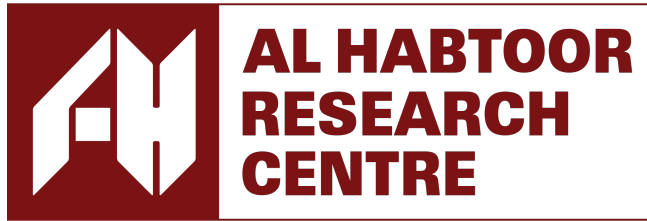


Fragmented by Design

Israel's October 2026 Election
and the Politics of Coalition



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Israel goes to the polls on 27 October 2026 in the first general election since 7 October 2023, and the vote carries a weight that extends well beyond the ordinary contest for a governing majority. It is being held in the shadow of one of the most consequential events in Israel's history: thirty-four months of multi-front war and a constitutional confrontation over the judiciary that remains unsettled rather than concluded. The choice facing voters is not a marginal adjustment of policy emphasis. The contenders offer genuinely opposing answers on who bears responsibility for the failures of October 7, how the war and its aftermath should be governed, what kind of relationship the state should have with its own courts and gatekeeper institutions, how the burden of military service should be distributed, and what shape any eventual settlement with the Palestinians and the wider region should take. An election that decides between those positions will shape Israel's trajectory and that of its neighbours for years beyond the term of the government it produces

What makes the outcome unusually difficult to forecast is what is beneath it. Polling through late August and early September has shown a Knesset splitting into two blocs of comparable size, with neither the pro-Netanyahu camp nor the anti-Netanyahu camp able to reliably clear the 61-seat threshold required to govern. The margin between them has moved by double digits within a single week, driven less by shifts in the standing of Likud or Gadi Eisenkot's Yashar than by the fate of smaller parties hovering near the 3.25% electoral threshold. A party that crosses the line brings its full seat allocation into play; a party that falls just short forfeits those votes entirely, redistributing them to its rivals through the mechanics of vote-sharing agreements. Ofer Winter's People of Israel, the Religious Zionism-Zehut merger, and the Hendel-Zelekha slate have each, in turn, swung the projected balance between the two blocs by several seats depending on whether they clear or miss the threshold, a volatility that has turned electoral engineering into as consequential a campaign battleground as the parties' actual platforms.

Sitting alongside this is the role of the Arab parties, who in most polling hold somewhere between eleven and fourteen seats and occupy the position of potential kingmakers without either side being willing to say so plainly. Netanyahu's strategy treats any coalition resting on Arab mandates as illegitimate by definition, a proposition his own advertising has worked to entrench. Eisenkot's bloc, for its own electoral reasons, has largely echoed that refusal rather than contested it, leaving Arab voters as a constituency courted by neither side even as their seats may ultimately decide who can reach 61. That contradiction, a bloc that may need Arab support to govern led by figures who have preemptively ruled it out, is one of the more consequential unresolved questions the election leaves for the coalition-formation period that follows it.

What follows sets out how this contest is actually being fought. It examines the five operating principles behind Netanyahu's campaign strategy, the deflection of accountability onto the security establishment, the drive to consolidate right-wing lists and eliminate wasted threshold votes, the effort to delegitimise any Arab-inclusive alternative, the deferral of decisions that would split his own coalition, and the conversion of institutional and diplomatic assets into campaign currency. It then works through eleven files on which the election is actually being contested, from October 7 accountability and the security record to conscription, the judicial overhaul, the economy, Gaza's governance, the West Bank, religion and state, Arab citizens' security, the relationship with Washington, and Netanyahu's own legal proceedings, assessing in each case what the coalition is exposed on, how it is managing that exposure, and whether the approach is likely to hold through polling day. Finally, it turns to the opposition bloc itself: a coalition of convenience built from Yashar, B'Yachad, Yisrael Beiteinu and the Democrats that agrees on removing Netanyahu far more firmly than it agrees on what would replace him, and whose internal fault lines, particularly over conscription and religion-and-state policy, may prove as consequential to its capacity to govern as anything the current coalition does between now and October 27.



A Scene Fragmented by Nature

The electoral picture suggests that Israel's October 27 election could produce another highly fragmented Knesset, with neither Benjamin Netanyahu's camp nor the opposition able to secure the 61 seats required to form a government. Although Gadi Eisenkot's centrist Yashar party has emerged as the leading individual party in several recent polls, its advantage over Netanyahu's Likud remains narrow, while the distribution of seats among the smaller parties makes the formation of a stable governing coalition increasingly uncertain. A Channel 12 poll conducted at the end of August, for example, put Yashar at 24 seats and Likud at 23. The wider anti-Netanyahu bloc was projected to win 59 seats, compared with 50 for the pro-Netanyahu bloc, while Arab parties held 11 seats. The same poll also demonstrated how much the final result could be affected by parties hovering around the electoral threshold. Ofer Winter's newly established People of Israel party was projected to enter the Knesset with four seats, while Bezalet Smotrich's Religious Zionism was projected to fall below the threshold.

