Israel's Coalition Negotiations: Deadlock, a New Knesset, and the Possible Paths to Replacing Netanyahu

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Two weeks after Israel's election, Prime Minister Benjamin Netanyahu has lost his parliamentary majority, but his opponents have yet to form a government to replace him. On Sunday, President Isaac Herzog tasked opposition leader Gadi Eisenkot with forming a government after 67 lawmakers recommended him for prime minister, giving him until December 6 to do so, with a possible two-week extension.

The central challenge facing Eisenkot is that every path to a new government requires the Jewish-led opposition parties to compromise on campaign promises not to govern with the ultra-Orthodox or Arab parties. In the meantime, the opposition's parliamentary majority allows it to exercise legislative power even before a new government is formed, including by potentially reversing elements of Netanyahu's judicial overhaul and constraining his caretaker government.

Breaking Down the Results: Different Turnout Rates, Not a Political Realignment

After four years of war and political upheaval, Israeli voters have produced a dramatically different Knesset without fundamentally settling the country's political divisions. Netanyahu's bloc fell from 64 seats in 2022 to 53, while the Jewish-led opposition parties gained just two seats from 46 to 48. The Arab parties, meanwhile, surged from 10 to a record 19 seats. Yet these dramatic shifts in the blocs' performances were driven largely by differences in turnout rather than a wholesale movement of voters between the political blocs.

According to analysis by former Knesset member and security analyst Ofer Shelah, the total number of valid votes cast increased by nearly 20% compared to 2022, while overall turnout rose more than seven percentage points to 78%, its highest level since 1999. Opposition voters – especially Arabs – accounted for the bulk of the surge in votes cast, which largely explains why opposition parties outperformed Netanyahu's bloc this time. Netanyahu's bloc received just 4% more votes than in 2022, compared with an 18% increase for the Jewish-led opposition and a staggering 64% increase for the Arab parties. Israeli election analysts agree that the difference in bloc performance is largely explained by this difference in turnout, rather than voters switching between blocs.

A second key factor behind Netanyahu's loss of 11 seats was that significantly fewer opposition votes were wasted below the electoral threshold than in 2022. In 2022, two opposition parties, Meretz and Balad, narrowly failed to enter the Knesset, together wasting nearly 290,000 votes (the equivalent of about seven seats). This time, the votes cast for parties that failed to cross the threshold were distributed much more evenly between the political camps. The Reservists–Economic Party, whose support came largely from potential opposition voters, received

approximately 155,000 votes, while Ofer Winter's party received another 96,000 votes, largely from Netanyahu's political camp.

Within Netanyahu's bloc, the only substantial movement of voters was Likud's consolidation of support at the expense of its partners, particularly Shas – the ultra-Orthodox Sephardi party. Shelah estimates that Shas lost approximately 148,000 voters in real terms, with some shifting to Likud and religious-nationalist parties. The religious-nationalist parties strengthened their position relative to the bloc, while United Torah Judaism (UTJ) largely maintained its existing voter base without benefiting from the overall increase in participation. The central conclusion from the numbers is striking: despite everything Israel has experienced, the electorate did not undergo a major ideological realignment.

Netanyahu's Delegitimization of the Arab Vote

The central role Arab parties could play in any opposition-led government has led Netanyahu and his media machine to pursue an unprecedented and seemingly baseless delegitimization campaign aimed at undermining confidence in the Arab parties' electoral support.

Shortly after the election, Likud declared that Arab parties had "stolen" the election through bribery, intimidation, forgery, and illegal voter-mobilization software. Netanyahu's son Yair went further, declaring on X that the election had proved that "the greatest threat to Israel's survival, apart from Iran's nuclear program, is what is called 'Israeli Arabs.'"

The allegations of fraud rest on two separate investigations, one related to suspicions that Ra'am activists attempted to bribe voters, and another that alleges the Joint List received illegal foreign funding. However, there has reportedly been no evidence to substantiate either allegation, and at least one of the investigations was found to have been directly initiated by Netanyahu's office. Both Israel's attorney general and the chairman of its Central Elections Committee have repeatedly emphasized that no evidence has emerged that could call the election results into question.

