



Two Years, Four Elections: The Twists and Turns of Israel's Political Deadlock

Israelis go to the polls – yet again – on 23 March. In this Q&A, Crisis Group expert Mairav Zonszein lays out the stakes for Prime Minister Benjamin Netanyahu and the direction of Israel's domestic politics and foreign policy.

What is this election about?

This election seems to be about one thing only: should Prime Minister Benjamin Netanyahu be in or out? More substantively, it is about whether the hybrid opposition to Netanyahu (spanning right to left) can muster enough votes to break a two-year stalemate and end his hegemony in Israeli politics. Since 2019, Netanyahu, the longest-serving premier in the country's history, has been unable to form a stable working majority. Then again, neither have his opponents – hence, Israel has held four elections in the intervening time (and nobody is ruling out a fifth).

The election is not about the fundamental direction of Israeli politics. No matter what happens, the next Israeli government will lean right. The Knesset's 120 seats will likely be divided roughly 80 to 40 along ideological lines, with right-leaning secular and religious parties in the majority, and centrist, leftist and Palestinian political forces in the minority. This basic breakdown represents the continued rightward shift in the make-up of Israel's parliament, and indeed of its voting

public, as well as the continued absence of a weighty liberal-left camp in the country.

But because anti-Netanyahu sentiment crosses the ideological lines, several outcomes are possible.

Beyond the basics, what sort of outcome should we expect?

Recent polls suggest that this fourth round of elections in two years will probably not produce a clear outcome and governing coalition. The pro-Netanyahu camp has a narrow path to victory, while the anti-Netanyahu camp has a slight numerical edge but comprises a range of parties from hard right to left that have little in common except their desire to oust Netanyahu.

The pro-Netanyahu right-wing bloc consists of his own Likud, two ultra-Orthodox parties – United Torah Judaism and Shas – and the far-right Religious Zionism alliance. The anti-Netanyahu bloc includes his primary centrist competitor, Yair Lapid, head of the Yesh Atid party that is projected to become the Knesset's second largest, followed by his two rivals on the right,

Naftali Bennett of Yamina and Likud defector Gideon Sa'ar of the freshly formed New Hope. These parties are followed in projected size by the Joint List of three parties that primarily represent the Palestinian citizens of Israel; Avigdor Lieberman's right-wing Yisrael Beiteinu; the Labour party, now headed by Merav Michaeli; and at the bottom, centrist Blue and White, left-leaning Meretz and the United Arab List, which are all hovering close to the electoral threshold, according to polls. In Israel, a party must garner 3.25 per cent of the total vote to win seats in the Knesset.

There is no main contender in this election with whom Netanyahu is going head to head, as there was in the last contest, when it seemed that there were two competing blocs and a choice of prime minister between him and Benny Gantz, then of Blue and White. Blue and White went from being the largest party in the September 2019 election to struggling to survive in the lead-up to this one, having split and had its leader Gantz join a coalition government with Netanyahu (reneging on his core pre-election commitment). That coalition dissolved after just seven months, due to predictable differences between Netanyahu and Gantz, which became irreconcilable after the failure to pass a budget.

Though practically decimated, Blue and White nevertheless remains a wild card in the 23 March polls, as do Meretz, Religious Zionism and the United Arab List, the other parties in danger of not reaching the electoral threshold. Any party receiving less than 3.25 per cent of the vote will forfeit its votes, potentially tipping the election results one way or another. But only one threatened party – Religious Zionism – is overtly in the Netanyahu camp, so threshold failure is likely to favour the sitting prime minister. The fact that so many parties, both old and new, will barely make it into the next

Knesset, or marginally fail to get in but still affect the result, reflects the ongoing (and perhaps intensifying) fragmentation of Israeli politics, not just between the pro- and anti-Netanyahu camps, but among left and right, Arab and Jewish, religious and secular forces.

This election is primarily a battle within the right, an indication of both the continued rightward drift of the Israeli body politic and the increasing disaffection with the prime minister inside his own camp. Netanyahu's main challengers are white male Ashkenazi (European Jewish) leaders: Lapid, Sa'ar, Bennett and Lieberman. Netanyahu was pivotal in bringing together, and in order to win will almost certainly rely on the support of, Religious Zionism, a far-right alliance which includes the openly racist Jewish Power party and the ultra-conservative religious and homophobic Noam party.

