

As Israel's Kingmaker Gets Off the Fence, Gantz Gets a Boost

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Brief Analysis

Although Benny Gantz's party lost the head-to-head battle, Avigdor Liberman's favorable influence on the coalition math has left the general in a stronger position—and taken some diplomatic weight off the Trump administration's shoulders.

Israel's third round of elections last week seemed inconclusive at first, but the deadlock may now be broken. Prime Minister Binyamin Netanyahu did better this time than in September's round two, but his gains were insufficient to form a new government. Potential kingmaker Avigdor Liberman jettisoned his previous idea of getting the two top parties to join forces; instead, personal antipathy and policy differences have led him to definitely state that he will not join any government Netanyahu leads. Thus, while centrist Blue and White Party leader Benny Gantz may have options to shape a new government, Netanyahu has no pathway on his own.

In theory, the center-left bloc has the requisite number of seats for a bare majority in the 120-member Knesset, since anti-Netanyahu forces won 62 seats. In reality, the situation is more complex.

OPTION ONE: MINORITY GOVERNMENT

The anti-Netanyahu forces include Blue-White (33 seats), the Arab-led Joint List (15), Labor-Meretz (7), and Liberman's Yisrael Beitenu Party (7). The question is whether they can coalesce into a government without the Likud Party. The Joint List has refused to join past governments; moreover, no leading Israeli party has invited them, and Liberman pledged during the campaign that he would not even support tacit arrangements in which the list provides a safety net for Gantz in crucial parliamentary no-confidence votes. Will he stick to that stance now, or stand down and enable Gantz to form a temporary minority government in which the Joint List is an unofficial partner? If the latter, it would be the first minority government in Israel's history to be sworn in from the start.

After meeting with Liberman on March 9, Gantz announced that the two leaders would work together. They had

exchanged public comments over the weekend about common goals for a new government related to the role of religion and state, suggesting behind-the-scenes coordination.

Going forward, Gantz could take one of two approaches, neither of which sees a minority government as permanent. First, after he is sworn in, he could use the minority coalition as a springboard to a wider government. Once Netanyahu acknowledges that he has no path to form his own government, Gantz could recruit either Likud (led by someone other than Netanyahu) or its ultraorthodox allies, who hold 16 seats and may be willing to join in order to secure more government funding for their institutions. The latter option would require Liberman to abandon another pledge—that his secular party would halt the encroachment of ultraorthodox laws. Second, Gantz could use the threat of a minority government as a negotiating tactic to extract better terms from Netanyahu in configuring a national unity government with a rotating premiership.

For his part, Netanyahu has begun to mobilize the public against a minority government in order to narrow Gantz's options. Netanyahu has claimed that if Gantz tacitly coordinates with the Joint List, he will essentially be partnering with elements of that coalition who have supported or failed to rule out the use of Palestinian violence against Israel. At the center of this drama are two right-leaning parliamentarians from Blue-White, Zvi Hauser and Yoaz Hendel, who are known to resist a minority government and may therefore hold the balance of power within the bloc.

The focus on a minority government is also bound to create a broader debate on the social and political role of Arab Israelis, who form 20% of the population. Polls show that young Arab Israelis want more integration, and Arab turnout shot up from 59% in September to 70% last week, reaching parity with Jewish turnout. Of course, this increase may have resulted from backlash to a provision in the Trump peace plan that proposes **gerrymandering three Arab-majority communities (<https://www.washingtoninstitute.org/policy-analysis/view/continuity-vs.-overreach-in-the-trump-peace-plan-part-1-borders-and-jerusal>)** northwest of the West Bank inside Israel for inclusion in a future Palestinian state, even though the area's 100,000 residents want to remain part of Israel.

OPTION TWO: UNITY GOVERNMENT

The fight over who takes the first rotation as prime minister is the key to forming any unity government, since Gantz does not believe Netanyahu would honor any agreement to step down after two years. Within a few hours of polls closing, the incumbent claimed a “giant victory” as Likud bested Blue-White head-to-head, increasing its total by four seats while its rival gained none. As past elections have shown, however, what counts in the end is the ability to galvanize a big enough coalition, not win the individual party battle—this is likely why only one world leader (Austrian chancellor Sebastian Kurz) has congratulated Netanyahu on his ostensible win.

