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TRANSCRIPT

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Mona Yacoubian: Just over two weeks ago, Israel held its first elections since the October 7th Hamas terror attack. With the highest turnout in decades, the election is of enormous consequence for Israel and the Middle East. The next Israeli government's approach to Gaza, the West Bank, Lebanon, Syria, and Iran will have enormous consequences for the Middle East's emerging order.

I'm Mona Yacoubian. I direct the Middle East Program here at CSIS. And to help unpack the consequences of Israel's elections, I'm pleased to be joined by a number of our nonresident affiliates: Ambassador Michael Ratney; Dr. Paul Salem; and the newest member of our nonaffiliate team, Celine Touboul, who co-directs the Economic Cooperation Foundation, a prominent Israeli think tank. Welcome to all of you.

Celine, a special welcome to you. We're thrilled to have you join us. And I'd actually like to start with you, if I could. On November 7th, the Israeli president tapped Gadi Eisenkot, former military chief and a primary rival to Prime Minister Netanyahu, to try to form a new government. Can you walk us through the steps that he has to take? Walk us through that process and give us a sense of what you think his prospects are for success. What happens if he's not successful? Sketch out, you know, the next few weeks in terms of how this process will play out.

Celine Touboul: Thank you. Thank you, Mona. Happy to join your team here.

So President Herzog assigned a task to Gadi Eisenkot last Sunday to form a government. He has basically until December 6 to try and form a government. The president may grant extensions totally no more than 14 additional days. Now, if he fails, the president will assign it to – could – it's optional; he doesn't have to – but assigning to Netanyahu, who can only succeed basically by forming a joint unity government, an option that Netanyahu does not really want, and will not grant him the stability that he's looking for and that he's enjoying for the last four years. Now, he will prefer another round of election that is likely to play more in his favor.

Now, Eisenkot has currently more options available to him than Netanyahu, but it still requires from him to reconcile faction with different views and priority, including within his own faction. The current challenge is which promise he will have to break to form a government: the commitment to mandatory service for all Israeli citizens, which the ultra-Orthodox will block; the commitment to create a government that will oust Netanyahu from power, rolling out a joint unity government; and the commitment, currently primarily voiced by Lieberman, who is the head of the Yisrael Beiteinu Party, a secular right-wing party, not to form a coalition supported by the Arab parties. Now, Lieberman is more and more isolated on that demand within the change bloc, which is precisely why I think he's insisting on it, positioning himself as a potential kingmaker of the next government and the one perceived as representing right-wing constituencies within that coalition. Now, a majority of the change bloc understand that excluding Arab party will limit their room of maneuver, and needless to say that it will send a very terrible message to the Arab minority who have made the choice to participate in unprecedented number to Israel democratic process.

So, just to wrap up on this, there are two factors that could, in my view, determine the likelihood to form a coalition by Eisenkot is, one, that he has more options available to him than Netanyahu has, but he has also less experience to do that; and, two, that the challenge is not only the refusal of Avigdor Lieberman to form a coalition with the Arab parties, but also the position of members in Eisenkot faction who could refuse a coalition with the Arab parties or to block the passing of the conscription law. Now, will they take the risk to vote against the government? I doubt it. But Netanyahu does excel in manipulating weak links in political factions.

Ms. Yacoubian: OK. So lots to keep our eyes on in the coming weeks.

And I'd like to pick up on exactly the question of Prime Minister Netanyahu, who remains in a caretaker position. As I know you're aware, there have been multiple reports, both before the election and as recently even as yesterday, that Prime Minister Netanyahu could be seeking to initiate conflict with Iran or bait Iran into a war. I wonder if you could help us understand the logic behind that and the likelihood that that may happen.

Ms. Touboul: OK. So the logic behind that is that Netanyahu generally knows that security crisis and an agenda that is security-focused strengthens his position and strengthens the position of his parties, even though this is less and less the case after more than three years at war.

But looking at the transition period, I think there are, you know, two dynamics that needs to be taken into account. One is what can happen in the Knesset, and I will talk about it a little bit, and what Netanyahu can do within caretaker government; and, importantly, the role that the attorney general can play in basically in restraining both.

So, coming to your question the likelihood of a war with Iran, no doubt that Netanyahu will try to do that. But I do think it would be difficult for him to do it if the president oppose it, especially if the president – your president –

Ms. Yacoubian: I want to clarify. Exactly. (Laughter.)

Ms. Touboul: Yeah. I'm clarifying.

Ms. Yacoubian: Yes.

