

Round Three in Israel: Domestic Dynamics and Foreign Policy Implications

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Brief Analysis

The top contenders from round two were unwilling to compromise, but new primary challengers, shifts in voting patterns, and potential plea bargains may make their inflexibility a moot point by March.

With the Knesset dissolving itself last week and declaring a third election within a year, Israel seems paralyzed and polarized. The country has been stuck in a transitional government since December 2018, and the new vote will not take place till March 2, making for an immensely durable impasse. During this time of stalemate, the government has avoided major military operations and been unable to approve the military budget, among other high-priority fiscal issues.

THE ROAD TO THE RE-REDO

The September redo election led to a split of 57 seats to 55 between the center-left and right blocs, with 8 seats going to a third swing bloc, meaning neither side reached the necessary majority of 61 in the 120-seat Knesset. Nevertheless, Prime Minister Binyamin Netanyahu did not budge when presented with various compromise options, not even after being indicted for bribery and other charges on November 21. Rather, he demanded that his allied ultraorthodox and settler parties be included in any national unity government with his centrist rivals, led by former military chief Lt. Gen. Benny Gantz of the Blue and White Party. He also insisted that he serve the first leg in a rotating premiership.

For his part, Gantz demanded that Netanyahu forswear seeking immunity through parliament on the corruption charges. To break the impasse, President Reuven Rivlin asked Netanyahu to declare himself incapacitated upon indictment, but the prime minister eviscerated that option by proffering a drastically minimalist redefinition of the term “incapacitation.”

The holder of the eight swing seats, Avigdor Liberman of the Yisrael Beitenu Party, stuck to his guns as well. While expressing more exasperation with Netanyahu than with Gantz, he insisted he would only join a unity government, not a right-wing or center-left government. Indeed, his party has gradually rebranded itself from a Russian immigrant faction—an identity that was losing steam due to generational shifts and assimilation—to one intent on curbing the influence of the ultraorthodox. This message proved very successful for Liberman at the ballot box, where he gained 137,000 more votes from April to September. But it did not help break the impasse.

SAAR'S CHALLENGE

The fact that Netanyahu's Likud faction allowed him to declare a third election in a row is a powerful testament to his control over the party. Yet a major crack has appeared since the indictments. On December 26, Gideon Saar will challenge Netanyahu in a vote for party leadership, the first serious primary challenge he has faced since 2006.

Saar became a rising star in the Likud after serving as cabinet secretary to Ariel Sharon, but his ascent was stopped short by Netanyahu in 2014 amid talk that he might succeed the prime minister. Saar does not have Netanyahu's connections to world leaders, but he also does not carry the baggage of indictments. As such, a unity government between Gantz and Saar could be reached rather easily. Saar is younger than Netanyahu, but he represents a throwback to an older Likud ethos that emphasized commitment to democratic procedure. Accordingly, he hopes he can appeal to some Blue White moderate voters if he runs in the next election, not merely the Likud base.

In light of this challenge, the prime minister has suddenly begun visiting Likud chapters across the country. Although Netanyahu is still the favorite, he knows that Saar does not have to win in order to create a new party dynamic of preparing for inevitable succession. The prime minister is counting on the fact that many other Likud figures would like to succeed him, giving him potential allies to contain Saar in the near term (e.g., Foreign Minister Israel Katz, Police Minister Gilad Erdan, former Jerusalem mayor Nir Barkat).

So far, the entire cabinet has backed Netanyahu, and Saar has only six parliamentary supporters among the party's leadership. Yet if he can convince a few cabinet ministers to say they are neutral (e.g., Erdan) and woo a few Likud mayors to his base, he may create a sense of momentum that leads to further parliamentary defections and a sufficiently dignified showing to position himself as the inevitable successor even if he falls short on December 26.

