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The Begin-Sadat Center
for Strategic Studies
Bar-Ilan University

Reshaping the Global Landscape: How Will Trump's Return Redefine Global Dynamics?

Eitan Shamir, Ed.



Mideast Security and Policy Studies No. 210

**THE BEGIN-SADAT CENTER FOR STRATEGIC STUDIES
BAR-ILAN UNIVERSITY**

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Reshaping the Global Landscape: How Will Trump's Return Redefine Global Dynamics?

List of Articles

Introduction, Eitan Shamir	7
What Will Donald Trump's Foreign Policy Look Like? <i>Jonathan Rynhold</i>	9
Continuity and Change in Trump's Approach to Israel <i>Eytan Gilboa</i>	13
Israel at the Beginning of the Trump Era – "Shaping the Day After" <i>Ran Segev</i>	15
Donald Trump's Second Presidency <i>Shmuel Sandler</i>	20
Donald Trump's Victory Is Shuffling the Cards in Tehran <i>Raphael G. Bouchnik-Chen</i>	22
Trump's Second Term: Implications for the Energy Sector <i>Michael Harari</i>	24
How Trump Will Affect Israel and Iran <i>Yaacov Lappin</i>	27
Full Israeli-Saudi Normalization Still Unlikely <i>Joshua Teitelbaum</i>	29

Donald Trump and the Palestinians	
<i>Shaul Bartal</i>	31
US-Iran Strategy During Donald Trump’s Second Term	
<i>David A. Levy</i>	33
Trump and Erdoğan: The Future of U.S.-Turkey Relations	
<i>Efrat Aviv</i>	35
What Might President Trump’s Policy Toward the FSU States look Like?	
<i>Vladimir (Ze’ev) Khanin and Ariel Kogan</i>	38
Trump and the Hindu Pacific	
<i>Lauren Dagan Amos and Alon Levkowitz</i>	41
Donald Trump and Kim Jong un: Back to Square One?	
<i>Alon Levkowitz</i>	43
Donald Trump and South Korea	
<i>Alon Levkowitz</i>	45

Reshaping the Global Landscape: How Will Trump's Return Redefine Global Dynamics?

INTRODUCTION

Prof. Eitan Shamir

Prof. Eitan Shamir is Managing Director of the BESA Center. His research focuses primarily on military strategy, command structures, and innovation within the military sphere.

In the complex and often unpredictable realm of global politics, few political developments carry as much potential for transformative impact as the prospect of a second Trump presidency. This collection of expert analyses delves into the multifaceted implications of such a scenario, offering a comprehensive and nuanced exploration of how a Trump return to the White House could reshape global strategic landscapes. With a special focus on the Middle East and Israel, the publication provides an in-depth examination of how potential shifts in US foreign policy could reconfigure regional dynamics and strategic relationships.

The geopolitical reverberations of an American presidential administration extend far beyond the borders of the United States, touching diplomatic relations, economic frameworks, security alignments, and regional power dynamics. Our contributors bring a diverse and sophisticated lens to this critical analysis, examining potential shifts from multiple geographic and strategic perspectives. From the intricate dynamics of Israel-US relations to the strategic calculations of Middle Eastern nations, from the complex geopolitical interactions in Asia to the potential recalibrations in regional and global energy markets, this volume offers a rich tapestry of informed insights.

Each of our experts has a unique vantage point drawn from deep professional expertise, knowledge of historical context, and nuanced understanding of international relations. The mosaic of perspectives

presented here is not about predicting an inevitable outcome, but about understanding the potential strategic implications of significant geopolitical shifts. By exploring these diverse scenarios, we aim to provide readers with a sophisticated, multi-dimensional understanding of how a potential Trump presidency could influence global dynamics.

WHAT WILL DONALD TRUMP'S FOREIGN POLICY LOOK LIKE?

Prof. Jonathan Rynhold

Prof. Jonathan Rynhold is head of the Department of Political Studies at Bar-Ilan University. His research focuses on US-Israeli relations, Israeli politics and foreign policy, and the Middle East peace process.

The Trump administration will be united by a hawkish approach to foreign policy. It will be willing to use more military force and use it more frequently than the Biden administration, while being less concerned about “collateral damage” (i.e., the death of civilians in harm’s way) and the humanitarian cost of war more generally. The administration will also be more prepared to act unilaterally than its predecessor. However, it will be divided about the depth and breadth of America’s commitment to its allies. While some of Trump’s key nominations are traditional Republicans who view allies as an essential component of a grand strategy based on international leadership, the president himself has been outspoken in expressing isolationist views.

Trump is not interested in America leading an international order, but rather in focusing on defense of the homeland and protecting America’s economic interests with tariffs rather than by promoting free trade. During his first administration, the US did not respond militarily to serious attacks on its allies in the Middle East, notably on Saudi oil processing facilities in 2019. Trump also seemed prepared to withdraw from NATO, America’s most important alliance. It remains unclear whether this is mere posturing or an underlying conviction. Either way, there will be heavy pressure on US allies to contribute more in financial and military terms.

According to these criteria, Israel comes out very well in military terms – it fights its own battles and is highly effective. But it is by no means clear that Trump would have been inclined to act as quickly and generously as did President Biden following October 7. Biden’s response came from the gut. He is deeply committed to the defense of

Israel out of conviction, and strongly believes that America's alliances in general are critical to its security. Trump lacks these attributes; he personally takes a more transactional approach. His pro-Israel policy was marked more by support on symbolic and political issues, like moving the US embassy to Jerusalem, than any upgrading of the strategic relationship. Moreover, given that Trump cannot stand for reelection, he is no longer beholden to the pro-Israel evangelical base of the Republican Party.

On the other hand, leading figures in his administration will no doubt share Biden's convictions on the *de facto* alliance with Israel. Not backing Israel would damage America's credibility worldwide and invite challenges by America's adversaries on other US allies. Moreover, the main concern of isolationist-leaning members of the administration is that the US must not be drawn into a long costly war. The Biden administration managed to supply Israel with over 500 transport planes full of military equipment without triggering such a war.

It is an open question whether the Trump administration would actively support an Israeli *attack* on Iran's nuclear program. This is of critical importance because the US has far greater capabilities than Israel. Moreover, direct US involvement has the potential to provide a highly effective deterrent against restarting the program, at least during Trump's term in office.

The Trump administration will definitely take a tougher line than the Biden administration regarding the Iranian nuclear program. We should expect much tougher sanctions and a harsh military response to any Iranian, or Iranian proxy, attack on Americans. Nonetheless, the goal will be to negotiate a better deal with Iran. In contrast to the foreign policy doctrine of George W. Bush, Trump has no interest in regime change. The president views such ambitions as the cause of the "forever wars" that he has vowed to avoid. This also means the US will avoid putting "boots on the ground".