Ms. Touboul: – will voice that opposition publicly. But he would be also restrained by an IDF chief of staff that has expressed his reservation for an offensive that is not really root into a concrete threat. And in that sense, the chief of staff is aligned with the sentiment that has been conveyed by Eisenkot in the letter he has sent yesterday to the attorney general, in which he has cautioned that using security force absent an immediate threat – (off mic)– could harm Israel democracy, and also that it will put the security process in a constitutional conflict because, importantly, you know, the change bloc has a majority in the Knesset. There will be soon a new foreign and security – Foreign Affairs and Security

Committee. The role of that committee is to oversee the IDF and the security apparatus. They have not – they are not a decision-making, you know, committee, but yet they can ask questions. They can require access to intelligence. And that put Netanyahu in a difficult position, and therefore they have been delaying the formation of the committee.

I just want to stress that there are other problematic development that can take place during that period, including in the West Bank, and we can expect that settler violence could rise. That could trigger, you know, confrontation with the Palestinian, which is also something that, if it goes wrong, could potentially serve the current government.

And the last thing I want to note, which is important, is that the Knesset can advance legislation during that period. There is a long list of laws that the change bloc is interested to advance. Some will be difficult because of what I mentioned regarding the attorney general that will not want that this will be used, again, when a government since not be formed. So that could prevent the formation of a, you know, national inquiry commission, for example. But still, they will have room of manager.

Ms. Yacoubian: OK. So – and we're going to turn to the West Bank and Gaza in a moment.

But, Michael, I'd like to bring you in as well. Of course, the U.S. has also just had fairly consequential elections, and it's interesting the timing of these two elections in Israel and then here in the U.S., and they are intertwined in different ways. I would note, for example, that both President Trump and Vice President Vance highlighted growing popular disaffection with Israel here in the U.S. as a factor in the midterm elections. I'm wondering if you could sort of unpack how these two very important elections are interacting with each other and what is at stake for the U.S.-Israel bilateral relationship.

Michael Ratney: Thanks, Mona.

You know, this this intersection of U.S. politics and Israeli politics was once a much simpler thing to understand, and it's gotten extraordinarily complicated and unpredictable at this point. Obviously, the most unpredictable factor has always been Donald Trump. Even a year ago we could have said that he was the most popular politician in Israel, more popular than any individual Israeli politician, and I think that was particularly true when it was clear that the U.S. and Israel were prepared to work together in the Iran war. Donald Trump's own popularity among Israelis started to decline, I think as it was clear that he wanted to stay Netanyahu's hand to end the war in Iran before there was a regime change in Iran, and essentially to restrict Israel's ability to pursue the military conflict on its own.

Trump has a very complicated relationship with Netanyahu. I think on the one hand he seems to find Netanyahu extremely irritating and frustrating. Netanyahu has not been cooperative on Gaza, on the Board of Peace, which has been sort of a signature initiative for the Trump administration. The Israelis have kept forces in Lebanon and Syria, even as President Trump has sort of suggested that this is working contrary to his desire to deescalate the tension in those – in both of those countries, and in the case of Syria to

support the presidency of Ahmed al-Sharaa. So you have this this kind of complicated relationship.

But President Trump my sense is doesn't want to be the president that somehow breaks with Israel or breaks with Netanyahu. He has made it his brand to be the most stalwart champion of Israel and defender of Israel, even while he understands – and he's articulated this in the media in the past couple of days – he understands that public sentiment in the United States is turning against Israel and that was one of the factors in the election.

Domestically, you know, the – it's not just in the Democratic Party or on the left where public sentiment has become much more sharply against Israel. Even on the right, and particularly among young Americans whether they're on the left or on the right, they've been far more critical of Israel. And I think you have somebody like Vice President Vance who has given voice to that. He came out the day after the U.S. midterm elections, cited a number of factors, principally unhappiness with the Iran war and kind of changing attitudes about Israel, as a factor. President Trump seemed to reinforce that view. And it creates this kind of moment of great uncertainty about the future of the relationship.

There's this sense that the Democrats are in ascendance right now, and that will mean kind of some of the fundamentals – the historical fundamentals of the U.S.-Israel relationship will be called into question. But even on the right there's this sense. Although Marco Rubio still seems to be quite an advocate of a strong U.S.-Israel partnership, clearly J.D. Vance is not. Those are the two names talked about as possible presidential candidates in two years.

So we have this moment of extraordinary uncertainty where the U.S. is very clearly turning kind of in a much more critical posture towards Israel, and Israel is wondering kind of where the United States is going to be for them. They've had, essentially since their founding, a strong U.S. relationship, and that relationship has only gotten stronger. They could count on it year after year, even very – during very difficult times. And I think for them, they are now starting to come to terms – slowly, I would add; I don't think they've fully internalize these changes in the United States – but slowly coming to terms with the fact that the whole kind of framework of that relationship may be changing.