The best break for Saar would be any evidence that Netanyahu is seeking a plea bargain with the attorney-general—that is, agreeing to exit the political stage and admit wrongdoing in return for all charges being dropped. One indication Netanyahu might be headed in this direction is that he has never explained why he was so insistent on taking the first rotation as prime minister during the failed coalition negotiations. Talks fell apart after he refused to budge on serving an initial six-month rotation, since Blue White wanted ironclad guarantees on any such deal. Perhaps Netanyahu sees a plea bargain as a potential parachute if the coming election campaign goes poorly for him, reasoning that he will have more bargaining leverage with the attorney-general while still prime minister.

GANTZ'S GAINS

Recent polling data looks up for Gantz, with Blue White already projected to win an all-time high of 37 seats. This boost could stem from several factors.

First, the public has seemingly singled Netanyahu out as the main culprit behind the distasteful prospect of a third election. Gantz can also be expected to hammer on the idea that Israel should not be led by someone facing three indictments during the upcoming campaign.

Second, senior Blue White official Yair Lapid has ended his insistence that he rotate leadership with Gantz, thereby precluding an electoral liability. Blue White officials had been concerned that the former talk show host would not have the same gravitas as Gantz, a retired general.

Third, the extraordinary nature of a third election may create a funnel effect in which more people give their votes to the two largest parties in the hope of breaking the impasse. Leadership shakeups and consolidation among smaller parties on the left and right produced virtually no electoral gains ahead of the September vote, though this may be attributable to the huge gains registered by Arab parties (see below) and Liberman.

NETANYAHU'S UPHILL CLIMB: POTENTIAL POLICY IMPACT?

One of the many challenges Netanyahu will face in the coming campaign is an invigorated Arab vote, which was indifferent in April but stirred against him in September. This shift was largely spurred by two factors: reconstitution of the Joint List coalition for Arab parties, and Netanyahu's bid to station Likud representatives with recording devices at polling stations in Arab areas. While the latter proposal was roundly condemned in Israel at the time and ultimately failed in the Knesset, it galvanized Arabs—their parties gained three seats in September, and they constituted nearly half of the total increase in votes compared to April (133,000 out of 271,000).

Netanyahu should be also concerned that turnout among Likud supporters dipped by 25,000 votes in September despite the overall increase in national turnout. This was startling for three reasons. First, he had added Finance Minister Moshe Kahlon's right-wing faction to his bloc, presuming that would net him the 150,000 votes the party won in April. But Likud's votes did not increase in round two; instead, the Sephardic ultraorthodox party Shas seemed to gain many of Kahlon's votes. Second, the number of ballots cast for small right-wing parties that did not meet the electoral threshold for entering parliament decreased between April and September, from 250,000 votes to 83,000. Yet Netanyahu did not gain from this shift either. Third, voting patterns in individual cities show that Liberman's boost in round two came more from the right than the center, suggesting that many voters prioritized his platform of curbing the ultraorthodox over Netanyahu's right-wing agenda.

Will these grim September returns push Netanyahu to double down on his mainstay campaign approach of appealing for votes on the right? If so—and assuming he wins the primary this month—he can be expected to press even harder on issues such as annexation of the West Bank. Alternatively, if he decides that the hard right approach will alienate more centrists, he may instead focus on less controversial policies such as forging a defense treaty with the United States (an idea that Gantz opposes because he believes it would tie Israel's hands militarily). There has even been talk of Netanyahu seeking non-belligerency agreements with Arab states, including Morocco (perhaps as a way of wooing voters of Sephardic Moroccan origin). Yet there is no sign that any of these states are interested at this time.

So far, Washington has largely avoided weighing in on these issues. Although the Trump administration had hoped to put forward its long-awaited peace vision if a unity government was formed, this now seems to be on hold again.

CONCLUSION

The biggest rival for Netanyahu and Gantz may not be each other, but turnout. In September, turnout increased despite predictions of election fatigue and proximity to the summer vacation period, suggesting that the public understood the high stakes of the re-vote. Yet at what point does voter fatigue become voting fatigue?

David Makovsky is the Ziegler Distinguished Fellow at The Washington Institute and creator of the new podcast [Decision Points: The U.S.-Israel Relationship \(https://shows.pippa.io/decision-points\)](https://shows.pippa.io/decision-points). ❖

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