

**THE NEW GEOPOLITICS**  
MIDDLE EAST

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# **ISRAEL IN THE MIDDLE EAST**

## **The next two decades**

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# ISRAEL IN THE MIDDLE EAST: The next two decades

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## **FOREWORD**

This paper examines some of the major trends likely to shape the Middle East over the next 10 to 20 years, evaluating how these trends will alter the threat environment surrounding Israel. Though necessarily speculative, this endeavor poses important policy questions that should be addressed today, whether by Israel or by the new Biden administration in the United States.

Mapping specific scenarios is impossible decades ahead of time, and we make no claim to predict the future. Still, it is worthwhile and necessary to consider where likely trajectories may lead. Some of the scenarios examined are more likely than others to materialize. Climate change or technological advances, for example, are already having significant impact. Other trends may never come to pass — but the magnitude of their consequences, should they materialize, mean they require attention nonetheless. To this end, the scenarios examined here are meant to illustrate the potential consequences of significant regional trends, not explore every possible picture of the Middle East's future.

The paper details the region's trajectory on three broad levels: transnational trends that will shape the terrain on which regional politics is conducted; shifts in regional geopolitics; and changes in world powers' interactions in the Middle East.

While the full text of this report represents the views of the lead authors alone, several colleagues made invaluable contributions to its ideas during interviews and other discussions. In particular, parts of this report include contributions from or were written in consultation with Eyal Tsir Cohen, Sharan Grewal, Ryan Hass, Shadi Hamid, Suzanne Maloney, Bruce Riedel, Shibley Telhami, and Tamara Cofman Wittes. The authors further thank the following individuals for their valuable input to this report: David Dollar, Kemal Kirişçi, Amanda Sloat, and Angela Stent for expert advice and consultation; Ted Reinert and Rachel Slattery for their excellent editing and layout; two anonymous reviewers for their valuable feedback; and Erik Yavorsky and Angela Chin for their essential research support.



## EXECUTIVE SUMMARY

Israel enters the 2020s looking toward its region from a position of confidence. Israel recently signed treaties to normalize relations with the United Arab Emirates (UAE) and Bahrain, and begin a normalization process with Sudan, deepening and making public dramatic shifts in Israel's regional position. Relative to its neighbors, Israel enjoys military prowess and economic strength, despite the heavy toll of the ongoing COVID-19 pandemic. In some ways, Israel has never been safer. Still, in a tumultuous region, several pillars of Israel's successes rest on uncertain foundations. With a new administration in Washington, and as regional and global changes continue at a stark pace, new and emerging threats risks threaten to challenge Israel's safety over the next two decades. In some instances, swift and decisive changes in policy are in order.

These threats will emerge on three levels: transnational trends which affect every country in the region; changes in the outlooks of important regional countries, whether partners of Israel — public or discrete — or its outright adversaries; and the trajectory of great power dynamics in the region, especially those involving the United States, Russia, and China.

Of the transnational trends which may shape Israel's threat environment, climate change and related effects, governance failures and economic shocks, and the spread of new and newly accessible military technologies stand out as particularly important in thinking about the future of the region itself. Alone, any of these trends could lead to a meaningful threat to Israeli security or well-being. In combination, they point to a region in which regional governments, including Israel's neighbors, struggle to maintain their control as cross-border crises mount and non-state actors have more powerful tools at their disposal.

Israel has depended on security cooperation with its neighbors for decades to cope with non-state threats. Of these neighbors, the Palestinian Authority (PA), Jordan, and Egypt are the most important. Given challenges to their models of governance and ongoing economic woes, these governments are each at risk of instability. Meanwhile, of Israel's regional adversaries, both Iran and Hezbollah in Lebanon also could see domestic unrest, which could improve Israel's position, but offer no guarantees of such improvement. Unrest in Israel's new partners in the Arab world, including Saudi Arabia, could bring to power more hostile rulers. In general, while sentiment in the Arab world has improved Israel's position in some quarters, public opinion among the vast majority of Arabs remains, at core, far more sympathetic to the Palestinians and wary of cooperation with Israel. Public opinion may not always directly shape politics, but its potential to do so, as it did in 2011, remains potent.

Great power politics in the region stand to undergo important shifts throughout the coming decades, with some already underway. For Israel, the greatest questions regard the United States and the bipartisan commitment to the American special relationship with Israel, its desire for engagement with the region more broadly, and its burgeoning rivalry with China. Should the trajectory of American retrenchment continue, Russia and especially China seem likely candidates to play a greater role in regional geopolitics. Beijing's interests as a massive energy importer from the region will likely shape its policy choices, and more assertive Chinese regional policies could leave Israel either to navigate mounting U.S.-China competition in its neighborhood or to face the prospect of a dominant external power indifferent to its core interests.

Many of these developments are beyond Israel's direct control. They necessitate preparation but involve few policy shifts. Over other issues, however, Israel does have meaningful influence, despite widespread perceptions in Israel to the contrary. In these areas — most notably the U.S.-Israeli relationship — Israel can and should act. Israel's policies toward the Palestinians, which were largely irrelevant with the Trump administration, will be crucial to the health of these relations in the long term. The meaningful challenges facing this relationship are further exacerbated by its China-related dimensions. Failing to act to preserve this relationship would risk undermining a central pillar of Israel's national security, while further raising important moral and political considerations. Israel's current sense of strength must not lead it to complacency.

## INTRODUCTION

Israel entered the 2020s in a position of national confidence, with military prowess far exceeding that of its neighbors and a strong economy, the COVID-19-related crisis notwithstanding. While the Middle East's profound transformation of the

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past decade has produced new threats, it has also weakened many of Israel's potential adversaries. Israel's main security concern of recent years, the rivalry with Iran, has also opened the door to new cooperation with important Arab countries. Late in the Trump administration's term, Israel signed treaties to normalize relations with the United Arab Emirates and Bahrain, and began such a process with Sudan, deepening and making public relations that have been developing for decades. Israel also has important ties to Saudi Arabia, adding these Gulf countries to the ranks of Egypt and Jordan, which already had formal peace treaties with Israel. Domestically, the 12 months leading up to August 2020 were the first since 1964 with no civilian casualties from terror attacks (one soldier was killed during that time).<sup>1</sup> For policymakers and publics in Israel, the United States, and elsewhere, this new reality has changed basic assumptions about Israel's security and national trajectory, giving the strong, and in some ways correct, impression that Israel has never been safer.

Regional and global conditions continue to transform, however, and Israel's current sense of confidence rests on impermanent advantages. Key pillars of Israel's security will come into question in the coming two decades, necessitating important changes — today — to Israel's national security and diplomatic policies.

Existing and emerging factors make deep instability likely to continue in the Middle East in the coming two decades. Climate change may well be the most far-reaching of these. The Middle East of the future will see more frequent droughts; reduced flows in essential rivers in Syria, Iraq, and elsewhere; a rise in sea levels that will threaten, over several decades, to inundate low-lying regions of the Gulf and the Nile Delta in Egypt; all while rising summer temperatures could make vast swaths of the Gulf region all-but-uninhabitable. In combination, these extreme conditions among several of the region's countries, including some of its poorest and most populous, will raise the prospects of economic failure, regime instability, and resultant major

new migration and refugee flows in both the immediately affected countries and in others, including several that are highly consequential for Israel's security, like Jordan and Lebanon. New military technologies, meanwhile, threaten to affect, and in the extreme even render partially irrelevant, Israel's qualitative military edge, making non-state actors and weak states into serious threats over the next 10 to 20 years. The plummeting costs of precise, unmanned platforms and weapons — from easily coordinated drone swarms to large numbers of precision missiles that may overwhelm missile defenses — will pose new risks to advanced militaries. The development and proliferation of cyber technology and knowledge will likely continue to play a major role in future conflicts as well. Cyber operations are already cheap, easily replicated, and hard to attribute to an attacker. While cyber defenses have generally outpaced the abilities of most actors, advanced technological countries, which are more exposed to attacks, may not be able to keep up in all cases.

With these technological changes and many we cannot foresee, seemingly weak states and non-state adversaries might be able to challenge the advantages enjoyed by advanced military powers. Israel already invests heavily in countering these threats, and technological advances will often operate in Israel's favor, but the proliferation of cheap technology suggests a possible long-term “flattening” of some — though not all — offensive capabilities and power. It may also mean that non-deterrable actors — those who, among other things, have no home-front to protect — may become even more consequential. In a reality which sees non-state actors gain possession of game-changing technologies advanced economies will need to adopt different tools and doctrines in addition to producing their own technological advances.

Widespread domestic economic and institutional weaknesses will also continue to threaten the stability of many of Israel's neighbors. The structural causes that produced the region's post-2011 upheavals remain in place — or are exacerbated — in most Middle Eastern states, compounded further by subsequent crises, including the spread of COVID-19. This paper will touch on some of the main dynamics in Iran, Saudi Arabia, Egypt, Lebanon, Jordan and the Palestinian territories. Instability in the region writ-large could contribute again to migration and refugee flows, with dramatic effects on neighboring regions, most notably Europe. From the Israeli perspective, and given the gap between public opinion and the governing regimes in these countries, domestic dynamics could quickly change their regional postures, possibly worsening Israel's position significantly. Countries that currently pose no threat to Israel may become potential foes, with new alliances behind them. Most immediately, these countries could lose control over areas near Israel, opening space for non-state actors armed with new technologies.

Now often set aside, Palestinian affairs naturally hold particular consequence for Israel's future. Palestinian institutions and politics are in disarray, internally divided and marginalized by former regional backers. The Palestinian leadership was estranged from and marginalized by the U.S. under the Donald Trump administration. Following the Israeli-Arab normalization agreements, the Palestinian national movement is more isolated than it has been in decades. While these developments did offer Israel temporary shelter from American pressure on the Palestinian issue, they did not resolve some of the most fundamental questions for Israel, on its own character and democratic well-being, or its internal security. They did not, moreover, remove the significance of the issue for Israel's international standing, including

with the Biden administration. Palestinians retain widespread public appeal in many countries in the region and the world. In the event of changes to governments in the region, would-be adversaries could again use this issue to rally regional publics. A collapse of the Palestinian Authority could also dramatically worsen Israel's domestic security. Finally, Israeli-Palestinian affairs may well become more consequential, not less, to U.S.-Israeli relations in the future.

New threats to Israel — as well as a general weakening of its position — could also arise from global geopolitical changes and long-term shifts to the Middle East policies of world powers. The opportunism of Russia in the Middle East and rising economic power of China coincide with American reticence to engage in the region, upending the structure of world power politics in Israel's vicinity. The two previous — and otherwise very different — American presidents already sought to reduce U.S. commitments in the region, and this rested on deep and probably lasting trends in American public opinion. As many Americans continue to argue their country's interests in Middle Eastern affairs are declining, China and several European countries may see theirs increase, the former due to dependency on energy imports, and the latter due to fears of renewed or increased refugee flows.

Adding to the region's uncertain position is the heightened, and potentially increasing, global competition between Washington and Beijing. This contest has the potential to devolve into outright rivalry, with technological as well as economic competition, necessitating costly choices for countries like Israel, which relies heavily on trade, technological innovation, and connectivity, as well as on its partnership with the United States. This same rivalry may pull the United States partially “back” into regional affairs, but would more likely turn U.S. attention elsewhere, while important regional dynamics become subservient to global ones.

Several of these trends coincide to affect Israel's relationship with the United States, a central pillar of its strategic posture. The relationship, though very strong, faces deep structural challenges. U.S.-Israeli ties are threatened by partisanship, with a growing gap between Republican and Democratic support for the relationship, generational ideological shifts, with younger voters far less likely to support Israel than their elders, and general American reluctance to commit resources in the Middle East. Skepticism of Israeli policy toward the Palestinians is rising on the American political left and even among younger Americans on the right.

Israel has the power to affect some of these developments by shifting or adapting its policies today. Some of these shifts would require considerable political will and significant changes of course — most notably on the Palestinian front. A failure to do so, however, would risk far worse options in the future.

## TRANSNATIONAL TRENDS

At a region-wide, and even global level, overarching trends will produce meaningful shifts in the coming decades. In this section we outline three such trends: climate change and migration, governance and youth demographics, and advances in the technology of warfare. At a time when regional governance continues to show deep, structural weaknesses, these first two trends promise to act as stressors, generating and exacerbating crises that regional governments are ill-equipped to manage. The resulting instability could upend politics in the region as a whole, and though its direct effects on

Israel may be limited in the medium term, several of its neighbors could see challenges to the foundations of their political systems. Although indirect, the effects on Israel will be deep. Developments in the technology of warfare, meanwhile, could lessen the advantage of state security forces over non-state actors throughout the region, directly threatening Israel's qualitative military edge.

The ongoing COVID-19 pandemic points to the degree to which transnational trends outside of Israel's control can upend its security picture. It is, further, an example of the kind of shocks which can create dramatic fissures in states with poor governance and even in those with functioning institutions, like Israel itself. The pandemic's effects on the region — especially those from the unfolding economic crisis — remain far from clear as this report heads to publication, yet they seem likely to further challenge the stability of regional governments. These include Israel's neighbors, whether those it has long relied on for security cooperation, or others such as Lebanon whose existing challenges may be exacerbated.

## Climate change and related effects

The Middle East will likely be one of the hardest-hit parts of the globe from the effect of climate change.<sup>2</sup> In a dry region, dependent on major rivers, lessened average rainfall would have dramatic economic and human consequences, depending in part on government decisions regarding desalination and proper water use. In a hot region, where the combination of high summer temperatures and humidity already limit the time one can safely spend outdoors in certain Gulf countries, rising temperatures will be acutely felt. And in a region of populations clustered along coastlines, significant sea level rise could mean the disruption of the lives of millions.

