Israel After the Election: Policy Implications of a Crucial Vote

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Brief Analysis

Watch experts discuss the preliminary results of Israel's landmark election, including possible coalition scenarios and their impact on relations with the United States.

On October 28, The Washington Institute held a virtual Policy Forum with Gili Cohen, David Makovsky, and Dennis Ross. Cohen is the diplomatic correspondent for Kan, Israel's public broadcaster, where she covers domestic politics, foreign policy, and regional security. Makovsky is the Institute's Ziegler Distinguished Fellow, director of its Project on Arab-Israel Relations, and former senior advisor to the U.S. special envoy for Middle East peace. Ross, the Institute's counselor and Davidson Distinguished Fellow, previously served as a senior U.S. official in multiple administrations. The event was moderated by Felicia Schwartz, a national security reporter at MS NOW. The following is a rapporteurs' summary of their remarks.

Gili Cohen

Both Prime Minister Binyamin Netanyahu and leading opposition figure Gadi Eisenkot notched wins and losses in this election. Netanyahu and his bloc won the most votes, and he even matched his total from the 2022 election, prior to the October 7 attacks. This reflects a significant endorsement of him and his policies since October 7. Nevertheless, he was unable to secure a majority coalition, and his Likud Party's share of seats in parliament decreased from 32 to 24 amid higher voter turnout for other parties. Meanwhile, Eisenkot was able to win 21 seats in his first election, yet he too was unable to secure a majority.

Despite the resultant uncertainty, Eisenkot will still seek to establish a government in which Netanyahu is not prime minister. To do so, he must reaffirm his position as leader of the opposition's so-called "change bloc."

In Washington, President Trump helped the Likud campaign by publicly endorsing Netanyahu. Eisenkot and others attempted to persuade Trump not to do so, but their efforts clearly failed.

Netanyahu also used the conflict with Iran to surge support in the last moments of his campaign, even floating potential military attacks. Notably, Eisenkot—the former chief of staff of the Israel Defense Forces—sent a strong message to the military establishment that he was watching them,

indicating his concern that security decisions were being motivated by politics.

A national unity government between Eisenkot and Netanyahu seems unlikely given their respective political calculations and campaign promises. Eisenkot understands that extracting the necessary commitments to enter such an arrangement would be hard given their mutual mistrust, particularly after Netanyahu ousted him and Benny Gantz from previous governing coalitions during the COVID-19 and post-October 7 periods. Likewise, Netanyahu appears uninterested in a unity government given the tone of his speech on election night, not to mention his repeated assurances that far-right ministers Itamar Ben-Gvir and Bezalel Smotrich will remain part of his coalition. The prime minister appears to believe that by waiting things out and forcing another round of elections, he can secure more voters from the small right-wing parties that did not cross the electoral threshold in this week's ballot, thereby getting his bloc closer to a 61-seat majority.

If a unity government does somehow emerge, a striking irony would materialize: the resultant opposition would likely be led by an Arab party. That is, if Netanyahu joins with Eisenkot but sticks to his pledge of excluding Arabs from any governing coalition, the Joint List could become Israel's largest opposition bloc for the foreseeable future.

David Makovsky

Because the results do not leave a clear path for either bloc to form a government, three main scenarios are possible. The first is an Eisenkot-led minority government that includes the Arab-led party Raam and has tacit consent to govern from the other Arab-led faction, the Joint List. These two Arab factions are sharply different—while Raam might be broadly acceptable to the public because it accepts Israel's legitimacy, the Joint List does not support the state's Jewish character. The situation is further complicated by the fact that any Arab party included in the coalition would become the deciding vote in any parliamentary debate regarding the survival or failure of the next government.

A second scenario is that neither bloc forms a government and Netanyahu remains the caretaker prime minister until a new election occurs, mirroring the tumultuous 2019-21 period. In this case, the current ministers would remain in their current roles; Netanyahu could not appoint anyone new.

The third option is the creation of a unity government. There are compelling arguments for this option, particularly because another round of war with Iran and continued regional volatility seem likely. Yet Eisenkot could only join a unity government if policy agreements with Netanyahu are determined beforehand, articulated in explicit detail, and accompanied by strict timetables and rules for noncompliance. Failing that, he could walk into the same political trap that Gantz did in 2020, joining a unity government with Netanyahu but never serving as prime minister.