If there is a unity government, Netanyahu could try to press for front-loading **annexation of West Bank settlements in response to the Trump plan (<https://www.washingtoninstitute.org/policy-analysis/view/settlements-and-solutions>)**. Blue-White may in turn resist this approach.

OPTION THREE: ANOTHER ELECTION

Blue-White is now considering passage of a law that a premier cannot form a government if he is indicted. The law would likely be written to avoid charges of retroactive legislation and come into force with the next election. But its primary goal may be to deny Netanyahu the leverage of threatening a fourth election, perhaps making him more amenable to compromise.

OTHER TAKEAWAYS

Diving into the voting data yields several noteworthy observations about Israel's current political dynamics, policy views, and campaign tactics:

Turnout. Overall voter turnout continued to grow rather than diminish with each round: 71.3% last week vs. 69.8%

in September. This may seem counterintuitive, but it is a testament to the public believing the stakes are high.

Likud's boost. Netanyahu's party did much better in this round, adding 238,000 more votes since September at the expense of Liberman (who lost 47,000), the ultraorthodox party United Torah Judaism (which lost 36,000), the pro-settler party Yamina (which lost 20,000), and Otzma Yehudit (Jewish Power), which not only lost 64,000 votes but also failed to cross the 3.25% threshold required for entry into parliament. Netanyahu's numbers received a particularly notable bump in areas near Gaza, which may suggest that his containment approach to that territory and the de facto truce with Hamas are popular among those voters.

The Trump peace plan also seemed to help him on different levels. Politically, it diverted headlines from his ongoing corruption indictments and allowed him to tout his ability to shape international decisions in Israel's favor. His pledges to declare Israeli sovereignty over West Bank settlements won him higher support from settler parties than ever before, with Likud's numbers increasing as much as 10% in most major settlements compared to September.

Blue-White gains despite itself. Gantz's party ran a lackluster campaign but gained close to 69,000 votes.

Notwithstanding his efforts to appeal to moderate right-wing Israelis, most of his extra votes came from other parts of the center-left bloc—the result of a funneling effect whereby people who previously voted for Labor or Meretz (which lost 138,000 votes) felt a need to stand with Blue-White against Netanyahu.

United Torah Judaism. This is the first time in memory that the ultraorthodox party's vote tally dropped, which is interesting given the very high birthrate among that community. Unlike in September, Likud bested United Torah even in Jerusalem. Does this mean ultraorthodox rabbis are losing their grip over their voters, or are such results just an aberration stemming from strong voter affinity for Netanyahu?

U.S. POLICY IMPLICATIONS

Netanyahu's failure to garner a majority takes some of the pressure off the Trump administration, which was facing the prospect of having to give him the green light to frontload West Bank annexations in order to appease the factions that voted him back into office. Any moves of that sort would likely have sounded the death knell for the Trump plan, perhaps even triggering unrest in the West Bank and difficulties with the Israel-Jordan peace treaty.

The parties can now defer such issues. Although there are indications that the White House is telling people some annexations might occur this year, multiple senior administration officials publicly insist that the Trump plan is not an ultimatum but rather an opening bid intended to elicit a Palestinian counterproposal. Many Palestinians seem to hope that the plan will be rescinded altogether if Trump is defeated in the next election, relieving them of having to decide whether to reassess their boycott of Washington and wholesale rejection of its latest peace proposals.

David Makovsky is the Ziegler Distinguished Fellow at The Washington Institute and coauthor with Dennis Ross of the book [Be Strong and of Good Courage: How Israel's Most Important Leaders Shaped Its Destiny](#)

<https://www.washingtoninstitute.org/policy-analysis/view/be-strong-and-of-good-courage-how-israels-most-important-leaders-shaped-its>. ❖

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