

Israel's Round Four: New and Old Dynamics

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Brief Analysis

It is far from certain that the next election will stabilize Israeli politics, and even if it does, the forces taking shape could create challenging peace math for the Biden administration.

Israel's March 23 parliamentary election will once again be a referendum on Prime Minister Binyamin Netanyahu's leadership. But two main factors distinguish it from previous rounds of voting, apart from the COVID-19 pandemic and the more active phase of Netanyahu's corruption trial. First, the vote will happen amid a sizable fracture within the political right. Second, the apparent lead that the center-left currently enjoys in the polls is deceptive.

On the second point, multiple center-left factions are hoping to cobble together a government following the **[collapse of the previous governing coalition \(https://www.washingtoninstitute.org/policy-analysis/israels-political-churn-continues-implications-netanyahu-and-us-policy\)](https://www.washingtoninstitute.org/policy-analysis/israels-political-churn-continues-implications-netanyahu-and-us-policy)**. Yet they lack a single, galvanizing leader due to the plummet of Benny Gantz and the Blue-White Party, and a few of them could easily fall below Israel's electoral threshold for entering parliament. Even if they do prevail, the resultant government would be politically heterogeneous to a precarious degree, raising questions about its policies and stability. Meanwhile, the pathway for the right is a pure right-wing government, despite internal fissures. In the end, many Israelis will once again vote in a pro- vs. anti-Netanyahu fashion and treat other center vs. right policy issues as secondary—but the new political math that emerges post-election will nevertheless be consequential.

Cracks in the Right

The scope of the challenge that Netanyahu's Likud Party faces from other right-wing factions has grown considerably. Former Likud politician Gideon Saar's New Hope splinter faction has accused the prime minister of undermining institutions, reflecting a widespread view that Netanyahu is seeking parliamentary insulation from his

ongoing corruption trial. Saar has vowed not to sit with Netanyahu in any government, and although his parliamentary list comes from the right, polls suggest many of his voters come from the center. Indeed, center-minded Israelis are turning to him as someone who can thwart Netanyahu given his political savvy and experience as the prime minister's former protege.

Netanyahu faces another challenge on the right from longtime rival Naftali Bennett, whose Yamina faction is skewering him for instituting nationwide pandemic lockdowns and allowing small businesses to wither. Unlike in past rounds, Bennett has refused to commit to a post-election alignment with Netanyahu, instead coyly saying he will entertain offers from either side, which could make him a kingmaker.

An extraordinary tactician, Netanyahu has taken steps to prevent parties from “wasting” votes on the right, including a highly controversial decision to task his aides with stitching together small far-right factions before the February 4 party registration deadline. In doing so, he granted a role for Itamar Ben-Gvir, a politician tied to the legacy of infamous racist figure Meir Kahane (Ben-Gvir says he has distanced himself from the late Kahane's calls for mass expulsion of Arabs, but he still supports expelling Arabs who are openly disloyal to the state). Because Ben-Gvir's faction could make or break a potential new Netanyahu government, its presence may hold profound policy implications.

By securing this collection of right-wing parties and wooing Bennett, Netanyahu could get very close to the 61 seats needed for a majority in the 120-member Knesset. A February 5 poll by Channel 12 puts the pro-Netanyahu bloc as follows: Likud with 29 seats, the ultraorthodox/Sephardic party Shas with 8, the ultraorthodox United Torah Judaism with 7, and the new party involving Ben-Gvir with 4. This puts them at 48 seats—or 59 if they convince Yamina to add its projected 11 seats.

Cobbling Together Mid-Size Parties Against Netanyahu

The anti-Netanyahu coalition will be led by whichever party polls the strongest, even if it comes from the right.

Currently, Yair Lapid's Yesh Atid faction is polling at 17 seats, Saar's New Hope at 14, Avigdor Liberman's Russian immigrant party Yisrael Beitenu at 7, the Labor Party at 6, the secularist Meretz Party at 6, and Gantz at 4. Together, these parties total 54 seats—or 63 if one includes the wild-card Joint List, a largely Arab coalition that has dropped from 15 seats to 9 (see next section).

Yet many questions persist about this potential coalition. Can the three smaller parties (Gantz, Labor, and Meretz) all cross the four-seat electoral threshold, or will votes for them be “wasted” if they fall short of that minimum? And would the shrinking Joint List be willing to partner up with them despite staying out of all previous Israeli governments? And would figures like Saar and Bennett countenance sitting in a coalition with the left-wing Meretz? Given its lack of ideological coherence, such a collective could become so unstable as to make a fifth round of elections inevitable.