Netanyahu escalated his campaign of incitement at the ceremonial opening of the 26th Knesset on November 10, using the occasion to launch a vicious attack on the Arab parties, branding their elected representatives "terror supporters" and accusing them of seeking the destruction of the Jewish state. His speech, delivered just after the swearing-in of a parliament with unprecedented Arab representation, sought to portray the participation of Arab lawmakers in forming a government as a threat to Israel's very existence.

The New Knesset Can Act Before a Government Forms

While Netanyahu will remain caretaker prime minister until a new government is sworn in, he no longer commands a majority in the Knesset. On November 10, the 26th Knesset was sworn in, and leaders of the Jewish-led opposition agreed to nominate Matan Kahana of Eisenkot's Yashar party to replace Likud's Amir Ohana as Knesset speaker. They also agreed to divide key committee positions among themselves.

Once they formally assume control of the committees, the opposition can begin legislating even before a government is formed. There is precedent for this: following the 2022 election, Netanyahu's coalition passed legislation expanding the national security minister's authority over the police, widely known as the "Ben-Gvir Law," before the government was sworn in.

The opposition could therefore very soon begin reversing key elements of Netanyahu's judicial overhaul, check the power of the ministries his coalition still controls, and potentially establish a state commission of inquiry to investigate the security failures that led to October 7. Perhaps most consequentially, opposition figures including Lieberman and Bennett have voiced a desire to move immediately to pass prime ministerial term limits, which could effectively prevent Netanyahu from serving.

Paths to Power

Now that he holds the mandate to form a government, Eisenkot has four potential paths to establishing an opposition-led government, all of which require cooperation with the Arab parties, the ultra-Orthodox parties, or some combination of both.

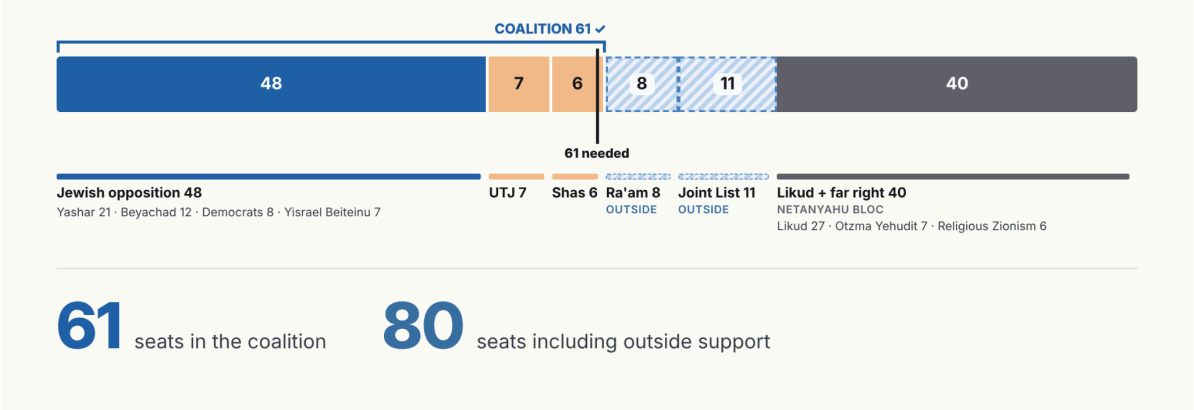
None of these options is straightforward. Every viable path will require at least some of the parties involved to break or significantly reinterpret campaign promises. Yair Golan, leader of the center-left Democrats, pledged not to govern with the ultra-Orthodox parties, while Eisenkot insisted that his coalition partners accept universal military or civilian national service and recognize Hamas as a terrorist organization. Bennett and Lieberman went further, ruling out governments reliant on either the ultra-Orthodox or Arab parties.

Yet these public commitments should not be mistaken for immutable political constraints. Coalition negotiations are inherently a process of bargaining and compromise, and statements made during or immediately after an election are also negotiating positions.

The Arab parties, meanwhile, should not be treated as a single political actor. Mansour Abbas's Ra'am has pursued a pragmatic strategy of political participation, including joining a governing coalition, while the Joint List has taken a different approach, expressing willingness to support a government from outside without necessarily joining it. Both parties have their own priorities, political constituencies, and conditions for cooperation.

