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Israel's Political Churn Continues: Implications for Netanyahu and U.S. Policy

by [David Makovsky](#)

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Brief Analysis

Internal rifts and defections have upended the prime minister's coalition, and the dynamics of the upcoming election campaign mean that Netanyahu will need to carefully avoid tensions with the Biden administration.

Israel is headed toward its fourth election in two years because Prime Minister Binyamin Netanyahu and Defense Minister Benny Gantz proved incapable of holding their grand coalition together. By law, a government that cannot produce a budget by the end of the calendar year automatically heads to elections ninety days later—March 23 in this case. A Knesset vote to delay this mechanism was narrowly defeated in a late-night session on December 21, marking a setback for Netanyahu and the potential disintegration of Gantz's centrist Blue and White Party.

What Drove the Collapse?

Gantz entered the government in May under pressing national circumstances, including three inconclusive rounds of elections and a raging pandemic. Yet his act of joining forces with Netanyahu split Blue-White, whose formation in 2019 had been predicated on ousting the embattled prime minister.

Moreover, the resultant grand coalition proved to be one of the most fractious in recent history, with Netanyahu clearly upset about sharing power with Gantz in a rotating premiership. Given the legislative disparity between his camp (the Likud Party plus loyal ultraorthodox parties, totaling 52 seats in the Knesset) and Gantz's camp (Blue-White plus assorted small centrist parties, totaling 19 seats), he never gave up on the prospect of extricating himself

from the rotation deal and creating parliamentary insulation from his corruption trials.

Ironically, withholding approval of the budget in order to trigger elections was precisely Netanyahu's strategy up until this month. That calculus seemingly changed two weeks ago, when popular parliamentarian Gideon Saar defected from the Likud to start a new party and challenge Netanyahu, spurring a drop in the premier's polling numbers. Instead of changing course and presenting a budget, however, Netanyahu doubled down on his pressure tactics. Seeing Gantz's poor numbers, he apparently believed he could extract concessions from his coalition partner to avert elections that would put both men at risk. Yet Netanyahu went too far, attempting to restrict the powers of the justice minister (Blue-White official Avi Nissenkorn) and monopolize future legal and judicial nominations. This put Gantz in a very difficult position given his party's commitment to judicial independence. Netanyahu also spread the word that Gantz would compromise on this principle in order to ensure he would rotate into the premiership next November as previously agreed, leading three swing Blue-White members to opt for new elections instead.

The steady weakening of Gantz's position since May is due in no small part to Netanyahu, who kept his coalition partner on the sidelines of popular achievements such as [the Abraham Accords](#) and the COVID-19 vaccine. As a result, Gantz was too politically weak to avert collapse even within his own party—he and Foreign Minister Gabi Ashkenazi may not be able to keep Blue-White together for the March campaign. After winning more than 30 seats in previous elections, the party is now polling at 5-9 seats, and some of its parliamentarians are looking to join other factions.

Moving to elections might be bad for Netanyahu as well. Although his track record of bucking expectations and coming out on top can never be discounted, the March vote will likely come at a time when the economy is still poor, the benefits of mass vaccination are not yet fully felt, and Saar has retained at least some of his current political momentum (e.g., on December 23, cabinet minister Zeev Elkin defected from the Likud to Saar's camp).

Is Saar a Threat to Netanyahu?

A veteran Likud politician, Saar has usually ranked at the top of the party's primary polls in the past several elections. Due to actions by Netanyahu, who tends to view other popular Likud figures as threats, Saar withdrew from politics in 2015. Yet he returned to the stage in 2019 to mount a primary challenge against Netanyahu, and although he won just 28 percent of the party vote, he was the only Likud member with the political courage to run against its longest-serving premier.

Saar represents a throwback to the Likud of the past, when leading figures such as Menachem Begin, Moshe Arens, and Dan Meridor defended the independence of Israel's public institutions. Saar defines his political identity as "*mamlachti*," by which he loosely means "supportive of state institutions." In the current political climate—where many Israelis see the country's central battle as pro-Netanyahu vs. anti-Netanyahu—Saar's chosen identity is shorthand for defending judicial independence against Netanyahu's efforts to exert more political sway over the legal system.

