Persian Gulf states



By Andrew Leber
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OPINION

October 27's outcome offers little prospect for major changes in Persian Gulf-Israeli ties.

Bilateral Saudi-Israel normalization, as part of a broader deal with the United States, has been under vague discussion for nearly a decade, especially since the signing of the 2020 Abraham Accords between Israel, Bahrain, and the UAE. Saudi Arabia's Mohammed bin Salman initially signaled openness to closer ties with Israel, though since October 7, he has returned to voicing clear support for Palestinian statehood as a condition for a deal.

There was little chance of a post-election prime minister offering an immediate grand bargain of Saudi normalization in exchange for (irreversible steps toward) an independent Palestine. During the campaign, Eisenkot vowed that "there will be no Palestinian state," while many liberal Israelis (and Americans) believe that mere "talks" would satisfy Saudi concerns. Now, a minority Eisenkot cabinet would avoid clear concessions on Palestine out of fear of losing support in the Knesset. Netanyahu, in turn, believes that MBS is not serious in supporting Palestine and can be worn down by presenting Israel as Saudi Arabia's only path to security in an unstable region — the instability of which Netanyahu is happy to contribute to.

This election outcome will make Saudi Arabia's balancing act even harder, maybe impossible. On the one hand, Saudi Arabia will continue to deal with the fallout of US and Israeli actions in the region and face charges of aiding and abetting these efforts by acquiescing to Israel's regional role. On the other, it could redouble engagement with European countries to push for Palestinian statehood (perhaps by lobbying the Trump administration), but at a risk of backlash from within the United States.

Regardless, there is no hope of an Israeli cabinet offering concessions up-front to make Saudi-Israel normalization possible.

As for the UAE, the election shows the staying power of "King Bibi". Much as Emirati leaders might have preferred a more flexible or less inflammatory Israeli counterpart, the election outcome will validate the decision to acknowledge Netanyahu's September visit rather than trying to keep it under wraps. Even if Netanyahu is locked out of this governing coalition, he is increasingly likely to stay around in a caretaker cabinet or return in subsequent elections.

Regional security



By Frederic Wehrey
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OPINION

On the key issues that matter to the region, there is a broad security consensus among most major candidates — including on the rejection of Palestinian statehood, the demilitarization of Gaza and southern Lebanon, and the use of military force to prevent Tehran from acquiring a bomb. Where differences emerge between the opposition and the Netanyahu cabinet, they are usually over strategy and tactics, rather than goals: targeting Iran's malign capabilities rather than its regime, as Eisenkot prefers; curtailing settler violence and settlement expansion in lieu of a carte blanche.

An opposition win might ease tensions around Gaza and in the West Bank for Egypt and Jordan, but it would do little to lower the risk of renewed war in Lebanon or with Iran. An inconclusive result and Netanyahu remaining in a caretaker role could delay progress on Gaza and Lebanon, even as Israel and the US consider new strikes on Iran. And regardless of the coalition that emerges, the Trump administration's much inflated benchmark for Middle East peace, Saudi-Israel normalization, is unlikely to happen without a path to Palestinian sovereignty.

More fundamentally, the election outcome cannot reverse the strategic shifts caused or accelerated by the Iran war — an emboldened, more confrontational regime in Tehran; the perception of a diminished, unreliable America, especially in the Persian Gulf; and regional states pursuing hedging, security diversification, and competing blocs of mutual defense and deterrence.



Israeli Prime Minister Benjamin Netanyahu (R) pins Gadi Eizenkot (C) as the IDF chief of staff at a ceremony in Jerusalem, on February 16, 2015. Both "mowing the lawn" and the "Dahiyeh Doctrine" are infamous Israeli military strategies developed by Eisenkot during his time as the army's chief of staff.
GETTY IMAGES

Lebanon



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OPINION

Irrespective of who wins the election, Israel's posture toward Lebanon will not change — Israel's insistence on military means to end Hezbollah and secure its northern borders remains. This posture reflects a broad consensus within Israel's political and security establishment and one that both contenders agree on.

Netanyahu insists on maintaining a "buffer" zone occupied by the Israeli army that today comprises around 6 percent of Lebanese territory. Most of its inhabitants have been forcibly displaced and some 48 towns and villages have been eradicated, according to the New York Times. (The Israeli defense minister claimed that 60 villages had been leveled.) The boundaries of the zone are not fixed, and the Israeli Army is expanding its occupation into adjacent areas. Should the Iran war be relaunched, Lebanon will likely witness even greater destruction and distress.