The picture shifted again only days later. A Channel 13 poll published on September 3 showed the pro-Netanyahu and anti-Netanyahu blocs tied at 53 seats each, leaving the two sides eight seats short of the 61-seat threshold. The remaining 14 seats were held by Arab parties. The change was partly attributed to two right-wing developments that strengthened the pro-Netanyahu camp on paper, namely the projected entry of Winter's People of Israel with four seats and the merger of Religious Zionism with Moshe Feiglin's Zehut, which was projected to win six seats as a joint list. At the same time, Yashar slipped from 24 to 22 seats, while Likud rose from 19 to 21.

Projected Knesset Seats: If Elections Were Held Today

Based on a Channel 12 poll conducted on August 31, 2026.

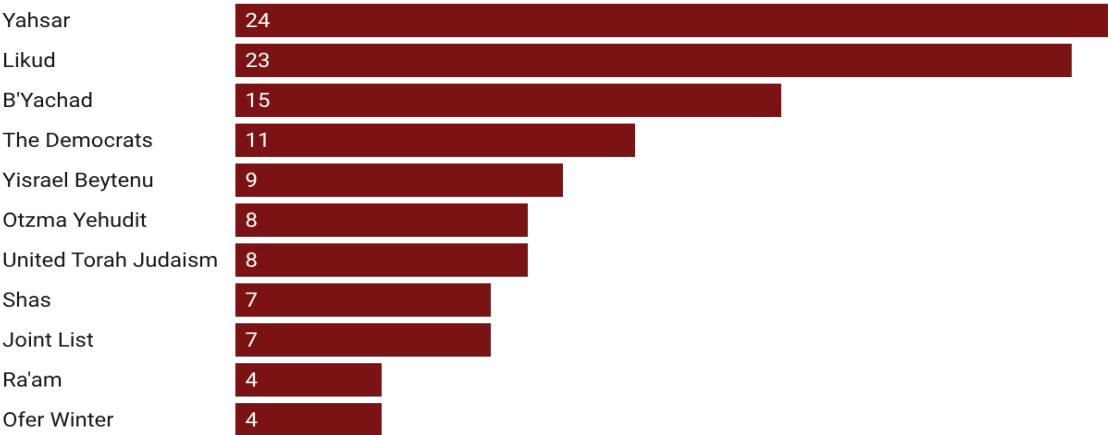


Chart: Al Habtoor Research Centre • Source: Channel 12 Poll • Created with Datawrapper

This volatility highlights an important feature of Israeli electoral politics. No single party is expected to come close to the 61 seats required to govern alone, making coalition-building an essential part of the electoral process. The problem for both camps, however, is that the current fragmentation may make the formation of a coalition difficult even after the election. The question is therefore no longer simply which party will finish first, but whether either side will be able to assemble a coalition that can command a parliamentary majority. For Netanyahu, the immediate challenge is to consolidate the right-wing vote. The current pro-Netanyahu camp consists primarily of Likud, the ultra-Orthodox Shas and United Torah Judaism, and the far-right Otzma Yehudit and Religious Zionism. Following its agreement with Moshe Feiglin, Religious Zionism will contest the election jointly with Zehut, while Itamar Ben Gvir has so far refused to reunite Otzma Yehudit with Smotrich. Ofer Winter has likewise resisted pressure to join the existing right-wing parties and is running People of Israel independently.

The importance of these smaller parties lies not only in the number of seats they may eventually win but also in the votes they could potentially waste by failing to cross the electoral threshold. This explains Netanyahu's repeated attempts to persuade the smaller right-wing factions to coordinate or merge.

His concern is particularly focused on Winter's party, which could attract voters from the existing right-wing camp without necessarily winning enough votes to enter the Knesset. If those votes are lost, the overall strength of the Netanyahu camp could be reduced even if the majority of those voters remain personally supportive of him. Netanyahu has therefore warned that Winter's independent candidacy could ultimately cost the right-wing bloc essential seats. Numbers show why the issue is so important. In the latest Channel 13 poll, the pro-Netanyahu bloc stands at 53 seats, including the newly strengthened Religious Zionism-Zehut list and Winter's People of Israel. Even with these additions, the bloc remains eight seats short of a majority. The situation is therefore not simply one of Netanyahu needing to defeat Eisenkot. He needs to ensure that enough parties on his side both cross the electoral threshold and remain willing to support him after the election. Conversely, if one or more small right-wing parties fail to enter the Knesset, their unused votes could alter the distribution of seats in favour of the opposition.

The opposition faces a different, but equally difficult, problem. Eisenkot's Yashar has established itself as the leading opposition party, but its position at the top of the polls does not automatically translate into the ability to form a government. In the latest Channel 13 poll, Yashar has 22 seats, while Naftali Bennett and Yair Lapid's B'Yachad has 12. The Democrats and Yisrael Beytenu occupy additional positions within the anti-Netanyahu camp, and the opposition as a whole still reaches only 53 seats.

One possible source of additional strength for Eisenkot is B'Yachad. An electoral merger between B'Yachad and Yashar before the election now appears difficult, particularly because Eisenkot previously rejected the opportunity to join Bennett and Lapid's alliance as its number two figure. His decision to establish Yashar independently was based on his growing position as a potential challenger for the premiership.