Some of Trump's nominations, like Marco Rubio, have indicated in the past that they would support US involvement in an Israeli attack on the Iranian nuclear program. Other more isolationist-leaning

figures, such as Vice President-elect J.D. Vance, have hinted that they would not support this. As with everything else, the key decision-maker will be the President himself. On the one hand, the President is instinctively inclined to prioritize a diplomatic deal. He had no issue with trying to do a nuclear deal with North Korea, even holding a friendly meeting with Kim Jong-un – leader of the odious regime in Pyongyang – while offering to withdraw all 25,000 US troops from South Korea. With that said, Trump walked away from that deal when his terms were not met.

In the Iranian case, there is an added reason why Trump might support an Israeli military strike. The FBI has confirmed that the Islamic Republic of Iran was involved in two assassination attempts on Trump's life. No American president has ever allowed US foreign relations to be more influenced by personal ego than Donald Trump. This personal angle on the issue could very well tilt Trump's inclination decisively.

Another potential challenge will be on the financial side of the special relationship. Israel is the largest recipient of US foreign aid and Trump has already gone on record saying that Israel should receive this in the form of loans rather than grants. In the twilight of the Obama administration, annual aid to Israel was set at \$3.8 billion a year until 2028 – that is, about 1% of Israel's GDP and about 15% of its defense budget.

In the last year, the Biden administration granted Israel over \$14 billion in extra aid to assist with the war. This was held up for a long time by Republicans in Congress on Trump's orders. While foreign aid is unpopular with Republicans in Congress, Israel is an exception because of robust evangelical support for Israel. Evangelicals make up about two-thirds of the Republican base. Trump no longer needs evangelical support to get re-elected as he cannot run again, but Congressional Republicans continue to require evangelical support. When it comes to financial matters, Congress has a great deal of influence, so Trump may decide that cutting aid to Israel is not worth the fight. However, even in that case, inaction could have serious consequences for Israel because when the current deal runs out, there

may not be the political will to sign a new deal. Once the continuity of aid is broken, it will be very hard to restore. On the other hand, since Israel has to spend all the aid it receives inside the US, Trump may be persuaded to view such aid as indirectly supporting the American arms industry.

On a related point, Trump has spoken of imposing “across the board” tariffs on imports to the US. This could seriously damage the Israeli economy. America is Israel’s largest trading partner and Israel has a large trade surplus of almost \$6 billion. International trade accounts for about two-thirds of the Israeli economy compared to about a third of the US economy. Though unlikely, one cannot rule out the possibility that while evangelicals will continue to donate money to Israel (estimated at about \$100 million a year), they may take the view that the US government should adopt the line preferred by Trump.

CONTINUITY AND CHANGE IN TRUMP'S APPROACH TO ISRAEL

Prof. Eytan Gilboa

Prof. Eytan Gilboa is an expert on US-Israel relations, international communication, and public diplomacy. He is the founding Head of both the School of Communication and the Center for International Communication at Bar-Ilan University.

Many Israelis, from Prime Minister Benjamin Netanyahu to ordinary citizens, are happy with Donald Trump's victory in the recent US presidential election and expect him to support Israel as emphatically as he did during his first term. This, however, may not be the case. Four sources of information may help to forecast Trump's approach to world affairs and Israel: the theory and history of presidential performance during second terms, Trump's policies during his first term, statements he made during his election campaign, and the people he has chosen to nominate to key positions in foreign policy and national security.

Theory and history aren't that useful where Trump is concerned because he has systematically defied both throughout his political career. But we do know that in second terms, presidents often behave differently than they did in their first and are more concerned about their legacies. This is especially true for Trump, who lost his bid for a second term, waited four years, came back and won. He has grown older, and in the last four years much has occurred in the US, the world and the Middle East.

Trump is unpredictable and at times erratic, but there is almost invariably both continuity and change in US policy. Trump's main motivation is to rebuild his reputation both inside and outside the US. Winning a second term has rehabilitated him domestically, and winning the Nobel Peace Prize would rehabilitate him internationally. Trump has said he will be a man of peace, striving to end the wars in Ukraine and the Middle East and reduce the threat of World War III.

During his first term, like his predecessors Barack Obama and Joe Biden, Trump identified China as the number one challenge to US domination in world affairs. China has become a partner with Russia, North Korea and Iran in the “axis of evil.” This axis is helping Russia in the war against Ukraine. Israel dealt a major blow to the axis by destroying the “ring of fire” Iran established around its borders. The regime change that just occurred in Syria is only the most recent element of this regional transformation.

Iran fears Trump because he might restore harsh sanctions or give the green light to an Israeli attack on its oil and/or nuclear facilities. The regime could either seek a nuclear agreement with Trump or break out to the bomb. They have indicated interest in nuclear negotiations with Trump, and he has suggested that he might be interested as well. The prospect of another nuclear agreement that is full of holes will not appeal to Israel.

Trump has stated that he wants the war in Gaza to be over and all Israeli hostages to be released by his inauguration on January 20, 2025. He also appears to want to implement Biden’s vision of adding Saudi Arabia to the Abraham Accords via normalization of relations with Israel. One of Riyadh’s core conditions is some kind of Israeli commitment, albeit vague, to Palestinian statehood. Trump’s 2020 “Deal of the Century” to resolve the Israeli-Palestinian conflict included the establishment of a Palestinian state over 70% of Judea and Samaria and Gaza.

While neither Benjamin Netanyahu nor his coalition partners are likely to share Trump’s vision of a Palestinian state, Netanyahu’s ability to resist Trump’s will – unlike his dealings with Biden on this issue - will be substantially reduced. Netanyahu has called Trump the greatest friend of Israel to ever serve at the White House. It remains to be seen whether he will retain that assessment through Trump’s second term.

ISRAEL AT THE BEGINNING OF THE TRUMP ERA – “SHAPING THE DAY AFTER”

Ran Segev

Ran Segev served for 31 years in a variety of senior roles in the Israeli security establishment, mainly in the fields of intelligence and national security.

Introduction

The election of Donald Trump to the presidency heralds a new era in US domestic and foreign policy. Although President Trump will not take office until January 20, 2025, it is already possible to examine the possible implications of his election for the Middle East and the potential created to bring about strategic changes in the region, in cooperation between Israel and the new administration.

In recent days, the president-elect has completed a round of senior appointments to key positions in managing US foreign and security policy. It seems that Israel, for the first time in years, has an opportunity to conduct an in-depth strategic dialogue with a team of senior officials who have previously been exposed to Israel's security needs and have shown attention and willingness to examine a joint strategy to achieve three main goals:

- containing Iran, reducing its regional influence and, above all, preventing Iran from achieving a military nuclear capability;
- allowing Israel, against the backdrop of the regional war, to realize its security goals in both Gaza and Lebanon; and
- renewing efforts to promote normalization between Israel and Saudi Arabia as a complementary step to the Abraham Accords and as part of a regional structure that will contribute to strengthening stability and economic prosperity in the region.

I will focus below on the realization of the achievements of the war, the so-called “Day After”.