Ms. Yacoubian: So potentially a watershed moment in the – in the U.S. Israel relationship.

You mentioned the Board of Peace, a signature initiative of the Trump administration. It is notable that just a couple days after our midterm elections President Trump turned to the initiative in Gaza, the ceasefire phase two, and sort of demanded that there be more progress on implementation of that plan. Can you give us a sense of how likely do you think it is that there will be progress in this very messy period that that Celine has very ably pointed out to us? What can we expect going forward with respect to the Gaza ceasefire plan?

Mr. Ratney: You know, Mona, from the very beginning of the Board of Peace it was clear that President Trump saw this as a signature initiative of his. He was going to create peace. He

created the Board of Peace, which in his mind is far larger than just Gaza. It becomes this almost substitute for the United Nations at some point, at least in his mind.

For Netanyahu, I don't think he ever had his heart in it. He clearly didn't want to see it succeed, because for him it was politically advantageous if the conflict continues. He wanted to show kind of no flexibility in terms of things like reconstruction assistance for Gaza or creation of an alternative government other than Hamas as long as Hamas was unwilling to disarm completely. And it created a real tension, because I think even in Washington there's this sense that Hamas disarmament, clearly necessary and desirable, but something that's part of a process, not something that you're going to implement on day one, at which point both political and security situation changes there.

And I think President Trump has and his team has found it quite frustrating working with a Netanyahu government that seemingly doesn't really see political advantage in any sort of progress in Gaza. And President Trump gave voice to that, you know, just – as you point out, just a few days after the election.

So I think if I had to predict I would say the pattern will hold, which is there will be kind of carping and complaining and leaks to the press about frustration with the Israeli government; that as long as Netanyahu is in charge, in any event, there won't be any real progress in Gaza; and President Trump won't want to kind of fundamentally break with Netanyahu. He will complain. He will hint. His team will leak to the press. But he will not want to be the guy that kind of fundamentally breaks with the Israeli government – particularly this Netanyahu government, who he explicitly and kind of oddly endorsed publicly during the Israeli election. So I don't think we'll see much change.

A good question would be – and maybe this is your follow-up – a good question would be: If Eisenkot is able to form a government, what happens then? I think then it becomes complicated. Eisenkot's going to want to establish a good relationship with Washington, with President Trump and with his team, knowing that there was both this presidential endorsement of Netanyahu but also this frustration with him. So I think, you know, the hopeful scenario is that Eisenkot sees a more pragmatic way forward on Gaza that doesn't have the same sort of political demands that Netanyahu has been making.

Ms. Yacoubian: So we're going to hold that question, and I'm going to absolutely bring Celine into this from her perspective.

But I want to bring our colleague Paul Salem in. Paul, you typically are based in Beirut. I know this evening you're in Abu Dhabi. But I think it would be super helpful for us to understand from your vantage point, you know, what's at stake for Lebanon regarding these elections. Where do things stand with this trilateral framework agreement that's been brokered by the United States between Israel and Lebanon?

Paul Salem: Well, thank you, Mona. And I am today in Abu Dhabi. I'm coming – I'm speaking to you from a hotel. If my bandwidth ends up being low, warn me if you can't hear me.

But, yeah, I think Lebanon is looking at a number of moving parts. Obviously, one of them is the Israeli election; more importantly, the complex process of forming a government, what will eventually come of that.

But it is also trying to understand the repercussions of the U.S. elections, not only for U.S. policy towards Lebanon but also how that might affect U.S.-Israeli relations, since the U.S. is a third partner in the negotiations between Lebanon and Israel, so that, you know, whatever changes in U.S. policy and U.S. relations with Israel might end up influencing those tripartite talks.

The third dynamic is the U.S.-Iran track, since for Lebanon we have Israeli occupation, we have Iranian IRGC presence and Hezbollah, so we have twin problems. And any U.S.-Iran talks, any agreements, any understandings, or even any escalations that happen will certainly probably affect Lebanon as well.

The trilateral framework has been a little bit stalled. I mean, yes, there was an announcement and a document back in June, and that was leading to a series of meetings that effectively produced one pilot zone, very small pilot zone, of three villages. Attempts to agree on further pilot zones did not get anywhere in the ensuing months. The pilot zones themselves have been very much contested. There is not yet a verification mechanism for those pilot zones. The Lebanese army and the Lebanese state say that they've done their part and they've taken over and cleaned up. Israel disputes that. There's no independent verification to take it one way or another. The Lebanese say that while they're deploying into these pilot zones the Israelis are bombing and attacking all around these pilot zones, which makes repatriation very, very difficult. So even the first pilot zone is – as a first step has not been a great success.