Nevertheless, a post-election agreement between the two camps remains considerably more plausible. If Eisenkot emerges as the strongest candidate for forming a government, cooperation with B'Yachad could become an important component of a broader coalition. Yet even a Yashar-B'Yachad partnership may not be sufficient. The most difficult question concerns the Arab parties, whose seats could once again determine whether either side can reach 61. In the latest Channel 13 poll, Arab parties collectively hold 14 seats, meaning that they occupy the position of potential kingmakers.

For Eisenkot, this creates a particularly complex political dilemma. The opposition may need Arab support to reach a majority, but relying on Arab parties could alienate the very centrist and right-leaning Jewish voters that Eisenkot needs to broaden his electoral base. The dilemma is reinforced by the fact that a large majority of Jewish Israelis remain opposed to including an Arab party in the government. Eisenkot has therefore avoided completely closing the door on Arab support while emphasising conditions that any potential coalition partner would have to meet, including recognition of Israel as a Jewish and democratic state, acceptance of the principles of the Declaration of Independence, and a commitment to military or national service.

Mansour Abbas's Ra'am could consequently become particularly important. Ra'am has already demonstrated that an Arab party can play a decisive role in Israeli coalition politics. Its participation in the Bennett-Lapid government in 2021 was the first time an independent Arab party joined an Israeli governing coalition. Its current strategy may also be intended to make cooperation with Jewish voters and parties more politically acceptable. Abbas's decision to place former Yesh Atid lawmaker Yoav Segalovitz on Ra'am's electoral list is significant in this regard. Although the move has not yet produced a major change in Ra'am's polling numbers, it potentially gives the party a more explicitly Jewish-Zionist face and could broaden its appeal.

The election therefore appears to be developing around two competing forms of fragmentation. Netanyahu's challenge is to prevent fragmentation within the right from turning into lost votes and lost seats. Eisenkot's challenge is different; he must bring together a sufficiently broad coalition of centrist, right-leaning and potentially Arab parties without undermining the electoral coalition that has allowed Yashar to become the leading opposition party in the first place.

This makes a post-election deadlock a credible scenario. If the right wins the largest number of seats but remains below 61, Netanyahu's best option would be to bring additional right-wing parties into his coalition, provided those parties enter the Knesset in sufficient numbers. The recent Religious Zionism-Zehut agreement has already demonstrated how such pre-election consolidation can alter the parliamentary arithmetic, but the latest polling still leaves the pro-Netanyahu bloc well short of a majority.

If Eisenkot finishes ahead of Likud, his most plausible route would similarly involve building a broad anti-Netanyahu coalition around Yashar, B'Yachad and other centrist parties, while potentially seeking external support or cooperation from Arab parties. However, this route carries its own political risks. The more Eisenkot depends on Arab parties to reach 61, the more difficult it may become to maintain support among Jewish voters who view such cooperation negatively.

The electoral picture shifted again in a Maariv poll conducted on 8 September, highlighting once more how sensitive the parliamentary figure is to the performance of smaller parties. The poll put Gadi Eisenkot's Yashar at 25 seats, up from 22 in the previous Channel 13 poll, while Benjamin Netanyahu's Likud remained at 20 and Naftali Bennett's B'Yachad fell to 13. More significantly, the Zionist opposition bloc was projected to hold 57 seats, compared with just 47 for the Netanyahu coalition. The four seats projected for the joint Reservists-Economic Party slate, led by Yoaz Hendel and Yaron Zelekha, would therefore give the opposition a potential 61-seat majority without relying on the Arab parties.

This represents a notable change from the 53-53 deadlock recorded by Channel 13 only days earlier and is largely explained by the movement of smaller parties across the electoral threshold: Hendel and Zelekha's slate entered with four seats, while Ofer Winter's People of Israel fell to 2.8% and dropped out of the Knesset, after previously being projected to win four seats. The poll therefore reinforces the central argument: the outcome may depend as much on which smaller parties cross the threshold as on the performance of the major parties themselves. At the same time, the figures should be treated cautiously because the poll was conducted before the candidate-list submission process was completed, while both the Hendel-Zelekha slate and Amcha Israel remained close to the threshold, meaning that relatively small changes in voter preferences could once again alter the balance between the blocs.

Nevertheless, the latest figures should not be treated as a definitive indication that the election will produce a deadlock. Israeli elections have repeatedly demonstrated how quickly the political balance can shift in the final weeks of a campaign, particularly as parties consolidate their lists and voters make their final choices. The latest Maariv poll shows that Eisenkot has strengthened considerably, with Yashar rising to 25 seats, while the opposition bloc has moved closer to the 61-seat threshold. At the same time, Netanyahu's Likud remains a major political force, and the outcome remains highly sensitive to the performance of smaller parties hovering around the electoral threshold. The failure of the People of Israel to cross the threshold, for example, has already altered the parliamentary arithmetic in favour of the opposition, while the entry of the Hendel-Zelekha slate has further strengthened its position. However, these developments could be reversed by relatively small changes in voter preferences before election day. Netanyahu could still benefit from a late consolidation of right-wing voters, particularly if smaller parties succeed in crossing the threshold or if further alliances reshape the distribution of seats. Conversely, further gains by Yashar or additional losses among right-wing parties could bring Eisenkot's bloc within clearer reach of a majority.