The 2017 Arab Climate Change Assessment Report finds that “all projections show that temperatures will rise over the Arab region during this century.” At mid-century, its moderate aggregated climate change projection shows an increase of 1.2 °C–1.9 °C (1.3 °F–2.1 °F), while its more severe projection shows an increase of 1.7 °C–2.6 °C (1.9 °F–2.9 °F).<sup>3</sup> In parts of the region, particularly the Gulf, life-threatening heat waves already plague several countries each summer. With time, these will grow in regularity and intensity, and one 2015 paper stated that combinations of high temperatures and humidity will make parts of the Gulf near-uninhabitable by 2100, and dependent on expensive means for cooling that would require resources that may be less abundant in the future.<sup>4</sup>



**Increasing water scarcity, exacerbated by climate change, poses an especially stark challenge in the Middle East.**

Increasing water scarcity, exacerbated by climate change, poses an especially stark challenge in the Middle East. Already the region faces enormous stresses due to the lack of water resources, and water stress will continue to affect the Middle East and North Africa more than any other region. The World Resources Institute

rates 17 countries as facing extreme water stress. Of them, 12 are in the Middle East and North Africa.<sup>5</sup> While several of these countries, most notably Israel, desalinate water to meet their needs, this requires intensive energy and financial commitments not available to many countries in the region. In 2015, the World Resources Institute ranked countries by the water stress they are projected to face in 2040 — and 16 of the top 25 are in the region.<sup>6</sup>



The region's essential rivers will face heightened stress from declining rainfall rates, with increasing water withdrawal driven by population growth, and, near their mouths, rising sea levels threatening salt-water inundation. A 2014 report by the Intergovernmental Panel on Climate Change notes that a "reduction in rainfall over northern Africa is very likely by the end of the 21st century."<sup>7</sup> Modelling conducted by the Regional Initiative for the Assessment of Climate Change Impacts on Water Resources and Socio-Economic Vulnerability in the Arab Region (RICCAR) show that water flow will decrease by more than 50% in the Euphrates River and by 25% in the Tigris River by 2050.<sup>8</sup> And a 2017 World Bank report stated that the Middle East and North Africa will have the greatest expected economic losses due to water-related scarcity of any region, at an estimated 6 to 14% of GDP by 2050.<sup>9</sup> The same report highlights that "flood and drought risks are increasing and are likely to harm the poor disproportionately."<sup>10</sup>

Rising sea levels pose a distinct, and potentially catastrophic, phenomenon. The Intergovernmental Panel on Climate Change projects that sea levels in the Mediterranean will rise by 0.3 to 1 meter this century.<sup>11</sup> Such sea-level rise in the Gulf and Mediterranean will create severe problems for many countries along these bodies of water, especially those with heavily populated, low-lying coastal regions. Egypt, with its low-lying Nile Delta, is particularly at risk.<sup>12</sup> Close to 25% of its population of 100 million lives in the low-lying coastal zone, while 30 to 40% of its agricultural production is located in the delta.<sup>13</sup> A 2007 World Bank report projected that a 1-meter sea-level rise would displace 10% of Egypt's population,<sup>14</sup> while other estimates are even more severe.<sup>15</sup> A 2012 report, prepared for the United Nations Development Programme, projected, that Egyptian economic losses to climate change could reach several hundred billion EGP (several dozen billion U.S. dollars) per year by 2060.<sup>16</sup> These projections necessarily involve a high degree of uncertainty as to scope, but the severe risk is clear. In Israel, too, a large part of the population lives along the coast. While Israel would have greater capacity to mitigate the risks to infrastructure in major population centers, it is largely unprepared to do so at present and the resources required would be a major strain on the country's finances and its institutions.

The effects of these changes will not be limited to human suffering or economic damage alone. Security risks will necessarily follow.<sup>17</sup> Looking forward, climate-accelerated migration will continue to challenge Middle Eastern governments' abilities to maintain stability as their citizens move internally, while also drawing high European interest as many leave the region. Further, competition over water resources could stoke political tensions, as with the much-discussed Grand Ethiopian Renaissance Dam being built in Ethiopia on the Blue Nile, with effects downstream in Egypt.<sup>18</sup> For Israel, desalination technologies have alleviated its water scarcity problem, but control of water resources remains a potential flashpoint with both Jordan and the Palestinians. In Gaza, in particular, rising levels of pollution and salinity make much of the groundwater undrinkable, greatly exacerbating the humanitarian crisis there and again raising tensions with Israel, as the authors, along with other colleagues, have detailed in much greater length elsewhere.<sup>19</sup>

Climate change is not merely a future prospect in the region. While it is outside the scope of this report to judge just how much of the post-2011 upheaval in the Middle East and North Africa can be traced to climate change, several studies have connected the region's turmoil to climate-exacerbated stressors such as drought.<sup>20</sup>

While they may not be a primary cause of specific upheavals, climate effects will necessarily further burden overstretched institutions and government resources.

Each of these climate-related challenges would create further political problems for a region which can ill-afford them. The region's political systems, rigidly constructed and likely to be overburdened by an array of daunting tasks arriving on shorter timelines, seem especially poorly equipped to meet the challenges posed by climate change. As will be the case elsewhere in the world, wealthier countries and regions will be better poised to mitigate the effects of climbing temperatures, declining precipitation rates, and rising sea levels, but no country in the Middle East and North Africa will be able to escape these changes entirely. Further afield, crises produced or worsened by climate change could produce new waves of migration from the region, meaning that outside actors — especially in Europe — will also have an interest in climate mitigation and adaptation in the Middle East and North Africa.

## Governance and demographic stressors

In 2011, long-standing failures of governance in the Middle East and North Africa left leaders unable to cope with rising economic and political challenges. Across the region, weak political and economic institutions could not manage the pressures of produced by rising youth populations, among several other factors. As such failures of economic and political governance reached points of crisis, regional publics rose in protest. The ensuing unrest, which turned violent amid government crackdowns in countries such as Syria, upended regional geopolitics and heightened threats to other countries as well.



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Today, the stressors that produced the uprisings in 2011 remain in place or have even multiplied, while the institutions of governance in the region are no better equipped to manage them. Economic growth, which was strong in the years before the Arab uprisings of 2011, will not be enough to avoid mass discontent. Inclusive growth, as Hafez

Ghanem writes in his study of the aftermath of the uprisings, is a far more important goal for Arab governments.<sup>21</sup> To this point, inequalities across age, gender, and geographic lines, among others, have meant that periods of growth do not always produce cross-societal benefits.

One particularly relevant stressor lies in the relative youth of the region's populations. Many other factors contributed to the Arab uprisings, with an array of pressures over-burdening weak institutional structures, but the region's youth — and its governments' inability to provide them with economic opportunities — illustrates the deep, ongoing nature of the problem. While in some countries the largest part of the youth bulge has already passed, demographic profiles in the region still skew young. Further, most governments still cannot create enough jobs to employ their young people.<sup>22</sup> As Nader Kabbani writes, "youth unemployment rates in the region have been the highest in the world for over 25 years, reaching 30% in 2017."<sup>23</sup>

This age structure could present an opportunity to the region. It could, as Elhum Haghighat writes, “be considered a one-time ‘demographic gift’ .... This ‘demographic gift’ will be there for another 20 years (until 2040) in most of the MENA countries.”<sup>24</sup> Until around that year, the region’s economies could still benefit from taking advantage of their large youth populations.

But failure to take advantage of this window of opportunity would be disastrous for the region. Haghighat notes that should this youth bulge pass without economic and political opportunities, it would create “unprecedented stress” on countries, raising the likelihood of civil unrest and conflict.<sup>25</sup>

A few of the region’s countries stand out as particularly young. In 2019, Yemen (19.8) had the region’s lowest median age, followed by the Palestinian Territories (20.0), Iraq, and Jordan. When disaggregated from that of the West Bank (21.4), Gaza’s median age (17.4) is lower than that of any other country in the region.<sup>26</sup> As noted, several factors combined in 2011 to overwhelm weak governing institutions and produce mass unrest, but unsatisfied youth were an especially important force behind the uprisings. These especially young countries, then, can be considered to face relatively greater risk of such unrest in the future, provided they are unable to reform their institutions in time to accommodate their youth populations. As the latest available youth unemployment data shows, Yemen, the Palestinian territories, Iraq, and Jordan still have a long way to go in providing opportunities to these populations and in some cases, such as war-torn Yemen, are not even heading in the right direction.

For Israel, Yemen may not be a priority in thinking about the stability of regional actors, but youth frustrations in the Palestinian territories and Jordan should be. Though indirect, threats to the stability of either the Palestinian Authority in the West Bank or the monarchy in Jordan would severely undermine Israel’s security position. Continued instability in Iraq, meanwhile, could lead to greater numbers of refugees moving into Jordan, again burdening a critical Israeli neighbor and partner.

In a young region, the age of Middle Eastern leaders stands out. Succession crises — or the question of future succession — can serve as a potential spark for unrest.

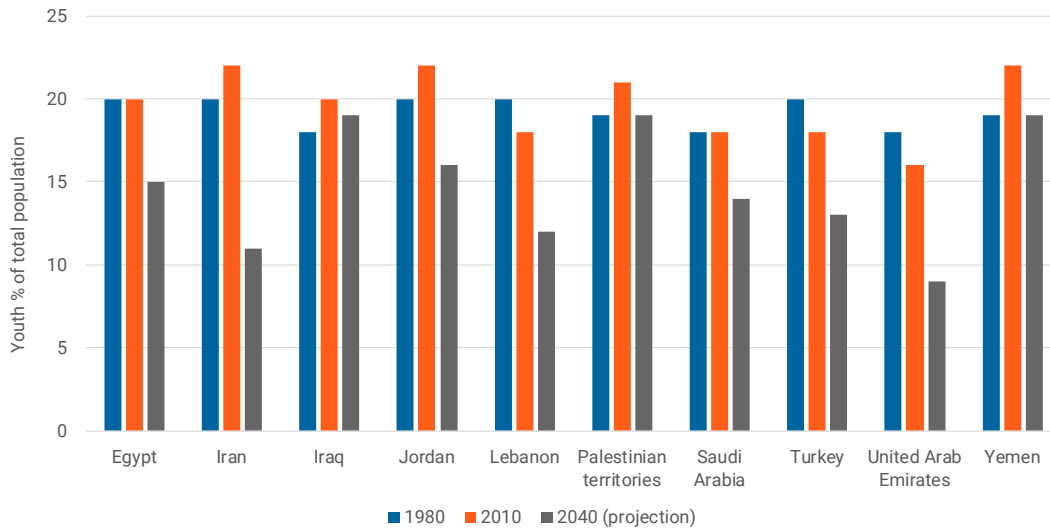
Recent years demonstrated the degree to which regional populations remain animated by their economic and political frustrations. 2019 saw the removal of two authoritarian leaders in the region, with Sudan’s Omar al-Bashir and Algeria’s Abdelaziz Bouteflika ousted by mass protest, even if the significance of their removal for regime transformation may be limited. Further protests have shaken the governments of Iraq and Lebanon. While each of these protest movements arose from a particular mix of frustrations and demands determined by local context, these tremors, which echo the political earthquake unleashed by the 2011 Arab uprisings, show that the region’s revolutionary moment is far from over.

Moreover, in an attempt to control and eliminate discontent, Arab regimes have responded to the Arab uprisings by becoming even more repressive in recent years. Extreme levels of repression can work in the short run by raising the costs of protest so high that only a few are willing to put their lives at risk. Such an approach, however, while providing an illusion of relative stability, risks greater instability on a longer time frame.

From an Israeli security perspective, these upheavals often meant the empowerment of adversaries along its borders. In Egypt, the cooperative regime of Hosni Mubarak was replaced for a time by a more hostile Muslim Brotherhood-led government, while, in Syria, both Iran and its proxies and jihadi militant groups found opportunities amid the chaos of the civil war.

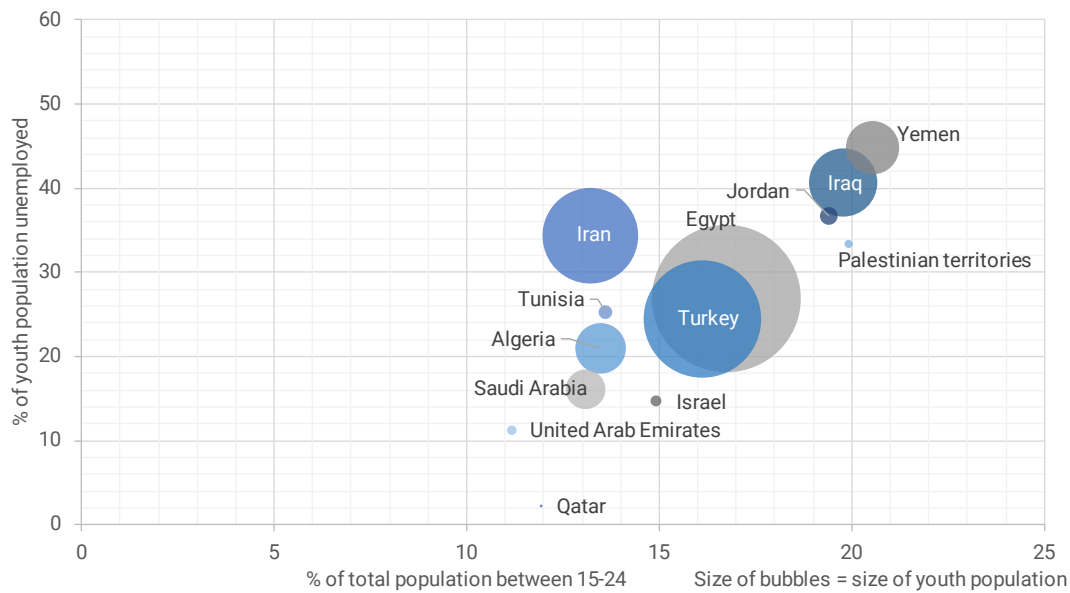
The upheavals did, also, bring Israel diplomatic and security advantages. Mass unrest may have convinced some governments in the region to de-emphasize hostility toward Israel, instead placing their focus on containing domestic frustrations, calculating that the true threat to their continued rule lay at home. Further uprisings, though, could easily remove some of these leaders from power. Even if they remain in place, off-balance governments could seek external foes to distract internal anger, with Israel a likely candidate.

**FIGURE 1: YOUTH SHARE OF TOTAL POPULATION OVER TIME FOR SELECT MIDDLE EASTERN COUNTRIES**



Source: *Elhum Haghighat*, *Demography and Democracy: Transitions in the Middle East and North Africa*<sup>27</sup>



**FIGURE 2: REGIONAL YOUTH POPULATIONS AND LATEST AVAILABLE YOUTH UNEMPLOYMENT RATES**

Source: Central Intelligence Agency, The World Bank<sup>28</sup>

**FIGURE 3: AGE OF LEADERS FOR SELECT MIDDLE EASTERN COUNTRIES**

Country	Leader	Age	Time in Office	Median Age of Population
Palestinian territories	President Mahmoud Abbas	84	Since 2005	20.0 Gaza: 17.4 West Bank: 21.4
Jordan	King Abdullah	58	Since 1999	22.8
Egypt	President Abdel Fattah el-Sisi	65	Since 2013/2014	23.9
Saudi Arabia	King Salman	84	Since 2015	29.9
	Crown Prince Mohammed bin Salman	34	Since 2017	
Iran	Supreme Leader Ali Khamenei	80	Since 1989	30.8

## Technology and the transformation of warfare

Israel today enjoys a decisive qualitative military edge over its many state and non-state adversaries. New — or newly accessible — drones, missiles, and cyber capabilities, among other technologies, threaten to narrow this gap in the coming years.