The last meeting, that happened in Tampa, Florida, a few weeks ago, did not apparently produce much progress. We did not get a verification mechanism, nor did we get agreement on any new pilot zone. It was kind of an understanding from people I talked to on the U.S. side of things and the Lebanese side of things that while the Israeli elections were heating up the U.S. side did not expect any major progress on the Lebanese-Israeli talks because the Netanyahu government was deep in, you know, election mode and was not going to offer anything substantial.

I think the Lebanese side is looking to see, A, if, you know, a different government is formed, if there is a different prime minister, and who – you know, what – who are the members of that government. Who is the foreign minister, defense minister? What is its policy orientation and policy statement? They certainly would welcome somebody other than Netanyahu, sort of – and sort of as a general thing. But they're also quite aware that the, you know, potential prime minister, Gadi Eisenkot, is also very hawkish, not only on Hezbollah and Lebanon issues but also on the whole idea of, you know, preemption and, you know, chasing security threats wherever they are.

I think the potential positives that could come if a new government is formed and if it takes, let's say, diplomacy more seriously – those are, you know, various ifs that, you know,

depends on what the Israeli side decides – but in terms of the mechanism between Lebanon, U.S., and Israel, there needs to be an agreement on a verification mechanism. A number of countries – Italy, Switzerland, and others – were put on the table. Israel has vetoed a number of those countries. Would be important to lock down a verification mechanism. Would be also important to agree on the next pilot zone to make the current pilot zone a success, and then to move on to the next pilot zone.

And in general, I think that any, you know, new Israeli government would have to kind of within a rethink about its regional strategy – and this easily applies both to Syria and Lebanon – that the Netanyahu government approach seemed to be they're going to create buffer zones and chase threats, even if that means maintaining failed states in Syria and Lebanon, maybe even promoting the failure of states.

Ms. Yacoubian: I'm going to ask you to stop there because we are going to turn to Syria in a moment and I'm mindful of time. I would certainly note your points.

And I think we are – you know, I think I want to turn, starting now with Celine, to what an Eisenkot government might mean – noting, though, I think as you rightly note, that Gadi Eisenkot is also known as the architect of the so-called Dahiya Doctrine, which, you know, advocates the use of disproportionate force, and targeting of civilian and energy – or, civilian infrastructure, anyway – in going after Hezbollah in areas where they are – where they are – have penetrated.

Celine, let me turn to you now, though, and kind of get to the question that Michael started to lay down, which is: What could we expect from Gadi Eisenkot government? Especially, you referenced growing violence in the West Bank. We've talked a bit about Gaza. Let's start there. And I'd love your thoughts on how we might – how might things be different with an Eisenkot government.

Ms. Touboul: OK. So even though they have – but I say, I mean, it's not only about Eisenkot, but who is likely to join him in the coalition, so a common denominator. First, they have avoided discussing this issue during the campaigns, and I don't think they have, like, an established policy, but there is a different approach on which they will build. And it's a security-driven approach that will prioritize stability-building in Gaza and the West Bank, but also towards the region.

On Gaza, the main nuances is that, first, unlike the current government, they expressed – they have expressed their support for the 15-point plan as a roadmap of President Trump for Gaza as a framework to advance Hamas disarmament and enable the consolidation of the ceasefire. Also importantly, as opposed to the current government, they believe that there are limits to what military force alone can achieve; and that also the refusal of the government to enable a transitional Palestinian administration to emerge, whether it is what is known as NCAG or the Palestinian Authority to step in, has primarily played in Hamas' favor, in their view, and therefore they are likely to remove their veto over any step that will enable that transitional administration to enter.

In the West Bank, they oppose Smotrich attempt to implement what is known as his Decisive Plan, which is an annexation plan designed to push the Palestinians out of the West Bank through land grab, a settlement expansion, movement restriction, but also violence. And the leader of the change bloc, if we can call it that way, understands the need to curb settler violence and to prevent a governance vacuum that will result from the PA's collapse, not only because this is the right thing to do but also because in their view it fuels instability and it clash with their security mindset.

Importantly, they are not hostile to the PA. They do share the view that it is weak and not efficient. But the PA is also what maintains security – Palestinian security coordination – which they will view as, you know, essential to contain Hamas foothold in the West Bank and in Gaza.