The end of the multi-front war – “The Day After” design

At this stage, it is not possible to assess whether the settlement efforts in Lebanon led by the Biden administration will mature sufficiently to ensure a lasting ceasefire in Lebanon by January 20, 2025. However, it appears that these efforts, which are based on Israel’s military achievements in this arena, are based on the changed reality on the ground, which should be reflected in the arrangements of the “day after.” The severe blows suffered by Hezbollah; Iran, the organization’s patron; and the organization’s leadership removed the basic condition they had previously set for a settlement in Lebanon, which prevented the advancement of an end to the war in Gaza. It appears that the Trump administration shares the Israeli view that the settlement in Lebanon will “stand on its own two feet” and be completely separate and unconditioned by developments on the war front in Gaza.

The collapse of the principle of unity of arenas creates a situation of clear prioritization in the political handling of the two main war arenas. In Lebanon, Israel is setting concrete goals of 1) pushing Hezbollah’s military presence north of the Litani River; 2) creating a security reality that prevents Hezbollah from regaining a foothold near the border with Israel; and 3) preventing the organization from rearming itself with Iranian assistance. It is currently unclear what enforcement mechanism will maintain the arrangement in Lebanon. However, it is clear that given the risk that this mechanism will not be effective, Israel must maintain freedom of action in this arena in order to prevent violations and erosion of the arrangement. Israel learned this lesson from Security Council Resolution 1701, which was put in place at the end of the Second Lebanon War in 2006 with similar aims and which proved hopelessly ineffective. It was such an utter failure that Hezbollah succeeded in massively rearming itself and posing a dramatically greater threat to Israel. Israel cannot allow that pattern to repeat itself.

The principle of maintaining Israeli freedom of action in Lebanon must be the basis for future cooperation between Israel and the US administration on the Lebanese issue in order to limit Hezbollah’s ability to recover while relying on Iran’s military, economic, and

political assistance. It seems highly likely that an arrangement based on this principle will receive the backing of the Trump administration.

During the multi-sector war in which Israel has been engaged since October 7, 2023, it has managed to create a new security reality on its southern border, opposite the Gaza Strip. The Hamas organization was hit very hard, most of its military command center in the Strip was eliminated, and its ability to conduct an effective guerrilla war against the IDF was greatly reduced. Hamas continues to wage terror against our forces in the Gaza Strip and maintain its position among the population through its control of humanitarian aid. It seems that during 2025, Israel will work to shape a civilian reality in the Gaza Strip that completely negates the possibility of the organization's recovery and significantly erodes its civilian control over large parts of the population. At the same time, Israel will work to foster a local civilian alternative, with inter-Arab and possibly even international backing, that constitutes an alternative to Hamas's civilian control in the Strip.

This challenge will require ongoing dialogue with the US and assistance from the Trump administration in providing a political umbrella for moves on the ground, including the possibility that the US administration will help encourage moderate Arab elements, such as the Emirates and Saudi Arabia, to contribute to building the civilian alternative in Gaza as part of the reconstruction of the Strip.

In Lebanon, Hezbollah suffered severe blows. The organization's charismatic leader Hassan Nasrallah was killed and its command center severely damaged. A large part of the organization's missile and rocket arsenal was also destroyed and many of its operatives were killed. But the IDF's main achievement along the border—the takeover of a security strip along Israel's northern border while destroying the military array that Hezbollah had built in the area as a base for an October 7-style attack on the Galilee—is already creating a different reality in southern Lebanon. Preventing Hezbollah from regaining control south of the Litani River, as well as preventing the recovery of its rocket and missile array, will be a major challenge for Israel's security policy in the north. From the Israeli point of view, the contribution of the American administration to the effort to restore

the political system in Lebanon so that it can exert counter-pressure on Hezbollah is of great importance. Active American involvement in the Lebanese domestic arena is especially important in light of the changes wrought by the war in Lebanon.

For the first time, Hezbollah's leadership was severely damaged, and the leader who led its moves in the Lebanese domestic arena is dead. The organization's military capability has been significantly damaged, and Lebanon is facing a humanitarian disaster due to the displacement of over a million Lebanese from their homes. There is also significant damage to infrastructure in Beirut and south Lebanon that will require large-scale foreign aid for reconstruction. It seems that if the Trump administration acts in accordance with Israel's interest in formulating an aid package from Arab sources that strengthens the moderate elements in the Lebanese domestic arena, there is a good chance that Iran's paralyzing grip on the Lebanese political system will finally come to an end.

The war has demonstrated that Israel is a regional military power capable of severely damaging Iran's proxies, the so-called "axis of resistance," which formed the main component of its "ring of fire" on Israel's borders. Iran's enormous investment in terms of finances, weapons, training, and building military capacity has gone down the drain. At the same time, Israel has proven to the US that it is a security asset with military and technological superiority over its rivals.

In addition, it seems that leading figures in the Trump administration were particularly impressed by the fact that the IDF fighters who accomplished these achievements were mostly uniformed civilians determined to defend their home and country. The two previous attempts by American administrations to shape a new policy in the Middle East, in Afghanistan and Iraq, collapsed precisely because these basic components were lacking – a society determined to defend its country alongside technological advancement and a developed economic capability to support the military effort. Israel's achievements in the military arena increase the confidence of the leading team in the Trump administration that Israel constitutes a first-rate strategic asset in the Middle East.

It is to be hoped that this confidence will be translated into concrete steps that allow Israel to shape a security and political reality on both the northern border with Lebanon and in the Gaza Strip that will ensure the removal of the security threats to the civilian populations of both the Galilee and the western Negev and allow the residents of those areas to return. The ultimate test of the strategic partnership will be the challenge of formulating a joint strategy to prevent Iran from acting immediately after the war to rebuild its proxy organizations, especially in the northern arena.

Beyond that, the Iranian nuclear issue will continue to be at the center of strategic dialogue between Israel and the United States. It is hoped that in the Trump era, a coherent strategy will be formulated for the first time—one that combines massive economic pressure with a credible and concrete military threat sufficient to deter Iran from advancing its plan to obtain nuclear weapons. Dialogue with President Trump and his administration's leading security and foreign affairs team has already begun during the transition period. It is based on the assessment of both Israel and the Trump administration that a nuclear Iran would be a tremendous danger to the future of the Middle East and the free world and must be prevented at all costs.

DONALD TRUMP'S SECOND PRESIDENCY

Prof. Shmuel Sandler

Prof. Shmuel Sandler is Professor Emeritus of Political Science at Bar-Ilan University. He is an expert on Israeli electoral politics, Israeli foreign policy and national security, and US foreign policy.

Whatever queries we might have, it's hard not to respect Donald Trump's 2024 electoral victory. Before providing some insights into his foreign policy, we must address the man himself and his political strategy.

After four years of ups and downs in the White House and an excruciating downfall in 2020, the defeated president did not easily give up his place there. Over the last four years, we have witnessed an unceasing campaign by a man in his late 70s who was determined to return to the White House. Ultimately, he pulled out a victory over an incumbent VP at the electoral level as well as in the popular vote, by a margin of 4 million votes.

Donald Trump is a multifaceted and very determined individual—a person unwilling to accept conventional norms as binding. As a second-term president, we can assume he will seek to leave his mark on history. We cannot ignore his capricious personality, which was on full display during his previous administration.