Israel's chief adversaries have already sought to make up their relative military weakness through new technologies and technological knowledge. Hamas has used small drones to attack Israel. Hezbollah has sought precision missiles which would pose a near-unprecedented threat to Israel's security.<sup>29</sup>



**Israel's adversaries will be able to increase their ability to threaten Israeli targets due to the emergence of several new technological innovations.**

Israel's adversaries will be able to increase their ability to threaten Israeli targets due to the emergence of several new technological innovations. Automated vehicles, moving on roads and through the skies, allow independent actors the tactical advantages in penetrating defensive layers previously

gained only by suicide attackers. Cyber warfare offers new avenues for attacking targets, and allows attackers greater anonymity than overt action. For state and non-state actors, such attacks are especially attractive given that they cost little to carry out and, should defenses prove formidable, can be repeated at low — and in the case of cyber attacks, near-zero — cost until a weak point is discovered.

The most important of Israel's non-state adversaries, Lebanese Hezbollah, is now seeking to transform its large stock of rockets and missiles to operate with far greater precision, with the assistance of its patron, Iran. The conversion of Hezbollah's stock would represent a threat to Israel unprecedented in its recent history. These upgrades only require a small kit, easy to obtain and operate, which allows a rocket to become a far more precise missile.<sup>30</sup> A series of accurate strikes, launched against a country as small and narrow as Israel, could cripple its infrastructure. Israel has effective anti-missile defense systems — an array of the short-range Iron Dome, the medium-range and anti-unmanned aerial vehicle David's Sling, the long-range Arrow 2, and the ex-atmospheric Arrow 3 — but each of these systems is expensive and necessarily limited in number. A relatively cheap arsenal of thousands of low-grade precision missiles could potentially overwhelm the defense systems, especially if targeted in cluster at a small number of targets. (Hamas has already deployed a tactic of clustering non-precision short-range rockets at a single Iron Dome battery).<sup>31</sup> In response, Israel has experimented with laser technologies and other countermeasures to cope with new threats, including drones and clustering tactics.<sup>32</sup>

Further, such a transformation would open a range of vulnerabilities within Israel. Militants operating a swarm of drones or missiles, or perhaps both in combination, could cause enormous damage to Israel's economy, while leaving the entirety of its territory under threat. Indeed, in July 2014, a rocket launched from Gaza that fell in the town of Yehud, near Israel's main international airport, temporarily halted international flights by all U.S. carriers. For a country with very little transportation across its border — effectively a transportation island — this could be a devastating

economic blow if sustained over an extended period of time. The availability of cheap, theater-changing technologies could make even weak groups like Hamas far more threatening.

Other civilian infrastructure would be vulnerable to precise attacks as well. These are few in number, and, though some have the necessary redundancy to continue operating under attack, the redundancy is limited by prohibitive cost. These include civilian ports, power plants, desalination plants, offshore drilling facilities, gas terminals at the coast, the Israeli national water carrier and other major water supply pipelines and canals, and major hazardous material storage facilities. (For example, facilities housing ammonia in Haifa were targeted in 2006 by Hezbollah, which at the time only had imprecise rockets. These facilities have since been removed from the heavily populated city). Military installations will be similarly vulnerable. Airbases, naval facilities, major personnel staging grounds, and, most notably, nuclear facilities will likely be targeted sooner or later.

States will, of course, make their own technological advances to counter these trends, and these may empower governments in the region in ways they haven't been before. New tools will emerge and spread for hacking, surveillance, including of domestic populations, expeditionary military capabilities, and missile defense. There will be, in other words, a continued, asymmetrical arms race in new technology that heightens the stakes in these realms. States may, in fact, become more powerful in some ways, while more exposed to new vulnerabilities in others.

Together, the regional climate and demographic outlook paint a grim picture of the challenges facing the Middle East. As these stressors act as tinder for future crises, trends in technology could leave militant actors with greater ability to challenge their state adversaries, including Israel, for military advantage.

## REGIONAL CHANGES

The geopolitics of the Middle East have been transformed in recent decades. Two decades ago, if an observer wanted to take the pulse of the region, they would first look to the major Arab capitals — Cairo, Damascus, and Baghdad — and then turn to Washington for its reaction. Now, many of the key decisions are made elsewhere, as the United States hesitates to commit resources in the region while Egypt, Syria, and Iraq have undergone debilitating crises.<sup>33</sup> Other countries — including Iran, Israel, Saudi Arabia, and Turkey — have emerged as key regional players in this new geopolitics.

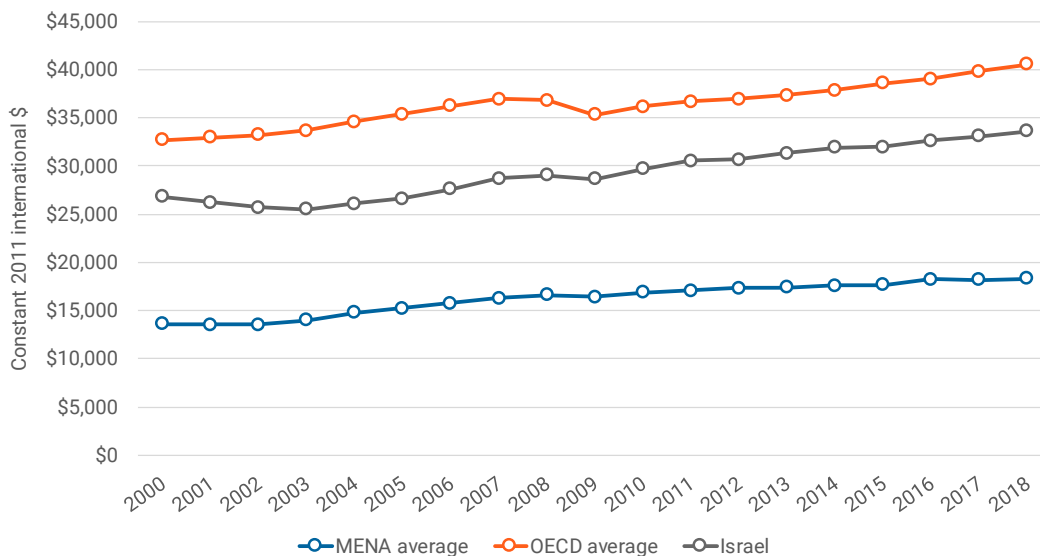
This transformed region offers some advantages for Israel's security. With domestic turmoil consuming the attention of many regional leaders, traditional Arab state adversaries can no longer mount the challenges to Israel they once could. Some of them prefer instead to take advantage of a common cause with Israel — confronting Iran and mobilizing American support for this effort. This process has come to a head of late, with the normalization of ties between Israel and the UAE and Bahrain, moves tacitly and actively supported by Saudi Arabia.<sup>34</sup>

Change is not over, however. 2019, for example, was itself a year of mass discontent and uprising in the Middle East and North Africa. In Sudan and Algeria, sustained popular protest forced the resignations of two long-time autocrats. In Lebanon and

Iraq, governance systems defined by corruption along sectarian lines have been challenged by broad protest movements. In the face of failures of governance, mounting economic problems, and aging leaders ruling burgeoning youth populations, popular unrest seems likely to continue to ripple across the region.

In this section we sketch some of the domestic pressures affecting Saudi Arabia, Egypt, Jordan, Iran, and the Palestinian territories — all cases where change could have profound effects for Israel's future. Each of these national contexts is unique, but in several of them a common picture of potential instability emerges. Across the region, economic systems will continue to struggle to cope with demographic pressures, while climate stressors exacerbate existing problems while creating new ones. Amid rising domestic tensions, real or potential succession crises could provide the spark for unrest, even as shifts in great power attitudes toward the region leave certain rulers with less margin for error in their responses.

**FIGURE 4: ISRAEL GDP PER CAPITA IN PERSPECTIVE**



Source: *The World Bank*<sup>35</sup>

## Iran

No country occupies Israeli policymakers' concern as intensely as Iran. This is not without reason. The Islamic Republic has sought to use proxies in various regional conflict zones to extend its interests. Iran has been involved, to some degree, in nearly every confrontation at Israel's borders and beyond it for decades. Iran's main proxy, Hezbollah, has been Israel's main battlefield adversary since the mid-1980s. Iran helped to forge and fund the organization, which now acts as almost an autonomous subsidiary to Tehran, having served as a fully-fledged partner of the Islamic Revolutionary Guard Corps in many different conflict areas, most notably Syria.<sup>36</sup>

Iran has further backed the small but lethal Palestinian Islamic Jihad, and at times and within limits, Hamas as well. More recently, Iranian forces and Iranian-backed militia have used Syrian territory for operations against Israel, and found themselves



the targets of many dozens of Israeli attacks there. Iran has deftly, and often very effectively, utilized these opportunities to exact a cost from Israel, in part as a means to deter Israeli action against Iran itself.

None of this is likely to change in the coming years, without a fundamental change in Iran itself. Further, Iran's nuclear program, a cause for major international crises over the past decade, is unlikely to go away. Tehran's interest in a nuclear program, despite the enormous cost the country incurs for it, will likely continue.

Israel and Iran's quiet war — a long series of attacks and counterattacks, overt and covert — has remained below the level of full-fledged conflict. Indeed, full-scale war is unlikely so long as deterrence is effective, but over the span of two decades even unlikely scenarios are quite possible. In particular, another conflict between Israel and Hezbollah could emerge from any number of miscalculations by either side, and could draw in Iranian or Iranian-backed forces elsewhere. Given the advances in military technology described above, the danger of such a conflict would be considerable. In Israel, Iran sees a close partner of its main rival, the United States, and one of the only players that can compete with Iran on the regional stage. Further, Iranian leaders see their attempts to engage in the Israeli-Palestinian conflict — through support for the Palestinian Islamic Jihad and Hamas, in particular — as a way to help their image across the Arab world. Rather than be a Shia, non-Arab country in a Sunni-Arab dominated region, Iran can portray itself as a partner in a pan-Islamic cause. By invoking the Palestinian cause, the Islamic Republic's leaders seek to play to Arab publics while calling out the hypocrisy of Arab governments, which have typically offered outspoken rhetorical support to the Palestinians while taking few concrete steps to advance the cause of Palestinian independence and sovereignty.

Tehran perceives the United States, under its various administrations, as leading a web of regional actors — Israel and Saudi Arabia chief among them — intent on constraining and undermining Iran. This web extends to non-state actors in the region, including Sunni jihadist groups, which Iranian leaders have seen as a mechanism for advancing an American conspiracy against the Islamic Republic.

Israel, for its part, relies heavily on U.S. approaches toward Iran. Washington's policies have vacillated in the past decade between the negotiations of the Obama administration to the "maximum pressure" campaign mustered by the Trump administration, to an expected return to diplomacy under Biden. All these approaches carry risks for Israel, and even in its successes the U.S. and Israeli effort to isolate Iran has run up against clear limits. These limits were made clear by the recent U.N. Security Council vote against extending an arms embargo on Iran, in which close American allies Britain, France, and Germany abstained instead of supporting the U.S. position.<sup>37</sup>

Of course, much of the animosity between Israel and Iran depends on the specific nature of the Islamic Republic itself. Indeed, the two countries share no border and have no major bilateral claims of one another.<sup>38</sup> Should there be a fundamental change in Iran, much of the relationship may change.

On the demographic front, Iran has passed the peak of its youth bulge and faces a different problem than much of the region in trying to manage an aging population. With a median age of 30.8, its population is older than most in the Middle East, yet a high youth unemployment rate still creates the potential for discontent among young

people to spark unrest.<sup>39</sup> As our colleague Suzanne Maloney writes of Iran's aging demographic bulge, "As middle adulthood nears, the absence of a promising political or economic horizon has become painfully acute — and not simply for urban elites, but for the larger population of Iran's post-revolutionary baby boom."<sup>40</sup>

The Islamic Republic, now in its fifth decade, faced the deadliest unrest in its history in late 2019.<sup>41</sup> Still, the Iranian political system is structured so as to place insurmountable hurdles in the way of efforts to reform its policies or institutions.<sup>42</sup>

All this could change rapidly should the nature or aims of the regime in Iran change. And while a second revolution in Iran in the near term may be unlikely and the regime is not an entirely closed one, mass discontent clearly simmers within Iranian society. As Maloney writes, "the prospect of meaningful change in Iran forever lies somewhere between unthinkable and inevitable."<sup>43</sup> Should it come to pass, upheaval in this key regional player could take any number of forms — from the demise of the Islamic Republic to a hardening of the regime's iron fist. In the case of internal upheaval, those within the Iranian system who have the weapons and the numbers to take greater power cannot be expected to have any less antipathy for Israel.

Iran could change rapidly under pressure, but the direction of this change — toward more openness or hardliner supremacy — and its timing remain highly uncertain. Policymakers in Israel may hope for a new Iranian revolution, but they cannot base policy on its occurrence any time soon.

## Saudi Arabia

For the last 75 years, the House of Saud has maintained its rule in Saudi Arabia in part by aligning themselves with the United States. In recent years, the United States, Israel, and Saudi Arabia have found common cause in their alignment of interests toward Iran. Indeed, Saudi Arabia and its close partner the United Arab Emirates, stand out for the changes in their rulers' attitudes toward Israel in recent years, the latter even signing a treaty with Israel along with Bahrain, which is heavily influenced by Riyadh.

Among all regional powers, Saudi Arabia also stands out in the degree to which its foreign policy — and some of its domestic dynamics — depend on the personal identity of its leader. Should Crown Prince Mohammed bin Salman (MBS) succeed his father as king, and remain in office for the long term, the kingdom could be shaped in his image for decades to come. Should King Salman be replaced by another member of the family, the kingdom's trajectory could change significantly.

There is, today, intense uncertainty as to the future course of Saudi Arabia, and the U.S.-Saudi alliance is more in danger than ever before. Questions also surround its domestic reforms, its foreign policy orientation, and the very stability of the monarchy. Upheaval in the kingdom, with possibilities ranging from a mass uprising to change in the royal succession plan, would also have significant consequences for the regional strategies of the United States and Israel.

