

Beyond the Deadlock: Five Scenarios for Israel After the Election

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Against considerable odds, Israel's 37th government is approaching the end of its term. Its tenure has been anything but stable – or successful – yet it has achieved a rare feat in Israeli political history: it survived a full term. While the specific outcome of the October 27 election remains uncertain, it looks increasingly likely to produce a less politically stable successor.

The State of Play

Neither bloc currently has a straightforward path to power. An [average of recent polls](#) puts Netanyahu's bloc and the non-Arab opposition at about 52 seats each. Including the Arab parties brings the opposition camp to 65, but most opposition parties reject forming a coalition dependent on them.

This deadlock may yet lead to less conventional outcomes. Yousef Jabareen, chairman of the predominantly Arab Joint List, recently [suggested](#) that his party could provide outside support for a minority government, potentially allowing the opposition to take office without an outright Knesset majority.

Meanwhile, two newly formed right-wing parties are hovering near the electoral threshold: the Netanyahu-aligned People of Israel and the unaligned Reservists. If one or both manage to cross the threshold, this could significantly reshape the parliamentary arithmetic and increase the likelihood of either post-election deadlock or a national unity government. If they don't, there is a higher chance that an opposition bloc led by Eisenkot could form a minority government with the outside support of the Arab parties.

None of the possible outcomes is likely to produce a stable government. An Eisenkot-led coalition would face substantial ideological divisions, a Netanyahu-led government would depend heavily on its smallest partners, and a unity government would require complicated power-sharing arrangements.

Five Scenarios for a New Knesset

Israel's intense political polarization obscures a striking degree of policy consensus. Except for the Arab parties, most opposition leaders supported Israel's military campaigns in Gaza, Lebanon, and Iran, criticizing primarily their outcomes rather than the decisions to launch them or the way they were conducted.

Yet consensus about past military operations does not necessarily extend to future policy. In a [July survey](#), 41% of Jewish Israelis favored resuming fighting in Gaza, while 50% preferred weakening Hamas through economic and diplomatic means. Israeli electoral history also teaches that

candidates do not necessarily govern as they campaign. The leading opposition candidate, Gadi Eisenkot, has avoided comments that could allow Netanyahu to cast him as left-wing, yet he has previously gone as far as [supporting diplomacy](#) with Iran and [separation](#) from the Palestinians.

The results of the election will therefore be hugely consequential, setting the stage for one of the following scenarios. At the moment, scenarios 1–3 are about equally likely, while scenarios 4 and 5 are significantly less likely:

Scenario 1. Deadlock and another election. If Netanyahu’s bloc and the non-Arab opposition win the same number of seats, or if Netanyahu’s bloc finishes ahead but still falls short of the 61 needed to form a government, it is likely that no one will manage to form a government after the election. Netanyahu would remain caretaker prime minister, and Israel would head to another election roughly three months after the government-formation process fails.

In the interim period between this election and the next, however, Israel would still have a newly elected Knesset in which the Jewish and Arab anti-Netanyahu parties together hold a majority. Several Jewish opposition leaders have ruled out forming a government with the Arab parties, but they have not ruled out cooperating with them in the Knesset. As Yossi Verter has [noted](#), they could use that majority to legislate and constrain Netanyahu even without forming a government. They could reverse parts of the judicial overhaul, establish an October 7 commission of inquiry, or even seek to bar an indicted politician from serving as prime minister – potentially locking Netanyahu out of power until his trial ends.

There is therefore a real possibility of a transitional Knesset that meaningfully restrains Netanyahu in the months between Israel’s elections.

Scenario 2. An Eisenkot-led government. Eisenkot has several potential paths to leading Israel’s next government, all of which become more likely if the new right-wing parties fail to cross the electoral threshold. The Jewish opposition parties could significantly outperform current polls and win an outright majority, although this remains highly unlikely. Alternatively, the opposition parties could break their campaign promises and form a coalition with Ra’am.

The third, most likely path would be a minority government: the Jewish opposition could finish ahead of Netanyahu’s bloc but short of 61 seats and still take office with outside support from the Arab parties. Under Israel’s parliamentary system, a government does not need an absolute majority to be sworn in; it only needs more MKs to vote for it than against it in the confidence vote that formally installs the government. If the Arab parties abstained from that vote, an Eisenkot-led coalition could take office with a plurality rather than an outright majority. Joint List chairman Jabareen indeed [signaled](#) on Sunday that his party would be willing to offer a “safety net” to an anti-Netanyahu coalition due to the urgent need to get rid of the Netanyahu government.

Notably, such an arrangement has happened before. After an ultra-Orthodox party left Yitzhak Rabin’s coalition in 1993, his government continued as a minority government with outside support from Arab parties while advancing the Oslo process.

A government formed by the current opposition offers the greatest potential for policy change, including curbing settler violence and settlement expansion, repairing ties with the Palestinian Authority, pursuing diplomacy in Lebanon and Syria, and potentially increasing cooperation with the Board of Peace in Gaza. But it would almost certainly have to balance competing pressures: Arab parties would push for progress on Palestinian issues, while Naftali Bennett and Avigdor Lieberman's hawkish parties – along with right-wing members of Eisenkot's own party – would likely resist such steps. Cooperation with the Arab parties could also provoke significant political backlash among Jewish voters, making both major policy change and the government's long-term survival uncertain.

