prime Minister Benjamin Netanyahu is scheduled to meet with U.S. President Barack Obama on March 23. The meeting follows the explosion in U.S.-Israeli relations after Israel announced it was licensing construction of homes in East Jerusalem while U.S. Vice President Joe Biden was in Israel. The United States wants Israel to stop all construction of new Jewish settlements. The Israelis argue that East Jerusalem is not part of the occupied territories, and hence, the U.S. demand doesn't apply there. The Americans are not parsing their demand so finely and regard the announcement — timed as it was — as a direct affront and challenge. Israel's response is that it is a sovereign state and so must be permitted to do as it wishes. The implicit American response is that the United States is also a sovereign state and will respond as it wishes.

The polemics in this case are not the point. The issue is more fundamental: namely, the degree to which U.S. and Israeli relations converge and diverge. This is not a matter of friendship but, as in all things geopolitical, of national interest. It is difficult to discuss U.S. and Israeli interests objectively, as the relationship is clouded with endless rhetoric and simplistic formulations. It is thus difficult to know where to start, but two points of entry into this controversy come to mind.

The first is the idea that anti-Americanism in the Middle East has its roots in U.S. support for Israel, a point made by those in the United States and abroad who want the United States to distance itself from Israel. The second is that the United States has a special strategic relationship with Israel and a mutual dependency. Both statements have elements of truth, but neither is simply true — and both require much more substantial analysis. In analyzing them, we begin the process of trying to disentangle national interests from rhetoric.

Anti-Americanism in the Middle East

Begin with the claim that U.S. support for Israel generates anti-Americanism in the Arab and Islamic world. While such support undoubtedly contributes to the phenomenon, it hardly explains it. The fundamental problem with the theory is that Arab anti-Americanism predates significant U.S. support for Israel. Until 1967, the United States gave very little aid to Israel. What aid Washington gave was in the form of very limited loans to purchase agricultural products from the United States — a program that many countries in the world participated in. It was France, not the United States, which was the primary supplier of weapons to Israeli.

In 1956, Israel invaded the Sinai while Britain and France seized the Suez Canal, which the Egyptian government of Gamal Abdul Nasser had nationalized. The Eisenhower administration intervened — against Israel and on the side of Egypt. Under U.S. pressure, the British, French and Israelis were forced to withdraw. There were widespread charges that the Eisenhower administration was pro-Arab and anti-Israeli; certainly no one could argue that Eisenhower was significantly pro-Israel.

In spite of this, Nasser entered into a series of major agreements with the Soviet Union. Egypt effectively became a Soviet ally, the recipient of massive Soviet aid and a center of anti-American rhetoric. Whatever his reasons — and they had to do with U.S. unwillingness to give Egypt massive aid — Egypt's anti-American attitude had nothing to do with the Israelis, save perhaps that the United States was not prepared to join Egypt in trying to destroy Israel.

Two major political events took place in 1963: left-wing political coups in Syria and Iraq that brought the Baathist Party to power in both countries. Note that this took place pre-1967, i.e., before the United States became closely aligned with Israel. Both regimes were pro-Soviet and anti-American, but either could have been responding to U.S. support for Israel because there wasn't much.

In 1964, Washington gave Cairo the first significant U.S. military aid in the form of Hawk missiles, but it gave those to other Arab countries, too, in response to the coups in Iraq and Syria. The United States feared the Soviets would base fighters in those two countries, so it began installing anti-air systems to try to block potential Soviet airstrikes on Saudi Arabia.

In 1967, France broke with Israel over the Arab-Israeli conflict that year. The United States began significant aid to Israel. In 1973, after the Syrian and Egyptian attack on Israel, the U.S. began massive assistance. In 1974 this amounted to about 25 percent of Israeli gross domestic product (GDP). The aid has continued at roughly the same level, but given the massive growth of the Israeli economy, it now amounts to about 2.5 percent of Israeli GDP.

The point here is that the United States was not actively involved in supporting Israel prior to 1967, yet anti-Americanism in the Arab world was rampant. The Arabs might have blamed the United States for Israel, but there was little empirical basis for this claim. Certainly, U.S. aid commenced in 1967 and surged in 1974, but the argument that eliminating support for Israel would cause anti-Americanism to decline must first explain the origins of anti-Americanism, which substantially predated American support for Israel. In fact, it is not clear that Arab anti-Americanism was greater after the initiation of major aid to Israel than before. Indeed, Egypt, the most important Arab country, shifted its position to a pro-American stance after the 1973 war in the face of U.S. aid.

Israel's Importance to the United States

Let's now consider the assumption that Israel is a critical U.S. asset. American grand strategy has always been derived from British grand strategy. The United States seeks to maintain regional balances of power in order to avoid the emergence of larger powers that can threaten U.S. interests. The Cold War was a massive exercise in the balance of power, pitting an American-sponsored worldwide alliance system against one formed by the Soviet Union. Since the end of the Cold War, the United States has acted a number of times against regional hegemonies: Iraq in 1990-91, Serbia in 1999 and so on.

In the area called generally the Middle East, but which we prefer to think of as the area between the Mediterranean and the Hindu Kush, there are three intrinsic regional balances. One is the Arab-Israeli balance of power. The second is the Iran-Iraq balance. The third is the

Indo-Pakistani balance of power. The American goal in each balance is not so much stability as it is the mutual neutralization of local powers by other local powers.