The election therefore remains highly fluid, with the final outcome likely to depend not only on the relative strength of Netanyahu and Eisenkot but also on the fate of smaller parties and the ability of either camp to convert its votes into a viable 61-seat coalition.

Netanyahu's Right: Five Operating Principles

To secure an unprecedented fifth consecutive term amidst a deeply polarised electorate and the aftermath of a profound national crisis, the incumbent leadership has constructed a campaign strategy designed less around policy proposals and more around narrative control and coalition mechanics. This strategy rests on five core operating principles that aim to neutralise vulnerabilities, maximise right-wing turnout, and systematically dismantle the opposition's path to a majority. The execution of these principles reveals a campaign focused on defining the terms of the debate before the electorate can.

Displace Accountability with Competence

The most dangerous question for an incumbent seeking a fifth consecutive term after the worst security failure in the state's history is **"Who was responsible?"** The organising principle of the Likud campaign is to replace it with **"Who is competent to act next?"**

The mechanism is not denial. It is the confinement of responsibility to the military and intelligence services, which have themselves accepted institutional responsibility, that the IDF's 2025 synthesis of its own enquiries concluded that the army underestimated Hamas and failed in its core mission of protecting civilians, combined with the appropriation to the political level of everything that followed: the degradation of Hezbollah's command and infrastructure, the campaign against Iran, and the October 2025 agreement that returned the remaining living hostages. The temporal framing does the work. Failure belongs to the institutions; recovery belongs to the leadership.

This framing is contested but not baseless, which is what makes it effective. Its vulnerability is empirical rather than logical: an Israel Democracy Institute survey in September 2025 found 64 per cent saying Netanyahu should accept responsibility and resign, either immediately or at the end of the war. A campaign that changes the subject can suppress the salience of that finding. It cannot reverse it.

Consolidate The Right and Eliminate Threshold Wastage

The cheapest seats available to any Israeli party leader are those recovered from allied lists that fail to clear 3.25%. Netanyahu has pursued them aggressively, demanding that Otzma Yehudit merge with Religious Zionism, pressing Winter to fold People of Israel into Smotrich's list, and warning supporters that "no vote can go to waste". The rhetorical vehicle is historical. Netanyahu has repeatedly invoked the 1992 election, in which right-wing lists fell below the threshold and enabled a Labour victory and, on his account, the Oslo Accords and the terrorism that followed: "We paid with thousands upon thousands of murdered citizens ... all stemming from that mistake." The argument fuses a technical point about electoral engineering with the campaign's central emotional claim, that the alternative to him is not merely a different government but a national danger—a register he escalated in warning of a "fascist regime" that would close sympathetic media outlets.

The strategy failed at the decisive moment. Ben Gvir rejected the merger in terms that foreclosed reconsideration, with Otzma Yehudit declaring the decision "final and complete" with "no talks, or meetings, or discussions on the topic". Likud's response—accusing him of "burning tens of thousands of right-wing votes" out of ego and thereby enabling "a left-wing government of Gadi Eisenkot, Avigdor Liberman, Yair Golan, and the Arab parties"—is the clearest available admission of how much the coalition believes is at stake. Winter likewise submitted an independent list. Slates closed on 8 September with no significant merger on the right.

Delegitimise the Alternative Majority

Netanyahu's opponents can assemble 61 seats in only two ways: by winning enough right-of-centre voters to reach a majority without Arab lists, or by relying on those lists in some form. The second route is arithmetically straightforward and politically expensive. Raising its price is therefore among the highest-return tactics available to the coalition, because it operates on the opposition's coalition-formation capacity rather than on its vote share. The instrument has been direct. On 23 July 2026, Netanyahu's account published an AI-generated advertisement depicting Eisenkot walking past a young man resembling his son Gal – killed in Gaza in December 2023 – in order to embrace Ra'am's Mansour Abbas. President Isaac Herzog described it as "the lowest of the low". The advertisement's strategic function was not persuasion about Eisenkot's character but the establishment of a proposition: that a government resting on Arab mandates is illegitimate irrespective of who leads it. The underlying public opinion supports the attempt.

Israel Democracy Institute polling has found 77 per cent of Arab respondents supporting the inclusion of Arab parties in government against 71.5 per cent of Jewish respondents opposing it. The tactic does not need to change minds; it needs only to keep an existing majority sentiment salient through late October.

Defer Every Decision that Splits the Base

On the files where the coalition's parliamentary requirements and its electoral requirements point in opposite directions—conscription above all, and the commission of inquiry—the operating principle is postponement dressed as consensus-seeking. Netanyahu has spoken of "broad agreement" among the public on opposition to Palestinian statehood and on avoiding "civil war" over conscription, asserted that "there is far more unity among the people than what you see in the Knesset", and declared an intention to form a "broad national government". The substantive content of these formulations is close to zero, and that is their purpose. A stated commitment to a conscription formula would cost him either the Haredi parties or the reservist vote. A stated position on the day-after governance of Gaza would cost him either Ben Gvir and Smotrich or the centre-right.

The language of unity permits both audiences to hear what they require. The cost is that it concedes the initiative on both files to opponents who have taken positions.