Scenario 3. Unity government. If neither bloc can form a government after the election, another possibility would be a broad national unity coalition bringing together centrist and right-wing opposition parties – including Bennett's B'Yachad, Eisenkot's Yashar, and Lieberman's Yisrael Beiteinu – with Likud and potentially other parties currently aligned with Netanyahu.

Opposition leaders strongly reject forming a government with Netanyahu himself, arguing that he has failed the Israeli people and must leave office. But they have signaled substantially more openness to a unity government with Likud if it excludes Netanyahu. [Lieberman](#) recently said that “Likud without Netanyahu could be a significant partner,” while Eisenkot's deputy [opened the door](#) to a coalition with Likud – and even Smotrich's Religious Zionism – if Netanyahu is no longer party leader. Netanyahu himself has [openly called](#) for a unity government.

If there is indeed deadlock after the election, the biggest obstacles to forming a unity government would therefore be the opposition's reluctance to break its promise not to serve with Netanyahu and the terms of power sharing. Eisenkot would likely insist on serving as prime minister first, while Netanyahu might seek to guarantee his political and legal future by demanding a pardon in exchange.

If formed, a unity government could include as many as 75 Members of Knesset and represent a broad Israeli consensus. Yet it would also likely change very little in the country's security policies – especially toward the Palestinians. Of all the outcomes, a “consensus” government that moderates its rhetoric and cracks down on settler violence while continuing de facto annexation in the West Bank and blocking progress in Gaza and Lebanon could be among the most damaging for Israel's diplomatic relationships, especially with the United States.

Scenario 4. Another full-right Netanyahu government. With the Netanyahu bloc [polling](#) at between 50 and 55 Knesset seats, it is highly unlikely they will manage to win 61 seats. Still, this scenario cannot be completely ruled out.

A renewed Netanyahu coalition would likely treat victory as a mandate to accelerate annexation in the West Bank, the judicial overhaul, and efforts to displace Palestinians from Gaza while potentially building settlements there. This outcome would likely further deepen domestic polarization in Israel, while also provoking an unprecedented level of diplomatic backlash against Israel.

Scenario 5. An Eisenkot-led government with defectors from Netanyahu's bloc. As has happened in the past, after the election individual Members of Knesset may break ranks and support a rival coalition. In the event of a post-election deadlock, even a handful of defections from Netanyahu-aligned parties could give Eisenkot a path to forming a government.

Such a government's central agenda would likely be national reconciliation: establishing an October 7 commission of inquiry, resolving the ultra-Orthodox conscription dispute, and repairing international relationships. Depending on who the defectors are, however, they could wield considerable influence in constraining progress on the Palestinian issue.

Netanyahu's Recovery and the Turnout Battle

Netanyahu's coalition has regained ground, rising in Channel 13 polls from 51 seats on September 23 to 55 on October 7. Part of this movement is driven by random noise. The rest is explained by electoral mechanics: Smotrich's alliance with Moshe Feiglin has strengthened his party's position above the threshold, while Ofer Winter's new People of Israel party is attracting many former Netanyahu voters who moved away from the prime minister after October 7.

The opposition, meanwhile, has struggled to present a single compelling alternative, while Netanyahu has been campaigning effectively by relying on fear. Likud's campaign billboards contrast his image under the word *Yamin* ("Right") with opposition leaders labeled "Palestine," despite their near-universal rejection of a Palestinian state.

Ultimately, turnout and the electoral threshold may prove more consequential than shifts in voter preference. Higher Arab turnout, for instance, would both strengthen the anti-Netanyahu bloc and raise the number of votes needed to clear the 3.25% threshold – potentially keeping smaller right-wing parties like Winter's out of the Knesset and wasting their votes.

The Disqualification Saga

Attempts to disqualify candidates have become a recurring feature of Israeli elections in recent years. The Central Elections Committee (CEC) – in which representatives of the governing coalition hold a majority – can seek to exclude candidates or lists for inciting racism, rejecting Israel's Jewish and democratic character, or supporting armed struggle against the state, subject to Supreme Court review.

This year, the committee disqualified all Arab parties. The Supreme Court overturned the decisions to ban the Joint List and Ra'am, as well as the disqualification of Joint List MK Ofer Cassif. But a majority of justices indicated they would uphold the disqualification of Balad chairman and Joint List candidate Sami Abu Shehadeh over an article he published on October 8, 2023, that was widely interpreted as supportive of Hamas's October 7 attack. Abu Shehadeh denied endorsing violence but opted to withdraw his candidacy rather than wait to receive the final ruling.

The outcome generated anger among Arab citizens, both at what many saw as a judicial double standard – the Court has allowed Itamar Ben-Gvir to run despite convictions for incitement to

racism and supporting a terrorist organization – and at opposition parties, including Yair Golan's Democrats, that supported Abu Shehadeh's disqualification. The Joint List is hoping to translate that anger into higher turnout.

Beyond a Change of Government

Forming a government, keeping it together, and changing Israel's trajectory are three distinct challenges.

Reversing Israel's growing international isolation will be difficult for any government that emerges from the election. As Shira Efron [argued](#), doing so will require concrete steps to curb settler violence, halt annexation, and restore a credible political horizon for Palestinian self-determination. Aside from curbing settler violence, today's opposition candidates have not signaled they would embrace most of these policy shifts. It therefore remains unclear whether electoral change can translate into a different political and diplomatic trajectory for the country.