Two of the three regional balances of power are collapsed or in jeopardy. The 2003 U.S. invasion of Iraq and the failure quickly to put a strong, anti-Iranian government in place Baghdad, has led to the collapse of the central balance of power — with little hope of resurrection. The eastern balance of power between Pakistan and India is also in danger of toppling. The Afghan war has caused profound stresses in Pakistan, and there are scenarios in which we can imagine Pakistan's power dramatically weakening or even cracking. It is unclear how this will evolve, but what is clear is that it is not in the interest of the United States because it would destroy the native balance of power with India. The United States does not want to see India as the unchallenged power in the subcontinent any more than it wants to see Pakistan in that position. The United States needs a strong Pakistan to balance India, and its problem now is how to manage the Afghan war — a side issue strategically — without undermining the strategic interest of the United States, an Indo-Pakistani balance of power.

The western balance of power, Israel and the surrounding states, is relatively stable. What is most important to the United States at this point is that this balance of power also not destabilize. In this sense, Israel is an important strategic asset. But in the broader picture, where the United States is dealing with the collapse of the central balance of power and with the destabilization of the eastern balance of power, Washington does not want or need the destabilization of the western balance — between the Israelis and Arabs — at this time. U.S. "bandwidth" is already stretched to the limit. Washington does not need another problem. Nor does it need instability in this region complicating things in the other regions.

Note that the United States is interested in maintaining the balance of power. This means that the U.S. interest is in a stable set of relations, with no one power becoming excessively powerful and therefore unmanageable by the United States. Israel is already the dominant power in the region, and the degree to which Syria, Jordan and Egypt contain Israel is limited. Israel is moving from the position of an American ally maintaining a balance of power to a regional hegemon in its own right operating outside the framework of American interests.

The United States above all wants to ensure continuity after Egyptian President Hosni Mubarak dies. It wants to ensure that the Hashemite Kingdom of Jordan remains stable. And in its attempts to manage the situation in the center and east, it wants to ensure that nothing happens in the west to further complicate an already-enormously complex situation.

There is very little Israel can do to help the United States in the center and eastern balances. On the other hand, if the western balance of power were to collapse — due to anything from a collapse of the Egyptian regime to a new Israeli war with Hezbollah — the United States might find itself drawn into that conflict, while a new intifada in the Palestinian territories would not help matters either. It is unknown what effect this would have in the other balances of power, but the United States is operating at the limits of its power to try to manage these situations. Israel cannot help there, but it could hurt, for example by initiating an attack on Iran outside the framework of American planning. Therefore, the United States wants one thing from Israel now: for Israel to do nothing that could possibly destabilize the western balance of power or make

America's task more difficult in the other regions.

Israel sees the American preoccupation in these other regions, along with the current favorable alignment of forces in its region, as an opportunity both to consolidate and expand its power and to create new realities on the ground. One of these is building in East Jerusalem, or more precisely, using the moment to reshape the demographics and geography of its immediate region. The Israeli position is that it has rights in East Jerusalem that the United States cannot intrude on. The U.S. position is that it has interests in the broader region that are potentially weakened by this construction at this time.

Israel's desire to do so is understandable, but it runs counter to American interests. The United States, given its overwhelming challenges, is neither interested in Israel's desire to reshape its region, nor can it tolerate any more risk deriving from Israel's actions. However small the risks might be, the United States is maxed out on risk. Therefore, Israel's interests and that of the United States diverge. Israel sees an opportunity; the United States sees more risk.

The problem Israel has is that, in the long run, its relationship to the United States is its insurance policy. Netanyahu appears to be calculating that given the U.S. need for a western balance of power, whatever Israel does now will be allowed because in the end the United States needs Israel to maintain that balance of power. Therefore, he is probing aggressively. Netanyahu also has domestic political reasons for proceeding with this construction. For him, this construction is a prudent and necessary step.

Obama's task is to convince Netanyahu that Israel has strategic value for the United States, but only in the context of broader U.S. interests in the region. If Israel becomes part of the American problem rather than the solution, the United States will seek other solutions. That is a hard case to make but not an impossible one. The balance of power is in the eastern Mediterranean, and there is another democracy the United States could turn to: Turkey — which is more than eager to fulfill that role and exploit Israeli tensions with the United States.

It may not be the most persuasive threat, but the fact is that Israel cannot afford any threat from the United States, such as an end to the intense U.S.-Israeli bilateral relationship. While this relationship might not be essential to Israel at the moment, it is one of the foundations of Israeli grand strategy in the long run. Just as the United States cannot afford any more instability in the region at the moment, so Israel cannot afford any threat, however remote, to its relationship with the United States.

A More Complicated Relationship

What is clear in all this is that the statement that Israel and the United States are strategic partners is not untrue, it is just vastly more complicated than it appears. Similarly, the claim that American support for Israel fuels anti-Americans is both a true and insufficient statement.

Netanyahu is betting on Congress and political pressures to restrain U.S. responses to Israel. One of the arguments of geopolitics is that political advantage is insufficient in the face of geopolitical necessity. Pressure on Congress from Israel in order to build houses in Jerusalem

while the United States is dealing with crises in the region could easily backfire.

The fact is that while the argument that U.S. Israel policy caused anti-Americanism in the region may not be altogether true, the United States does not need any further challenges or stresses. Nations overwhelmed by challenges can behave in unpredictable ways. Netanyahu's decision to confront the United States at this time on this issue creates an unpredictability that would seem excessive to Israel's long term interests. Expecting the American political process to protect Israel from the consequences is not necessarily gauging the American mood at the moment.

The national interest of both countries is to maximize their freedom to maneuver. The Israelis have a temporary advantage because of American interests elsewhere in the region. But that creates a long-term threat. With two wars going on and two regional balances in shambles or tottering, the United States does not need a new crisis in the third. Israel has an interest in housing in East Jerusalem. The United States does not. This frames the conversation between Netanyahu and Obama. The rest is rhetoric.

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