Below are three scenarios for the next 15 to 20 years in the kingdom. Because of the centrality of the reigning monarch in the country's trajectory, the scenarios below hinge on the identity of the king and the succession of power. Adding uncertainty to all these scenarios is the kingdom's acute dependency on the price of oil. Despite the

planned diversification of the Saudi economy under “Vision 2030,” the Saudi economy will continue depend heavily on oil exports for its fiscal well-being. Some speculation exists that hydrocarbon revenue will be close to peaking by 2040, according to a 2020 International Monetary Fund study, which also projects that the Gulf Cooperation Council (GCC) countries could exhaust their financial wealth in the next 15 years without changes to their fiscal policies.<sup>44</sup> Throughout this period, sharp drops in the price oil could spark serious domestic unrest in each of the below scenarios.

The first scenario, favored by King Salman, would see the king rule for another five to 10 years while his son and chosen successor, Crown Prince Mohammed bin Salman, gains experience and improves his international image. Several blunders have damaged the crown prince’s image in most Western countries most particularly the disastrous war in Yemen and his role in the murder of Saudi journalist Jamal Khashoggi in the Saudi consulate in Istanbul.<sup>45</sup>

Mohammed bin Salman tried to portray himself as a reformer eager to modernize the kingdom. Some domestic reforms have taken place, and may continue, but his international blunders and the difficulty of transforming a country with the deep institutional weaknesses of Saudi Arabia and with a sizeable population accustomed to a very wealthy state, make success in achieving both social and economic reforms unlikely. The Saudi leadership hopes that the passage of time, an end to the war in Yemen, and the geopolitics of Saudi oil will gradually wear down opponents of the crown prince and he will be able to recoup some of his losses. This was also the hope of the Trump administration, which was far less critical of MBS than Democrats or Congressional Republicans.

In this scenario Saudi Arabia will be a continuity state. It will avoid major shifts in its foreign policy. The kingdom will remain closely aligned with Washington, with ties to both political parties, and will oppose efforts to reform the politics of the Arab world. It will also continue to oppose Iran and its allies in the region, although it may try to find a way to end the quagmire in Yemen. It will expand ties to China, India, and Japan, its main export markets, while working with Russia to control the supply of energy.

This scenario rests on a questionable assumption: that the crown prince’s image in the United States will not harm the bilateral relationship materially. With Biden entering the White House in 2021, however, the chances of a disruption to the relationship rise dramatically. Biden has stated publicly that Saudi Arabia would be treated very differently under a Biden administration, stating that he would “make them, in fact, the pariah that they are,”<sup>46</sup> suggesting the United States would move toward holding the crown prince accountable for Khashoggi’s murder, a short-term symptom of a longer-term malady in the U.S.-Saudi relationship.

The second scenario is a variant of the first. Instead of a postponed succession, Mohammed bin Salman would become the new king in the next year or two. With little time for Mohammed’s tattered image to recover in the United States and elsewhere in the West, a crisis in Washington’s relationship with Riyadh becomes far more likely, though not guaranteed, with Biden entering the White House. The Saudis could turn to China and or Russia as an alternative, but their military institutions depend deeply on American (and British) arms, so such a shift would not make for an easy replacement.

The one major change in Saudi foreign policy that could occur would be dramatic, public engagement with Israel, following the lead of the UAE and Bahrain. The crown prince's aides already floated the idea of an Anwar Sadat-like opening to Israel in the wake of Khashoggi's murder, hoping that it would reverse the crown prince's plummeting popularity in Western capitals. Bold engagement with Israel would be deeply unpopular with the Wahhabi clerical establishment and many others in the kingdom and the Arab world, but may reflect the crown prince's preferences more accurately than the current Saudi stance.

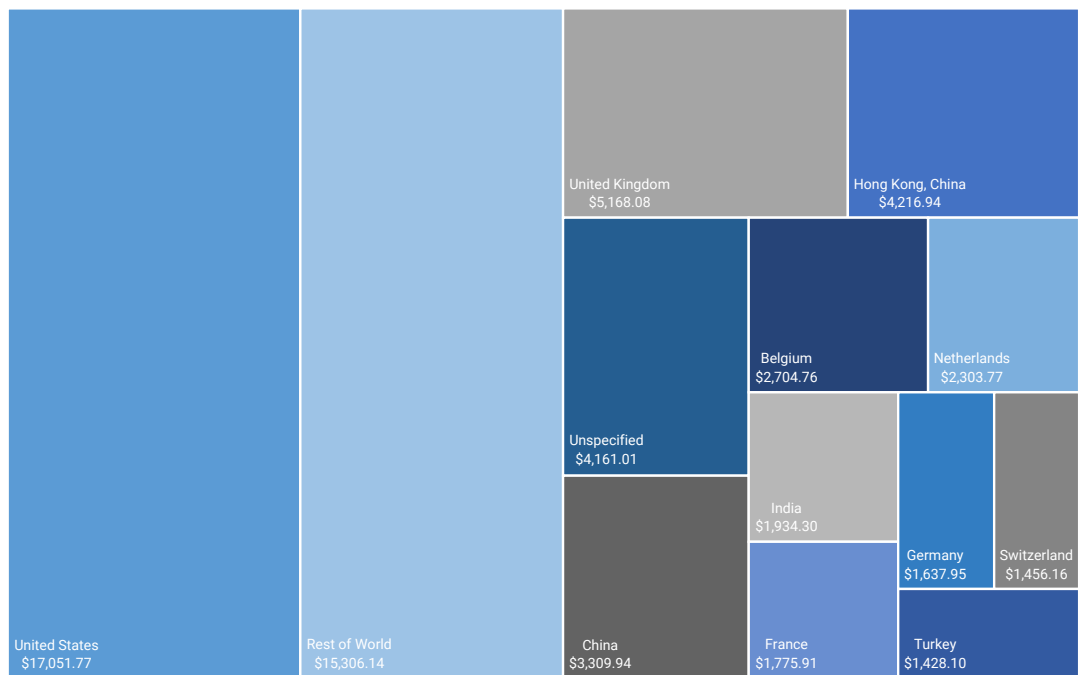
A third scenario — the least likely of the three — would see Mohammed bin Salman removed from the line of succession, with another Saudi prince becoming the heir apparent and eventually king. Mohammed's two predecessors were ousted from the line of succession, so there is ample recent precedent. There is also precedent for the royal family removing a sitting king from office and establishing a new line of succession.

While dramatic, this scenario could be a means for policy continuity from pre-MBS days. The war in Yemen would be easier to resolve without the burden of Mohammed bin Salman's enormous vested interest in the conflict. Policy towards Israel might then remain in the traditional Saudi path.

Finally, there is always the chance of an outright revolution in the kingdom. It remains, at least today, unlikely though not impossible. Were such an event to occur, it could lead to the break-up of the nation, and a dramatic weakening of the position of the remaining constituent states.

For Israel, the policies adopted by Mohammed bin Salman have been central to its newly found openings in the Arab world. His ascension to long-term rule in Saudi Arabia may solidify this reality for decades. Any change in his position may, conversely, quickly swing the pendulum in the opposite direction. Similarly, any instability in the regime at large could spell a significant worsening of Israel's fortunes with regard to the kingdom.



**FIGURE 5: ISRAELI EXPORTS BY TRADING PARTNER, 2017 (MILLIONS OF USD)**

Source: World Integrated Trade Solution, The World Bank<sup>47</sup>

## Regional arms race

Advances in the nuclear program of Iran — which now claims to be free from the constraints of the Joint Comprehensive Plan of Action (JCPOA) — could produce an arms race between Iran and several other countries in the region. With the United States seemingly unwilling to pursue a major conflict with Iran, as demonstrated by the muted response to the Iranian-orchestrated attack on the Abqaiq oil refinery in Saudi Arabia's Eastern Province, Iran's regional rivals may decide their only course of action is to take their defense into their own hands, triggering a Middle Eastern nuclear arms build-up. This would see Saudi Arabia, and perhaps the United Arab Emirates, make its own efforts to develop or acquire a nuclear weapon. These Gulf powers could then be followed by others such as Egypt and Turkey, which could pursue some form of a military nuclear program both out of a sense of security need and also to maintain an already diminished sense of prestige within regional geopolitics.

Such an arms race would, of course, hold dramatic implications for Israel's security. It could go from being the region's lone nuclear power to one of many, and pose new existential threats to its national security.

## Egypt

With the passage of constitutional amendments in April 2019, Egyptian President Abdel-Fattah el-Sissi appears likely to remain in office until at least 2030. The amendments extend his current (second) term from four to six years and make him eligible for another six-year term in 2024. Lawmakers have indicated that they may later revise the constitution again to extend el-Sissi's mandate even further.

Whereas Donald Trump was a staunch supporter of el-Sissi, the Biden administration is likely to put at least some pressure on el-Sissi to liberalize (but not necessarily democratize) his regime, primarily by reducing human rights abuses and opening some space for civil society. A future administration may, having learned from President Barack Obama's failure to sustain pressure on el-Sissi, also pursue a stronger and more prolonged push for liberalization, including by ending the reliance on a national security waiver for U.S. aid. El-Sissi's response to renewed Western pressure will therefore prove a critical juncture.

With Biden in the White House, el-Sissi may concede to U.S. pressure and initiate a limited political and economic liberalization of the regime. Like his predecessor Hosni Mubarak, el-Sissi would create greater space for civil society organizations, permit a modicum of contestation on university campuses and in trade unions, and hold controlled parliamentary elections that allow room for some competition. None of these measures, however, would (be permitted to) threaten el-Sissi's rule, but will instead allow el-Sissi to present a democratic façade to the United States.

This "Mubarak model" would be the most likely response if pressure is significant and sustained, as jeopardizing the \$1.3 billion in U.S. military assistance as well as military-to-military relationships would be risky. Seven years after the July 2013 coup, el-Sissi's strongest constituency remains the military. Rather than building up a ruling party, coopting civilian businessmen, or empowering the judiciary, el-Sissi has instead neglected each of these elites in favor of doubling down on the generals. To survive, he cannot afford to alienate the military, and as such, cannot afford to lose U.S. military assistance, if in fact such assistance would be on the table.

In the absence of significant U.S. pressure, a move to the Mubarak model is still possible, although unlikely. El-Sissi remains preoccupied with the Muslim Brotherhood as his primary national security concern, despite its dismantling inside of Egypt and unprecedented internal divisions. If this preoccupation, with its attendant repression, hasn't changed in recent years, it is difficult to see what new factors short of major U.S. pressure would push el-Sissi to open up even limited political space.

In an alternative scenario, el-Sissi could reject U.S. pressure, remain just as repressive, and potentially move closer to Russia or China. Indeed, el-Sissi threatened in 2013-14 to pursue stronger relations with Russia and China, although what exactly this would mean in practice is unclear. A switch to Russian military equipment would be difficult for Egypt due to issues around the interoperability of weapons systems. Such a shift would depend in part on Egypt's relationship to its two primary patrons, Saudi Arabia and the United Arab Emirates. A more than symbolic shift to Russia and China would only be likely if it coincides with a Saudi-UAE shift towards Russia and China. A turn to Russia or China, or both, could translate into greater ties with Iran, although, again, this would be dependent on whether Egypt remained firmly in the Saudi-UAE orbit. A closer relationship to the Assad regime is more probable, since Damascus, while an adversary to Saudi Arabia, is not nearly the security threat to the Gulf monarchies that Tehran is.

Given the level of repression suffered since 2013, we do not believe a critical mass of Egyptians are likely to attempt to organize a sustained, 2011-style mass uprising,

as illustrated by the fizzling out of protests in September 2019. In 15-20 years, however, the next generation of young leaders may be more willing to take the risk. Were another (large enough) peaceful uprising to materialize, the military would fall under considerable pressure to jettison el-Sissi, just as it did with Mubarak. However, this time around, political forces would be unlikely to permit the military to assume a dominant role in the transition, given their distrust of the military and prior experience with military-managed transitions. These forces would further be unlikely to allow the military immunity for crimes, including mass killings, in which it was directly implicated. This would create strong incentives to for the military to, at least initially, attempt to quell any uprising through sheer force. Whether this posture can be sustained depends, in part, on the protesters' makeup, the military's ability to portray protesters as belonging to an "outgroup," as well as regional and international responses, including from the United States. One fundamental challenge with the repression option is that the soldiers who would need to fire upon their countrymen are conscripts who not only are forced to serve but do so without any of the benefits enjoyed by the officer corps. That vertical split in the military, so long as it remains in 15-20 years, may limit the ability of the generals to sustain repression over any significant period of time.

It is difficult to predict where a future uprising would lead. But one of the key variables is the question of what lessons opposition forces have learned from the 2011-2013 period. If they have learned the importance of consensus, moderation, and most importantly, a rejection of the "military solution," then a lasting transition to democracy is possible. Based on our interviews with members and leaders of the Muslim Brotherhood in exile, there is a realization that rushing for the presidency and foregoing consensus with secular pro-democracy forces was a major source of the very polarization of which the military was able to take advantage. Short of this level of lesson learning, Egypt may run the risk of falling into another round of chaotic transition, which would in turn make more likely another military coup and renewed dictatorship.

The most unlikely scenario would be a descent into large-scale violence. We consider this a true "black swan," because it is hard to imagine a chain of events that could plausibly lead to something resembling civil war. This makes it worth considering — in the event that some of our starting assumptions, as outlined above, do not hold, or if the regional environment changes to the extent that it alters the calculations of relevant actors inside of Egypt.

One possible scenario would see large numbers of Egyptian protestors, fed up with el-Sissi's repressive rule but disillusioned with how a peaceful uprising played out in 2011, incorporate violent methods in their strategy against the regime. Ultras youth groups, anarchist movements, and Islamist militants step up attacks against the government and perhaps even one another, outbidding each other for dominance. The military, having been preoccupied running businesses rather than training, and not equipped for handling significant violence, is unable to contain the violence on all fronts. The Egyptian military and security forces, pointing to growing violence, justify greater repression, which in turn has the effect of further militarizing a segment of the protestors. Saudi Arabia and the United Arab Emirates provide military assistance to the el-Sissi regime, while Turkey and Qatar support the protestors-cum-rebels. Egypt descends into a proxy war not unlike Syria or Libya today, with potentially grave consequences for its neighbors.

For Israel especially, instability of any kind in Egypt could have profound consequences — from a heightened terrorist threat in the Sinai at the minimum, to the potential for a long-term threat from the Egyptian state itself.

## Lebanon

2020 saw a huge, deadly blast rip through the port of Beirut. It saw Lebanon approach hyperinflation, with little government capacity to deal with the crisis or take necessary steps to receive aid from international bodies. It saw a government resign and a public increasingly losing faith in the country's system of government.