The two central issues most strongly prevalent in his election campaign, and which, according to all estimates, brought him victory, were revitalizing the American economy and stemming illegal immigration to the US. From this, we can assume that his primary focus will be on the domestic arena. However, due to the strong linkage between the two arenas and the global status of the US, Trump will have to deal with foreign policy. Here he will encounter conflicts between different values, so we can expect a less coherent policy.

Trump's foreign policy and national security personnel selections are undoubtedly extremely positive for Israel. Trump's appointments for Secretary of State, the Pentagon, National Security Advisor,

ambassadors to Israel and the UN, and the President's Middle East envoy collectively constitute a team sympathetic to Jerusalem. To balance this team, he appointed his in-law Massad Boulus, a Lebanese-American businessman, as his advisor on the ME. There is no doubt that this sends a message to the region, the Arab states, and Iran. However, another common denominator running through Trump's appointments is loyalty to the President. Three key officials from the previous term - Vice President Pence, Secretary of State Pompeo, and Ambassador Haley - will not be included in the new administration. Trump will be expecting his newly appointed officials to be committed to executing his political strategy.

Given these insights, what can we expect from the new administration's initial foreign policy? We can assume that the Russia-Ukraine war, the Israel-Iran struggle, and the growing tensions between China and Taiwan will occupy the incoming administration. Trump's perceived disregard for allies, lack of sympathy for the Ukrainian cause, and demand of PM Netanyahu that he end the war would indicate that most of his attention will be given to Asia.

Relations with China encompass strategic and economic issues. The intention to impose tariffs on imports from China was already on the agenda during Trump's previous term and even intensified during Biden's presidency. Pressure is also likely to be applied to Zelensky to reach an agreement with Russia, thus separating Putin from Beijing. All of the above pose a big question for Netanyahu: What will be Trump's position on Iran during or after Israel concludes its multiple-front war?

DONALD TRUMP'S VICTORY IS SHUFFLING THE CARDS IN TEHRAN

Col. (res.) Dr. Raphael G. Bouchnik-Chen

Col. (res.) Dr. Raphael G. Bouchnik-Chen is a senior research fellow at the BESA Center. He specializes in Middle Eastern and international strategic affairs.

Donald Trump's victory in the US presidential elections has ratcheted up anxiety in Iran that the president-elect will instantly resume his well-known policy of "maximum pressure" on Iran via tough economic and commercial sanctions.

Iran's Vice President for Strategic Affairs Muhammad Javad Zarif was quoted on November 9 as suggesting that Trump do a cost-benefit analysis on his "maximum pressure" policy to decide whether it is worth continuing. He recalled that Trump's previous standpoint vis-à-vis Iran led Tehran to increase uranium enrichment to 60% purity, which is practically the grade of fissile material needed for nuclear devices. In a communique on November 7, Iran's Foreign Ministry expressed the hope that Trump's election will be an opportunity for the new administration to reconsider wrong policies of the past.

Amid reports of an alleged Iranian plot to murder Donald Trump, Foreign Minister Abbas Araghchi indirectly accused Israel of fabricating the story in order to harm confidence-building between Iran and the US – notwithstanding the fact that in February 2023, high-ranking IRGC commander Amir Ali Hajizadeh said Iran has a holy mission to kill Trump in retaliation for the assassination of Qassem Soleimani.

Newly installed (July 2024) Iranian President Masoud Pezeshkian, considered a reformist, has asserted that he is committed to a conciliation process with the West in order to work towards lifting Western sanctions imposed on Iran. Pezeshkian's administration has contended that the JCPOA (the nuclear accord of July 2015) in its

current format is “not good enough” anymore, and that an amended agreement is necessary. Therefore, resuming the nuclear talks should be a high priority on the international agenda.

The emerging Iranian “smiling” diplomacy backed by Supreme Leader Khamenei may have important ramifications for the current boiling military tension between Iran and Israel. Though Iran has not yet backed off from its declared intention to retaliate against Israel following the massive Israeli air attack against strategic assets deep in Iranian territory (October 26, 2024), its “foot-dragging” on this matter may have a significant effect on Iranian behavior versus the US. By manifesting a certain policy of restraint towards Israel, Iran may be delivering a message to President-elect Trump of its desire to open a new chapter in Iran-US relations.

In the meantime, Iran is currently engaged in a diplomatic offensive directed towards the Gulf States, including Saudi Arabia. This demarche is linked to Tehran’s willingness to consolidate its posture in this strategic region. However, it is likely that in Saudi Arabia, there are expectations that with Trump, the US could return as the regional hegemon and provide a sense of strategic direction in which Saudi Arabia can play a key role.

One thing is clear. High-ranking political figures in Iran, including government officials, are using moderate rhetoric to signal an allegedly sincere desire to cultivate a channel for dialogue with Donald Trump’s administration. One can also argue that Iran’s rapid developments in its nuclear program can serve as serious leverage in future negotiations with the West.

Experience suggests that it would be wise to suspect the Iranian regime’s real intentions with regard to its approach to the incoming US administration. The mullahs’ top priority was, and still is, to reach a sufficient military nuclear capability to annihilate the State of Israel. To the regime, that end justifies the means.

TRUMP'S SECOND TERM: IMPLICATIONS FOR THE ENERGY SECTOR

Ambassador (Emeritus) Michael Harari

Ambassador (Emeritus) Michael Harari was Israeli Ambassador to Cyprus (2010-2015). He is a consultant in strategy, policy and energy.

Examining the implications of President Trump's reelection appears at first glance to be an easy task for most experts, especially when it comes to the energy sector. After all, we can draw conclusions from his first term, as well as from the rhetoric that characterized his campaign. However, the picture is a bit more complex.

Let's start with the obvious. The Trump administration will refocus on the familiar energy sectors, oil and gas and perhaps nuclear. As the president-elect said during the campaign, "We have more liquid gold than any country in the world. More than Saudi Arabia. More than Russia", implying that it should be exploited economically and perhaps also politically. Moreover, President Trump's lack of concern for the climate crisis does not augur well for the renewable energy sector. As you may recall, Trump withdrew from the Paris Agreement during his previous term. Regardless of what he does now, he is unlikely to cooperate with the ambitions of the climate conference for a new mechanism to finance renewable energies for developing countries.

But other factors need to be considered. The many investments made with government encouragement during the Biden administration in the fields of renewable energy have been successful. They are driving an economic sector that is vibrant in terms of both employment and profits, in "red" (Republican) as well as "blue" (Democratic) states.

The Biden administration also managed to pass the IRA (Inflation Reduction Act), which encouraged investments in these areas. Should Trump wish to repeal the law, there is no certainty that he will be able to, given the balance of power in the Senate (despite the Republican

majority) and also in the House. Given that this sector is economically successful, Trump might prefer in any case to avoid doing it any serious harm. It is also worth noting Elon Musk, who is very close to the president, created and owns Tesla, the electric car manufacturer.