Netanyahu's First Positive Campaign—Up to a Point

Over six elections since 1996, Netanyahu's highly successful campaign strategy has been to paint his adversaries as not just politically misguided, but also risky for Israel's security. Yet his current campaign has shown a more positive spin so far.

First, he has relished Israel's position as the world leader in vaccination efforts—in fact, a large majority of the country's adult population will likely be vaccinated by election day. Many Israelis credit Netanyahu for paying more than other countries for early vaccination and providing Pfizer and Moderna with ample data.

Second, he is likely betting that the wide domestic support for the Abraham Accords will still help him at the ballot box. This apparent hope persists even though current polls have his party running several seats below its tally in the

previous election, which took place before the Arab normalization breakthroughs.

Third, Netanyahu has launched a charm offensive with Arab Israeli voters. During a January trip to Nazareth, he publicly apologized for fearmongering about Arab voters in the 2015 campaign. He has also granted Arab requests for more police stations to deal with criminal violence. Moreover, he cajoled a key faction—Raam—to start its own election list, dropping the Joint List’s projected seat tally by a third. Seemingly overlooking Raam’s Islamist hue, Netanyahu has highlighted his camp’s affinity with the social conservatism espoused by many Arab Israelis—and, in the process, forced his rivals on the center-left to hastily woo Arabs to their lists.

The public positivity of Netanyahu’s campaign has its limits, however. In press releases over the past two weeks, he has targeted Lapid as his main rival—a notable shift because he has criticized Lapid as insufficiently tough on Israel’s enemies in the past and will likely return to this strategy. Such criticisms are partly intended to sow doubt among Saar and Bennett voters, convincing them that right-leaning leaders will join up with center-left factions and accept unpalatable policies just to topple Netanyahu.

Even so, the prime minister has serious vulnerabilities in round four. This campaign is the first to be conducted while his corruption trial is in its active phase (he asked that the trial be delayed until after the election to avoid what he claimed were public perceptions of judicial interference in the balloting). Moreover, his government’s economic safety net for COVID-battered small businesses has been relatively weak. His ultraorthodox allies are likewise being pilloried because a small but highly publicized minority of them have systematically flaunted coronavirus regulations—indeed, current polls indicate that an astonishing 52 percent of right-wing voters do not want the ultraorthodox in the next government. Making matters worse, Saar is now working with the Lincoln Project, the American Republican group that waged a massive media campaign against Donald Trump.

Implications for U.S. Policy

Three early implications stand out. First, while the campaigns have not focused on West Bank annexation or **[Iranian nuclear negotiations \(https://www.washingtoninstitute.org/policy-analysis/coming-iran-nuclear-talks-openings-and-obstacles\)](https://www.washingtoninstitute.org/policy-analysis/coming-iran-nuclear-talks-openings-and-obstacles)**, one can imagine these issues getting more attention in the coming weeks, especially if Netanyahu decides to turn the election from a referendum on his leadership to a right vs. center struggle with Lapid. In this scenario, some of the campaign rhetoric could put Netanyahu at loggerheads with the new U.S. administration, despite his efforts so far to emphasize friendship and cooperation with President Biden.

Second, given the complex realities of coalition negotiations, Israel is unlikely to have a functioning new government until at least May. This could complicate efforts by Washington and other capitals to engage Jerusalem on a range of important policy issues, including efforts to reestablish ties with the Palestinians that could be sensitive for Israel.

Third, if the election remains a referendum on Netanyahu’s leadership, one end result could be a parliament that leans even further to the right on foreign policy. Netanyahu’s right-wing coalition may not win more than 60 seats, but the overall right-leaning contingent in the Knesset could be as high as 70-80 seats. Saar, Liberman, and possibly Bennett are reliably right-wing on foreign policy issues, and they would presumably remain so even if they convince centrist voters to choose them as part of a center-left anti-Netanyahu coalition.

In short, it is far from certain that this fourth round will settle the instability of Israeli politics. And even if it does, the forces taking shape could create challenging political math for Washington on Israeli-Palestinian issues once the dust settles.

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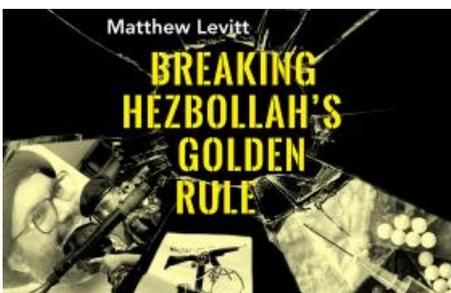
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