This system, which allocates government positions along confessional lines, dates back to the founding of the state, with some alterations in recent decades, following the 1975-1990 civil war. Instability is inherent to the delicate balance this system strikes between Lebanese communities — including Maronite Christians, Shiite Muslims, Sunni Muslims, and Druze. The protests of the past year targeted corruption within this system as a whole rather than that of the leaders of any particular sect. This marked a departure in Lebanese politics, which have been defined by sectarian rent-seeking for decades, and underlined the deep well of anger that exists within the Lebanese population toward its leaders.

The 1975-1990 civil war was resolved, in part, through the intervention of an external “leviathan.” This outside power — the Syrian military — stepped in with massive force, overwhelming internal Lebanese conflicts and resolving the security dilemma that had fueled the civil war. That leviathan is no longer present in Lebanon, and with the Syrian state devastated by its own civil war, it shows no prospect of returning.

Instead of the Syrian military, Lebanon now plays host to huge numbers of Syrian refugees. Since conflict began in 2011, following the Syrian government's violent repression of protests, well over a million Syrians have sought refuge in neighboring Lebanon. The Lebanese government estimates that it now hosts 1.5 million Syrian refugees in a total population of 6.8 million.<sup>48</sup> As in Jordan, discussed below, this is not the first refugee wave to arrive in Lebanon, where over 470,000 Palestinians are currently registered as refugees with the United Nations Relief and Works Agency for Palestine Refugees in the Near East (UNRWA).<sup>49</sup> These Palestinians complicate the already complex demographic picture in Lebanon, and the addition of so many Syrians only further threatens to upend the country's delicate stability. Taken together, the uncertain stability of the Lebanese political system, the anger made clear by the present protests, and the presence of so many refugees suggest a very high potential for violence.

One factor potentially warding off violence is the widely held assumption that Hezbollah would dominate any civil conflict and emerge in an even more powerful position, depressing the incentive for others to challenge it. Today, Hezbollah is the strongest actor by far in Lebanon, with military superiority to all other armed forces in the country, including the Lebanese army. In many ways, Hezbollah can already use Lebanon for its ends, maintaining freedom of operation while keeping limited responsibility for governance.

For Israeli planners, Hezbollah is today the most immediate foe. The group poses a real, potentially growing threat to Israel. Its efforts to acquire an arsenal of precision missiles, discussed in greater detail in the previous section on technological

changes, are especially concerning for Israel.

Since their last war in 2006, Israel and Hezbollah have both been preparing for another conflict. On Israel's side, this has featured intensified intelligence efforts and a campaign of attacks against shipments of arms and other materiel through Iraq and Syria bound for Lebanon. On Hezbollah's side, the effort to acquire precision-guided munitions has coupled with a large-scale effort to dig tunnels across the Israeli-Lebanese border.<sup>50</sup> Through these, Hezbollah could launch attacks, infiltrating the Galilee and potentially capturing Israeli villages and towns, which would provide an enormous public relations victory for the group.

Several issues could act as tinder for another conflict. Sheba'a Farms, a small strip of land held by Syria until 1967, has previously served that role, with Lebanese factions including Hezbollah claiming it as Lebanese territory and using it as a rallying cry against Israel. The ongoing dispute over the boundary between the Israeli and Lebanese Exclusive Economic Zones (EEZs) in the Mediterranean Sea is another potential flashpoint, and one with far greater economic consequences given the area's potential for energy exploration.<sup>51</sup>

Short of dramatic change in Iran, and with little prospect of dramatic change in Lebanon, Hezbollah will likely continue to be Israel's most immediate foe. Since 2006, deterrence has been successful in preventing war. That said, should Hezbollah come close to achieving its goal of acquiring large numbers of precision munitions, Israeli policymakers will face a dangerous incentive to strike preventively. Israel has already struck frequently and effectively in its campaign of prevention in Lebanon and Syria. It would be wise to continue to do so within bounds that do not lead to a wider conflagration.

Nonetheless, any campaign of prevention risks missing important elements due to intelligence gaps or material limitations. With all this, the possibility remains that Hezbollah may acquire significant numbers of precision missiles. This would represent a dramatic worsening of Israel's security position, best met without over-reaction. For Israel, such an outcome would be best managed by establishing rules for continued deterrence. Israel would still be, after all, far stronger than Hezbollah, regardless of its weapons programs. Negative outcomes — lessened freedom of action for Israel in Lebanon, and increased cover for Hezbollah to conduct destabilizing operations of its own initiative or Iran's — would be unavoidable. Israel would be best served by calibrating its responses short of all-out confrontation. Risks of intentional confrontation would be high and, in many ways, represent the worst foreseeable threat to Israel over the next two decades.

## Jordan

Jordan, for decades a stable and reliable neighbor to Israel, faces a series of fundamental challenges that will likely intensify over the coming decades. In a turbulent region, the kingdom's chief interest will be the continued stability of the monarchy. Amman will likely look to ensure this continued stability along three interrelated related avenues: maintaining fiscal stability amid economic challenges; preserving relationships with its most important patrons, the United States and the Gulf monarchies; and mitigating the domestic effects of American or Israeli decisions taken regarding the Palestinians.



In recent decades, Jordan has managed to navigate a period of regional chaos, maintaining stability through largely cosmetic domestic reforms and massive foreign aid, with large sums delivered by the United States and Saudi Arabia to buttress the kingdom. These patrons have acted as a safety net for Jordan, which lacks the natural resources of many of its neighbors.

The coming years seem likely to bring continued challenges. While Syrian refugees are no longer arriving in the enormous numbers of the first half of the 2010s, many remain in Jordan with limited prospect for return to Syria, straining the kingdom's resources and social fabric. Since gaining independence, Jordan has absorbed successive waves of refugees from its neighbors — whether Palestinian, Iraqi, or Syrian — and with political upheaval in the region likely to continue, another wave of refugees is always a possibility.

While it does not have some of the ethnic or sectarian fissures that directed the course of much of the past two decades' strife elsewhere in the region, Jordan does face a demographic challenge. In the Middle East and North Africa, only Yemen, Iraq, and the Palestinian territories have a higher percentage of their populations between the ages of 15 and 24. With an official youth unemployment rate of 36.7%, Jordan faces clear challenges in managing discontent among its young people.<sup>52</sup>

A further potential fracture exists between Jordan's citizens of Palestinian descent and its East Bank population. As the Israeli-Palestinian peace process is increasingly seen as dead, Jordan will face mounting pressures from its citizens of Palestinian descent. Actions taken by Israel, such as annexation of the Jordan Valley, could make the peace treaty with Israel even more unpopular with the Jordanian public than it already is. As the Israeli and American governments move to settle the conflict on Israel's terms, and over Palestinian objections, the Jordanian monarchy faces intense pressure to push back.

With the release of the Trump administration's plan for ending the Israeli-Palestinian conflict on pro-Israel terms, Jordan faces a fundamental challenge. The Jordanian public is broadly opposed to the 1994 Wadi Araba treaty, which made peace between Israel and Jordan. A blow to the Jordanian economy or the Palestinian national cause would prove challenging for the monarchy's standing with its subjects. In such an economic or political crisis — or a mix of both — the government would face growing pressures to withdraw from the peace treaty. This would not likely mean hostilities between Jordan and Israel, as the balance of power there is clear and overwhelmingly in Israel's favor. Instead, this scenario would see the two countries cut off official (though likely not clandestine) relations.

While such a move would surely be popular with a broad section of the Jordanian public, Amman also faces strong incentives to maintain its cooperation. Among these are significant energy and water infrastructure projects on which the two countries have cooperated. Jordan could perhaps find other water and energy sources, but such alternatives may be costly and unreliable. The monarchy is further caught between its popular demands and its American allies. The United States remains Amman's most important international partner, and a country as dependent as Jordan is on foreign transfers can ill-afford to jeopardize such relationships. Given this dependence, and much like Israel, Jordan's leaders listen to American discussions of retrenchment in the Middle East with apprehension.

The monarchy could continue to walk the line it has so far maintained, staving off total crisis through a reliance on foreign patrons. Intermittent protest would continue without boiling over into a mass uprising at the levels seen in 2011 or more recently in Sudan and Algeria. The kingdom would continue to cycle through prime ministers — there were five between 2011 and 2013, and mass protests forced another to resign in 2018 — while maintaining the same fundamental policies.<sup>53</sup>

Such continued crisis management is by no means guaranteed to succeed. The combination of pressures facing Jordan are significant and growing in severity. Regular and widespread domestic unrest seems likely. The scope of that unrest, however — and the government's capacity to contain and respond to it — is far less certain.

## The Palestinians

The Palestinians are, at present, weakened and divided. In the West Bank, the Palestinian Authority — a product of the now-defunct Oslo process — continues to administrate parts of the territory amid declining popular legitimacy and the looming prospect of fiscal crisis. To many Palestinians, the PA's chief interest seems, for now, to be maintaining its longevity though the world has moved on from the context for which it was created. Meanwhile, the Trump administration's peace plan, presented in January 2020, leaves the Palestinian leadership with few options.

In Gaza, Hamas continues to rule a battered population. Recurrent violence between Israel and Hamas, described last year in a joint Center for a New American Security and Brookings report on U.S. policy toward the Gaza Strip, has devastated Gaza's population and infrastructure.<sup>54</sup> A bitter rival of Fatah, the dominant party in the Palestine Liberation Organization (PLO), Hamas has recently pursued a quiet truce with Israel.

The divide between Fatah in the West Bank and Hamas in Gaza has defined much of recent Palestinian politics and will likely remain a key component in Palestinian developments over the next two decades. Bridging this gap — or achieving dominance over rivals in both territories — will be a chief aspiration for any Palestinian leader, but the rift is deep.

Among many Arab leaders, the Palestinian cause has diminished as a priority. Part of this is a question of other concerns taking precedence, as many Arab regimes have faced fundamental challenges to their continued governance in the past decade. Also contributing is the fact that Palestinian President Mahmoud Abbas lacks the charisma of his predecessor, Yasser Arafat. Where Arafat could galvanize popular Arab support to force the hands of Arab leaders, the divided Palestinian leadership today is largely helpless as their cause is demoted in the priority list of regional actors.

Still, the Palestinian issue remains highly emotive for Arab publics, especially the publics of countries most relevant to Israeli interests, including Egypt and Jordan. The cause of the Palestinians also holds significance for many of the non-Arab countries of the region, including Turkey and Iran. The attention placed on the Palestinian issue is much less in many of these countries than in the past, but this diminished focus could be reversed in case of a flare-up in the West Bank or Gaza.

Further, the Palestinian cause plays a central role in the ongoing decline of U.S. support for Israel, especially among the American left, which views the conflict through a lens of human rights and justice.

With the Palestinians, as with several other regional actors, the question of succession is central. When leadership of the PA, PLO, and Fatah transitions to a person — or persons — other than Abbas, several core questions will come to the fore regarding the structure and direction of Palestinian leadership. However, unlike other actors in the region, the very nature of the Palestinian national cause is in question as well.

With aging leadership, a burgeoning youth population, and the dramatic shifting of the terms of American diplomacy with the Trump administration plan, the generally understood aims of the Palestinian institutions are increasingly in doubt and will likely change over the coming years. Over the next decade or two, the survival of the Palestinian Authority will come into question, and with it Palestinian security cooperation with Israel, an important element of domestic Israeli security.

The further demise of the Palestinian Authority, or the transformation of the Palestinian agenda — either back toward violence, or towards official calls for granting Israeli citizenship to Palestinians in the West Bank — could potentially serve as a rallying point. A combination of political destabilization among Israel's regional neighbors, and a new crisis with the Palestinians could quickly change what appears at present to be a geopolitical advantage for Israel. Further, should the PA collapse, the West Bank could see non-state militants take advantage of ungoverned spaces from which to launch attacks at Israel, as is already partly the case in Gaza.

A change toward a rights-based cause, rather than an independence-based one, would find many allies around the world, including among many Americans. These see Israeli control over the West Bank as an occupation not necessarily of land, but of individuals, and a disenfranchisement of people. A call for the Palestinian people to be granted a vote for the government that controls so many aspects of their lives has the chance to resonate with many in the West, including among younger Americans of both parties.

## GREAT POWER SHIFTS

The end of the Cold War and the decades that followed presented a relative golden age for Israel's security interests. Its traditional adversaries were weakened, while its closest ally, the United States, had risen to become the sole global superpower. This unipolar moment of American preeminence produced numerous opportunities for Israel. Adversaries saw benefit in changing their stance toward Israel so as to improve their relations with the United States, and those who did not change their positions now operated without the support of the Eastern Bloc.

Israelis today look at their international position with a sense of success, even triumph. The clearest element in this, perhaps, is an American administration that shares the Israeli government's views not only on the Iranian nuclear and conventional threats, but also on the future of the West Bank and the Israeli-

Palestinian conflict. This was made most apparent symbolically by the move of the American embassy to Jerusalem and recognition of Jerusalem as Israel's capital, but no less significant was the Trump administration's release of its plan for the Israeli-Palestinian conflict on terms strongly favorable to Israeli positions.<sup>55</sup>

However, the American unipolar moment has long passed. And while the effects of this change are felt in the Middle East, they have yet to arrive in full. After the fall of the Soviet Union, the United States found itself as the sole hegemon in the Middle East, much as it was the sole superpower in the world.

Today, instead, three key extra-regional players define great power competition in the Middle East: the United States, Russia, and China.