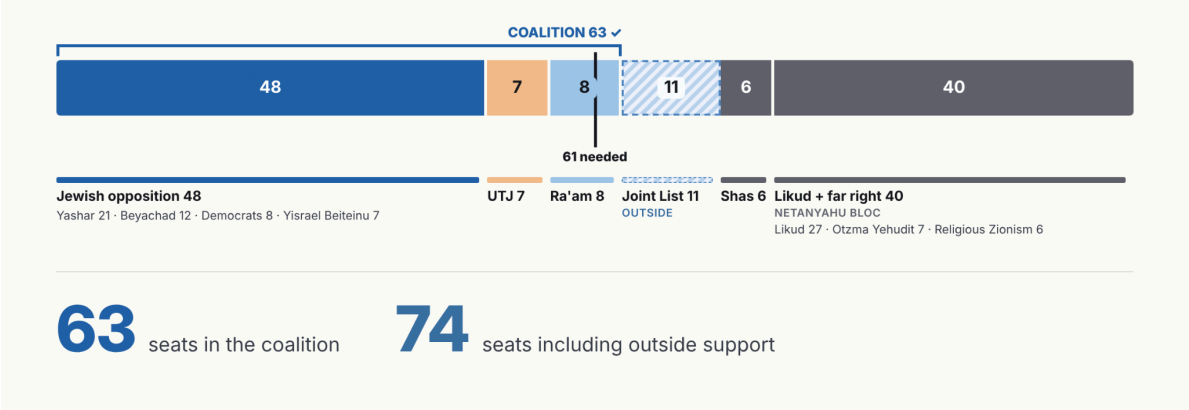
Below are four possible pathways to forming an Eisenkot-led government, each with its own political and practical obstacles:

Option A: Jewish-led opposition + UTJ + Shas (61 seats)



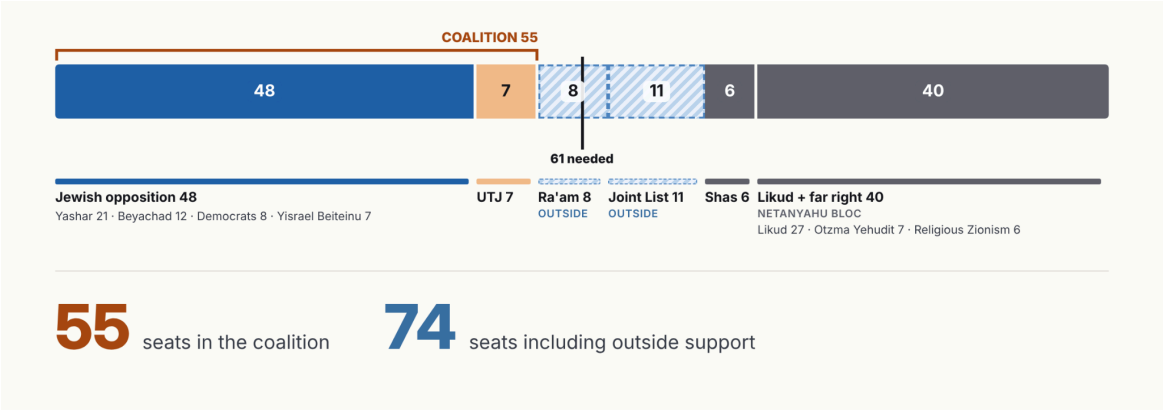
This is the only path that would give Eisenkot a parliamentary majority without relying on the Arab parties, and his bloc has signaled a willingness to compromise on its vow to pass a universal draft law in order to form a coalition with the ultra-Orthodox parties. The principal obstacles are persuading Shas to abandon its longtime ally Netanyahu and negotiating an acceptable compromise on ultra-Orthodox military conscription. Lieberman reportedly believes that if his bloc convinces UTJ to join the Eisenkot coalition, Shas will follow. Sources within UTJ share this expectation, even as Shas denies any intention of joining. Such a coalition could prove more stable than its one-seat majority suggests, since it could draw on support from Arab parties on individual votes without depending on them for its parliamentary majority.

Option B: Jewish-led opposition + UTJ + Ra'am (63 seats), with potential Joint List support from outside.