The last, you know, is the region, and the restoration of ties with Egypt and Jordan that is viewed by all this coalition as crucial for both security reason and political reason. And this is an important departure from Netanyahu's approach, who has favored Qatar and has favored the UAE, who for very different reason have a position towards a PA that is very convenient to the current government.

Now, none of these parties, and Eisenkot included, see the question of Palestinian statehood as relevant today's reality. But I do think that Gadi Eisenkot and Lapid are, unlike Bennett, two-staters. And it doesn't mean that they will do anything to advance that, but still I think it's important to note.

Now there will be two factors, I think, that will determine the scope of the shift that we will see on the ground. One is something that is common to any government in Israel, the need to accommodate right-wing constituencies, and that will include Bennett and Lieberman. And this consideration will dramatically limit the ambition of the shift. It is likely to restrain their willingness to clash with the settlers, and in that sense is going to be very counterproductive to even the objective that they have set to themselves.

And what could potentially, obviously, counterbalance that trend will be, you know, the scope of the international pressure, regional incentive, wherever the U.S. has a very clear policy and demands towards Israel on this issue. And this pressure also can create, you know, domestic legitimacy for measures that this government will implement.

Ms. Yacoubian: So I want to pick up this thread about how an Eisenkot government views the use of military force relative to deepening security, with respect to Lebanon and Syria in particular, where, as Paul has noted, we've seen incursions by Israel in both Lebanon and Syria as part of this security doctrine of preempting threats outside of Israel's borders before they materialize into an October 7-style attack inside Israel – understandably so, given how horrific October 7 was. But is there a difference in terms of how a Gadi Eisenkot government might view that positioning on both Lebanon and Syria?

Ms. Touboul: Well, first, important to note that Eisenkot was a commander of the IDF's Northern Command, and he understand the – let's say the Lebanese front from – obviously,

from an Israeli perspective, OK? And so he comes in with some working assumption and a worldview that is well-established, and you have mentioned the Dahiya Doctrine.

But you know, even though he will have a hardline security-focused stance, he is known as a commander that does not take bold action without weighting pros and cons and considering various options before making a decision. And in that sense, it will not be based on the desire to – you know, to gain some political benefits out of a military operation. And I would assume that because the way he operate within the decision-making process it will not also set objective to a military operation that are not attainable, and that's also an important difference to what we have seen with the current government.

Also importantly, I will – I think he will seek the U.S. approval; and that therefore if the U.S. team in Lebanon and the U.S. president come with, you know, an articulated plan, he will – he will take that into consideration, provided it does provide strict security guarantees that will enable him to withdraw from these areas.

Now, I think there is something also important to understand with Eisenkot. He is aware that the reserve – the reserve army in Israel is exhausted, and that there is limit to what you can ask from them after, you know, such a long war. There is limited resource. All this will, you know, enter into his consideration, but it will not make a decision that lead to a withdrawal if there is no security guarantees that are provided.

Ms. Yacoubian: OK. That's actually super helpful.

Michael, I want to turn back to you, and we're going to expand the aperture here a bit on the region. You, of course, served as U.S. ambassador to Saudi Arabia. At the time of your tenure, normalization between Israel and Saudi Arabia was sort of a prime objective of the U.S. government. Things, of course, have changed significantly since then. But give us a sense of what's at stake for Saudi Arabia regarding the Israeli elections. And in particular, how does – how does MBS – how does Mohammed bin Salman, the crown prince, view the prospect of a different prime minister in Israel?

Michael Ratney: I think certainly it's easy to say the Saudis are pretty distracted right now. You know, they're dealing with the fallout of the Iran war. They're currently under attack and in a conflict with the Houthis in Yemen. And so their mind is really elsewhere at this point.

I think the Saudis, like many in the region, would certainly breathe a sigh of relief if there was a different sort of Israeli government. Netanyahu, whatever you think of him, he's become quite this kind of toxic presence in the region, and certainly in U.S. politics as well. And I think without that you start to move towards something that the Saudis want, which is sort of turning down the flame in the region, deescalating some of these conflicts, so that they're just not so ever-present. And that would mean, hopefully, deescalating in Gaza, reducing settler violence in the West Bank that's on TV screens every day at this point.

I don't think a different Israeli prime minister, in and of itself, changes the Saudi calculation when it comes to normalization. The Saudis have been very careful, and I think smartly, not to get into the game of saying, we want to work with this Israeli politician and not that one. Their view is it's just – it's none of their business. They will deal with whoever is in charge, assuming that government is prepared to essentially meet their criteria for moving ahead with discussions about normalization. Netanyahu was not, and it remains to be seen whether an Eisenkot government would be able to do it.

