Hello, everyone. Thank you so much for calling in to the Center for Strategic and International Studies Press Briefing “Previewing President Biden’s Trip to the Middle East.” My name, as our moderator said, is Paige Montfort, and I’m the media relations coordinator here at CSIS.

We have a great lineup of experts with us this morning, afternoon, or evening, depending on where you’re calling in from, and I just wanted to give you a brief outline of what you can expect from our call today before we get started. So first there will be some opening remarks from my expert colleagues whom I’ll introduce in just a minute. Then we’ll go into a question-and-answer session moderated by our AT&T representative and my colleague Emma Colbran, who will close out the call today. If you’re RSVPed for the briefing we’re going to send a transcript directly to your inbox within just a few hours and we’ll also send that out by an email blast and post it to CSIS.org.

So without further ado, I’m going to introduce our experts in the order in which they’ll be speaking. So first we will have Jon B. Alterman, CSIS senior vice president, Zbigniew Brzezinski Chair in Global Security and Geostrategy, and director of the CSIS Middle East Program. And after Jon we’ll have Emily Harding; she’s deputy director and senior fellow of the International Security Program here at CSIS. Then we’ll have Ben Cahill; he’s senior fellow in our Energy Security and Climate Change Program. And finally, Marti Flacks joins us; she’s our Khosravi Chair in Principled Internationalism and director of our Human Rights Initiative here at CSIS. So a great lineup of folks, and with that, I'll turn it right over to Jon Alterman to get us started.

Jon B. Alterman: Thank you very much, Paige.

For the Biden administration the visit represents, I think, a triumph of governance over politics. There are a lot of good reasons, political and practical, for the president to take the position on Saudi Arabia he did two years ago, but as his administration has sought to advance a series of U.S. interests in the Middle East, it discovered what U.S. administrations have discovered for decades: that doing a lot of things in the Middle East and around the world are much easier if the Saudis are trying to help you and much harder if they aren’t.

I’m happy to talk about the politics of this, which seem to me pretty obvious, a combination of refuting the – I’m sorry, the politics of the refusal to engage with the crown prince. I think that’s partly a refutation of the Trump administration’s closeness to the crown prince in particular and the serious concern from any number of democratic constituencies about a range of Saudi actions and behaviors, and of course, to some extent, those two are linked. But what I want to talk about more is the administration’s approach to this meeting.
This meeting is an effort to go broad but not deep, and let me say what I mean by that. This meeting is about energy, broadly defined. It’s about the environment. It’s about scientific cooperation. It’s about energy security. It’s about the security of Israel. And it’s about investment. It’s about human rights and women’s changing role in Saudi Arabia and Yemen. And it’s not just about Saudi Arabia. Part of this visit is going to bring together regional leaders, many of whom are close to the United States, to explore closer cooperation.

I don’t expect there are going to be any huge reveals that come out of this trip. Ben may disagree, but I don’t think the Saudis are going to announce they’re going to produce as much oil as quickly as they can to bring prices down. And I don’t think they’re going to recognize Israel. And they’re not going to satisfactorily resolve all the imprisonments and court cases that the United States has been raising with them for years.

I expect instead this trip is going to do a number of other things. First, and most simply, this trip is going to break the ice. We’ve had all kinds of speculation about when and under what circumstances the president will speak with the Saudi leadership, both the king and the crown prince. Making every encounter a fraught and transactional negotiation has made things difficult. And this trip is seeking to make future contact easier.

Second, I think the president is going to make clear that the United States sees the U.S.-Saudi relationship as being important for many years into the future. The current U.S. presence in the Gulf is an outgrowth of the so-called Carter doctrine, which, if you remember, arose from a single line in the 1980 State of the Union. I’d be surprised if this trip produces a Biden doctrine, but I do expect some sort of clear statement of why the United States cares and will care about its relationship to the Gulf in general and Saudi Arabia in particular.

Third, he’s going to emphasize the point I made at the top that a U.S.-Saudi partnership is important for both sides to accomplish their goals and preserve their security.

Fourth, he’s going to sketch out a broad set of joint activities that will get the governments cooperating. I don’t know the full extent of them. I’m told that some are in defense, some are in space, some are in energy, and some are in economics. Having a shared set of activities and a shared set of objectives will, it’s hoped, build better cooperation in areas where we have less agreement.

So what are the Saudis going to do in exchange? I’d expect a whole list of things that the United States considers constructive, from Israel to Yemen to
Iran to internal affairs. We might see the Saudis doing something modest that the United States considers constructive on Ukraine. I don’t think any of this is going to be like flipping a switch, but I do think the Saudis will feel an obligation to show greater alignment with the United States.

It’s reasonable to ask if all this is an inappropriate reward for the Saudis, given their record inside and outside the country, not least with the murder of Jamal Khashoggi. And to that I say this: None of this is going to erase the stain of Jamal’s murder, which will hang over the U.S.-Saudi relationship for many years to come, and appropriately so.

But we also shouldn’t forget that Jamal was passionate about the need for reform in Saudi Arabia, and he was encouraged by much of what he saw happening. His concern, as he expressed it to me, was not the direction of Saudi reform but that a broad and necessary societal reform effort was being reduced to the efforts of one man and one office. He thought that any process of reform requires revision and adjustment and requires broad social buy-in, and that wasn’t the direction the process was going.

I don’t think the United States should be indifferent to the reform process in Saudi Arabia, nor should it reduce the country to the actions of a single person. I think the Biden administration’s trip is well timed and well calibrated. It’s not going to end U.S. concerns with the kingdom, nor the kingdom’s concerns with the United States.