What will determine the outcome?

Voter turnout will be the most important factor. Between the pandemic and inevitable fatigue with the fourth election in two years, many Israelis are likely disenchanted. A majority of Israelis have already received their first vaccine shot, but some may still stay away from the polls due to coronavirus concerns, while others have found themselves stranded outside the country due to entry restrictions (there is no provision for absentee voting). If the ultra-Orthodox community, which has tied its fate to Netanyahu, shows up in significantly larger numbers than the rest of the electorate, it could tip the result in Netanyahu's favour, as could the expected decrease in Palestinian participation, since their Joint List, which made major gains to become the third-largest party in the last election, has split.

Many Israelis are dissatisfied with Netanyahu's handling of the coronavirus. Israel has been through three lockdowns in the

past year, and health and education officials have criticised his management of the pandemic as motivated by political interests. Netanyahu, however, has his own COVID-19 card to play in the campaign – his success in getting the population vaccinated, as Israel leads the world in that respect. The fact that he is on trial for corruption and is expected to appear in court on a weekly basis starting in April does not seem to have had a significant impact on his electoral fortunes. The case against him is not new and his voter base has largely discounted it.

Will the votes of Palestinian citizens or the broader Palestinian question be a factor in this election?

The situation for Israel's Palestinian citizens is different this time, because Mansour Abbas, the leader of the United Arab List, an Islamist grouping, decided to split from the Joint List that proved so successful in the last election. Abbas cooperated occasionally with Netanyahu during the outgoing Knesset, fuelling speculation that he could side with the prime minister in future coalition negotiations.

Netanyahu has campaigned among Palestinian citizens, who make up about one fifth of the population, controversially and in contrast to his previous wholesale disregard for their democratic rights. In 2016, he suggested that their mass participation in elections (“voting in droves” was his phrase) was something sinister, and two years later, he oversaw passage of the Jewish Nation-State Law, in effect enshrining their second-class citizen status. The more active courting of this constituency by Likud and other Zionist parties speaks to the ruling right's changing tactics for holding onto power, while the positioning of the United Arab List reflects Palestinian voters' obvious desire to

have a stake in decision-making and a shift in strategy for how to achieve their shared political goals, for example around policing and crime. It also reflects the glass ceiling to what the Joint List could achieve in parliament and government, having been shut out of power and influence by the exclusionary consensus among Jewish-Zionist parties. Yet Lapid has, for the first time, expressed a willingness to rely on Joint List support in a future coalition. Should he do so, it could be a game changer, as no Palestinian party has ever been part of a governing coalition.

Netanyahu has tried to leverage Israel's normalisation agreements with Arab states in his campaign, portraying himself as the only leader with the real-world experience and high-level contacts necessary to deliver such ground-breaking and lucrative deals. But he has been unable to recruit U.S. President Joe Biden to his re-election bid and thus is ill positioned to solicit the pre-election gifts that Biden's predecessor Donald Trump enthusiastically bestowed upon him on previous occasions.

The 53-year occupation of the West Bank and Gaza, and creeping de facto annexation of the former, are practically non-existent issues in this election, even with the controversy, mainly abroad, over Israel's failure to streamline vaccination of Palestinians in the West Bank and Gaza. There is broad consensus that Israel can manage the occupation at a low cost and with little accountability. None of the leaders of the largest parties is advancing a workable alternative political vision that could challenge this perception. Netanyahu still tries to smear politicians who promote a negotiated two-state solution as “leftists”, but the tag has less traction, given that he has weaponised the term against practically all his opponents, irrespective of their politics.

What are possible scenarios for government formation?

Likud is projected to receive the largest number of seats (28 to 30) of the Knesset's 120, a significant drop from its current 36. The pro-Netanyahu right-wing bloc (plus Bennett, who has not ruled out allying with Likud) is stable but polling just below the 61-seat majority needed to form a governing coalition. Bennett, leader of the religious nationalist Yamina party, is ambiguous about his plans, seeking to gain maximum "kingmaker" leverage in coalition negotiations, but if his votes are enough to give a Netanyahu-led coalition 61 seats, then that is the coalition that will likely come together (following inevitable negotiating crises). If Netanyahu, in partnership with Bennett, fails to reach 61 seats, he would still have a slim chance at forming a coalition by peeling off the required additional members from other parties.