This helps explain why early polls show Saar, a right-leaning politician, winning votes away from both the right-wing Likud and the centrist Blue-White. His "New Hope" splinter party is currently projected to win 16 seats while Likud has fallen to 26, and his numbers could increase if he adds key figures to his team.

Two other parties are polling similarly to Saar: Yamina (Rightward), headed by Netanyahu protege-turned-rival Naftali Bennett, and the centrist Yesh Atid (There Is a Future), headed by Yair Lapid. Both men have kept the fire on Netanyahu's handling of the pandemic and its economic implications, and their parties are now projected to win seat tallies in the mid-teens.

Amid this shifting landscape, a combination of midsize centrist and right-wing parties could have the numbers to replace the prime minister. In his first press conference as the government collapsed, Netanyahu argued that any

right-wing rivals would be dependent on the center as their only path to power, implying that they would need to form a coalition with him. (Thus far, only Saar has come close to saying that he will not serve under Netanyahu.) Given his history and political skills, one can expect Netanyahu to look for wedge issues to divide the opposition—for example, during the Knesset vote on delaying elections, he wooed an Islamic faction in the Arab-led Joint List to side with his stance for the first time.

Even if the midsize parties come together after the election, Blue-White's decline and potential demise mean that no large centrist party will be going toe to toe with Netanyahu during the campaign. With him, Bennett, and Saar on the right and only Lapid in the center, the next prime minister will likely be right-leaning.

One can also expect the public to pay less attention to some of the harder far-right edges of Likud's positions on Palestinian issues, especially with Netanyahu touting the four normalization agreements his government has struck with Arab states. Indeed, he and his ministers might seek to visit these countries—the United Arab Emirates, Bahrain, Sudan, and Morocco—during the campaign season and invite their dignitaries to Jerusalem. Likewise, Egypt is reportedly considering whether to invite Netanyahu for his first official visit to Cairo, partly in the hope of staving off congressional scrutiny under the Biden administration. Yet Arab countries may change their outlook on such trips now that an Israeli election campaign is about to begin.

What Does This Mean for Biden's Relations with Netanyahu?

A fourth Israeli election creates a pause in the Biden administration's effort to sort out its future policies toward Israel. Although this pause might be a blessing given the many urgent items on Biden's agenda, it could also complicate things.

For one, the United States has sought to restore ties with the Palestinians ever since they suspended relations in 2017. If Biden's team accelerates that quest, Israel will want to be involved, but will its coming elections slow things down?

Another potential complicating factor is what Biden represents to Netanyahu on a personal vs. political level. Both leaders have publicly praised their personal friendship, and each would have an interest in avoiding the somewhat cold diplomatic relations seen at the start of the Obama administration in 2009. Netanyahu also has an interest in showing voters that he can work with a Democratic president—so long as he understands that Biden is neither Trump nor Obama when it comes to Israel.

At the same time, however, Netanyahu's focus during most elections has been to avoid being outflanked on the right. Therefore, one wonders if he will make statements on Iran or settlement annexation during the campaign, or even approve settlement activity outside the West Bank security barrier, any of which could trigger a reaction from the Biden administration. For now, Netanyahu faces no genuine pressure from Saar and Bennett on these issues—their campaigns are more likely to focus on economic recovery from COVID-19 and the independence of Israeli institutions.

Whatever his plans, Netanyahu would do well to quietly signal Biden before Inauguration Day that he wants to keep relations with the United States at a premium. This means reassuring U.S. officials that there will be no policy surprises in the coming weeks, and that the election campaign will not cause bilateral ties to get off on the wrong foot.

David Makovsky is the Ziegler Distinguished Fellow at The Washington Institute, creator of the podcast Decision Points, and coauthor with Dennis Ross of the book Be Strong and of Good Courage: How Israel's Most Important Leaders Shaped Its Destiny. ❖



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