But I was a staff member on the Baker-Hamilton Commission, and Alan Simpson walked in one day, the former senator from Wyoming, and he just looked and shook his head and said no troubled marriage ever got better when the two parties stopped talking with each other. We’re talking to the Saudis. And for a long time to come, we’re going to have a lot to talk about.

Thanks, Paige.

Ms. Montfort: Thank you, Jon.

And over to Emily Harding.

Emily Harding: Thanks so much, Paige.

I thoroughly enjoyed that comment about the troubled marriage, Jon. I agree. (Laughs.)

So I’m going to talk a little bit about what goes into creating a presidential trip like this, drawing on my time at the agency, and then also at the NSC. I want to make a couple of comments about the Ukraine background music that’s going on behind this trip, although I suspect my colleague Ben is going
to talk extensively about the gas situation. And that’s a big part of it. And then I want to talk a little bit about the U.S. force presence in the Middle East and how that plays into what’s going on with Biden’s trip.

So, first of all, what goes into a presidential trip like this? You know, we talk a lot in the think tank world about whole of society efforts, whole of government efforts. Preparing for a presidential trip is, truly, a whole of government effort.

Everyone wants their issue included in the president’s talking points. All of the different branches of government have interests in what’s going on in this particular trip. The ambassadors in the State Department will have done 95 percent of the negotiating upfront. What you want as a staff member is not to have the president surprised by anything or put on the spot.

That said, something unexpected always happens. A meeting doesn’t go the way you would expect it to or somebody throws something on the table that wasn’t supposed to be on the table. Biden, in particular, does tend to improvise. You know, he’s the president. He can make the decisions he wants to, and so the staff will be working very hard to try to keep the trip on track.

The intelligence community, where I grew up, will create reams and reams and reams of background briefings for this one. They’ll do profiles on every single person that Biden is likely to meet and they’ll also do what we call background music PDBs, where you – presidential daily briefs – where you write, “As you go on this trip, the kinds of things that your hosts are going to be thinking about are” blank, sort of setting the scene for what the president is walking into.

Sort of a side note, the president’s staff will not sleep on this trip. You are awake for D.C. time and you are also awake for local time. So what it turns into is a marathon of grabbing 20 minutes here or there where you can. So that’s kind of the way that the presidential trip will go from the staff’s perspective.

The Ukraine background music – so if you look at the last, you know, 20 years of American foreign policy, it’s been very much focused on the Middle East for a whole host of reasons.

Then, with the Obama administration, we started talking about the pivot to Asia. Europe started saying, you know, don’t forget about us over here. We still have this looming bear on our borders. And then the Ukraine conflict happened, sort of proving that we cannot walk away from Europe. We cannot walk away from our security commitments there.
So we find ourselves in this place where we have to sort of keep tabs on what's going on in the Middle East because a lot of U.S. core interests are still there. We have an active conflict in Europe, and we're still looking warily at China and their activity across the globe. So what do you do if you're the United States government and you have limited resources – I mean, huge resources but limited resources to try to manage all these global conflicts. You need to think pretty carefully about where you're going to put your various force elements.

So in the last year or so, two of my colleagues, Seth Jones and Seamus Daniels, put together a huge review of our Middle East force posture and they made some recommendations for how to manage this whole global scene of conflicts.

When they started writing it, of course, the Ukraine conflict had not happened yet. But when they finished, this was, clearly, at the forefront of everybody's mind. They put their pens down in May of 2022.

So they had some key recommendations for how to go about thinking about the U.S. force posture in the Middle East.

First of all, our core findings were that the U.S. still has a plethora of interests in the Middle East. Terrorist organizations are still active, if weakened somewhat. We still need to counterbalance Iran's ambitions, freedom of operation of the naval assets is really important, oil, and these are chokepoints for delivery of goods around the globe.

We still need to monitor Chinese and Russian activity in the region. Every time we step back, Russia, in particular, has deepened their relationship in the Middle East. And China, too, is looking to exploit the region for their own ends.

So what Seth and Seamus argued for was a notable but tailored presence in the Middle East, something along the lines of 20,000 to 30,000 troops, a robust Special Operations Force, keeping the 2,500 troops we have in Iraq. On the air front, keep the expeditionary air wings in Kuwait, Qatar, and Saudi Arabia. Expand our unmanned ISR presence. Those kinds of capabilities allow for a long loiter time. And while they're not exactly cheap, they are somewhat expendable, more so than a manned aircraft. So if Iran decides to get salty about something and shoot at them, it's not the end of the world.

Missile defense is going to be a key part. If we are keeping a troop presence in the Middle East, then we need to deploy more comprehensive air and missile defense around them. We're also going to need to continue to assist our allies with missile defense.
One really interesting finding was that the Navy does not need to keep a consistent Carrier Strike Group in the region. That’s been a somewhat permanent presence for the last couple decades. We do, however, need naval patrol boats, Coast Guard cutters, destroyers with land attack and anti-ship capabilities to try to push back on Iran and then also keep our allies safe. Also argued for a Marine Expeditionary Unit and an amphibious-ready group on the ready.

And I think one of the really important things to think about is not so much what we need to be doing there but the consequences if the U.S. is seen as pulling back its presence from the region. It would definitely benefit our competitors like China and Russia. Iran’s sweep of influence is still from Afghanistan all the way to Lebanon.