A winning anti-Netanyahu coalition would need to include Lapid, Sa'ar, Bennett and Lieberman (plus Labour, Blue and White and probably Meretz if they all cross the threshold, or, less likely, the Palestinian parties), but these parties' leaders would likely spar acidulously over how to divide power. It is hard to see how such distinct personalities and parties would be able to form a coherent coalition, but the determination to unseat Netanyahu could prevail and hold them together for at least a while.

If Netanyahu proves able to pull together the necessary majority, he will almost certainly find a way to achieve parliamentary immunity and avoid trial. Thus, all those who seek to replace him have a major incentive to cooperate in forming a coalition if given the chance. If, instead, leaders of an anti-Netanyahu camp of 61 parliamentarians agree – in the period between 6 April, when the

Knesset is sworn in, and the date on which a coalition is formed – they could try to pass a law barring the president from inviting a minister charged with a crime to form the government, thereby scotching Netanyahu's chance at becoming prime minister again. It would be possible, but not easy, to pass such legislation, though it would subsequently face challenges in the courts.

There are other scenarios. If Netanyahu is unable to form a coalition, Likud might abandon him and cobble together what would be the most natural alliance in the new Knesset – a government of the nationalist and religious right comprising Likud, Sa'ar, Bennett and the ultra-Orthodox parties – which would have a clear majority. Such a scenario could also emerge not immediately but sometime during the next Knesset's term. Some also speculate that Netanyahu's allies and rivals may offer him the post of president, which carries the benefit of legal immunity, unlike the prime minister's job.

If neither camp has a working majority to form a government after the allotted period of time, Israel will need to hold yet another election – an unprecedented fifth in search of a stable coalition.

How could the election results affect Israeli-Palestinian dynamics, the Middle East and the Iran file?

No matter what the election results are, there is little reason to expect much change to the status quo of de facto annexation, which is undermining a viable two-state option further and further as it proceeds. A narrow Netanyahu-led right/hard-right coalition can be expected to escalate provocations of Palestinians, in particular by expanding settlements, displacing more communities and continuing to commit other human rights violations, possibly including renewing a

push for de jure annexation. These policies might lead to more open tensions between Israel and the Biden administration.

If a coalition without Netanyahu emerges, it will include parties aligned with existing hardline positions vis-à-vis the Palestinians, namely the parties of Bennett, Sa'ar and Lieberman. The inclusion in prominent positions (up to and including the premiership itself) of Lapid, Labour and even Meretz would militate against the most visible provocations (including de jure annexation) but would likely neither prevent the relentless march of settlement construction nor create a real diplomatic opening toward the Palestinians. Lapid has taken positions that negate the prospect of a viable sovereign Palestinian state alongside Israel or a substantial reversal of Israeli policies in the territories that contravene international law.

Regarding Israel's northern front, any Israeli leader will likely continue what Israeli security experts call the "war between wars" (targeted military campaigns to pre-empt perceived threats) with Hizbollah and Iran in Lebanon and Syria. Tensions in the north will therefore remain high. On the broader question of Iran, Netanyahu will continue to work within the U.S. political arena to keep

the Biden administration from returning to the nuclear deal (the Joint Comprehensive Plan of Action, or JCPOA) and discourage give-and-take dealings on other regional files.

Any successor to Netanyahu would be less experienced. A new prime minister might therefore be less bold in crossing the Biden administration. Lapid, for one, along with some in the defence establishment, might consider a return to the JCPOA to be the least bad option for Israel. Alternatively, there might be full continuity with the Netanyahu position or competing power centres within a governing coalition – which could mean that the U.S. would face a less united front of Israeli opposition to the nuclear deal.

More broadly, any non-Netanyahu government would see a good deal of internal jostling, meaning that there would be more room for miscalculation or impetuous action, notably on the northern border or in Gaza. There might also be additional unexpected domestic or regional flare-ups during the interregnum, when parties are busy negotiating a winning coalition, including if Netanyahu's political fate hangs in the balance and he decides to strike rashly in the occupied territories or beyond Israel's borders.