We can therefore cautiously summarize the outlook for the incoming administration's energy policy as follows: Rhetorically, we will return to his first administration's tone, with clear hostility to the discourse surrounding the climate crisis and a stress on the need to invest in America's "liquid gold" to generate profits and improve the state of the American economy. This will also be done in practice by encouraging investment and expanding gas and oil production, including fracking technology. Trump might also lift the Biden administration's freeze on granting new licenses for the construction of gas liquefaction facilities in the US. At the same time, the administration will adopt a more selective and focused policy towards the renewable energy sector. This could entail reductions in environmental regulations that demand stricter standards and sometimes even exact fines for polluting energy companies.

Another very important angle concerns Europe. The Biden administration, which formed a Western coalition against President Vladimir Putin in response to the invasion of Ukraine, sought to greatly reduce Europe's dependence on Russian gas and succeeded in doing so. In the first half of 2024, 47% of the liquefied gas purchased by Europe came from the US (!) and only 18.7% from Russia. The rest came from countries like Algeria, Qatar, and others. From the US perspective, this is a political achievement as well as an economic one. From the European perspective, this constitutes an unhealthy dependence on a single energy supplier.

European countries were not afraid of this dependence under the Biden administration, but a Trump administration is a different story. On the one hand, Trump will likely want to persevere to continue reaping the economic gains that result from the arrangement. On the other hand, it is difficult to assess how this calculation will be affected by Trump's policy toward Russia and desire to bring an end to the war. Brussels and quite a few capitals on the European continent will

be closely and anxiously following Trump's decision-making on this front and its possible consequences.

The importance of the Persian Gulf, from the perspective of the Trump administration, remains the same, both in light of its desire to maintain low energy prices (meaning it will be less comfortable than its predecessor about allowing an attack on Iranian oil facilities) and in light of its desire to promote normalization (a new "deal of the century"?) between Saudi Arabia and Israel.

In the Eastern Mediterranean, the natural gas in the region, which is mostly Israeli, has a major impact on the region at large. Israeli exports to Egypt and Jordan are of considerable importance to the economies of those countries and therefore to stability in the wider region. Egypt, as is well known, exports some of the gas imported from Israel to Turkey and Europe, but this is accounted for by its urgent need for precious foreign currency and is not necessarily a "tie-breaker" from Europe's perspective.

The maritime agreement between Israel and Lebanon did not prevent the war on the northern front, but it was not supposed to. In any case, the agreement was not dissolved and remains in place. Greek-Turkish hostility and the Cyprus problem will require much more effort to solve, despite positive developments in bilateral relations between Ankara and Athens. It is difficult at this stage to assess to what extent, if at all, the Trump administration will want to get involved.

HOW TRUMP WILL AFFECT ISRAEL AND IRAN

Yaacov Lappin

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The arrival of a second Trump administration could significantly improve Israel's strategic posture and place the Iranian regime under new pressure.

During President Trump's previous term, US-Israel relations strengthened, with policies that favored Israel's security concerns. A breakthrough occurred between Israel and the moderate Gulf Arab states under the framework of the 2020 Abraham Accords, which disturbed Iran greatly.

The second Trump term could further free Israel's hand to offensively engage its adversaries without as much concern for diplomatic repercussions, or the withholding of arms – a tactic the Biden administration came to favor to show its displeasure with Israel's war effort. While the Biden administration did provide over \$17 billion of military aid to Israel after the October 7 mass murder attacks by Hamas, it has also consistently pressured Israel to prematurely abandon its war efforts against Hamas, Hezbollah, and Iran. Biden has urged Israel to make do with limited offense in the face of an existential seven-front war that has been forced upon it by the Iranian axis.

It is likely that support for future Israeli actions against Iran, whose nuclear program is racing ahead, will be more forthcoming from a second Trump administration. An early indication of Trump's appointees suggests not only unconditional support for Israel's security, but also a hard line against Iran. Appointees like Michael Waltz as incoming National Security Advisor, Mike Huckabee as US Ambassador to Israel, Elise Stefanik as US Ambassador to the United Nations, Pete Hegseth as Secretary of Defense, and Marco

Rubio as Secretary of State, together with Republican control of Congress for the next two years, suggest a highly significant opportunity for Israel, with particular relevance for the Iranian nuclear program. The alignment of US and Israeli policies might embolden Israel to take more decisive actions against Iran while enforcing any future arrangement in Lebanon and completing the task of crushing Hamas in Gaza.

Furthermore, a second Trump administration could continue the trend of diplomatic normalization between Israel and Arab states, as evidenced by the Abraham Accords signed in 2020. The Sunni Arab moderate bloc would be strengthened by clear signaling from Washington that attempts to contain and appease the Islamic Republic of Iran have ended.

On the international stage, the US might renew its “maximum pressure” campaign against Iran, reinstating sanctions and discouraging other nations from engaging economically with Tehran. This could significantly impact Iran’s economy, limiting its ability to fund proxy organizations and invest in its nuclear program.

However, any move by the future Trump administration to try and contain Russia in a less confrontational manner could end up strengthening Iran, which has become a major supplier of firepower to Moscow. The Iranian-Russian-Chinese coalition is a mutually reinforcing triangle that allows each member to circumvent sanctions and provide resources the other members lack.

With Iranian-made suicide drones flying into both Israeli and Ukrainian cities, it will be vital for the next American administration to make the linkage between the Middle Eastern regional conflict and the global challenges to the American-led world order and international security.

FULL ISRAELI-SAUDI NORMALIZATION STILL UNLIKELY

Prof. Joshua Teitelbaum

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As a rule, historians like myself are better off leaving predictions to those practiced in making them. This applies even more where the unpredictable Donald Trump is concerned. But history does give perspective, and using that perspective for a tentative glimpse ahead is warranted.

Even before the Hamas-Israel War, Saudi Arabia's price for full normalization was too high for Biden's Washington: NATO-like status for Riyadh; fast-tracked US arms sales; and a civilian nuclear program. And Crown Prince Muhammad bin Salman would have demanded some kind of Israeli gesture towards the Palestinians—certainly unlikely with the current Israeli government. That said, steps short of full normalization might have been possible, and, given the right circumstances, might still be.

But since the Hamas-Israel War, such developments have become much more unlikely. Although the leaders of Saudi Arabia have little warmth left in their hearts for the Palestinians, even an autocrat like Muhammad bin Salman cannot afford to ignore the effects of Gaza's devastation on a largely sympathetic Saudi population. Peace with Israel is not his main concern, but rather transforming his country, which involves granting social liberalization in exchange for limiting political freedom. Most Saudis accept that bargain. (Those who might have needed more convincing are reminded of the [gruesome murder of *Washington Post* columnist Jamal Khashoggi in 2018.](#)) A controversial full normalization with Israel only complicates matters for him.

In the past, Bin Salman had made quite [favorable statements towards Israel](#). He left anti-Israel statements to Foreign Minister Prince Faisal bin Farhan bin Abdullah. But at the 11 November 2024 Saudi-hosted Joint Arab-Islamic Extraordinary Summit, [he accused Israel of committing genocide](#), and stood by Iran against Israeli attacks. Hosting this summit, which was attended by Iran, is only one of [several recent Saudi steps toward Tehran](#).