We can see additional security competition. We haven’t talked yet about the JCPOA negotiations, but this is also going to be a critical piece of the background music for the trip. And then, also, the terrorist presence that’s still in the region could see a resurgence, especially post-Afghanistan withdrawal.

And then, just a momentary comment about Israel's entry into the CENTCOM AOR as opposed to the European Command AOR, that, plus the Abraham Accords, really does open the door for much closer integration of capabilities between the Israelis, our Gulf allies, and then also our capabilities in the region. It made some sense at the time to put Israel in EUCOM, but CENTCOM just makes so much more sense given the threats in the region.

So, that’s all I have.

Thanks so much, Paige.

Ms. Montfort: Great. Thank you, Emily.

And next up, we have Ben Cahill.

Ben Cahill: Thanks, Paige. So, I’ll talk about some of the energy angles of President Biden’s trip to the Middle East.

So, for months President Biden has urged Saudi Arabia and the UAE to raise oil output. But to echo what Jon hinted at earlier, I don’t think we should expect any dramatic announcements coming out of this trip.

What I want to emphasize is that Saudi Arabia really wants to manage this oil market through OPEC+ and not through unilateral moves. In the last couple years, Saudi Arabia has really focused on keeping cohesion within OPEC+. They see that this has delivered a lot of benefits. It’s helped them
navigate a huge amount of volatility in the oil market since 2020. And they don’t want to go it alone. Maintaining cohesion within the group is really a critical priority for them.

When Saudi Arabia confronts the issues in the oil market today, they don’t want to be rash. You know, from their perspective, they have been vindicated in not overreacting to the fallout from Russia’s war on Ukraine. We’ve seen in recent months that the impact on Russian oil production has actually been much lower than people thought it would be a few months ago, including me. So, they don’t want to overreact to this.

And the most important thing to emphasize is that Saudi Arabia and OPEC+ have very limited spare capacity, and they have to manage it carefully. So, in some ways, if they made a decision to, you know, boost output by, say, a million barrels a day for a month, that could actually backfire in a market like this. You know, producing more could fail to bring prices down, and it could also spook the market if stir capacity dwindles.

And I just want to take a minute and explain the Saudi perspective on market issues and managing the market today. Saudi Arabia is the de facto leader of the OPEC+ countries and the major oil producers around the world, and if you take a step back and think about what’s happened in recent years, they really think that Western leaders have lost their way on energy policy. They think that Europe and the United States have overestimated how quickly we can pull off an energy transition. They believe that fossil fuels will be much longer than Western leaders realize, and in some ways, they see this as, you know, a moment where we’re learning the importance of energy security and realizing some policy mistakes made in the last couple years.

And the attitude in Riyadh is also that U.S. energy policy has been erratic in the last few years and somewhat unpredictable. Just a couple years ago, President Trump urged OPEC to cut production, and now for many months Biden has urged them to produce more. And from the Saudi perspective, the market tightness that we see today is partly due to conditions that Western sanctions on Russia have created, and of course, these measures followed other sanctions on countries like Iran and Venezuela that have curtailed some global oil production in recent years.

So, the Saudis really believe that the OPEC+ framework – this cooperation that they’ve had since 2016, including the cooperation with Russia – has been very effective in helping them deal with a lot of the volatility. We saw the sharpest demand decline in history several years ago at the peak of, you know, the COVID-19 crash in April 2020.
The deal that they have has gradually brought the market back into balance, and it’s paying huge dividends for them. In March and April of this year, Saudi Arabia earned a billion dollars every single day from oil exports.

That said, Saudi Arabia obviously feels a great amount of pressure from the United States but also other importing countries, like India and China, on high oil prices. They do worry about demand destruction at such high prices, and they can’t ignore the calls from consuming countries.

But a word here about spare capacity. You know, it’s important to note that right now Saudi Arabia’s oil output is near record levels. So, their production target for August, according to the OPEC+ deal, is about 11 million barrels per day. And Saudi Arabia has only produced at this level for very short bursts a bit in 2018 and then for about a month in 2020 during, you know, a brief price war, when production actually surged past 12 million barrels a day. So we’re kind of at unprecedented levels. It’s also summertime, which is the peak demand period in Saudi Arabia. The country tends to use about a million barrels a day and direct crude burn for power generation. So that makes it harder to free up volumes for export. And the critical thing to emphasize is that as OPEC+ has added more capacity onto the market each month, that wedge of available spare capacity has dropped. So by September, Saudi spare capacity will only be about 1.2 million barrels a day. The UAE, which is really the only other country within OPEC+ that has spare capacity, will have about 800,000 to 900,000 barrels a day by September. At this level, they really have to be quite careful about how much they add and how fast they ramp up.

So what to expect from the trip. You know, from my perspective, the Biden administration seems to be lowering expectations on the energy issues. President Biden said last week that this trip is not about asking Saudi Arabia for more oil. I think that a surge in Saudi production seems unlikely. I expect some fairly anodyne statements from Saudi Arabia about helping to balance the global oil market, meet global demand, support economic growth and stability among the importing countries. But frankly, I think the move that we saw last month, which involves a very modest production increase for July and August, is probably about the most that we can expect at this point. So for all the reasons that Jon and Emily have outlined, I think it will be a constructive trip. It’s important the two sides are talking together. And I don’t expect any dramatic announcements on oil policy.

And back to you, Paige.

Ms. Montfort: Great, thank you so much, Ben.