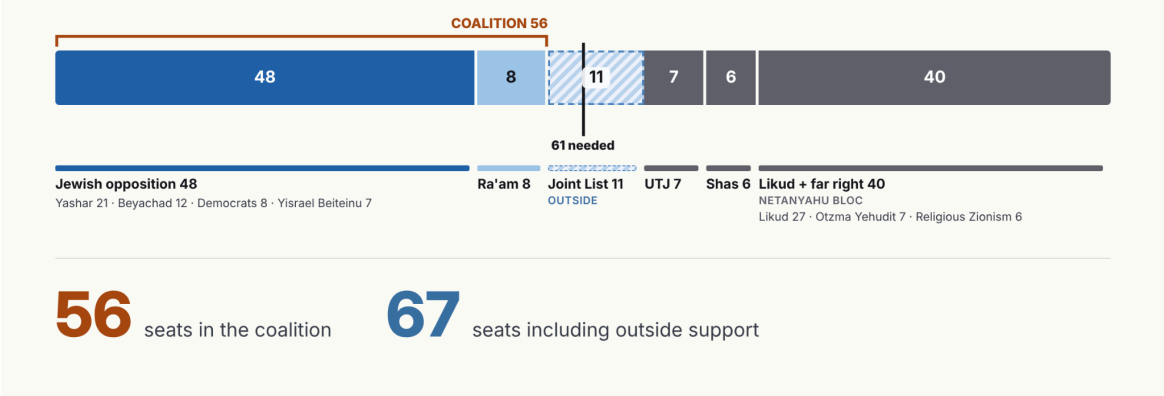
This arrangement would require Lieberman and Bennett to reverse their opposition to relying on Arab parties, while still requiring compromise on the ultra-Orthodox draft issue. In a potentially significant development for this option, Ra'am leader Mansour Abbas has reportedly indicated a willingness to recognize Hamas as a terrorist organization in exchange for genuine political partnership, satisfying one of Eisenkot's central conditions and potentially softening the ground for Lieberman and Bennett to sit in a coalition with Ra'am.

Option C: Jewish-led opposition + UTJ (55-seat minority government), with Ra'am and the Joint List supporting from outside.



This would allow Eisenkot to form a government without formally including Arab parties in the coalition, but would still require Lieberman and Bennett to abandon their commitments not to rely on Arab parties' support, as well as a compromise with UTJ over ultra-Orthodox military conscription. If Shas refuses to sit with the Eisenkot bloc, this could be the only path to replacing Netanyahu that does not involve directly including the Arab parties in the coalition.

Option D: Jewish-led opposition + Ra'am (56-seat minority government), with the Joint List supporting from outside.



This would avoid the need to negotiate a conscription compromise with the ultra-Orthodox parties, but would require Lieberman and Bennett to reverse core campaign commitments. It would also make the government dependent on the continued support of the Joint List, whose positions on Zionism, the occupation, and security differ sharply from those of several Jewish-led opposition parties. Although the Joint List has expressed willingness to support an Eisenkot government from outside, both sides would have to make significant ongoing compromises to sustain the government, particularly on legislation and budget votes that fund or sustain Israel's policies in the West Bank and Gaza.

The Alternatives

If Eisenkot fails to form a government within his allotted 28 days (with a possible 14-day extension), the country will face one of two options: a national unity government, in which Likud and some or all of the Jewish-led opposition parties agree to share power, or new elections.

A national unity government would almost certainly be led by Netanyahu, potentially with a rotation agreement promising Eisenkot a future term as prime minister. If Bennett's B'Yachad and Lieberman's Yisrael Beitenu agreed to join Likud and Eisenkot's Yashar, the four parties would command 67 seats, enough to govern without the far-right, ultra-Orthodox, or Arab parties. The main obstacles are the Jewish opposition's continued refusal to serve in a Netanyahu-led government, as well as Netanyahu's insistence on including his existing coalition partners in a unity government.

Another election. If no government can be formed, Israel could face another election, with Netanyahu remaining prime minister of a caretaker government in the interim. Netanyahu's insistence on including his existing coalition partners in any governing arrangement may suggest that he prefers fresh elections to a unity government without them. He could be predicting that the opposition's failure to replace him would demoralize Jewish and Arab opposition voters, depressing their turnout in the next election and bringing his bloc closer to 61.

The Road Ahead

The weeks ahead will largely be determined by the extent to which Eisenkot manages to persuade his allies to compromise on their campaign commitments and agree to form a government with the ultra-Orthodox parties, Arab parties, or both. If he fails, the country is likely to face one of two daunting outcomes: a national unity government led by Netanyahu, or new elections in which the prime minister could gain strength.