Convert Institutional and External Assets into Campaign Currency

Three assets are being monetised. **The first is legislative timing:** the 2025 amendment to the Judicial Selection Committee takes effect only when the Twenty-Sixth Knesset convenes, and the July 2026 Attorney General law is scheduled for 1 January 2027. The election does not merely choose a cabinet; it determines who activates, entrenches, or repeals an institutional restructuring already legislated. For voters who want that restructuring, a Likud vote is the operative instrument.

The second is a sympathetic media ecosystem, of which the polling house effect, which includes a Channel 14 figure among the Prime Minister's personally allocated places, is another. The third is Washington. President Trump's formal intervention in support of Netanyahu's pardon request, and the July 2026 White House meeting, are deployed as evidence of a relationship that is personal rather than institutional and therefore non-transferable to a successor. The claim has force. It also carries the risk.

Issue Management

This part applies it to the eleven files on which the election will actually be contested, examining in each case the exposure the coalition carries, the line of attack the opposition has adopted, the techniques by which the coalition intends to neutralise it, the voter segments the approach protects and those it quietly concedes, the developments to expect before 27 October, and whether the position holds.

Two framing points govern the analysis. The files are ordered by the coalition's exposure rather than by their prominence in media coverage; the West Bank file, which barely features in the campaign, is among the most consequential in delivery terms, while the judicial file, which dominated Israeli politics in 2023, is being fought almost silently. And a recurring analytical error in commentary on this campaign is to treat Netanyahu's handling of a file as evasion. It is more accurately understood as sequencing. On every file where his parliamentary requirements and his electoral requirements diverge, the objective is not to win the argument before 27 October but to prevent it from being adjudicated before 27 October. That is a different and far more achievable goal, and everything described below is calibrated to it.



Table 1. The Campaign Playbook briefly

File	Core threat to the coalition	Principal technique	Effectiveness
October 7	Direct attribution of the worst security failure in the state's history	Confine responsibility to the services; contest ownership of the doctrine	Holds, cannot win
Security record	A challenger who cannot be framed as weak	Attack inside the domain: resolve, not competence	Well, aimed, low yield
Conscription	Partners and core voters require opposite outcomes	Defer; relocate blame onto the judiciary	Holds to polling day
Judicial agenda	Institutional anxiety is now a vote-choice issue	Delayed fuse: legislated, activation contingent on the result	Highly effective
Economy	Distributive resentment at protected allocations	Aggregate substitution plus pre-election disbursement	Adequate
Gaza	Any specific position splits the bloc	Studied ambiguity; delegated maximalism	Effective, hostage-making
West Bank	A sovereignty statute would trigger a crisis	Administrative annexation without legislation	Highly effective
Religion and state	Concessions to partners repel the secular right	Legislate quietly; front-load the payments	Containment only
Arab citizens	A governance failure with an electoral sting	Convert the failure into an identity boundary; depress turnout	High return, high variance
Washington	Alliance friction and falling US public support	Personalise the relationship; fuse with the lawfare narrative	Effective now, costly later
The legal file	Fuses his personal position to his institutional programme	Persecution narrative; pardon as managed ambiguity	Raises floor, caps ceiling

October 7 and the Attribution War

The coalition carries an exposure without precedent in Israeli electoral history. Approximately 1,200 people were killed on 7 October 2023, and some 250 were taken hostage, in a failure that occurred after the longest cumulative premiership in the state's history and under a doctrine its author had publicly defended. That doctrine was not a single misjudgement but a layered system: that Hamas's responsibilities as Gaza's ruler would make it risk-averse; that work permits and transfers would deepen its interest in quiet; that periodic limited campaigns would restore deterrence; that intelligence would expose preparations; that the barrier and remote-fire systems would convert warning into denial; and that Hamas could be separated from the wider Iranian axis while Israel prioritised Iran and managed the West Bank. Every layer failed simultaneously.

The institutional response has been more forthcoming than the political one. The Chief of the General Staff and the Shin Bet director both left office in 2025 having accepted institutional responsibility, and the IDF's 2025 synthesis of its internal enquiries concluded that the army underestimated Hamas and failed in its core mission of protecting civilians. No equivalent political accounting has occurred. An Israel Democracy Institute survey in September 2025 found 64% saying Netanyahu should accept responsibility and resign, either immediately or at the end of the war.

The opposition's case against him is deliberately procedural rather than operational, and this is its strength. It does not require voters to adjudicate intelligence assessments. It asks a simpler question: why has the man who presided over the failure refused the one mechanism that would establish who failed? The argument is carried by actors Likud cannot easily attack—bereaved families, reservist organisations, and a challenger who lost a son in Gaza—and it converts a contested technical dispute into an accessible test of character.

Against that, the coalition's first and most basic technique is the vertical confinement of responsibility. Blame is pushed down the chain to services that have already accepted it and which are institutionally barred from campaigning in reply. The move is efficient precisely because it is partly true: the IDF and Shin Bet did fail in warning, force posture, and command response and have said so publicly. What the campaign adds is the treatment of that admission as exhaustive rather than partial—as though an institutional failure of execution settles the question of political responsibility for the doctrine that produced it.