And last, we have Marti Flacks.
Thanks, Paige. So I am cognizant that I’m the last speaker standing between all of you and questions, so I will just make a few additional points.

And first, I just wanted to start with a broad one, which is that this trip is bookended by the killings of two journalists, obviously, Jamal Khashoggi in Saudi Arabia and Shireen Abu Akleh in the West Bank. And I think this trip is therefore an opportunity to really put into focus the threats that journalists are facing, not just in the region, but around the world. Although killings of journalists actually went down last year, some 45 or more lost their lives, and some 500, nearly 500 are still imprisoned, according to Reporters Without Borders. And, you know, we’ve seen an overall deterioration in press freedom in really problematic environments like Russia this year, in Afghanistan, but also in democracies, where we’ve seen journalists targeted in India and Hungary and in many other places. And so, as much as we think about the broader human rights issues and the broader strategic issues that this trip is going to raise and will – those are extremely important, and I’ll talk a bit about those -- I do hope that President Biden uses this trip specifically as an opportunity to highlight this particular issue and its salience for this region by raising those two specific cases, of course, on his two stops, but also the issue of press freedom more generally. And I also hope he engages journalists on every stop of this trip, as most any U.S. president would do on most any international trip.

And that leads me to my second point specifically about this trip, which is that presidential visits are as much about optics as substance sometimes. And having worked on them myself, I would just echo everything that she said and emphasize the amount of care and thought that goes into the staging of the events that the president participates in and the meetings they have. And so I’m looking very closely in this visit as to how they approach the issue of the president’s meeting with the crown prince. So we saw the president’s comments last week that in his perspective, he’s going to a multilateral meeting at which the crown prince will be there. We’ve heard from the Saudi side that they’re seeing it as a bilateral meeting between the two. I want to see how they are – how they’re laying this visit out – will there be a photo of the meeting, will there be a joint press conference or joint statement afterwards? Will, they, you know, sit down and have a meal? What are the optics that they are setting up around this particular meeting in particular? These optics really matter because of exactly the point that Jon made at the beginning, in terms of the cards that the U.S. is playing.

And that’s my last point I just want to make, which is that this is a trip of tradeoffs, and I think that we have to be clear and transparent about the calculations that the U.S. administration is making. They are calculating and weighing their priorities, and that’s appropriate; that’s how foreign policy is made, but there needs to be a cost-benefit analysis.
Now, the challenge I have in this case is that the human rights benefits of the policy that the Biden administration has adopted, this policy of increased isolation of Saudi Arabia and a reluctance to engage at the highest level, isn’t a strategy, right? It’s a response to an egregious human rights abuse and that outrage that the administration has expressed and that President Biden has expressed is appropriate and it’s right, but they haven’t made, up till now, the connection between that outrage and that isolation and the kind of change or accountability that they want to see as a result of that policy. And so it’s very hard to do a cost-benefit analysis to say that that response actually outweighs the benefits of that, of the engagement that Jon talked about. And so that’s why, fundamentally, I don’t disagree with the point Jon made about the need for engagement with the Saudis.

There are a very, very small number of situations where I think it’s appropriate for the U.S. to simply not engage a foreign government, no matter how vehemently we disagree with their policy, no matter how egregious their behavior. And this is certainly a situation, I would say, where engagement is appropriate. The question is how you calculate the value specifically of a presidential visit, and that’s where I would probably take a slightly different tack than some of my colleagues.

You know, I think that any presidential visit can’t be the first card that you play in a reset of a relationship and that any presidential visit, with the exception of maybe our closest U.S. partners and allies, needs to come with deliverables and needs to come with an expectation that there are benefits, concrete benefits to both parties. The concrete benefit in this case for the Saudis is obvious in terms of the optics; the concrete benefit to the United States needs to be defined. And so I would like to see some very specific concrete outcomes from this discussion, whether that’s in relation to human rights in the situation in Saudi Arabia specifically or whether that’s more broadly in terms of the relationship with Israel, the situation in Yemen, perhaps the energy situation, although I take Ben and Jon’s point about the limited capacity there.

I think whether this visit is worth the costs to the administration in terms of its credibility on human rights issues remains to be seen, once we see what specifically comes out of the visit and the commitments the Saudis are making. So I’m sort of willing to wait to see where it goes, but I think the bar needs to be a bit higher than perhaps my colleagues do in terms of when I would be prepared to play that presidential card.

So I will stop there and turn it back over to Paige.

Ms. Montfort: Great. Thank you so much, Marti, and also Emily, Ben, and Jon, for all of your comments and analysis to start us off.
So now we have about 30 minutes left for questions from everyone who is calling in. I’m going to turn it over to our AT&T moderator to give the queuing instructions, if you’d like to ask a question, and also to my colleague Emma Colbran, who is going to be closing out this call today for us.

Operator: (Gives queueing instructions.)

And Jarrett Renshaw from Reuters, you’re open. Please go ahead.

Jarrett Renshaw: Sure.

I just wondered if you could put a more fine point on the optics part of this trip. For instance, what is your expectation whether there will be some photos of President Biden and MBS together? What is your expectation in terms of kind of their actual engagement? And how carefully managed do you think all that will be by particularly the White House?

Mr. Alterman: This is Jon. My expectation changed over the weekend when I saw somebody from the White House. My expectation had been that that was going to be very tightly managed and it would be unlikely that there would be a photo of the two of them together. I think the White House’s expectation is they’re going to be in the same room, they’re not going to be far apart. At some point the crown prince is likely to come over and extend his hand, and some sort of image will emerge. You know, I think it won’t be a posed image, I don’t think, but I think there will be some sort of image of the two of them together. And the president will have to think about what he wants that image to capture.