If a unity government proves feasible, it could enable former opposition elements to tackle some of their long-delayed objectives, such as setting policy on military service for ultraorthodox Israelis, creating a commission of inquiry into October 7, and establishing term limits. Eisenkot could also frame the resultant ouster of Ben-Gvir and Smotrich as a success. Yet the issue of who heads this government would need to be resolved first. If Eisenkot offers this option and Netanyahu proves unwilling to dilute his base in order to make it happen, then the opposition leader would have more legitimacy to pursue other options. In any case, Israel is clearly entering a period of political uncertainty that could last for the next couple months, if not longer.

Meanwhile, Likud has made allegations of election fraud against the Arab parties and argues that the results should be contested. Such claims will likely be made by both blocs as they work through the arithmetic needed to form a government, with each side likely using whatever leverage it can to reach that goal.

As for President Trump's endorsement of Netanyahu, it certainly made a difference in the election results. Although it is unclear if the prime minister came to some kind of agreement with the White House in order to obtain that endorsement, Trump typically expects something in return for such concessions. Perhaps Netanyahu promised to adjust Israel's policy on Iran or Gaza, sideline the far-right elements of his government, or work to create a unity government with Eisenkot.

Dennis Ross

The high Arab turnout in this election was unprecedented, indicating that Arab Israelis value their vote and consider themselves active participants in the country's democracy. Moreover, the legacy of October 7 remains a clear force in Israeli politics. While the country has moved to the right overall, Netanyahu's parliamentary coalition shrank by double digits to 53 seats, indicating strong rejection of his government's policies.

Yet there is no simple path for Eisenkot to produce an interim or transitional government by forming a coalition with Arabs. He would need all of the opposition parties to accept such a merger, including factions led by Avigdor Liberman, Naftali Bennett, and Yair Golan. His alternative—negotiating a unity government with Netanyahu—would not be simple because his voters expect him to avoid that path. To make this option more palatable, he would need sufficient leverage, whether by proving that he has a credible coalition path with Arab factions or by mobilizing the opposition parties to flex their power in parliament. That could happen as soon as two weeks from now, when the new Knesset is seated and votes to select a new chair. Although no one should discount Netanyahu's ability to maneuver, it will be difficult for him to overcome the new reality in the Knesset, where he will now face a 67-seat opposition compared to 53 seats for his bloc. The opposition might also use this opportunity to form a long-delayed commission of inquiry into October 7 (which Netanyahu has repeatedly rejected), or to pass legislation that undoes his onslaught against Israel's attorney-general.

Netanyahu typically focuses on building support within his own coalition first before engaging in negotiations with outside factions. To that end, he has pursued a messaging campaign accusing the Arab parties of fraud and attempting to discredit them as reliable coalition partners. This narrative is directed both at voters and at Eisenkot, signaling that any coalition reliant on Arab parties will be destined to collapse. While this type of maneuvering is standard in Israeli politics, the enlarged role of the Arab vote is a new dynamic. The community's astonishing 19-seat tally now grants them unprecedented political weight, though this influence remains potential for now.

Of course, other factors can influence the government formation process. For example, the resumption of major allied military operations against Iran

would create a stronger basis for a unity government. But even there, things are not so clear-cut. Although Trump would prefer a short conflict in which he could claim victory after striking limited targets (e.g., Pickaxe Mountain; remaining nuclear-related infrastructure; missile/drone inventories and production capabilities), Netanyahu has a more aggressive interest in targeting Iran's energy infrastructure and pursuing regime change. Prior to endorsing Netanyahu, Trump likely told the prime minister that Israel must refrain from striking Iran again before the U.S. midterms. Ultimately, Trump is the senior decisionmaker in their partnership, and Netanyahu knows it.

Once the midterms are over, Trump will likely return to limited operations against Iran. Ongoing Qatari and Saudi diplomacy may yet produce a deal that avoids military action, but whether the deal would last is uncertain.

In the United States, support for Israel has been steadily declining—a trend that could be exacerbated by the renewal of the unpopular war with Iran. A new prime minister could stem that decline, but a Netanyahu-led unity government would have to prove to Americans that it was changing course. Given the high degree of public negativity toward Netanyahu—especially among Democrats and independents—even a more centrist unity government in partnership with Eisenkot would find far less support in Congress than in the past. Netanyahu would need to show that this new coalition will take concrete steps to stop attacks against Palestinians in the West Bank, be more responsive to the Board of Peace's plans for Gaza, and prove that he is for certain measures that help the Palestinians, not just what he is against.

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