You know, the Saudis, somewhere in the midst of the height of the Gaza war, when normalization was essentially off the table, nonetheless made clear that if there were a clear, definitive end to the war in Gaza – and that means no IDF presence, no yellow line, no buffer zone; basically, the war in Gaza is over – and there was an Israeli government commitment, a commitment by whichever government is in office, to a pathway – they would use the term irreversible pathway to Palestinian statehood. That doesn't mean that the Palestinian state needs to be formed tomorrow to move ahead with a relationship, but it needs to be articulated as a matter of government policy.

Now, as Celine pointed out, that's clearly not something that an Eisenkot government would be keen to do. It might even be something that would potentially rupture a change coalition if they were in office, and so they would be really reluctant to go down that road. Now, I've heard folks sort of suggest, well, there's other things that Israel could do that could show kind of a pathway towards more pragmatism and moderation, something that maybe the Saudis would feel more comfortable with. I think that would be fine, but it wouldn't get you to normalization. Normalization is still going to require an explicit commitment to Palestinian statehood. And I think without that it really doesn't matter who the prime minister of Israel is.

Ms. Yacoubian: OK. So clearly something well over the horizon, it sounds like.

Paul, I want to turn back to you. You had started to talk about Syria. And I would love to now, you know, have you delve a little bit more deeply into what is at stake for Syria, understanding, of course, that we have the collapse of the Assad regime in December of 2024, a new government headed by Ahmed al-Sharaa, a former al-Qaida leader, and therefore prompting a pretty strong response from Israel, concerned about security issues. Help us understand better how Syria you think views this election and what's at stake.

Dr. Salem: Well, certainly, I mean, the new government in Syria has found Israel to be one of its most intractable problems. President Sharaa, after he took over in Syria, one of his objectives, obviously, is to, you know, restart and rebuild the Syrian state. The Israeli army immediately destroyed most of the military capacities of that state, even though most people would, you know, assess that that really did not pose any threat to the Israelis. That greatly undermined his efforts.

He worked hard and has succeeded in reuniting the territory of Syria. There were problems in the northwest with the Alawites; those have been overcome. There was the entire northeast with the Kurds; that was overcome through diplomacy and other means. But he

has not been able to deal with the Druze problem in the south. A political process has been all but aborted by, you know, basically Israeli intervention and support for, you know, one leader, one faction among the Druze, and a commitment not to work with the Sharaa government. So that's hampered sort of national unity.

Obviously, the territorial integrity of Syria – the Syrian state has now regained effectively territorial control over all of the territory except – I mean, other than the Golan Heights, which were occupied long ago – the new territory that was taken over after the fall of the Assad regime. So a tremendous number of challenges between Syria and Israel.

President Sharaa nevertheless has said, you know, he wants no war, he wants no conflict with Israel. He's launched direct talks with the Israelis, meetings that have happened not too long ago; interested in a security agreement, which would guarantee or, you know, ensure security for both Israel and Syria, while leaving the issue of the Golan Heights for later. President Sharaa has gotten a lot of, obviously, support from the Gulf countries, from Turkey, from Europe, and from the U.S. And Tom Barrack, Trump's envoy in Turkey who's also been very effective in Syria and Iraq, also very much backing this new Syrian government, and wanting to find a way to deescalate between Syria and Israel, and more than that to find a way forward.

There are maybe hopes, like on the Lebanese side, that maybe a different government would pick up on the potential for diplomacy; would recognize that a stable Syrian state, like a stable Lebanese state, would be a positive; and that everybody has an interest in building that.

Finally, I'll say, obviously, Syria – while Lebanon is stuck between Iran and Israel, Syria is stuck a little bit between Turkey and Israel, which is a whole 'nother kettle of fish that we can't get into right now.

Ms. Yacoubian: That is super helpful, though, Paul, I think a very, very useful framing as we start to understand. Again, I think we've painted a very comprehensive picture of how to understand the elections in the current Middle East.

Now I want to really drive all of us toward a bit more of the over-the-horizon thinking. And here, Celine, I'll start with you. Our program's strategic framing is based on this idea that the Middle East is at a hinge moment – that we are really witnessing the collapse of an old order, a new order has yet to fully emerge, and that the region itself will be key in shaping the contours of a new Middle East. Help us understand from an Israeli perspective what's at stake and how the outcome of this current election will help us, or will give us a sense of what Israel's trajectory could be, in this emerging order. Maybe, you know, kind of contrasting what a – and again, I'm giving is kind of a hard task in a short time – (laughs) – but contrasting a bit what a continuation of the Netanyahu government might look like as opposed to right now the most likely alternative, a Gadi Eisenkot government.