Ms. Flacks: I’ll just add – this is Marti – I was involved in a couple of presidential or senior-official trips to places where their senior officials were, for example, wanted by the International Criminal Court. And I will say that those optics were extremely carefully managed, down to not just seating arrangements but camera angles. You know, is it possible to get them in the same shot? You know, how do you walk people in the room, as Jon was saying, to either allow or avoid a handshake or an interaction?

You know, that’s standard protocol for any presidential visit anywhere, any presidential interaction, is that, you know, his interactions are very carefully managed. So I would expect the White House to spend a lot of time thinking about that and trying to manage it. The X factor is, of course, the other party can always disrupt those plans if they’re determined to. And so, you know, it will be interesting to see how cooperative the Saudis are in accommodating the U.S. preference for, you know, how that interaction is staged.

Mr. Renshaw: Great. Thank you.
Operator: Next we have Alex Ward with Politico. You’re open.

Alex Ward: Yeah, thanks so much for doing this.

I have sort of a 30,000-foot question. I’m struggling to sort of understand why this is happening now, right? We just had the NATO summit. Ukraine is a big deal. I get that there’s energy needs. Outside of that, where’s the urgency to do this trip? What is the – as you sort of all mentioned, you know, this is going to be a broad, not a deep, trip. There aren’t going to be that many deliverables. The chances are that this is probably better for Saudi in the end than the U.S. So why sort of a rush to go over there, outside of the energy issue?

Mr. Alterman: This is Jon.

I’m not sure why this is considered a rush. You know, there was initially a thought that it could be tacked onto the NATO trip, and it wasn’t tacked on. It was left to sit. But, you know, if you say, well, August it’s not going to happen, September you have UNGA – who knows where we’ll be in the fall? You know, you have the election. It will be seen as an election stunt. I think – I’m not sure that there’s this sense of urgency so much as there’s a sense that if we’re going to do it, we should do it.

And as I say, I think there are issues involving regional security. There are issues with the Iran negotiations, which are not progressing in any sort of constructive way. I think that, again, I don’t think this is driven by politics, which would create a sense of urgency. I think it’s driven by a sense of governmental responsibility, that having this trip will make a lot of things possible that were much harder before, and we should just bite the bullet and do it. And I think, you know, the assessment in the White House must be this is actually politically harmful with a lot of the president’s constituencies, but still we should go ahead and do it.

Ms. Harding: This is Emily. The only other thing I would add to that is that the presidential trips take a long time to plan, so it’s entirely possible this has been in the works for a long time. And as Jon says, it just – there’s not a better time to do it, even if this isn’t the perfect time.

We also haven’t talked much about the Israeli political situation. And I think that’s going to be an interesting needle for the president to walk through as well.

Operator: And next we have –

Mr. Cahill: This is Ben. Maybe I can just jump in on the energy issues.
I do think that the energy situation is a big impetus for this trip. And I think, given the intense pressure to do something about inflation and high energy prices, you know, the president wants to pull all available levers to deal with this issue. We saw he recently proposed a holiday from federal gasoline taxes. They've released oil from the Strategic Petroleum Reserves. You know, there's a lot of debate about how effective those moves are, but I think they want to do everything they can to reassure the public that they're trying to act on lowering energy prices. And having a more constructive relationship with Saudi Arabia and OPEC+, I think, is an important part of that.

The immediate deliverables of this trip might be somewhat underwhelming to some people, but it's clear that heading into the second half of this year we have a lot of uncertainties in the global energy picture, mostly related to Russia-Ukraine but also just to the very high prices and the tight oil market and natural gas market. And I think there is a sense in the White House that they need to be able to pick up the phone and have a constructive dialogue with lots of parties, and in the oil world that starts with Saudi Arabia. So I do think that this – if there's a sense of urgency to have this meeting or a reason why it was, you know, pushed over the top several months ago, energy prices were, obviously, a huge part of that.

Operator: And next we have Justin Sink with Bloomberg. One moment. You're open, Justin.

Justin Sink: Hey, guys. Thanks so much.

I was wondering if you could maybe talk about what – I know that you have kind of downplayed the likely deliverables, but I'm wondering what you're expecting to see, whether the kind of overflight – (inaudible). On oil, I guess my question is whether we don't expect anything to come out of this or if it's just that there's not a ton of capacity in Saudi and UAE to add more, but we'll probably see that come out of it. There are security guarantees for Saudi that might come out of it or some sort of constructive talks beyond airspace with Saudi and Israel. And then I know you kind of alluded to talking about the political situation in Israel, so to whatever extent you could talk about how you expect the president to address that, that would – that would be helpful. Thank you.

Mr. Alterman: Ben, do you want to take the energy piece and I'll take the Israel piece?

Mr. Cahill: Sure, I will. Maybe I'll just add a bit more context.

So, in April 2020, OPEC+ made the largest production cut in history. And ever since then, month by month they've been adding more oil back onto the market. That deal is – was set to expire in September; in other words, all the
production cuts on paper will be fully restored by then. What OPEC+ did last month was they brought the end of that agreement forward by one month.

So heading into this fall it is decision time for OPEC+. The challenge for them is that after August they have to decide what happens next. Will they reach a new production agreement that gives a target or a quota to every country within OPEC+, Saudi Arabia and all the others? And what do they do about the spare capacity challenge?