For over one hundred years, the Saudis' main concern has been the security of the regime. They have hedged their bets with Iran in the past due to perceived lack of US commitment to their security. And that is also why they had previously linked normalization to US security guarantees. Riyadh still fears Iran, particularly an Iran armed with nuclear weapons. If the Trump administration can convince Riyadh that it has the both the willpower and the staying power to take on Iran, perhaps the current Saudi trend can be stopped. But Trump himself is completely unpredictable, and possible picks for influential posts contain both old-time conservative anti-Iran hawks and isolationists.

At the present time, Riyadh has little to gain from full normalization with Israel, and it is difficult to imagine the Trump administration putting the necessary pressure on Israel. Still, combined with a hard line on Iran and some smaller gestures towards the Palestinians, *steps short of normalization* might eventually be possible. These could include, for example, direct flights to Saudi Arabia for Israeli Muslim pilgrims who now must fly via Amman on Jordanian papers. Given the right circumstances, even mutual interest sections in the UAE Embassy might be possible. But a lot would have to fall into place to bring even these small steps to fruition.

DONALD TRUMP AND THE PALESTINIANS

Lt. Col. (res.) Dr. Shaul Bartal

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Donald Trump's first term in the White House was seen as a disaster for the Palestinians. This concept applies to all currents of Palestinian society, including the PLO, as well as the Iranian proxy organizations that operate within Palestinian society, Islamic Jihad and Hamas. The Trump administration was considered sympathetic to Israel and close to the views of the Israeli right. Trump transferred the American embassy to Jerusalem on May 14, 2018 (a symbolic date related to Israeli Independence Day), and also halted funding to the United Nations Relief and Works Agency for Palestine refugees (UNRWA) in September 2018. The stopping of UNRWA funding was meant to pressure Palestinian leadership to agree to the president's peace vision, which he called the "Deal of the Century". "I stopped massive amounts of money that we were paying to the Palestinians. We're not paying until you make a deal," Trump declared in September 2018. The Palestinians did not agree to the deal and opposed all other American proposals during Trump's presidency. It is therefore hardly surprising to see mainly hostile reactions against his election among the Palestinians.

Trump's reelection forces the leadership of the Palestinian Authority, led by Mahmoud Abbas, to try to open a new page in their relationship with him and avoid the mistakes of the past. The Arab networks reported that a phone conversation took place between Mahmoud Abbas and Trump for the first time since 2017. During conversation, Abbas congratulated Trump on his victory and talked to him about [stopping the war in Gaza](#).

The Palestinian leadership does not hide its fear of another "deal of the century" that would once again authorize Israel to annex settlements

in the West Bank. The Fatah websites have highlighted the faction's desire to turn over a new leaf in its relationship with Trump, while Hamas, ever loyal to the Iranian line, has condemned [Trump as an impulsive and greedy narcissist](#). Hamas understands that the new-old regime will expand the Abraham Accords and strengthen the alliance of the Sunni countries and Israel against the Shiite alliance (which includes Hamas and Islamic Jihad, though both are Sunni, and is supported by China and Russia). Hamas has concluded that now is the time to ramp up the "resistance" in order to face down the Americans' attempts to stabilize the Middle East. It appears, then, that the two currents in Palestinian society, Fatah and Hamas, also reflect the inter-bloc rivalry in the Middle East that Trump will try to stabilize during his term.

US-IRAN STRATEGY DURING DONALD TRUMP'S SECOND TERM

Cdr. David A. Levy

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The Trump transition team has begun to reveal its foreign policy agenda, and one thing is clear: It's bad news for the Iranian regime and the "Islamic Revolution" it patronizes. President Trump's nominees strongly support a close Washington-Jerusalem relationship while advocating for an aggressive approach with Tehran.

In the closing stages of his 2024 campaign, Donald Trump invoked Ronald Reagan's "Peace through Strength" doctrine. It was rumored that senior policymakers in Trump's first administration were reading Peter Schweizer's book, *Victory: The Reagan Administration's Secret Strategy That Hastened the Collapse of the Soviet Union*. In 2018, an anonymous White House official said "It's no secret" that Schweizer's book shaped their approach, revealing that elements of Reagan's Cold War strategy informed the Trump administration's use of sanctions, regional alliances, and support for Iranian opposition groups.

Ronald Reagan's strategy to defeat the Soviet Union combined economic pressure, military buildup, ideological warfare, and diplomatic isolation. He worked with allies, particularly Saudi Arabia, to lower oil prices, straining the USSR's economy, and collaborated with Saudi Arabia in Afghanistan to support the mujahideen, further draining Soviet resources. Reagan imposed technology restrictions to hinder modernization and initiated a defense buildup, including the Strategic Defense Initiative, forcing costly Soviet military spending.

During his first term, inspired by Reagan's approach, Donald Trump pursued a similar strategy to counter Iran, aiming to exploit its economic and ideological weaknesses while avoiding direct conflict. Trump's

administration worked with allies to lower oil prices and intensified sanctions on Iran, particularly targeting its oil and financial sectors to weaken Iran's economy. Militarily, Trump strengthened US alliances in the Middle East, enhancing regional defenses to deter Iranian aggression. He also employed cyber operations to disrupt Iran's nuclear and military advancements. With the killing of Qassem Soleimani, the US administration disrupted Iran's support for its proxies. Finally, by supporting Iranian opposition groups and promoting dissent within Iran, Trump sought to weaken the regime internally, challenging its ideological hold and pushing for a shift in Iran's regional behavior.

Trump has started assembling his foreign policy team to execute his Reaganesque approach. Florida Senator Marco Rubio, nominated for Secretary of State, has long championed stringent sanctions on Iran and opposed the 2015 nuclear deal. Michael Waltz, Trump's pick for National Security Adviser, supports a strong US presence in the Middle East to counter Iranian activities. Secretary of Defense nominee Pete Hegseth has pushed for a decisive military stance against Iran. Elise Stefanik, Trump's choice for UN Ambassador, has emerged as a leading advocate against antisemitism and called for intensified sanctions to curb Iran's influence. Mike Huckabee, nominated as US Ambassador to Israel, opposes a two-state solution and has referred to Samaria and Judea as "disputed" rather than "occupied." Meanwhile, at Foggy Bottom, Brian Hook, a key architect of the "maximum pressure" campaign against Iran during Trump's first term, is leading the State Department's transition team for the new administration.

Americans of a certain age can recall an abundance of Iranian malfeasance. Highlights include the 1979 Iran Hostage Crisis and the 1983 Iran-backed Hezbollah bombing in Beirut that killed 241 US servicemen, and during the Iraq War, Iran armed and funded insurgents who killed US troops with advanced roadside bombings. More recently, Iranian-backed proxies in Iraq have attacked US bases and in the Red Sea, Iran is supporting the Yemini Houthis who routinely attack US Navy ships (so far, without much success). Trump appears to be signaling that he has his eyes on Tehran and that continued misbehavior will have consequences.