Eisenkot does not present an alternate approach. In June, he attacked Netanyahu for agreeing to Trump's request that fighting remain limited to south Lebanon. As the author of the Dahiyeh doctrine, Eisenkot has argued for Israel's freedom of military action over Lebanon, including Beirut's southern suburbs, and expressed support for maintaining the military occupation. Unlike Netanyahu, he may accept a narrower occupied zone.

Ultimately, the underlying premise is structural. Since October 7, Israel's security posture has changed in fundamental ways, and whoever leads Israel will inherit this consensus. A new cabinet with different partners may bring about a change in tone. But for Lebanon, occupation and military action will remain policy.

Egypt



By Amr Hamzawy
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OPINION

The Egyptian government is expected to stay its course in opposing the policies of Netanyahu and his far-right allies. Ongoing attacks, forced displacement practices, blocking humanitarian aid, and derailing the implementation of the peace plan have been at the core of Israeli policies in Gaza. Egypt has played a major role in thwarting the displacement of the Gazan population in the past few years and in mediation efforts to end the war, so it will remain on high alert in this regard.

Opposing settler violence in the occupied West Bank, the Egyptian government has worked with regional and international partners to sanction the Israeli far-right cabinet for sponsoring it and for increasing settlement activities in all zones of the West Bank. Participation in regional and international efforts to protect the Palestinian population in the West Bank, especially with the uptick in hate speech against Palestinians and the propagation during the election campaigning of dystopian scenarios of forced displacement, is expected to be at the core of Egyptian policies toward Israel, regardless of who the next prime minister is.

Finally, given Netanyahu's and the far-right's appetite for warmongering in the Middle East and the high likelihood of renewed attacks in different regional spaces, including in Iran, in a Netanyahu-led caretaker or new cabinet, Egypt is bound, on the one hand, to double down on its mediation efforts and initiatives for collective security arrangements with other regional middle powers such as Turkey, Saudi Arabia, Pakistan, and Qatar. On the other hand, Egypt in a volatile Middle East is expected to push forward with the modernization of its military arsenal for deterrence purposes.

Jordan



By Marwan Muasher
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OPINION

The biggest surprise of the Israeli elections is the performance of Arab parties. Previously, many Palestinian citizens of the entity did not vote, under the conviction that casting ballots would be legitimizing a system that discriminates against them. This time, the Palestinian public viewed this election as almost existential, and they voted in record numbers, almost doubling their seats from the 2022 election.

That is significant. They will be the third-largest bloc in the Knesset, after Netanyahu's Likud party and Eisenkot's Yashar party. The Arab parties will not back a Netanyahu-led coalition, and Eisenkot is unlikely to form a cabinet without tacit support from the Arab parties — even if they do not officially join the cabinet, particularly as neither Eisenkot nor the largest of the two Arab parties wishes to do so.

The bottom line is that where Arab parties have won a crucial battle, and where Netanyahu has lost so far, the biggest loser remains an elusive peace that none of the Israeli political parties want to work for.

This is significant for Jordan. An Eisenkot cabinet that reins in the settlers in the West Bank might be seen by the international community as having successfully addressed the issue. But for Jordan, the larger question is whether Israel will accept a settlement that would establish a Palestinian state on Palestinian soil and do away with what Jordan sees as an expansionist policy that might still attempt to solve the problem at its expense. Given both Netanyahu's and Eisenkot's opposition to a Palestinian state, the Israeli elections have done little to address Jordan's concerns.

Turkey



By Alper Coşkun
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OPINION

Israel's elections are unlikely to produce a breakthrough in its deeply troubled relationship with Turkey, regardless of who ultimately forms the next cabinet. The bad blood between the two runs deep and will not be easy to overcome, despite a largely eclipsed legacy of goodwill. Years of political acrimony, the war in Gaza, and an intensifying sense of regional competition have added up, causing deep suspicion among the political leaderships, security, defense, and intelligence establishments, as well as the publics on both sides.

Ankara would welcome the end of Netanyahu's tenure, and a new political constellation in which the surprisingly successful Arab parties wield influence may reduce the inflammatory rhetoric in relations. While he has given no indication of a desire to seek a reset with Turkey, Eisenkot may even opt for a less confrontational posture.

The deeper problem, however, lies in the two's competing visions of regional order. Turkey prioritizes a consolidated region of sovereign actors, while Israel prefers a fragmented landscape where it retains freedom of action. This division is compounded by disagreement over Gaza and the future of the Palestinians.

A change in cabinet in Israel may open some space for mutual goodwill. But the differences between the two sides have broadened and deepened to such an extent that meaningful change will only be possible through a shared determination for a reset, based on a compatible vision for the region.

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