You know, I think what Saudi Arabia and the UAE would like to do, ideally, is craft a new deal that lets both of them add a little bit more production onto the market. Saudi Arabia and the UAE are really the only two countries that can ramp up production in the near term and sustain it for several months. They have the capacity to do it. They could benefit from it economically. The challenge for them is that it’s really difficult for them to do that in the context of a broader OPEC+ agreement. And those decisions will really be made next month at the next OPEC+ meeting.

So it’s possible that a new agreement will emerge that will let Saudi Arabia and the UAE raise output a little bit. And I expect that part of the discussion of this trip will be the mechanics of that, how that might happen, and I think that the Saudis will probably try to reassure the United States that they’re working to do it while managing these constraints of spare capacity.

The other thing I’ll say briefly on broader energy issues is that, you know, beyond oil there are avenues for cooperation and engagement between the U.S. and Saudi Arabia. So Saudi Arabia has pretty ambitious renewable energy targets. It’s in the middle of a big expansion of solar photovoltaics capacity. Saudi Arabia is a member of the Net Zero Producers Forum, which is a group that was brought together last year by major oil producers to talk about how to achieve their net-zero targets, how to, you know, share technology and best practices. So it’s possible that there will be some statements about cooperation on these lines as well between the Energy Ministry in Saudi Arabia and the Department of Energy in the U.S., and I think there’s a lot that could be done to bolster that partnership and that relationship.

Mr. Alterman: On the Israel thing, Israeli politics right now are in a state of unusual turmoil, even for Israeli politics, as they look toward their fifth election in three years November 1st. Partly, Israeli politics are one of the reasons why, I think, they’re – why I have very modest expectations for Israeli-Saudi rapprochement because the Israelis are not in a position to give anything on Palestinians or anything else to the Saudis to make it more palatable.

That being said, closer cooperation between Israel and Saudi Arabia is an idea that enjoys broad support across the Israeli political spectrum and has
very deep support in Saudi Arabia. There is a lot that is going on quietly from arms sales to other kinds of cooperation.

I think the general direction of that relationship is clear. The timing is unclear, and I think this trip will represent a small move in that direction rather than any sort of quantum leap. As I say, it’s partly because of where Israeli politics are right now. I think it’s partly because King Salman sees the Palestine issue not as a legal or diplomatic issue. He sees it as a moral issue, and I think he’s going to be very reluctant to allow things to proceed on his watch. But as I say – or, very reluctant to see normal diplomatic relations on his watch but, clearly, there’s a lot of engagement going on quietly behind the scenes.

Operator: And, next, we have the line of George Condon with National Journal. You’re open.

George Condon: Great. Thanks so much.

I had two questions. One, what are the major pitfalls that President Biden has to avoid both in Israel and in Saudi? And, secondly, going back to when he was a senator and a vice president, he has always stressed that he views diplomacy in very personal terms.

Does he have the personal relationships in the Middle East that he has in Europe or Asia?

Mr. Alterman: Does anybody else want to take that? Otherwise, I’ll shoot my mouth off.

(No audible response.)

Hearing none, I think the pitfalls are, one, he can look like he came back empty handed, and I think, you know, Marti’s points are – and Emily’s points about what goes into preparing this trip and how much staging goes on, it would look embarrassing if it looked like the president got taken.

I think the president also has to be very careful what kind of imagery. We all remember how iconic the picture of Donald Trump with King Salman and President Sisi with their eyes on – with their hands on a glowing orb that came from the president’s first overseas trip in 2017 to Saudi Arabia.

There’s always a danger that this trip produces an iconic image which would not be the image the president and his team want to present. So I think that’s also on people’s minds.

You know, on the personal relationship side, I was an aide to Senator Moynihan in the late ’80s, and the senior Democrat on the Senate Foreign
Relations Committee was a senator from Delaware named Joe Biden. So I saw a lot of Joe Biden. I heard a lot of Joe Biden talking about diplomacy.

He was, really, very focused on Cold War diplomacy. He was focused on talking to Soviets. He was talking to European allies. I think that’s his comfort zone.

He also has been a longtime committed supporter of Israel and has dealt with Israelis for a very long time. He has not been committed to the Middle East. He doesn’t have the personal relationships. He doesn’t have the duration of relationships.

I mean, don’t forget he has been dealing with a range of Israeli leaders for four decades and, I think, has a very good sense for the parameters of what the Israeli debate is, how people take things, what people are trying to get out of meetings, what you should say. I think there’s – he brings a lot of depth there, but not in the Gulf, not in the Middle East. As you know, the leaders of Egypt and Jordan are also going to be there. So I think, you know, on the one hand, the president does take things very personally. He certainly was deeply involved in the Iraq diplomacy of the Obama administration, and so it’s not like he hasn’t dealt with people from the Middle East. But there’s something special, I think, both about Europe and Russia, and about Israel, where he really does have a four-decade record of engagement that doesn’t really kick in when he’s dealing with – not only with the Gulf, but also with, you know, a Saudi Arabia that is in transformation.

I wrote a piece that the press guys can send you, you know, which starts with the fact that the first time we went to Saudi Arabia, everything was black and white. All the women were dressed in black; all the men were dressed in white. That’s not what Saudi Arabia is now. Saudi Arabia is a riot of color and diversity, and how the president grasps that, deals with it, tries to encourage it, encourage the good things, diminish the bad things, is a challenge for any U.S. president. Their senior – you can’t look at Saudi Arabia and not say, wow, there’s stuff I’d really like to encourage, and, boy, if there’s anything in my power to make this stop, I want it to stop yesterday.

