Ep. 27: The Trillion-Dollar Bet: U.S., Israel, Saudi Arabia, and the Future of Defense Tech

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In this episode of *Misgav Mideast Horizons*, we sit down with Isaac "Yitz" Applbaum – one of the most experienced investors in Israeli technology and a key figure at the intersection of Israeli, American, Saudi, and Emirati innovation – for a wide-ranging conversation on the future of defense tech, regional cooperation, and the U.S.–Israel relationship.

Yitz, Chair of Kinetica Partners and Senior Advisor to the Saudi Minister of Communications, IT, and Space, shares his remarkable personal journey from Brooklyn to Israel to the GCC, and explains why he believes Israel–Saudi normalization is coming sooner than most people think. Drawing on years of firsthand experience in the Gulf, he outlines where cooperation between Israel and Saudi Arabia could be transformational – particularly in defense, healthcare, AI, agtech, and water – and why the combination of Israeli innovation and Saudi scale could be a true "100X" moment.

We also dive deep into the global defense tech boom following October 7, and what it means for Israel's economy, innovation ecosystem, and international standing. Yitz explains why countries like Germany, Japan, and the United States are increasingly looking to Israel not just to buy systems, but to co-develop and co-invest in next-generation defense technologies. He discusses the rise of early-stage defense startups, the role of elite IDF talent, and what Israel's government can do to better support this rapidly growing sector.

In the latter part of the conversation, we explore how U.S.–Israel defense cooperation could evolve beyond traditional military aid toward deeper partnerships, joint projects, and large-scale initiatives. Yitz also reflects personally on October 7, the surge in antisemitism on both the Left and the Right, and how it has changed the way he engages with the world.

In the first part of the episode, we go beyond the headlines to discuss the latest

developments related to President Trump’s Board of Peace, Gaza, the Iran protests, Josh Shapiro and the Harris campaign, and deepening UAE–India ties.

This is a candid, insider discussion on technology, alliances, and the future of the Middle East—with someone who is helping shape all three.

👉 **Spotify**: https://open.spotify.com/episode/0gNfCcZvCLp43dXMSrqfp5?si=A9nQTVn3ScCGxEhaWMmKeA&nd=1&dlsi=cb3d6e6bc17c4565

👉 **Apple:** https://podcasts.apple.com/us/podcast/countdown-to-snapback-sanctions-on-iran/id1822734204?i=1000727151332