

ISRAELI–SAUDI NORMALIZATION—A CENTRAL AXIS IN THE AMERICAN VISION OF A REGIONAL STRATEGIC ARCHITECTURE IN THE MIDDLE EAST

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Since the signing of the peace treaty between Israel and Egypt, the United States has worked to expand the circle of peace and promote normalization between Israel and Arab states. In the 1990s, significant progress was made with the signing of the peace treaty with Jordan and the establishment of low-level diplomatic relations between Israel and Morocco, Tunisia, and Gulf states. A historic breakthrough occurred with the signing of the Abraham Accords in 2020, which led to diplomatic relations with the United Arab Emirates, Bahrain, and Morocco, as well as Israel’s inclusion in the U.S. Central Command (CENTCOM) a year later. Since then, both the Biden and Trump administrations have worked to continue and expand normalization between Israel and additional Gulf states, most notably Saudi Arabia.

In late 2023, following the outbreak of war in Gaza, the Biden administration intensified efforts to promote this normalization as part of a broad American–Saudi–Israeli package deal (“Biden’s Vision”). Under this framework, Saudi Arabia was required to normalize its relations with Israel, limit its technological ties with China (including artificial intelligence, quantum computing, communications, and semiconductors), and refrain from purchasing weapons from China. Israel was required to move forward toward a two-state solution, and the United States, to establish a defense treaty with Saudi Arabia, recognize its civilian nuclear program, and grant it virtually unrestricted access to advanced U.S. weapons systems, such as the F-35 fighter jet.

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On the eve of the war, U.S. officials estimated that the United States and Saudi Arabia were close to finalizing the bilateral elements of the deal and that its implementation essentially hinged on Israel's position regarding the Palestinian component. The Trump administration is currently working to promote a similar package in essence, though it sees a prolonged ceasefire in Gaza as a practical prerequisite.

Since 1961, the United States has avoided signing a defense treaty with any state—the ultimate form of U.S. security assurance. Therefore, the conditional willingness to do so with Saudi Arabia—a country perceived by many in the U.S. as problematic—stems from a range of significant strategic considerations. These include the importance the U.S. places on normalization between Israel and Saudi Arabia, progress on the Palestinian issue, the establishment of a regional strategic framework to contain Iran, and countering the influence of Russia and China in the region, as part of the global great-power rivalry.

In the eyes of the United States, Iran's "Axis of Resistance" attempt to thwart normalization between Saudi Arabia and Israel and to derail the establishment of a strategic regional alliance against Iran was among the main causes of the outbreak of the war in Gaza. The U.S. views the heavy blow sustained by Iran's "Axis of Resistance" during the war as an important achievement and an opportunity to advance its objectives. Although Iran poses no military competition to the United States, successive American administrations have been reluctant to enter into direct military conflict with it.

American Considerations and Obstacles to Normalization and an Agreement with Saudi Arabia

The strategic considerations underlying the Biden administration's pursuit of a trilateral agreement with Israel and Saudi Arabia continue, to a great extent, to guide the policies of the Trump administration. However, the relative weight of these considerations, as well as the price the new administration will be willing to pay for them, may change significantly. Below is an analysis

of the main considerations and obstacles to the breakthrough that such an agreement would consitute.

Fear of commitment and international entanglements: It is no coincidence that the United States has refrained from establishing defense treaties for over 60 years, relying instead on less binding guarantees such as presidential declarations and Memorandums of Understanding. Within the Republican Party, including Trump himself, isolationist trends are evident, and Democrats also share concerns about commitments and international entanglements. The Biden administration’s willingness to establish a defense treaty with Saudi Arabia therefore reflected the exceptional strategic importance it attributed to the trilateral framework. Trump and the Republicans also support, in principle, the desire to advance the goals of the trilateral framework, but they are less willing to provide the strategic returns mentioned in order to achieve them, especially regarding the Saudi demand for a defense treaty.

Conditioning the agreement with Saudi Arabia on normalization with Israel or a separate agreement: The Trump administration is expected to maintain this condition, especially if it assesses that it can revive the “Deal of the Century” or a similar initiative. For this purpose, it may also pressure the Saudis to settle for general and less binding Israeli statements regarding progress toward a two-state solution. However, its commitment to the trilateral framework is weaker, and if it assesses that Israel is the one blocking progress on the Palestinian component, it is not unlikely that it would settle for a separate agreement with Saudi Arabia alone.