Ms. Flacks:

This is Marti, and maybe I’ll just add one quick point about the pitfall, which is the framing of the trip. I think if the White House lets this trip be framed as President Biden going to Saudi Arabia in order to secure energy supplies to bring down gas prices, to tackle inflation, I think the trip is going to be seen as a failure, not just for the reasons that Ben has said, because they’re unlikely to deliver, but because even if they were to deliver, it’s going to look like the U.S. president going hat in hand to an unsavory foreign leader and asking for help, and that’s not going to play well on either the left or the right. I think, alternatively, if they can push the framing that my colleagues have been talking about, about the broader U.S. interest in the region, the opportunities to improve relationships with Israel, the opportunities to
continue the or strengthen the reform process in Saudi Arabia that Jon was just talking about and think about this in terms of the medium-term and long-term goals, I think there's some willingness to think about and consider those opportunities, and see this trip as part of a broader strategy. I think if it's seen as a short-term tradeoff, it's inevitably going to be a failure.

Operator: Next, we have Barbara Usher with the BBC. You're open.

Barbara Usher: Hello, can you hear me?

Mr. Alterman: Yes.

Ms. Usher: OK. Thank you.

A couple of questions. One is – was Israel's entry into CENTCOM was mentioned as opening a lot of doors, potential doors combined with the Abraham Accords. You've already said you're not expecting a big breakthrough on Israel-Saudi Arabia relations, but do you expect any movements on this regional security initiative while Mr. Biden is in the region?

Secondly, a question about human rights. What would be like a concrete deliverable on human rights that might mitigate this image of Biden meeting with an unsavory leader for short-term gains? And then thirdly, political damage of various constituencies – within various constituencies and agencies was mentioned. How much political damage do you think he could face? And do you think the fact that this is sort of framed in the wider geopolitical concerns of dealing with Ukraine and Russia and all that has helped to make it more palatable to those who would otherwise not have supported it?

Thank you.

Ms. Harding: I guess I’ll take a stab at the regional security cooperation thing. This is Emily.

I think this is one of those strange issues where the quieter it is, the more successful it will be. For a lot of these constituencies, for all of the countries that Biden's going to visit on this trip and the GCC folks, advertising strong relations with Israel is not going to be popular. For Israel, advertising very strong relations with some of these Middle Eastern countries is going to be popular, but not. So huge breakthroughs aren't likely to, number one, happen, and number two, be broadcast widely.

The way these relationships have been successful is if it has been at more the working level, and on – I don't want to say a case-by-case basis, but in a
sector-by-sector basis; you know, it can refer there are stronger ties on things like intelligence sharing. It can refer there are stronger ties on things like security cooperation. But then something like overflights is going to be sort of a different story, and I’ll let Jon take that.

I would expect that there will be presidential support for these kinds of closer ties, but it’s not the kind of thing that somebody at the presidential level would negotiate. I will let Jon disagree with me on all of the above, though. Over.

Ms. Flacks:

On the human rights front, to be honest, I have to say I don’t think that there are specific commitment that we can expect the Saudis to make that would sort of compensate for – yeah, the fact of the presidential visit. I think, obviously, there are some things they could do like releasing detainees that would signal that they are listening to us on human rights issues. I don’t think that compensates for the optics. I would put the emphasis more on what President Biden and the administration do on human rights issues to show that they are – they continue to be committed and that they understand the tradeoffs that they are making, so some of the things that I mentioned earlier like raising these particular cases, like meeting with journalists and setting a good example for how heads of state and how governments should engage the civil society.

Most presidential visits – at least when I worked in the White House – we would almost always meet civil society activists, either publicly or privately, depending on the circumstances of the country. We would certainly always do press anywhere we went. So signaling, you know, best practice on those kinds of things, I think, is really important, as well as raising the specific cases. And then thinking about, more broadly, the kind of human rights issues that the situation nods to, which are attacks on journalists, so the administration has launched a number of new initiatives to support journalism around the world, and I think this is a good opportunity for them to highlight those, to think about how they could work on or apply those initiatives to Saudi Arabia and other countries in the Middle East and kind of package this as an acknowledgment.

I think trying to hide the fact that this is – that this is a concession to, you know, someone that even President Biden has made clear he would rather not engage with is a waste of time because they are not – they’re not fooling anybody. The best they can do is put it in the context of it’s a tradeoff that we’re making, and we are going to do our best to compensate for that in other ways as well as get something concrete – or many things concretely out of this visit to make it worth it for us to make that tradeoff.

Mr. Alterman:

Let me just take some of the sort of Israel things. I think you are going to see some overflight movement. You know, one of the things – I saw a piece today
that said that Brett McGurk was doing some advance for the trip. He flew directly from Tel Aviv to Saudi Arabia, to Riyadh – or I guess Jeddah – Riyadh or Jeddah, I can’t even remember where this trip is going to. The government is mostly in Jeddah for the summer.

Anyway, it was a direct flight, and I think you are going to see some normalization of travel. And it’s especially important with the Abraham Accords. And you have some of the Israelis going to the UAE, and as somebody who was in the UAE in May – (laughs) – I mean, you had a lot of Israelis – a lot more than I expected – and they were not shy about making clear they were Israelis in public.