Ms. Touboul: You know, I think that something that very much characterized Netanyahu era, especially since October 7, was his ambition to reshape the Middle East but primarily

through military means, not really diplomatic ones. And you know, we should remember that – two things about Eisenkot. One, he said repeatedly that he doesn't see Iran, Syria, or Lebanon are, how you call that, threat that undermines the existence of Israel. He does see the threat, but not as existential threat. And he emphasized that the existential threat are from within, from the fabric of the society and the cohesion. Another thing that I think is important is that Eisenkot did support the JCPOA, and that's also an important departure from Netanyahu.

So I do think that, as I said before, he understands the limit to military power, the need for, you know, the role that diplomacy and policy can play in strengthening military gains. That's a major departure.

Something else I want to stress on the – on the issue of normalization with Saudi Arabia that also Michael discussed. No doubt that this is, you know, an aspiration that is shared by all political factions, I mean, except maybe the ultra-Orthodox that don't care much about that. But I think that within the change bloc the aspiration to move towards normalization will be important. Lapid is known for the one that, you know, made the Abraham Accords and Forum Negev a reality.

Now, I think that what – you know, I understand perfectly the gap between how Israel sees it and what Michael indicate when it comes to the need for Saudi Arabia and the demand that it will be conditioned on progress towards Palestinian statehood. I think that you know, for normalization to serve as an effective leverage and impact policy, the kind of slogan of a – of a pathway toward Palestinian statehood or the credible pathway needs to be translated and break down into very specific demands that an Israeli government can relate to, not like an all-or-nothing approach, which I think that the – that Saudi Arabia has clarified that it's not an all-or-nothing approach. It can be a process that is synchronized between Israeli-Palestinian progress with progress on normalization.

The question is how you make that promise much more tangible so that you can act upon it. And I do think that the stabilization-building approach of the government, that could kind of set the ground for, you know, restoring ties with our neighbors, could then, you know, be the starting point for something more ambitious.

Ms. Yacoubian: So, Michael, I now want to pull you in based – you know, pulling off of what Celine has just laid down as well as Paul toward the end of his answer, some of these openings/opportunities that we may see, if in fact the next government in Israel is led by Gadi Eisenkat. Help us understand, again, looking at that over the horizon, emerging order in the Middle East, a Middle East in which the U.S. of course will still continue to play a role – I would argue, perhaps a very different one, but still in some ways indispensable depending on the conflicts – how do you see the U.S. role, and in particular, though, with this question of which way Israel goes, whether it's a continuation of a Netanyahu government or a new government, and both with respect to the bilateral relationship – again, looking over the horizon – but also with respect to the U.S.' ability to perhaps play a catalyzing role in in helping to shape these – the new contours of the region?

Mr. Ratney: You know, Mona, it's always such a tough question to answer, at least if we're looking at the next two years, because so many of these policy decisions don't reside in any sort of coherent policymaking process, right? They reside in the head of one person who's quite unpredictable. In fact, unpredictability and sort of a capricious approach to policymaking has been President Trump's brand. So you can read the tea leaves. You can see this sort of gradual irritation with the Israeli leadership, at least the current Israeli leadership. You can sort of sense that President Trump sees which way the wind is blowing in terms of Israel in terms – in domestic politics, and ask yourself whether even in this next two years this sort of stalwart commitment to Israel and Israel's security is going to remain stable, particularly if we're looking ahead a few years where a Republican candidate might not be so favorably disposed towards Israel, particularly if it's somebody like J.D. Vance. But the bottom line on that is it's just wholly unpredictable, and I wish that weren't the case. But that's just the nature of the kind of foreign policy that we're dealing with during this kind of era of President Trump's term.

I think looking beyond that, I think if you're a Gulf state or Israel you're looking at where American politics is headed on this issue, and it's much more favorably disposed towards the Palestinians, and it does not have that kind of natural impulse to support Israeli positions. And I think, you know, if you're Saudi Arabia, you looked back on the kind of beginnings of the discussions about normalization, and one of the reasons why the whole idea of this grand deal that involved a mutual defense treaty with the United States and normalization with Israel, why it was so appealing in the U.S. domestic political context was because it was good for Israel, and there were doubts about whether or not it would be good for the Palestinians. I think if you're Saudi or really any state that's contemplating this relationship with Israel, you're looking ahead and saying, well, the litmus test might not be whether or not this is good for Israel; the litmus test might be, is this good for the Palestinians? That's really where politics is headed at this point.