TRUMP AND ERDOĞAN: THE FUTURE OF U.S.-TURKEY RELATIONS

Prof. Efrat Aviv

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In 2020, during a meeting at the White House, President Donald Trump asserted that he has a longstanding friendship with Turkish President Recep Tayyip Erdoğan. Trump said, “The President and I have been good friends for a very long time, almost from day one, and we understand each other’s country and where we are coming from.” He emphasized that trade was the foundation of their strong relationship and pledged to increase bilateral trade between the US and Turkey to \$100 billion. Following Trump’s success in the 2024 election, Erdoğan swiftly took to social media to greet Trump, referring to him as “my friend.”

For Turkey, the transition from President Biden to President Trump offers relief. Biden had expressed concerns over Turkey’s democratic backsliding under Erdoğan, notably going so far as to exclude Turkey from the 2021 Summit for Democracy. This exclusion marked a critical stance on Erdoğan’s governance. In contrast, under Trump’s administration, the American pastor Andrew Brunson was released from Turkey and returned to the US. Additionally, the death of exiled religious leader Fethullah Gülen, whose extradition Turkey had long demanded from the US, removes another obstacle in US-Turkey relations.

However, despite Trump’s generally positive stance toward Turkey, significant controversies remain. Trump, while fostering a friendly relationship, imposed sanctions on Turkey five times during his previous tenure. These tensions, particularly over issues like the Kurdish forces in Syria and the S-400 missile defense system, are likely to persist regardless of the two presidents’ personal rapport.

While it is not specifically related to Trump, US support for Kurdish groups in Syria that Turkey considers to be linked to the PKK, a designated terrorist organization, is an obstacle in the countries' bilateral relations. This issue has persisted across multiple US administrations, with Trump's decision to arm Kurdish forces in 2017 adding further strain to US-Turkey relations. However, the deepest friction with the incoming US administration is likely to be caused by Trump's apparent disapproval of Turkey's purchase of the Russian S-400 missile defense system.

The US views this purchase as a significant threat to NATO's defense architecture, as the S-400 could potentially compromise the security of NATO's advanced technology, including its F-35 jets. As a result of the S-400 transaction, Turkey was excluded from the F-35 program, depriving it of access to both the jets and the industrial opportunities associated with producing parts for the aircraft. This issue has remained a key point of tension in the broader context of US-Turkey relations.

Even the overall positive trade relations have had their ups and downs. While Trump and Erdoğan both expressed interest in expanding trade, the imposition of tariffs and sanctions created economic friction. The growing Turkish opposition to Erdoğan – particularly the CHP – can be a source for distrust for Erdoğan if Trump meets with their members and strengthens ties with the opposition. This would be a clear sign of Trump's discontent with Erdoğan.

A critical point of divergence between Trump and Erdoğan is the Palestinian issue, which arose more strongly on October 7. Trump, a strong supporter of Israel, contrasts with Erdoğan, who is a vocal backer of Hamas. Turkey's support for Hamas, including granting them passports and allegedly aiding in money laundering that has enabled them to conduct terror attacks from Turkish soil, complicates relations.

The significance of the Palestinian issue to Erdoğan was highlighted in his greeting to Trump, in which he mentioned it specifically: "In this new era, which will begin with the election of the American people, we hope that Turkey-US relations will strengthen, and that

regional and global crises, especially the Palestinian issue and the Russia-Ukraine war, will come to an end.” Time will tell whether this marks the beginning of a new chapter in bilateral relations and national interests, or if ongoing tensions will continue to overshadow Trump’s and Erdoğan's personal friendship.

WHAT MIGHT PRESIDENT TRUMP'S POLICY TOWARD THE FSU STATES LOOK LIKE?

Prof. Vladimir (Ze'ev) Khanin and Ariel Kogan

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Trump's declaration that he is returning to the White House with the aim of finishing wars rather than starting them is one of the most widely quoted memes in international public discourse since he won the US election. At this moment, it is too early to predict whether this proclamation will become a foundation of his foreign policy strategy, whether it is a real intention, or whether it is a non-binding slogan.

Trump comes to his second term as president with a powerful popular mandate and an even deeper disregard for foreign policy conventions than he displayed during his first term, according to noted diplomat and Middle East expert, James Jeffrey (<https://jstribune.com/jeffrey-trump-administration-faces-a-suddenly-promising-middle-east/>). If that is the case, the current wars of Israel against the Iranian bloc in the Middle East and the war against the Russian military invasion in Eastern Europe are likely to be the first in line for American "pacification".

In this scenario, we must take note of the distinction between the Trump administration's relations with Israel and Ukraine. It is likely that unavoidable disagreements between Washington and Jerusalem will be resolved behind the scenes while similar clashes of vision and divergence of interests of the US and Ukrainian leadership will be discussed openly, with the Americans exerting pressure in public.

Trump, who clearly aims to reach a long-term armistice with Putin and Zelensky that both leaders can agree upon (“Russia did not win, and Ukraine did not lose”), might be willing to make some concessions to the Kremlin in other FSU areas within the realm of so-called “ultimate Moscow interests”. For example, Washington might limit its involvement in the internal and international affairs of such countries as Georgia and Moldova, which, despite substantial domestic opposition <https://besacenter.org/victory-as-a-defeat-on-the-results-of-the-presidential-election-campaign-in-moldova/>, formally declared their pro-Western “European choice”. Even more important for Putin, Trump might have only limited interest in Belarus, a devoted Russian satellite that took Moscow’s side in the Russia-Ukraine war <https://ridl.io/unclosed-triangles-of-armed-diplomacy-in-the-post-soviet-space/>.

Secondly, Trump would probably be ready to “soften” American policy towards the states of Central Asia that proved their relative autonomy from Moscow by their “multi-vector” geopolitical strategies. It is unclear whether and in what way Washington would be able to move on with an increased “soft power” policy at the expense of the other diplomatic and/or political tools. We may expect, however, that Kazakhstan, as the regional geopolitical superpower, would become a major channel for American policy in the area, whatever it will be.

In the Southern Caucasus, the White House and the State Department face an uneasy dilemma amid the concluded but unresolved Azerbaijani-Armenian conflict. At first glance, some top Republicans declaratively supported Armenia; however, their top-rank political strata realize the Armenian deep strategic connection with the Iranian regime and the significant role played by Yerevan as an intermediate element of the Moscow-Tehran vector. Markus Ritter, who heads the European Union mission monitoring Armenia’s border, said the Iranians “are here in the region, the best friends of the Armenians.” While Russia and Azerbaijan bristle at the European presence, he said, Iran seems to accept it. In the coming Trump presidency, Armenians fear that a harsher US policy toward Iran could ricochet

against their country and embolden Azerbaijan <https://www.nytimes.com/2024/11/12/world/europe/armenia-azerbaijan-russia-iran-cop.html>.