So I think you are going to see something on that. You’re going to see something on handing over of these Egyptian islands in the Gulf of Aqaba, Tiran and Sanafir, back to Saudi sovereignty. It’s a sort of old, and technical, and not all that interesting story, but it basically means that Saudi Arabia has agreed it will allow Israeli shipping to go to Eilat. So I think you’re going to see sort of things like that, which is – you know, my colleagues have suggested, you know, lower-level officials can sort of work out all the details and it can be on a deliverable list.

In terms of political damage, yeah, I think that during the Trump administration there were a lot of Democratic politicians who saw President Trump’s closeness to Saudi Arabia, which was unapologetic and unreserved, as sort of morally – an example of moral turpitude. And the statements that the president made about how the crown prince – you know, maybe he did, maybe he didn’t, all those kinds of things, I think, got a lot of Democrats very much online that there’s something unabashedly morally objectionable to dealing with Saudi Arabia. The war in Yemen became another manifestation of people’s moral concern with Saudi Arabia.

The war in Yemen is honestly very complicated, because to my mind, coming from the outside, there’s a lot of moral objectionability going on, but a lot of it is committed by the Houthis, who not only shell civilian areas – I mean, unabashedly shell civilian areas in Saudi Arabia, who use aid as a tool of war, who are trying to use the aid business to get bribes from people delivering aid as a way to sustain their government. And I think that the Iranians are not taking responsibility for everything the Houthis do, but they’re happy to sort of poke the Saudis through giving technology, weapons, and money to the Houthis.

And so what I’m concerned about with the way some Democrats talk about Yemen is you essentially give the Iranians veto power over the U.S.-Saudi relationship, because the Houthis won’t stop fighting as long as they think they’re going to get a better deal in the future. And U.S. pressure on Saudi
Arabia to make a deal could be seen as giving the Houthis more reason to hold back.

The Saudis have gotten much more skillful and have become much more restrained about targeting. The Saudis have been making a lot of political and diplomatic moves that suggest that they are ready to resolve this conflict in a way which frankly is going to give the Houthis a lot more power than they had. And I think, to my mind, congressional Democrats and others in the Democratic Party, who’ve been rightfully concerned about Yemen, have to see Yemen not as a mere consequence of Saudi overreach but as a conflict that needs resolution where the Saudis are doing responsible things to nudge this in the right direction.

And I think that we’re going to get more things from the Saudis on Yemen. But the solution is not just from Saudi Arabia. And you can lean so much on Saudi Arabia that you’re actually helping the Houthis and the Iranians, who in many ways are more concerning than the Saudis, and you don’t move the conflict any closer to resolution. You lead it toward greater warfare. And that seems to me to be a mistake.

Operator: And we have time for one more question, and that will be from Aamer Madhani with AP. You’re open.

Aamer Madhani: Hello?

Mr. Alterman: Yeah, we got you, Aamer.

Mr. Madhani: Hey. Thank you.

So I have two questions. One you sort of alluded to, Jon, with the imagery. But is there any concern of MBS or the king embarrassing or overtly making it clear that the pariah marks or the declassifying of the Khashoggi report was not acceptable?

And then, secondly, I was also just interested, from whomever would want to take this, in the broad assessment. Jon, again, you alluded to the Trump relationship with the Saudis and his moral turpitude. But substantively, how much has the Biden Middle East policy substantively changed from the Trump administration? They’re sitting down with someone he called a pariah. Not much attention has been given to Israeli-Palestinian peace process in the early going of this administration. And after the early going even with Erdoğan trying to keep some distance, Biden was pretty effusive last week in Europe about Erdoğan when he needed him.

I think the odds the Saudis would try to embarrass the president in this trip are relatively low because I think it would damage precisely the kinds of
strategic things they’re trying to do. So I think their incentives for cooperation are high. I really – I don’t think that you could make an argument that the Biden administration’s strategy is similar to the Trump administration’s strategy, both in terms of welcoming senior Saudi leaders into the White House, saying all kinds of effusive things, touting weapons sales and investment and making it seem like a partnership. I think there is a very clear distance; there is an effort to sketch out broad areas of work we will do together. A lot of this is not going to be done at the level the Saudis often like to deal with, the president and the king, but it’s going to be done at the level of bureaucrats, and I think that represents an American preference.

And again, I think that all this suggests that we have a lot of work to do and we’re going to get on and do it. I think, as I recall, the – you know, I was talking to people on the campaign; they were talking about sort of taking a year to reevaluate the U.S.-Saudi relationship. It’s been two years since the president said that MBS should be treated as a pariah, and I think this is a cautious reengagement, and I don’t think you’re going to have the president say anything like President Trump had said, basically saying it doesn’t matter whether the crown prince was involved in the murder of Jamal Khashoggi and it doesn’t matter how they behave internally. I think, to the contrary, you’re going to see the president talking about the importance of continued reform in Saudi Arabia. And again, I think it all – I think that the effort is going to be forward-looking about how much work we have to do and not about satisfaction with how great a relationship we have. There’s a lot of work to do in this relationship, and I think the Biden administration is saying we’re going to get on and do it across a wide variety of areas.

Operator: And speakers, please go ahead with any closing remarks.

Mr. Alterman: I think we’re good.

Emma Colbran: All right, well, thank you all for – sorry. Thank you all for joining. We’re going to have a transcript that will be ready in a few hours so you can keep an eye out for that. And if you didn’t get to ask your question or you’d like to follow up with our CSIS experts, please feel free to email Paige Montfort at pmontfort@CSIS.org. Again, thank you, everyone, for joining, and we’ll have the transcript soon.