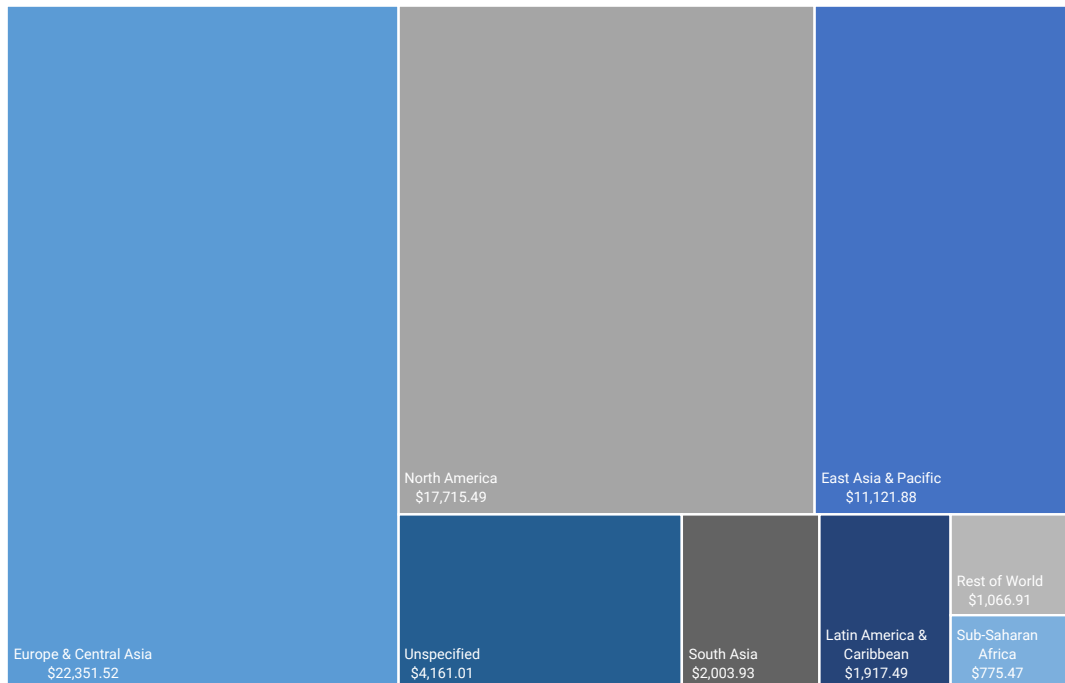
**The American unipolar moment has long passed. And while the effects of this change are felt in the Middle East, they have yet to arrive in full.**



A reluctant United States looks to lessen its commitments in the Middle East and its domestic support for Israel, while still strong, is undergoing fundamental changes. An opportunistic Russia has exploited fissures in the region — most notably in the Syrian civil war — to increase its influence. China, meanwhile, is a rising player in the region, with deep economic interests that could drive greater involvement by Beijing in Middle Eastern politics. Taken together, these trends could make the region an arena in a new era of great power competition. Navigating this new environment requires smaller regional powers such as Israel to make costly and difficult choices.

A fourth global player, Europe — the European Union and the United Kingdom in particular — remains an economic power hub. It is particularly important for Israel, as the country's largest trading partner, taken as a bloc. Further, one issue remains highly motivating in the politics of several European states: the Palestinian issue. Europe in general tends toward more critical positions toward Israel than the United States. In some scenarios, such as a future annexation of parts of the West Bank, Israel could incur significant economic costs from European policy shifts. These shifts need not entail full European consensus among EU member states. Even seemingly-bureaucratic decisions by the European Commission can have significant repercussions for the Israeli economy. In 2013, for example, the Commission — acting as a bureaucratic body rather than a political council that requires wide consensus — demanded that Israel exclude projects that cross the “green line” into the West Bank or East Jerusalem as a condition for Israeli participation in the Horizon 2020 research and innovation program.<sup>56</sup> Given the financial consequences for Israeli academia, the Israeli cabinet, headed by Benjamin Netanyahu and with membership from his right flank, agreed to this exclusion, demonstrating the leverage that seemingly-mundane European decisions can have.

Still, Europe is too fractured on foreign policy to act as a single force on most geopolitical issues. The departure of the United Kingdom from the European Union exacerbates this point, to a degree. Still, it is worth noting that European players may increase their involvement in the region, especially given the degree to which their interests could be affected by Middle Eastern dynamics, most notably renewed refugee flows. This future involvement, while important, will likely take place at a lower scale than that of the three powers we detail below.

**FIGURE 6: ISRAELI EXPORTS BY REGION, 2017 (MILLIONS OF USD)**

Source: *World Integrated Trade Solution, The World Bank*<sup>57</sup>

## A reluctant, polarized America

As the United States slowly emerges from the unipolar moment, it increasingly seeks to reduce its Middle East responsibilities. Weary of costly wars in Iraq and Afghanistan and smaller engagements alike, two successive — and otherwise very different — American administrations, those of Barack Obama and Donald Trump, aimed to limit U.S. commitments in the region. The Biden administration is unlikely to reverse course. Moreover, most Democrats agree on the need to shift the focus of American foreign policy from counterterrorism, the Middle East, and Afghanistan to Russia and China.<sup>58</sup> Attitudes toward the region will likely vacillate between administrations in the coming decades, but the bedrock of support for Middle East involvement has waned considerably among the American public across party lines. This trend will likely not be reversed short of a major, galvanizing event such as a direct attack on Americans or American territory.

In January 2019, our colleagues Mara Karlin and Tamara Cofman Wittes wrote in *Foreign Affairs* that Trump and Obama “seem to share the view that the United States should devote fewer resources and less time” to the Middle East.<sup>59</sup> In the same article, they described a U.S. stance toward the region that “diverts resources that could otherwise be devoted to confronting a rising China and a revanchist Russia.” Martin Indyk, writing in *The Wall Street Journal*, argued that the time had come to accept that “few vital interests of the U.S. continue to be at stake in the Middle East.”<sup>60</sup> These arguments will only grow more persuasive to American audiences as the U.S. relies less on imports of Middle Eastern oil.<sup>61</sup> The legacy of Iraq may fade as a driving force in American politics, but voters are still unlikely to show enthusiasm for difficult and costly engagements in the region going forward.



No sequence of events made this change clearer than those that followed the September 2019 attack by Iran or its proxies on Saudi Aramco's Abqaiq oil-processing facility. The attack, which featured an array of missiles and drones striking at an installation critical for the uninterrupted flow of energy out of the Persian Gulf, produced no overt military response from the United States. A dramatic American attack that killed Iranian general Qassem Soleimani followed months later, but even American officials tied the strike to more proximate incidents involving American, not Saudi, personnel, rather than to the Abqaiq attack.

Until recently, a non-reaction to an attack on America's foremost regional interest — energy exports — and one of its long-term partners — Saudi Arabia — would have seemed unthinkable. Now, in an era of American retrenchment, the region has fallen among Washington's priorities. Among the U.S. public, this non-reaction is a popular position. In our colleague Shibley Telhami's October 2019 survey of American public opinion, 66% of respondents (including 53% of Republicans, 70% of independents, and 77% of Democrats) answered that the United States should not consider military action in response to the attack in Saudi Arabia even "if sufficient evidence emerges that Iran is responsible."<sup>62</sup>

While most Americans agree their interests in the Middle East have broadly become less urgent, an active debate has emerged over which regional interests do remain important, if diminished. Energy flows from the Gulf countries, the security and stability of key regional partners — Israel, Jordan, Egypt, and Saudi Arabia chief among them — and counterterrorism have been the core components of any recent U.S. regional strategy. With the emergence of the United States as a net oil and gas exporter, rising critiques of American partners in the region, and the military defeat of the Islamic State group, American priorities in the region are as uncertain as they've been in decades.

In theory, America's great power rivalries could bring it to invest greater resources in the Middle East despite limited domestic appetites for such efforts. The return of Russia could spur such urgency on the part of American leaders. More likely, the United States would feel itself pulled into competition over various zones of influence in the Middle East as a subset of a broader, global contest for influence with China. In such a scenario, a geopolitical contest between these two superpowers would return the Middle East to the role it often played during the Cold War, with the region again becoming an arena in which outside powers compete. Already, in Syria, such a dynamic has returned in the form of Russian involvement, and the potential rise of China as a more serious and wide-ranging competitor to American interests and influence could accelerate such a dynamic.

In this way, American policy toward the Middle East could have very little to do with the region itself. Instead, broader geopolitical concerns would create incentives for involvement in the Middle East's political disputes. As so many pairs of foreign powers have done before, Washington and Beijing — or Moscow, for that matter — might find in the Middle East a convenient space in which to land blows against one another.

As American global strategy continues to focus on East Asia and Europe, U.S. relations with most governments in the region may grow increasingly transactional. The broad, strategic interests of the United States therefore diverge from those of its regional partners, which generally would prefer that the United States maintain or increase its commitments to their security.

The region is now entering an era in which American engagement can no longer be assumed. In this new phase of American foreign policy priorities, the United States will likely focus on global power dynamics and domestic affairs at the expense of its Middle East investments.<sup>63</sup> For Israel, which considers the United States as its closest international partner by far, this trend should be deeply concerning. There is no replacement for U.S. involvement from an Israeli perspective. Relations with Russia, which have improved in recent years, are important, but cannot approach the strategic depth of U.S.-Israeli relations, and Russia itself cannot truly compete with the United States in meaningful ways, whether economically, technologically, or strategically. It is unlikely to be able to do so in the coming two decades.

### U.S.-Israel relations

Not only is the United States looking to lessen its investment in the region, but the foundations of its partnership with Israel may be far weaker than some assume. A contradiction exists in present U.S.-Israeli relations. On the one hand, the ties between the two countries have been stronger than ever in recent years on some central issues — including, during the Trump administration's term, in the two governments' positions on the Israeli-Palestinian conflict. On the other hand, the structural basis of the relationship faces major headwinds, which will likely grow stronger over the next two decades.



**The long-running process by which Israel becomes a “Republican” issue in the United States, rather than a bipartisan one, has accelerated in recent years.**

The long-running process by which Israel becomes a “Republican” issue in the United States, rather than a bipartisan one, has accelerated in recent years. The past decade saw an Israeli prime minister, Benjamin Netanyahu, butting heads publicly and frequently with a Democratic president, Barack Obama.

This included, most dramatically for Democrats, Netanyahu’s speech to a joint session of Congress in March 2015 in opposition to the JCPOA. Netanyahu then developed a close relationship with a Republican president, Donald Trump, highly popular among Republicans and historically disliked among Democrats, cementing his position, and perhaps that of Israel, as a Republican ally.<sup>64</sup> Indeed, Israel enters the Biden administration’s term with some trepidation.

The power disparity between Israel and the Palestinians further weakens Israel’s appeal among those wishing to stand with the underdog. Rather than the David of old, facing the vast Arab countries that surround it, Israel is now viewed as the Goliath facing the Palestinians. Many younger Americans, especially on the left, tend to view the Israeli-Palestinian conflict through a human rights lens and are far more critical of Israeli policy than their older compatriots.<sup>65</sup>

Americans’ resulting increasingly polarized attitudes toward Israel are shown in our colleague Shibley Telhami’s recent survey data.<sup>66</sup> In his October 2019 survey, a plurality of Democratic respondents (48%) who had heard of the “Boycott, Divestment and Sanctions (BDS) movement” answered that they strongly or somewhat support it. Another 37% said they neither support nor oppose the movement. Among Republicans who had heard of the BDS movement, meanwhile, 76% answered that

they strongly or somewhat oppose it.<sup>67</sup> Democratic politicians have taken note of these sentiments, and several major candidates in the Democratic nomination race in 2020 expressed potential support for conditioning aid to Israel on its policies toward the Palestinians.<sup>68</sup>

Americans' skepticism is driven by deeper political instincts than partisan allegiance. A profound gap separates Israeli and American public opinion regarding the trajectory of the Israeli-Palestinian conflict. Many Israelis see the status quo as more or less sustainable, with some limited degree of Palestinian "autonomy" as perhaps the least-bad available outcome.<sup>69</sup> To most Americans, however, this is not an acceptable outcome. Consent of the governed is a foundational — if long-hypocritical — tenet of American political thought. It is difficult for many Americans to accept that anything other than that as desirable.

Most in the United States and elsewhere across the world believe the conflict can result in one of two possible outcomes: two states or one state, whether democratic or not. Variations on these outcomes seem to many outside Israel as merely window-dressing on a system increasingly termed by critics as an "apartheid" or Jim Crow system of parallel legal status for people of different backgrounds in the same geographic area. Most Americans have no stock in Palestinian nationalism or a Palestinian state. They are invested, however, in the idea that people — all people — have civil rights in the state that controls them.

Israel has therefore become an issue with increasing meaning for Americans' political identities and domestic political allegiances. Opinions on foreign policy tend to be relatively weakly held — with most voters outside of niche populations with close affinity to the matter only mildly engaged and easily swayed by their leaders. In domestic politics, Americans' feelings toward their political affairs and leaders tend to be much more deeply felt, especially amid the present, polarized environment. It is with these emotions that Israel has become intertwined for many American voters.

The result could be a U.S.-Israeli relationship that swings wildly between Democratic and Republican control of the White House. Bipartisanship, long a crucial tenet of the strategy of the main pro-Israel groups in the United States, has already eroded considerably. The continuation of this dynamic could create moments of opportunity for Israel, but they would be followed by reversals of American positions. For a country as dependent on the U.S. global position as Israel is, this would be a truly dangerous proposition.

Much of this process is not lost on the leadership in Israel, but it is relegated to the status of a fact of life over which Israel has no agency. Israeli leaders take demographic and cultural shifts to mean their weakness among the future Democratic Party is unavoidable. The party's future preferences are seen as disconnected from Israel's policy choices, instead informed by appeals to a majority-minority population in the United States with an affinity for the underdog and an increasing cultural concern for marginalized populations. Israel, this argument goes, must prepare for a future of partisan support in America, but it cannot affect it. This view is mistaken, even if it contains a grain of truth.

Israel indeed cannot change demographic trends in the United States or the culture of the country. Better diplomacy by Israel among future power centers of American society — something Israeli diplomats already attempt — could only affect things

on the margin. But actual Israeli policy changes, especially in the Palestinian arena, can have a major effect on how Israel is perceived and, equally, on the intensity with which these perceptions are held. There is nothing inherently anti-Israel about the large minority groups in the United States, even if there is much that would be naturally pro-underdog.

It is important to note that Democrats do not, by and large, embrace anti-Israeli, or even pro-Palestinian, positions per se, but rather favor not leaning toward either side. It is the widespread perception, that was not always the case in the past two decades, that the conflict is zero sum that leads to a necessary trade-off in affinities.

Among many Democrats, in fact, there is still a well of goodwill toward Israel, alongside profound anger at Israeli policy as personified by Netanyahu. Israeli policy toward the Palestinians — especially settlement policy in the West Bank, and the blockade of Gaza — have become focal points for young activists of all stripes.

In Telhami's polling data, for instance, the two major changes in attitudes among Americans are a growing number of younger, and more Democratic leaning voters preferring that the United States lean toward neither side in the conflict, something that even characterizes younger Evangelical Christians, relative to their elders, though in less intensity than among other groups.<sup>70</sup> Moreover, it is age, not race, that correlates strongly with shifting attitudes. Demographics in this case is not destiny.

Even if solving the conflict or its worst aspects may be out of Israel's reach in the coming years — it would depend not only on Israeli actions but on dramatic changes among other parties as well — Israel could do a great deal to mitigate it and its effects. It could take dramatic steps to reduce its footprint of military rule over the Palestinians,<sup>71</sup> to change the reality in and surrounding the Gaza Strip,<sup>72</sup> and to reduce the salience of the Palestinian question on the world stage. Further, it could avoid major steps that would entrench the current stalemate.

Critical Americans, Europeans, and others need not love Israel for its position to improve dramatically, they merely need to see it less as an urgent issue to confront. Israel needs to appear in the news less in the context of the conflict. To do so, it must improve dramatically the conditions of the Palestinians and advance a credible path for conflict resolution, whether full conflict resolution is possible in the next couple of decades or not.