The need for Senate approval for a defense treaty, or settling for a Memorandum of Understanding: An American defense treaty signature requires approval by two-thirds of the Senate. The likelihood that Senate Republicans will currently agree to establish a defense treaty with Saudi Arabia is unclear, and many Democrats are also wary of strengthening ties with the Saudis. Therefore, the likelihood is increasing that the United States will seek to settle for signing a defense memorandum with the Saudis, which does not

carry a contractual commitment and does not require Senate approval. Such a proposal would be a major blow to the Saudis, who seek the contractual commitment embodied in a defense treaty.

The demand for recognition of a Saudi civilian nuclear program: The Saudis rejected the conditions set by the Americans (even before the Biden administration) for the recognition of a Saudi civilian nuclear program, namely the stringent conditions of Section 123 of the U.S. Atomic Energy Act (“gold standard”). It is likely that the Trump administration will show more flexibility on the matter. However, considerable opposition is expected from within the U.S. defense establishment and beyond, including research institutes and other bodies involved in arms control, and even from parts of the American public, who fear the risk of encouraging a nuclear arms race in the region and the precedent it would set.

Supply of weapons to Saudi Arabia: This component is the least problematic among the strategic returns the United States would be required to provide to the Saudis, both due to the strong economic interest in promoting the U.S. arms industry and the desire to strengthen Saudi Arabia’s ability to defend itself and play an important role in the regional strategic framework. However, the sales may clash with the U.S. legal commitment to maintain Israel’s qualitative edge, and could lead to demands from Israel and other allies for increased weapons supply (the United States has yet to fulfill its commitment to supply the UAE with F-35 jets in return for signing the Abraham Accords). Major arms deals require congressional approval, but are not expected to face significant obstacles.

Iran’s response: Implementation of the comprehensive framework with Saudi Arabia, even just the U.S.–Saudi components, is intended to strengthen deterrence against Iran and its partners in the “Axis of Resistance.” However, there is concern in the United States that Iran may respond with increased aggression, greater cooperation with China and Russia, and even demands for equivalent security guarantees from them. Growing friction with the

“Axis,” such as attacks on U.S. forces in Iraq and Syria and on naval forces in the region, could increase internal pressure in the United States to withdraw its forces from the Middle East.

Implications for relations with China and Russia: The global confrontation with China and Russia is at the top of the American agenda in foreign and security policy, economics, and other areas. A breakthrough in security relations with Saudi Arabia, especially if accompanied by progress on the Palestinian issue and in Saudi-Israeli relations, would be considered a significant American achievement globally. This would enable progress toward institutionalizing the regional strategic framework against Iran and its containment, ensure continued American leadership as the dominant superpower in the arena, and reduce the influence of China and Russia in the region. These achievements would strengthen the United States’ global standing vis-à-vis Russia and China, who, along with Iran and North Korea, are currently regarded as its main global rivals. On the other hand, it may increase friction and competition with China and Russia, and even push them to enhance their cooperation with Iran.

Outlook and Policy Recommendations for Israel

Normalization between Israel and Saudi Arabia and institutionalization of the regional strategic framework against Iran may be seen by the United States as the preferred way to end the war in Gaza and as an appropriate response to the Axis of Resistance. President Trump would view such achievements as a direct continuation and the crowning achievement of his success in bringing about the Abraham Accords. However, at this stage, it is difficult to assess his willingness to grant a defense treaty to Saudi Arabia and invest significant resources in promoting normalization between it and Israel, and in advancing the Israeli-Palestinian issue.

Israel has a strong strategic interest in normalization with Saudi Arabia, in institutionalizing the regional framework against Iran, and possibly in

establishing a U.S.–Israeli defense treaty in exchange for accepting a Saudi–U.S. treaty. These achievements would bring about a far-reaching transformation of the Middle Eastern landscape and may constitute an optimal response to Iran. Cooperation between Israel and CENTCOM countries has already deepened significantly since Israel joined the command, as was exceptionally evident in the joint response to Iranian attacks against Israel in April and October 2024. The possibility of expanding economic cooperation with these countries is also important for Israel.

Therefore, Israel must make every effort to align its policy with that of the United States in all its components. The Palestinian issue will continue to be an obstacle to progress toward implementing the package, unless the Trump administration waives the condition and pressures the Saudis to normalize relations with Israel regardless of the Palestinian issue, or if Washington and Riyadh reach an understanding that the “Deal of the Century” or something similar constitutes a sufficient basis for progress. In this case, the pressure will shift to the Israeli side.

Without firm Israeli support, a U.S.–Saudi deal—particularly regarding a defense treaty and recognition of the civilian nuclear program—is expected to face significant difficulties in Congress. This could open up an opportunity for Israel to influence the contents of the deal and demand a parallel defense treaty, or at the very least concrete steps to maintain its qualitative edge. However, Israel must remain alert to the possibility that the Trump administration might still be tempted to promote a separate agreement with Saudi Arabia and act to prevent it.