

Ukraine and Russia, Israel and Iran: Searching for the Significant

by George Friedman - June 16, 2025

The Ukrainian drone attack on Russia at the beginning of this month and the Israeli attack on Iran have some striking similarities.

1. Both attacks occurred during negotiations between the United States and the attacked nations (Russia and Iran) that had failed to come to fruition before deadlines set by Washington.
2. Both attacks relied heavily on major, covert intelligence operations.
3. The United States did not seem involved in either operation. However, in Israel's case, the U.S. was informed in advance, approved the attack and even partly shaped it by prohibiting Israel from killing the leader of Iran. There is less clarity on what the U.S. knew of Ukrainian plans or how it influenced them, but it is unlikely that the U.S. didn't know about the attack ahead of time.
4. Both attacks had two purposes. The first was the destruction of a strategic asset: long-range aircraft in Russia and nuclear infrastructure in Iran. The second was to create a profound sense of vulnerability in the enemy by using covert operatives deep within enemy territory, sowing uncertainty about the presence of additional covert teams.
5. In both cases, the only response to the attacks, at least at this point, was substantial drone strikes.
6. Neither attack was followed by a conventional military invasion.

The similarities are obvious, but the significance of these similarities is less so and must be considered. From the standpoint of U.S. policy, the operations suggest several things. First, the United States retains a significant interest in these wars. In other words, the desire to disengage from the risks of global involvement is not absolute. The United States retains important interests in both Europe and the Middle East but is limiting its direct involvement. In Israel's case, the U.S. was aware of the impending attack and set parameters on the action; in Ukraine's attack, it has not claimed any prior knowledge, but the denial is not convincing given the level of effort involved in the operation and the admitted transfer of intelligence in general to the Ukrainians.

In both cases, the U.S. had a strategic interest that it was pursuing by diplomatic means. Also in both cases, the inability to reach a viable understanding within a defined time frame was the preface for the attacks. So we see two things on the American side. It is genuinely interested in reaching settlements with two very different countries – Iran and Russia. Failing that, it approves significant actions by the nations directly at risk, and shares intelligence and provides weapons, but does not itself openly engage in combat. The ability of what I will call “client nations” to impose penalties on nations that fail to meet American diplomatic expectations differs from the tendency of the United States to serve as the primary actor. The United States is maintaining a significant degree of control over the actions of its client states without exposing its own forces to danger, while in fact retaining its ability to act diplomatically by maintaining a degree of plausible neutrality, if not indifference. This may seem a tortured read of the situation, but I think it is a reasonable and significant one.

From a military standpoint, the increased use of covert operations is significant. I don’t know how much was from operatives on the ground versus signals intelligence. Claims that human intelligence was critical in locating targets for drones or aircraft to hit could simply be intended to cover up vulnerabilities in modern technology, such as how readily your laptop can give away your position. In any event, the nature of war is rapidly evolving, with the prior model of mass warfare increasingly obsolete.

I have taken this approach to the events in the Middle East because the clash was an event that was going to happen and has had few consequences. The inability of Iran or most countries to hide the development of nuclear weapons is one of the features of radiation. There was never a possibility that Tehran could avoid detection or that the Israelis or the Americans would not destroy the facilities before they went operational. As for regional repercussions, Iran is not well-liked in the Arab world, since, among other things, Iranians aren’t Arabs. Iran’s support for extremist Islamist forces threatens major Arab states as well. So from my point of view, the Iranians were never going to build any operational weapons. As for the drone exchanges, they will cause many deaths but will not change the balance of power. I do not see Iran in a position to threaten its neighbors with conventional war, nor would it want to.

More interesting is the situation in Ukraine. Russian President Vladimir Putin pledged that he would avenge the Ukrainian attack, which was in fact a full-scale and massive covert operation. Delivering drones to Siberia is not done by texting. After such a major failure of Russian intelligence and security, Putin must do something, and yet at this point, he has not. The fact is that he does not know what else the Ukrainians slipped into Russia for an encore. But where the outcome in Iran was hardwired, the question of Putin’s next move is not.

From where I sit, the geopolitical consequences of all this are less significant than what it says about the evolving nature of war and the shifting behavior of the United States.

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