No element of Israel's national security is more important in the long term than its close partnership with the United States. The United States provides Israel with diplomatic and material support. During times of distress, including in some extreme cases hypothesized in this report, U.S. support may prove crucial. In times of war, Israel may rely on the United States for the urgent supply of basic military materiel, as it has in the past. In the most extreme case, in 1973, a U.S. airlift was crucial for supplying Israeli forces as they were fending off the surprise attack by the Egyptian and Syrian armies — but far more recently, during the 2014 conflict with Hamas in Gaza, supplies of Iron Dome missiles, for example, were needed urgently and were supported, in late July that year, though an emergency bill in Congress.<sup>73</sup>

Diplomatically, the United States repeatedly wields its power to deflect the most strident international criticisms of Israel, including at the United Nations Security Council, where Washington has a veto which it has not hesitated to use on Israel's

behalf. But the U.S. veto cannot be taken for granted, as was the case when the Obama administration was about to exit the stage and it abstained on U.N. Security Council Resolution 2334 regarding Israeli settlements, which Israel saw as highly damaging to its position and which passed by an overwhelming 14-0 vote, with the sole U.S. abstention.<sup>74</sup>

The partnership with the United States also makes Israel far more attractive to other actors — including the Arab world — who view it as a conduit to the United States. In many eyes, “the road to Washington goes through Jerusalem” as the now-old adage goes.

Materially, the United States continues to provide Israel with billions of dollars of support, annually. In the latest memorandum of understanding between the two countries from 2016, the U.S. commitment grew to \$3.8 per year for ten years starting in 2019.<sup>75</sup> While these funds are to be spent in the United States itself, this provides not only a very large amount of equipment to Israel but allows it significant — though not unlimited — access to the latest U.S. military equipment.<sup>76</sup>

Equally important, the prominent U.S. role in the Middle East has been a major boon to Israeli security. Starting in the 1960s, the U.S. rivalry with the Soviet Union allowed Israel to rely on the United States as a counter to Soviet support for its enemies. With the end of the Cold War and the emergence of a U.S. hegemony in the region, Israel found itself in the enviable position of closest regional partner to the sole superpower. An active, engaged, and very friendly United States was as important to Israel as any military capability. With the broad trends now prevalent in the United States, both Washington’s role in the Middle East and its consistent, bipartisan inclination toward Israel are at stake.



## BDS and economic pressure on Israel

The Boycott, Divestment and Sanctions (BDS) movement — which emerged out of the 2001 UN Conference Against Racism in Durban, South Africa, and calls for the boycott of Israel and Israeli institutions — seeks to isolate Israel from the global economy. While it is unlikely to succeed in this goal, BDS threatens to rally critics of Israel globally while provoking unhelpful reactions from Israeli leaders themselves and attempts in the United States, especially, to legislate against the campaign. BDS and other forms of economic pressure may prove more central to efforts to confront Israel, even as Israel's security position remains strong.

As noted in a 2018 piece by Dany Bahar and Natan Sachs, Israel's exports are high quality and diversified, and therefore less vulnerable.<sup>77</sup> This remains the case, however, only so long as the sanctions are unofficial and conducted by social movements, not states. With the prospects of Israeli-Palestinian peace eroding, the possibility of much more damaging official sanctions being deployed, especially by Europe, will rise.

The United States remains highly unlikely to participate in any sanctions effort — or to acquiesce to UN sanctions — in the coming two decades. What is possible, under certain political conditions, however, is that the United States will condition its military aid to Israel on progress toward Palestinian statehood.

## The return of Russia to the Middle East

Russian President Vladimir Putin has shown an intense interest in returning as a major player in the Middle East and has used the chaos of Syria's civil war as a platform for doing so. Despite its role in defending the Assad regime's grip on power, in seeking to reestablish itself as a central player in the region's geopolitics, Russia has attempted to avoid choosing side on many of the region's fault lines. In an approach that differs from the Soviet Union's longstanding policy in the Middle East, today Russia talks to every country in the region. This includes Israel and Saudi Arabia, then and now closely aligned with Moscow's key global rival, the United States.

In the Middle East, Russia has also highlighted a key tenet in its leaders' understanding of world affairs — that of "absolute sovereignty." In this view, the stability of (non-hostile) regimes is paramount, regardless of their domestic affairs. Moscow is convinced that the West has sought to undermine or overthrow governments in several post-Soviet countries, as well as in the Middle East — in Iraq and later in Libya. In Syria, Russia found a case in which to draw a line in the sand.

Beyond these broader geopolitical ambitions, Russia also sees its Middle East policies as an extension of its domestic approaches toward its Muslim population, which numbers 20 million and is the fastest-growing religious group in the country. Russian leaders are keen to prevent outside actors, particularly jihadi organizations originating in the Middle East, from shifting their focus to the North Caucasus. In Syria, Moscow viewed its approach as one of taking the fight to an enemy, rather than letting that enemy come to its own borders.

Russia also has an economic interest in the region, given its status as a key — and rival — producer of oil and gas. Recognizing the benefits of working with the Middle East's oil producers, Russian leaders have increasingly cooperated with the Organization of the Petroleum Exporting Countries (OPEC), something they had historically avoided doing. Finally, Russia also benefits from its weapons sales to a number of actors in the Middle East.

Russia has in recent years solidified its position as the main external power in Syria, providing crucial support for the Assad regime's success in the civil war there. Moscow is now a central external focal point for all major Middle Eastern countries, sometimes to the exclusion of the United States, for the first time since the fall of the Soviet Union. For countries such as Saudi Arabia and

**For countries such as Saudi Arabia and Egypt, Russia presents an appealing partner, especially given its disinterest in pressuring authoritarian governments on human rights.**



Egypt, Russia presents an appealing partner, especially given its disinterest in pressuring authoritarian governments on human rights. Viewed in tandem with the potential for significant American retrenchment, Russia's engagement with the region poses significant questions for the structure of great power relations in the region. Still, Russia's foreign policy demonstrates both a desire to thwart those Western objectives it sees as infringing on its interests as well as an acute awareness of its own limitations.

One possible trajectory for Russian actions in the Middle East region would be the continuation of its present posture. This would see Russia maintain economic ties to a range of regional actors, avoiding choosing sides wherever possible. In the meantime, Moscow would exploit fissures in the power of regional actors or its global competitors so as to assert its status as a great power relative to the United States and China.

Should China continue to grow its economic ties in the region, yet maintain its reluctance to involve itself in the complications of Middle Eastern security and political affairs, an arrangement could arise in which Beijing becomes the dominant economic power in the region and Moscow exploits the political and security space left open by an increasingly disinterested Washington to assert its status and to protect its interests. Russian leaders understand such an arrangement could leave Moscow the junior partner to Beijing. Given Chinese economic power, though, Russia would have little choice but to accept this role.

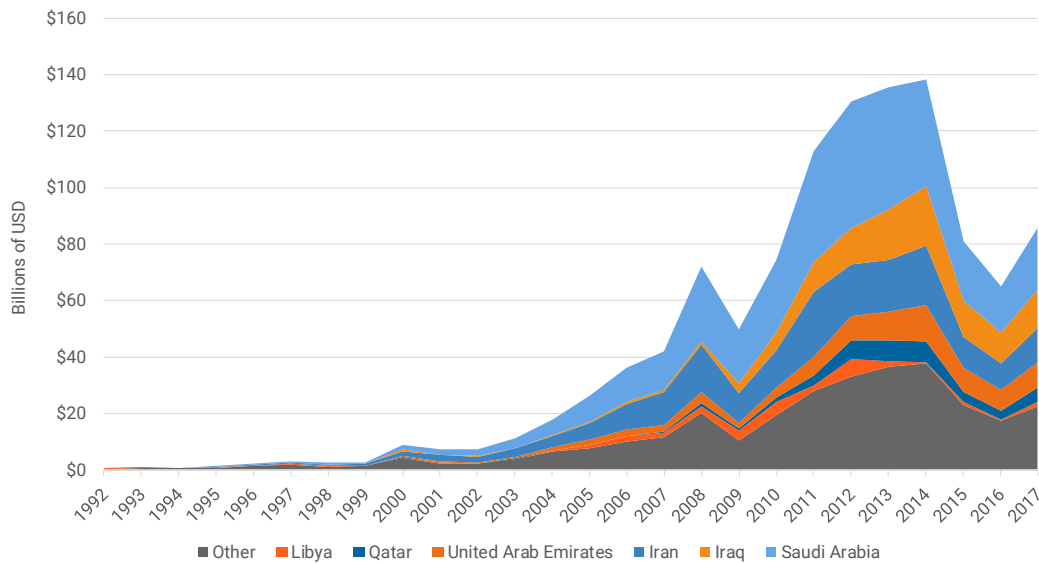
This trajectory depends on the continuation of many present factors, chief among them continuity in the Russian domestic political system. As with many other authoritarian countries examined as part of this project, Russia could theoretically be ruled in 15-20 years by the same leader, Vladimir Putin, but this seems unlikely, given his age (67). The leader who follows Putin could find it difficult to consolidate domestic political power. Given the personalized nature of authority in Putin's Russia, continuity in policy following a leadership transition is far from guaranteed. That said, a policy of increased involvement in the Middle East as part of the wider restoration of the Russia's global role enjoyed under the Soviet Union is broadly supported by key Russian officials and power brokers.

Although Russia may well continue its present opportunism in the region, it may change course if the costs of such a policy rise. So far, its actions have come at low relative costs in terms of (Russian) lives and money. Should the costs rise, Russia knows it will not be able to match the resources of the United States or of a rising China, should they be motivated to act. Should Russia be faced with a damaging Middle Eastern quagmire of its own, the memory of the Soviet experience in Afghanistan and the example of the U.S. failure in Iraq may lead Russian leaders to step away. A more aggressive American policy in the region — perhaps spurred on by a major regional crisis which draws U.S. interest — could change the Russian cost-benefit analysis. Similarly, should the Middle East become an arena for increased U.S.-China competition, such a contest may push Russia to the side of regional affairs, its leaders judging that low-cost gains can no longer be won. In this scenario, the activist Russian policy in the region during the last half-decade would be an aberration, rather than a lasting return to the Soviet-era norm.

For Israel particularly, Russia looms large. In Syria, Russia is aligned with Iran, Israel's adversary, although the potential exists for serious disagreements between the two once fighting ends. Moscow has now deployed forces to Israel's immediate northeast, limiting Israeli freedom of action and necessitating intensive high-level coordination between Israel and Russia. So far, Israel has largely succeeded in managing its relationship with a more regionally salient Russia. This success, however, is dependent on uncertain Russian interests. A continuation of Russian involvement in the Middle East is therefore highly consequential for Israel, with a low level of predictability in its outcomes.

## A rising China

Nothing occupies American policy interest today like China's rise and the trajectory of U.S.-China relations. China's presence in the Middle East, as in many parts of the world, is broadening and deepening, with commercial and investment ties growing under the rubric of China's far broader Belt and Road Initiative (BRI). Beijing's interests in the region are driven primarily by an overriding need for energy imports to fuel the Chinese economy. Including energy, China is the largest trading partner of many countries in the Middle East. It is, further, an enormous investor in construction and infrastructure, primarily through BRI.<sup>78</sup>

**FIGURE 7: CHINESE FUEL IMPORTS FROM MIDDLE EAST AND NORTH AFRICA, 1992-2017**

Source: *World Integrated Trade Solution, The World Bank*<sup>79</sup>

In contrast to its economic centrality to the region, China remains mostly on the sidelines of the main geopolitical questions, though there are already important exceptions to this rule. Like Moscow, Beijing has avoided choosing sides in the region's core political disputes, prioritizing bilateral economic relationships with all the key regional actors. Beijing, for example, has sought to maintain productive economic ties with both sides of the Saudi-Iranian fault line, while so far avoiding alienating other regional actors.<sup>80</sup> It has sided with other major powers, notably Russia, in its policy in negotiations toward the JCPOA, but has otherwise generally avoided antagonizing parties to regional conflicts.

Yet even while China has tried to avoid choosing sides, it has already made important forays into strategic affairs, most notably in cooperation with both Iran and Saudi Arabia, two major energy producers. In summer 2020, China and Iran discussed a major trade and military partnership, at a scale that would dwarf other BRI projects and would break open the isolation of Iran's economy. China would invest at a huge scale in Iran in infrastructure and in the beleaguered financial sector, while gaining access to Iranian oil for decades to come, likely at a discount.<sup>81</sup> The two countries would also cooperate on military and technological issues, including cyber technology.<sup>82</sup> If implemented, this would be a transformative development. At present, the deal remains far from complete. In Iran, there are voices criticizing the terms of the deal as a capitulation to a foreign power,<sup>83</sup> while Chinese firms would still have to navigate their way around international sanctions, so long as those persist. But the sanctions will likely change in the coming two decades, and elements of the giant deal may well be implemented. Already, Iran, China, and Russia have conducted a highly visible naval exercise, in what was likely a signal to the United States, more than anything.<sup>84</sup>

At the same time, China has expansive existing trade relations with Saudi Arabia, a key energy supplier. Recently, there have even been concerns among American intelligence agencies that China may be cooperating with Saudi Arabia on infrastructure to extract nuclear fuel, a move that would raise deep concern in the United States and Israel.<sup>85</sup> China would like to have it both ways in the Saudi-Iranian rivalry, and may be able to do so for a time. Moreover, should U.S.-Saudi relations worsen, as described above is a distinct possibility, the Saudi government may be less inhibited to cooperate with China on a wide range of issues.

Either way, Israeli concerns with China's relationships in the region, and especially its relations with Iran, are marginal to the Chinese calculus. This reality is a far cry from the attentiveness of the United States to Israeli concerns over its qualitative military edge or over Iranian and others' nuclear ambitions.

China's naval capacity in the region is also growing. It maintains an increasing presence in the Red Sea, including its establishment of a military base and investment in port facilities in Djibouti.<sup>86</sup> The potential exists, down the road, for China to also move into the Persian Gulf. Indeed, China is positioned to become a more important regional power, should it choose to do so.

Relative to the United States, China enjoys several advantages in its approach to the Middle East. Through strategic partnerships usually founded in economic interests, China has operated in the region without adopting broad, region-wide goals. This leaves it with far greater flexibility than the United States in its dealings with Middle Eastern countries. As Jon Alterman put it: "China's advantage in all of this is the government seems to know what it is trying to do, and what it is not trying to do. China has a strategy that is elegant in its simplicity, seeking ways to encourage governments open the door wide to Chinese engagement."<sup>87</sup> Unlike the United States, Beijing does not ask its partners for government reform, promote democratization, or otherwise intervene in other country's domestic affairs.<sup>88</sup> For many of the region's governments, used to dealing with American administrations concerned with their domestic governance, Beijing's silence on such issues makes it an attractive partner.