Layered onto this is a temporal partition of the war itself. The conflict is divided into a "before", which belongs to the institutions, and an "after", which belongs to the political leadership: the degradation of Hezbollah's command, the campaign against Iran, the October 2025 agreement, and the return of the hostages.

The division has no analytical basis, since the same decision-makers were present throughout, but it is intuitive to a voter who experienced those events sequentially, and it converts thirty-four months of war into a redemption narrative with a single author.

The third and least remarked element is an attempt to contest ownership of the concept itself, and it is the campaign's most important single hinge. The argument is that the containment doctrine was a professional consensus rather than a personal preference – endorsed by the general staff, the intelligence community and successive security cabinets, including officers who now stand for election against him. If the conceptzia belonged to the establishment rather than to one man, then Gadi Eisenkot owns a share of it, and the accountability question loses the asymmetry on which the opposition's case depends. which is why the campaign returns to it far more often than its low media profile would suggest.

Procedurally, the government has advanced a politically structured "state-national" inquiry as an alternative to a statutory State Commission. Its function is not to investigate but to occupy the space that would otherwise be filled by an unanswered demand. A voter who believes an inquiry is coming in some form is materially harder to mobilise than a voter who believes one is being refused outright, and the substitution therefore does useful work even among those who would prefer the statutory version. To this should be added a quieter exercise in calendar management: October 2026 contains both the third anniversary of the attack and the first anniversary of the agreement that returned the hostages, three weeks before polling. Expect the campaign to invest heavily in the second and to minimise participation in the first, where the platform belongs to bereaved families and where memorial events have in recent years become sites of protest.

None of this is aimed at the 64%. Netanyahu is not attempting to recover them, and the campaign's internal logic does not require him to. The target is the narrower band of right-leaning voters—plausibly 8 to 12% of the electorate—who hold him partly responsible but regard the alternative as worse, and whose vote is therefore available to a sufficiently strong argument about consequences. The segments explicitly written off are the centre, the liberal national-religious constituency, and the bereaved and reservist networks, whose defection is treated as a sunk cost and whose hostility is, in some formulations, actively useful as evidence of the establishment arrayed against him.

Before polling day, no statutory commission should be expected. If pressure becomes acute, the likeliest response is an announcement of intent to establish an inquiry after the election with its composition left unresolved—a commitment that costs nothing and absorbs the demand. Alongside it, expect heavy paid-media investment in the 2024-26 operational record, concentrated in the final fortnight and delivered through sympathetic outlets rather than through the Prime Minister personally, and sustained attempts to draw serving and retired officers into public dispute, which both dilutes the services' moral authority and reinforces the claim that the doctrine was theirs as much as his.

The architecture is sound and the execution competent, but the file cannot be won—only held. Suppressing the salience of an accountability question that a settled majority has already answered is a defensive operation with a hard ceiling, and it consumes campaign resources that cannot then be spent on persuasion. The residual risk is one of timing: the anniversary of 7 October falls inside the campaign's closing phase, precisely when the coalition would prefer the agenda to be prospective.

The Security Record and the Contest with Eisenkot

Likud's claim to a monopoly on security competence is the foundation on which its coalition rests, and it has been holed rather than sunk. The doctrinal consequence of 7 October is a shift from periodic deterrence restoration towards persistent forward defence, thicker border forces, pre-emption, and reduced tolerance for adversary force build-up—a posture that promises greater tactical security at a permanent cost in manpower, fiscal space, international legitimacy, and escalation risk. The coalition has not explained how those costs will be borne and has no incentive to, since doing so would return the discussion to conscription and the budget.

The specific exposure, however, is Gadi Eisenkot. A former Chief of the General Staff who joined the emergency government, resigned from the war cabinet in June 2024, and lost a son and a nephew in Gaza is immune to the framing Likud has deployed against every centrist challenger since 2019. He cannot plausibly be called weak, foreign, elitist or unacquainted with the burden of service, and the standard repertoire of delegitimisation does not merely fail against him but rebounds. His own case is that Netanyahu subordinated strategy to coalition maintenance—that the containment of Hamas served a political objective of keeping the Palestinian question unresolved and the coalition intact—and that the same subordination continued during the war in the sequencing of hostage negotiations. It is an argument about motive, delivered by a man whose motives are difficult to impugn.

Likud's response is the most technically accomplished element of the entire campaign, and it consists in attacking Eisenkot inside his own domain rather than outside it. Instead of contesting his security credentials, Netanyahu contests his resolve: that Eisenkot and his allies opposed the entry into Rafah, the seizure of the Philadelphi Corridor, and the expanded campaign against Hezbollah, and that following his advice would have left "all of Hamas" intact and Hezbollah's leadership and infrastructure standing. The manoeuvre converts professional caution—ordinarily an asset in a post-catastrophe electorate—into evidence of insufficient nerve, and it does so using decisions whose outcomes the government now claims as vindications. Running alongside it is a reinterpretation of Eisenkot's departure from the war cabinet in June 2024, reframed from a principled objection to the absence of a strategy into an abandonment of responsibility at the decisive moment, with the subtext that he was present for the difficult decisions and declined to own them.