That is why, regardless of American empathy towards the Armenian people, in the event of a direct clash between the pro-American bloc and Iran and its allies, Washington's geopolitical interests might make Armenia a target of diplomatic, economic, and military sanctions. Of course, this may not occur if Yerevan and Baku normalize relations and sign a peace treaty before then. On the other hand, it is likely that the upcoming American administration, which is quite pro-Israeli, will value Azerbaijan's strategic partnership with the Jewish state and may be less receptive to calls to condition Washington's cooperation with Baku through "democratization."

With its extensive cooperation and mutual relations with the FSU states, Jerusalem may be able to promote, moderate, and even participate in these policy trends.

TRUMP AND THE HINDU PACIFIC

Dr. Lauren Dagan Amos and Dr. Alon Levkowitz

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Despite the uncertainty surrounding Donald Trump's expected policy in the Indo-Pacific, possible policy directions can be assessed by examining Project 2025, a conservative initiative to redesign the federal government led by the Heritage Foundation. Although Trump has stated that he has no connection to this project and was not involved in drafting its proposals, many of the writers and consultants involved in the project served in his first administration or were involved in his election campaign. Therefore, although Trump does not directly endorse the project, his connections with the initiative and its supporters may reflect his possible policies in the strategic Indo-Pacific space. In general, the document emphasizes strengthening US strategic alliances, establishing economic and security cooperation with key countries (such as India), and improving the effectiveness of the US State Department, especially in light of regional challenges such as China and the Middle East.

Security cooperation: The US sees India as an important security partner due to its strategic location and role in safeguarding important maritime trade routes. This cooperation is essential for dealing with cross-border threats and ensuring regional stability. **Economic cooperation:** India's growing economy is seen as critical. The US is interested in deepening trade and technology ties with it, seeing India as a key market and a counterweight to China's economic dominance.

Quad framework: Project 2025 views the quadrilateral security dialogue that includes the US, India, Japan and Australia as a central

basis for regional security. The US promotes the expansion of cooperation within this framework and proposes a “Quad-Plus” model to include additional regional partnerships with common interests. The document also suggests that it is in the US national interest to establish a security alliance in the Middle East that includes Israel, Egypt, the Gulf states, and possibly India. This alliance is described as a kind of “Quad 2” inspired by the Indo-Pacific Security Framework. The alliance’s main goals would be to ensure freedom of navigation in strategic areas such as the Persian Gulf and the Red Sea/Suez Canal, which are of critical importance to the global economy and American prosperity. **Regional strategy for South Asia:** The US approach includes a complex view of Pakistan and Afghanistan that seeks to stabilize the region through strategic engagement while maintaining a realistic stance regarding the complex dynamics in Pakistan.

It is understandable that US strategy includes supporting a regional security architecture through cooperation, such as the Multilateral Security Dialogue (Quad), which includes the US, India, Japan and Australia. Within this framework, India is considered a critical partner for maintaining freedom of navigation and combating Chinese influence, especially in the main trade routes in the Indian Ocean. Overall, the US sees its relationship with India as a cornerstone of a broad Indo-Pacific strategy, with the intention of building a stable, prosperous and resilient regional order that reduces China’s influence.

Trump’s policy is expected to continue to focus on superpower competition in the Indo-Pacific region while strengthening the strategic partnership with India and reducing involvement in climate change and secondary economic issues in South Asia.

DONALD TRUMP AND KIM JONG-UN: BACK TO SQUARE ONE?

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Donald Trump was the first US president to meet, during his term in the White House, with an acting North Korean leader. On June 12, 2018, Kim Jong-un and Trump met in Singapore and signed a joint declaration that was supposed to ease tensions in the Korean Peninsula and bring peace to Korea. The Singapore Summit created huge expectations but failed to achieve its goals. The failure of the Hanoi Summit on February 27-28, 2019, to implement the declaration demonstrated its pitfalls. Pyongyang and Washington failed to continue negotiating. Washington didn't lift the sanctions as KJU wanted, and Pyongyang didn't disarm its nuclear and missile capabilities.

Trump's second term challenges Washington, Pyongyang, and the regional players.

Trump's hawkish foreign and security teams signal to Kim Jong-un that his second term will include more threats and sanctions. Trump might consider pursuing the brinkmanship strategy he used in his first term. He knows that increased pressure on North Korea will not gain the support of China or Russia, and they might ease the pressure from Washington by assisting Pyongyang. In Russia's case, this might be an acknowledgement of North Korea's assistance to Russia during the war against Ukraine, and would reflect the generally improved relations and increased trade between Pyongyang and Moscow.

Trump will not be able to bring the Singapore Declaration back to the table. Kim Jong-un has stated that nuclear disarmament is no longer up for discussion. As long as Russia continues the war with Ukraine, it will need North Korea's support in the form of weapons and soldiers. Russia has become an important economic pipeline for North Korea.

China will continue to be North Korea's main trade partner, even when Russia increases its trade share with NK.

Pyongyang will continue to test and launch short-range, middle-range, and long-range missiles. It will also continue to test drones that it has under development in the hope that Russia and Middle East customers might be interested in buying them.

As long as North Korea's missiles land in the sea, Washington will condemn these tests but contain them. Pyongyang might even conduct its seventh nuclear test, secure in the knowledge that Beijing and Moscow will not support new sanctions by the UNSC.

Trump has been elected to his second and last term. He will not compete for a third. This gives him a free hand to initiate policies towards KJU or suggest a new summit. Trump could choose to legitimize North Korea's nuclear weapons by offering KJU a deal that includes economic incentives which in the long run might lead to a bottom-up change in North Korea.

DONALD TRUMP AND SOUTH KOREA

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South Korea is in a partial stalemate. President Yoon Suk Yeol was impeached by the National Assembly in December 2024, but the final decision on his political fate depends on the Constitutional Court of Korea. It might take a few months for the court to decide if the impeachment is final or if President Yoon can return to office. During those months, the political system of the Republic of Korea will be preoccupied with a lack of presidential leadership.

Notwithstanding the domestic political crisis, Seoul is concerned about the economic policy implications of Donald Trump's second term. It is trying to understand what his industrial policies are likely to be and what South Korea should do to cope with the changes. Will a new trade war between Washington and Beijing erupt again, as occurred during Trump's first term? If so, would Seoul be expected to support Washington or Beijing? Another economic question is the implications of Trump's "Make America Great Again" rallying cry. What might it mean for the South Korean economy if the Americans decide to bring some industries back to the US?

Another economic issue that Seoul will be concerned about in Trump's second term is the cost-sharing of US forces deployed in Korea. Seoul negotiated with the Biden administration to increase the South Korean share in the cost-sharing. Seoul hopes Trump will not demand another increase.

The economy is important, but it is not South Korea's only concern with regard to Trump. Two more important issues are Trump's policy towards North Korea, which could affect South Korea's security; and US relations with Japan. The Camp David Joint Statement 18

of August 2023 demonstrated an improvement in the relationship between Washington, Seoul and Tokyo.

All these issues are dependent on a quick solution to the presidential crisis. The longer the crisis continues, the harder it will be for Seoul to deal with the Trump administration and the regional challenges it faces.

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