Meanwhile, competition between China and the United States has increased in recent years. While the reality of such a great power rivalry is apparent, perceptions of such competition have recently grown dramatically in Washington, with expectations of future tension perhaps outpacing the evidence provided by present conditions.

As China's global prominence and its nascent military presence in the region grow, it may be forced to choose between different parties to regional disputes. The countries of the region, moreover, would likely then have to make their own choices in response, perhaps provoking a realignment of Middle Eastern geopolitics.

In the scenario that would place the greatest pressure on American partners in the Middle East, the region would become one arena in a broader contest between the United States and China. The region's many fractures and fissures would then become divides across which Washington and Beijing could fight proxy conflicts, in a pattern reminiscent of Cold War-era disputes between Washington and Moscow and their respective partners, with Iran, or Saudi Arabia, or even — with difficulty — both being prime candidates for Chinese partnership.



For China, an outcome in which it becomes muddled in Middle Eastern quagmires would be highly undesirable and a departure from its current strategy. In this, Chinese officials display both an acute awareness of American misadventures in the region as well as a humility as to their own ability to navigate the region's disputes more deftly. Beijing hesitates to involve itself in regional security issues. In policy documents outlining its approach to the region, including the 2014 "Visions and Actions on Jointly Building Silk Road Economic Belt and 21st-Century Maritime Silk Road" and the 2016 "Arab Policy Paper," references to regional diplomatic and economic initiatives are central, while security issues are given far less prominence.<sup>89</sup>

For Beijing, then, the Middle East may be a geopolitical arena of last resort. Still, a trajectory by which the United States and China vie openly for global supremacy is a possibility, and in such a contest the two powers may take opportunities to gain advantages wherever they can be found.

For Israel in particular, managing relations with the United States will be crucial in seeking to pursue opportunities with China, as demonstrated by bipartisan American objections to Chinese investments in technology in Israel and in the country's infrastructure, such as the management of the Haifa port.<sup>90</sup> Previous cases of U.S. vetoes to Israeli-Chinese arms deals made the point clearer still. There, however, are common misperceptions in Israel that American concerns regarding Israeli-Chinese interactions are technical and therefore easily managed. In truth, across American party lines, policymakers increasingly expect that American partners throughout the world will make stark choices between the preferences of Washington and Beijing — choices that, for Israel, will incur meaningful costs.

From Israel's perspective, Beijing's continuing interest in maintaining the secure flow of energy from the region, mean that its primary interests lie with parties other than Israel, notably Saudi Arabia and Iran.<sup>91</sup> In extremis, this could prove a major challenge to Israeli national security in a future where China is more engaged in regional affairs and regional dynamics have shifted to Israel's detriment. As with Russia, the bottom line for Israel in its relations with China is clear: Beijing cannot replace Washington.

## CONCLUSION

Israel's current security outlook rests on several pillars: its economic and technological prowess and resulting military capabilities, especially in airpower, precision firepower, cyber technology, and intelligence; its ability to mobilize a relatively large, well-trained, and highly-motivated military with broad civilian support; its peace treaties and security cooperation with Egypt and Jordan, the United Arab Emirates, Bahrain, and other less-formal but significant relationships with Arab countries; its security cooperation with the Palestinian Authority; its nuclear arsenal, as a defense of last resort; and, of course, its close, albeit informal alliance with the United States.

In the coming two decades, the trends outlined in this report will directly or indirectly threaten several of these pillars. Each of these threats, on its own, would challenge Israel's security posture. Given current trajectories, there is a significant chance that several could materialize simultaneously. Many of these trends will be outside of Israel's control, but others can be affected directly by Israeli action today, as we describe below.

Transnational trends, including climate change, migration, demographic shifts, and technological change, will upend the lives of millions in the Middle East in the coming decades. Mounting stressors will add pressure to brittle political systems across the region. The COVID-19 pandemic has already strained regional governments, and its economic fallout seems likely to continue to add to the burdens borne by states. Governments in most of the region remain ill-equipped to cope with these pressures.

As a result, the coming decades will likely see large numbers of people fleeing instability, moving within and from the region, and placing pressures on governments in the Middle East and North Africa and elsewhere, especially in Europe. Further, ongoing failures of governance could lead to uprisings or other forms of unrest which see present governments lose control of some of their territory — as has occurred in Syria and the Egyptian Sinai — or be replaced — as in Egypt twice in the last decade. The first outcome could provide hostile, non-state actors with havens from which to attack Israel. Israel's current strategies, that rely on a combination of deterrence and regular degradation of adversaries' capabilities, would be much harder to implement against such actors. As has been the case in the past at limited scale, groups with little governing responsibility can be hard to deter.

The second outcome — the replacement or collapse of a neighboring regime — could directly undermine Israel's security cooperation with some of its most important neighbors. This could hinder its ability to fight terrorism, and could allow militants footholds directly at Israel's borders.

Even as instability on Israel's borders could produce new and more-difficult-to-manage threats, the diffusion of new and newly accessible technologies could erode Israel's military advantages over its adversaries, whether state, quasi-state, or non-state actors. Drones, precision missiles, cyber capabilities and more are all becoming cheaper and more widely available. States will react with their own, corresponding tactical and technological advances and Israel will likely see continued success in this area. The availability of sophisticated tools in the hands of Israel's adversaries, however, will hand them powerful means with which to conduct attacks and may grant them considerable new opportunities they do not presently have.

At the regional and domestic levels, actors on which Israel relies for security cooperation face deep, mounting challenges to their continued governance. Meanwhile, Iran and its proxies, the most important being Hezbollah in Lebanon, have solidified their regional positions. Both face uncertain domestic contexts, yet in both Iran and Lebanon internal instability need not empower actors any friendlier to Israel.

Saudi Arabia, a crucial partner for Israel in bettering its regional relations, may be more unstable than appears at present. Its future financial outlook is worrisome, and the success of social and economic reforms is far from guaranteed. Mohammed bin Salman's toxic image in Washington, meanwhile, combined with America's decreasing dependence on Saudi oil, has caused many Americans to question the utility of the U.S.-Saudi partnership in its current form.

In Egypt, extreme repression has quelled dissent, but few of the underlying political and economic problems which fueled the uprisings of 2011 have been addressed. The Egyptian-Israeli peace treaty was an enormous achievement for Israel's security. Even if political upheaval in Israel did not threaten the treaty directly, it could empower hostile militant groups in the Sinai to strike Israel from Egyptian territory.

Jordan has been among Israel's most crucial regional partners in recent decades. Its monarchy faces mounting stressors — a young population, limited resources, and societal fissures — and uncertain continued support from the United States and Saudi Arabia. Should the United States and Israel continue to move to shape the Israeli-Palestinian conflict on terms very unfavorable to the Palestinians, Jordan will also face increasing domestic pressure to change the status of its relationship with Israel.

Of all the relevant regional actors, the Palestinian Authority is the weakest and the one with the most uncertain future. Created as a product of the Oslo Accords, the PA finds itself in a post-Oslo world. This crisis joins internal Palestinian divisions — primarily between Fatah in the West Bank and Hamas in Gaza — financial difficulties, and flagging popular legitimacy. Under many scenarios, its leadership will, at the very least, face pressure to suspend security cooperation with Israel, a move that would drastically undermine Israeli security as it relates to the West Bank.

Even while threats from its neighborhood increase, Israel may find great power shifts in the Middle East hinder its ability to cope with rising dangers. Both Russia and China have committed greater resources in recent years to the Middle East than in the past, and China, in particular, may emerge as a challenger to Washington in the region. Should China take a much greater role in

**Should China take a much greater role in regional security due to its massive energy needs, Israel would find itself dealing with a dominant external power indifferent to its core interests.**



regional security due to its massive energy needs, Israel would find itself dealing with a dominant external power indifferent to its core interests. Other regional powers, including Iran, could find a patron of sorts in China, dramatically complicating Israeli efforts to limit Iranian activity in the region or its nuclear program. If American-Chinese competition grows more severe, as is quite possible, Israeli policymakers may be forced to make stark and costly choices. While Israel should favor American interests in this scenario, doing so could entail real economic pain, especially given the centrality of Israel's technology sector to its economy.

In addition to broader great power shifts, Israel's relationship with the United States — its most important means for countering the threats it faces — will face new challenges. The coming two decades will likely see an America reluctant to maintain its active role in the Middle East — a role that has benefitted Israel greatly — and skeptical more specifically of the nature of its partnership with Israel. The increasingly partisan attitudes toward the U.S.-Israel relationship, and especially the rights-based critiques of Israeli policy among younger Americans on the political left, mean that the stability of the relationship over successive U.S. administrations will be threatened.

The importance of the United States to Israel should not be underestimated. The United States routinely provides Israel with diplomatic cover in myriad active ways. The partnership with the United States also provides Israel with secondary advantages, as countries throughout the world, including the Middle East, seek closer ties with Israel so as to advance their interests in Washington. The United States also provides Israel with annual military support, currently \$3.8 billion, to be spent in the United States. The United States further has served as a supplier of essential materiel in times of need, including most notably the 1973 war, but more recently too. Putting the long-term trajectory of U.S.-Israeli relations on strong footing is therefore a primary Israeli interest today.

## Policy implications

Taken together, these broad and necessarily speculative trends suggest policymakers in Israel should, first and foremost, be wary of complacency or a sense of triumphalism. Even if Israel's economy, industry, and military remain strong, these trends could make Israel's current position far more difficult. As noted, some of these trends lie outside Israel's sole control, but Israel has significant leeway to affect others if it acts soon.

Facing the effects of climate change, Israel must take seriously its own infrastructure-related risks, and those of a rising temperature in much of its territory. With the dramatic effects on the broader region, Israel has clear limitations of scale. But while Israel alone can change little about the broader phenomenon, it can contribute, in small but meaningful ways, to efforts at adaptation, both domestically and among its neighbors. Technological advances and Israel's capacity as a hub of technological innovation open the possibility for Israeli impact in this vital area, especially with new openings for Israeli industry in the Arab world. The political limitations today in pursuing such efforts pale in comparison to the historical imperative to pursue them. Adaptation should thus be placed as a strategic goal, even while recognizing the limits of Israeli efficacy in facing the immense challenge.

Like climate, the economic, social, and demographic factors contributing to expected instability in the Middle East are effectively outside of Israel's control. Israel must avoid getting involved in the domestic troubles of neighboring countries — a lesson Israel learned after the debacle of its intervention in Lebanon in the 1980s, but which is frequently challenged by security threats on Israel's borders. Yet the consequences of this instability could be profound. As it pursues productive relationships with cooperative regional leaders, Israel should not rest too much of its strategy on such relations. Israel must deal with the neighbors it has, while recognizing that in none of them is the current regime structure permanent or necessarily stable, and should they fall their replacements could easily be far less cooperative or even hostile. Where once Israel faced the threat of powerful, hostile Arab states, now the vulnerability of those same states stands to undermine Israeli security.<sup>92</sup>

Rapid changes to technology require a continuation of the already-robust Israeli efforts to advance countermeasures of its own. This should be coupled with redoubled efforts to limit the vulnerability of Israeli civilian infrastructure to attacks. The advancement of the capabilities of hitherto weaker parties also means Israel may be forced to adopt a more cautious approach to low-intensity combat against

hostile groups and a greater reliance on deterrence, where applicable. It should compensate for these limitations by further leveraging international cooperation, intelligence sharing, and, importantly, limiting the opportunities for conflict open to its adversaries.

Most urgently for Israel, its deep partnership with the United States faces threats to its stability and longevity. Israel cannot take for granted that the U.S.-Israel partnership will last in its current form, and must recognize the need for tangible policy changes to counter these trends. In a time of dire need, Israel may still depend on active U.S. support for its very ability to defend itself in prolonged conflicts. In less extreme circumstances, the support of the United States is central to Israel's position in the world and to others' perceptions of Israeli power.

The potential return of great power competition to the Middle East creates challenges for the U.S.-Israeli relationship. U.S. concerns about Israeli-Chinese cooperation are not merely technical, and they will not be easily managed. American policymakers and experts from across much of the political spectrum are expecting that allies around the world may have to make stark and difficult choices in the future between the two powers. Israel must therefore play a difficult balancing act: continue to work to broaden its international cooperation, including with a rising economic power like China, while recognizing the seriousness of U.S. concerns and the real, and costly limitations these concerns place on Israeli-Chinese cooperation in technology, infrastructure, and other important realms. When faced with a choice, Israel must prefer its relationship to the United States, even at real cost to its economic ties to China.

Of all the threats to the U.S.-Israeli relationship, though, the increasingly partisan nature of American support for this informal alliance could most damage Israel's interests in the medium and long term. Israel has the ability to alter this trend, but better messaging will not be enough. The most important factor by far fueling increasing partisan views of Israel is the strong and growing perception among many Americans that Israel's treatment of and intentions toward the Palestinians stand in contrast to basic American values. Most notably, these values include the right of individuals to govern themselves and elect the government that has effective control over most aspects of their lives.

Israel can ignore the moral, ideological, and strategic questions posed by its relationship to the Palestinians for a time, but it cannot escape them. And, indeed, Israel's relationship with the Palestinians stands out as one area where Israel has significant control. While not determinant of the region's future, it will be crucial to several core elements in Israel's future security environment, let alone its domestic wellbeing, which is outside the scope of this report. The current trajectory of the conflict risks directly undermining important regional partners such as Jordan and the Palestinian Authority, attracting greater regional and international censure amid a time of likely upheaval, and endangering the stability of the U.S.-Israeli relationship.

Addressing these questions will require profound changes in Israel's policy toward the Israeli-Palestinian conflict. A credible policy aimed at meaningful Palestinian independence is essential, even if achieving it may be impossible for quite a while. Similarly, Israel must work diligently to change the reality in the Gaza Strip and on its border. The Palestinian cause does not dominate world affairs. It matters



enormously, however, for Israel's ability to influence those currents of regional and world politics that will produce new dangers for Israel, exacerbate existing risks, and lessen its ability to cope with these threats.

The coming two decades will present significant risks for Israel. This, of course, does not mean Israel will not enjoy continued success in many realms. Complacency will not help the chances of success, however. Given the challenges the region and the country may face, Israeli policymakers need to take urgent and continued action toward alleviating the threats they can control, while minimizing their vulnerability to those they cannot.

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