And so for the Saudis, who, frankly, in terms of normalization are in no rush – and if anything, they're starting to see a relationship with Israel as, you know, kind of – kind of adding risk to their calculus, not mitigating risk – they're looking ahead and saying, well, you know, maybe in a few years – we were on the right path. We were – we were being champions of Palestinian rights and Palestinian statehood, and that's eventually where the United States is going to end up.

Ms. Yacoubian: And thank you. I think that, again, very – I gave you a tough question. This is a tough question for everyone, but I think particularly from an American perspective given all of the uncertainty in our political environment.

Paul, finally, I want to turn to you and ask you the same question, but again maybe from the vantage point of the Arab world. And you know, help us understand, again, as we think about an emerging order in the Middle East, the prospects of potential leadership change in Israel. What does that mean? How does that play out? Michael earlier on referred to the specificness of how Bibi Netanyahu is perceived. If there is a continuation of his government, you know, what does that look like for the region, again, over the horizon? If

there is a new government, is that a reset for the Arab world in particular as they seek to chart a course in this emerging order?

Dr. Salem: I mean, I think the answer would be no, that they don't see that it is a fundamental departure from what's come before. I mean, I think most of the Arab world harks back to the Madrid peace conference, Oslo Accords, Rabin, and the failure of that process – of course, the assassination of Rabin and the failure of that sort of major attempt to build a two-state solution, and based on the two-state solution to build a normal Middle East. The Arab position has been such for the last 25 years, back to the declaration in the Beirut Summit of 2002, so there's no real mystery.

Now, since the assassination of Rabin and the rise of Netanyahu, that normal pathway to normalization was taken off the table by the Israelis, and over the last three years has been turbocharged by – you know, by what Hamas did on October 7, which only empowered that sort of extremist position, and has put the region and the region's relationship with Israel in a much, much worse situation. And I – you know, from what people observe about Israeli public opinion, yes, Eisenkot is a different person than Netanyahu, and there's maybe a little bit to hope from that, but public opinion in Israel apparently is still completely rejecting of any idea – I mean, I remember about a month ago there was an interview with all of the leading candidates, and they were asked one question: Would you consider a two-state solution? And the virulence of the answer of all the candidates that I heard really, you know, took me aback.

So, no, I don't have any high hopes. I think the hopes would be deescalation, a bit of progress on Gaza, less horror on the West Bank, less horror in Gaza that would calm the temperatures, negotiations with Syria and Lebanon to make some progress. But I do think either there's got to be a more fundamental rethink among Israelis about their future with the Palestinians and their future with the Middle East – if they think that, you know, this kind of apartheid system and permanent occupation and war is a great way to go, and permanent war on multiple fronts is a good way to go, I don't think it is, and I don't think Israel has become more secure over the last three years.

But I think more practically, the reason that the Israeli right wing has been able to get away with all of its settlement policies and all of its, you know, policies in the West Bank and the last period in Gaza is really because of the United States. The United States was the enabler of all of this. And the United States has a lot to answer for for what has happened on the West Bank, and certainly what's happened in Gaza. Also, keep in mind Iran has been very happy with the radical turn in Israel. It gives them a great talking point. It gives Hezbollah and their other allies great talking points.

But I'll end with the point that if the U.S. changes in 2029 – I mean, yes, a change has happened in the midterms, the mood is different, but you still have the same president in place. I don't expect a radical change from Trump. I don't expect a radical change from Eisenkot. But it's conceivable that a different president in the White House, particularly a Democratic president which whom – we don't know who that might be, but it really could be a big departure. And how can Israel sustain open-ended occupation and settlement

without any external support? Because if they lose the U.S., they have nobody. Maybe that's a healthy thing that Israel has to live within its means, has to live like a normal state, and has to make peace with the Palestinians. And then peace with everybody else is quite easy – I mean, other than Iran, which is a completely different issue.

So I'll end with that. Hope's not very high, but maybe at least we climb down from the madness of the last three years.

Ms. Yacoubian: A lot to think about. A lot to contemplate. I want to thank all of you for a very rich, if perhaps appropriately sobering, discussion. But it leaves no doubt in my mind that we are really at a remarkable moment in the Middle East and that there's much to be – to be tracking. And so I thank you all for your very incisive analysis and participation.

I also want to thank our online viewing audience. And I hope that if you are interested, if you found this conversation interesting and useful, you will look to our Middle East Futures Project in particular, which is our latest initiative in which we're seeking – through a variety of means, including a Middle East Futures Papers series, we're really looking at unpacking and trying to understand this very consequential moment not only for the Middle East, but of course also for the United States and our policy in the region. Thank you all very much, and I wish everyone a pleasant rest of your day.

(END.)