The most durable line, however, is the simplest: that a chief of staff is not a prime minister. The claim is that strategic leadership requires diplomatic, coalition, and economic capacities Eisenkot has never exercised, and that generalship is a narrow technical competence that voters mistake for a general one. This is the one argument about Eisenkot that is neither offensive nor easily disproved; it does not require the electorate to revisit 7 October at all, and Israeli political history supplies precedents on both sides of it. It is therefore the line most likely to produce movement in the closing fortnight.

Two further elements support the effort. Of all the achievements the campaign can claim, the 2026 campaign against Iran is the one least attributable to the security establishment's initiative and most attributable to a political decision taken over institutional caution; expect it to carry disproportionate weight in the final weeks, precisely because it is the single case where the frame of over-cautious professionals and a decisive politician has its strongest empirical footing.

And the Likud slate has been rebuilt to present a governing team rather than a leader with a bench of loyalists: the elevation of Israel Katz, Eli Cohen, and Gideon Sa'ar to the top of the list, alongside the inclusion of bereaved parents among the Prime Minister's personally allocated places, is designed to give the party security and diplomatic depth in a contest where its leader's own credibility on that ground is contested. Expect, correspondingly, no televised head-to-head debate: Netanyahu leads Bennett and Liberman in suitability polling and trails Eisenkot by ten points, so the format that serves him is one in which Eisenkot is one challenger among several rather than the alternative.

The target throughout is the soft-right defector – a 2022 Likud voter, frequently a reservist or from a reservist household, who holds the government responsible for 7 October but is not willing to install a government dependent on Yair Golan and the Arab lists. For this voter the message is not that Netanyahu was right, but that Eisenkot would be worse under fire. The centre and the liberal national-religious vote are not contested at all. In the weeks remaining, expect repeated attempts to draw Eisenkot into detailed operational argument about Rafah and Lebanon, where Likud believes the terrain favours it and where every hour he spends is an hour not spent on accountability; continued pressure on the question of whom he would appoint to senior security positions, aimed at manufacturing a division between him and the serving establishment; and a rising prominence for the Iran file, with any new regional development framed as vindication of political over professional judgement.

For all its craftsmanship, the effort has so far been unproductive. Eisenkot led the suitability matchup by ten points on 25 August, and Yashar has led every mainstream seat projection since mid-August. The most plausible explanation is that the attack answers a question the electorate is not primarily asking: "Would he have been aggressive enough?" is a weaker frame than "Would this have happened on his watch?" The prime-ministerial-competence line is the exception and the one most likely to yield, because it is the only part of the argument that does not depend on relitigating a catastrophe the voter has already assigned.

Haredi Conscription: Managing an Insoluble File

The historic Torato Umanuto bargain rested on exemptions remaining numerically containable and politically exchangeable. Demography and thirty-four months of multi-front mobilisation have destroyed both conditions. Approximately 90,000 Haredi men were legally liable for service by March 2026, with some 72,000 aged 18 to 24 having ignored conscription orders. The IDF recorded 2,811 Haredi-background enlistees in the 2024-25 draft year against an immediate requirement of roughly 12,000 combat and combat-support personnel—and administrative counts of "Haredi" enlistment include men who have already left active yeshiva society, so even that figure overstates institutional integration.

The legal position is no longer ambiguous. In HCJ 6198/23 the Supreme Court held unanimously in June 2024 that the expired statutory framework left no authority for blanket non-enforcement or for continued student-linked funding; a November 2025 judgement found implementation inadequate and required an enforcement plan. Sanctions have accumulated: yeshiva support restricted from April 2024, daycare eligibility from March 2025, and National Insurance discounts from January 2026. The coalition's legislative answer—a law barring the arrest of draft evaders for seven months—was frozen and then struck down on 3 September 2026, all nine justices identifying a fatal legislative "new subject" defect and eight also finding unconstitutional inequality. The government boycotted the hearing, and both the Knesset's own legal adviser and the Attorney General had urged the court to invalidate the law.

Table 2. Monthly Reserve-Duty Participation By Sector, Men Aged 21–44, 2025

Sector	On reserve duty, average month 2025	Ratio to Haredi rate
National-religious men, 21–44	4.3%	14.3: 1
Traditional men, 21–44	2.6%	8.7: 1
Secular men, 21–44	1.7%	5.7: 1
Haredi men, 21–44	0.3%	1.0: 1

(Israel Democracy Institute labour-force analysis). The ratio between the national-religious and Haredi figures is approximately fourteen to one.

Universal service is the easiest unifying principle available to the opposition and the hardest policy for it to implement, which is why every anti-Netanyahu list campaign on it has none published a detailed enforcement sequence. Its electoral power lies in the reciprocity frame—not “the Haredim should serve” but “you are being asked to serve repeatedly while others are paid not to”—and the supporting evidence is unusually concrete. A survey of reservists found 70% saying the government’s handling of Haredi conscription would heavily affect their vote, 63% supporting universal military or national service, and only 34% of respondents who voted Likud in 2022 certain to do so again.



Table 3. The Conscription Trade-Off by Actor

Actor	What a workable formula must deliver	What the actor cannot survive
Shas and United Torah Judaism	Protection of full-time study and communal authority over enlistment	Meaningful quotas, funding sanctions, or arrest enforcement
Likud	An arrangement that keeps the Haredi parties inside the coalition	Being seen by reservist voters to have purchased exemption
Religious Zionism	Solidarity with the right-religious bloc	Ignoring a service burden carried disproportionately by its own voters
Reservist and secular-right voters	Visible, enforced movement towards universal service	A further framework with deferred targets and no penalties
A change government	Universal service as a unifying principle	Implementation without civilian tracks, enforcement sequencing and scholar quotas

No available formula satisfies more than two of the five positions simultaneously, which is the structural reason the file has remained unresolved across three parliaments.

Netanyahu’s handling of this file begins with a relocation of the argument itself. The debate is moved from distributive justice, where the coalition loses on every available measure, to civil peace, where the Haredi position is at least intelligible to a wider audience. Hence the language of seeking “an agreement on the issue”, the criticism of enforcement mechanisms rather than of the principle of service, and the recurring warning against “civil war”. The reframing does not defend exemption, which would be indefensible before an electorate that has spent three years in uniform; it defends the avoidance of coercion, which is a materially easier proposition to sell and which allows a voter who supports universal service in principle to accept indefinite delay in practice.

The second move is temporal. The entire question is deferred to the Twenty-Sixth Knesset, and no draft framework will be published before polling day, because publication would immediately price the trade-off that Table 3 describes.

Where a formula must be gestured at, its likely shape can be inferred: graduated annual targets with long ramp periods, expanded civilian-service tracks, accommodation for a defined quota of genuinely full-time scholars, and enforcement triggers that begin in later years. The design principle is that the first-year obligation must be small enough for the Haredi parties to accept and the trajectory steep enough for reservist voters to read as progress. Formal equality and low actual compliance are entirely compatible—courts can remove the legal permission structure, but enlistment depends on IDF processing capacity, tailored units, police enforcement, rabbinic authority, and labour-market incentives—and it is in that gap that any eventual agreement will sit.

The most strategically significant move on this file, however, is the transfer of blame from the coalition to the judiciary and the Attorney General: the argument that a negotiated communal settlement was within reach and was made impossible by judicial intervention and legal establishment maximalism. This merges the conscription file into the constitutional file, converting a distributive grievance on which Netanyahu is losing into a judicial-overreach grievance on which his coalition is united. It is the single most efficient manoeuvre in the campaign, because it takes his worst file and relocates it onto his best terrain, and it explains why the rhetorical response to the 3 September ruling was so immediate and so heavily invested: those attacks are conscription messaging, not judicial messaging.

Two supporting techniques complete the picture. Likud's removal of Yuli Edelstein from the chairmanship of the Foreign Affairs and Defence Committee over the draft bill established that an enforcement-minded chairman would not be tolerated; the signal was directed at Shas and United Torah Judaism rather than at the public, and it guarantees that the committee, which must produce any future conscription law, will be chaired by someone capable of delivering Haredi consent.

And the Haredi vote itself is delivered by rabbinic instruction and communal organisation rather than by advertising, which means what Netanyahu must supply is not a public argument but a credible private guarantee. That is why the substantive commitments on this file are made in coalition negotiation rather than in campaign material, and why his public language can remain studiously vague without costing him a single Haredi mandate.

The trade he is making is explicit and quantifiable in outline. Netanyahu is protecting approximately fourteen Haredi mandates, without which no path to 61 exists, at the price of an unknown quantity of Likud mandates drawn from reservist, secular-right, and national-religious households. The reservist survey suggests the price is high: if even a third of the two-thirds of 2022 Likud voters who are no longer certain actually defect, the loss exceeds the fourteen mandates protected. The arithmetic works only because the fourteen are guaranteed and delivered as a bloc, while the losses are dispersed across four rival lists rather than concentrated in one—a distinction that matters enormously for coalition formation and not at all for the popular vote.

Before 27 October, expect no conscription bill and no published formula; any commitment will be to a process rather than to content. Expect Aryeh Deri rather than Netanyahu to serve as the visible negotiator on the Haredi side, allowing the Prime Minister to remain formally uncommitted. Expect escalating rhetorical attacks on the High Court, maximal Haredi turnout operations, and a strong probability that further enforcement-freezing legislation is attempted in the next Knesset rather than this one.

Deferral is the optimal play available, and Netanyahu is executing it competently. It is nonetheless a loan rather than a settlement. The moment the election is over, coalition formation requires a written conscription clause, and at that point the contradiction is priced in full: a clause acceptable to Shas and United Torah Judaism will be unacceptable to any partner Likud needs in order to expand beyond its current bloc, and a clause acceptable to those partners will collapse the coalition it already has.

This, and not the polling deficit, is why the coalition-formation phase after 27 October is more uncertain than the vote itself.

The Constitutional Agenda and the Delayed Fuse

The reasonableness controversy is frequently misstated and should be corrected before the live issue is described. The Knesset removed the reasonableness review in July 2023; in HCJ 5658/23 the Supreme Court restored it in January 2024, with twelve of fifteen justices recognising the authority to review basic laws in exceptional cases and eight voting to void the amendment. The 2023 overhaul, in other words, failed—and it failed at enormous political cost, having produced the largest sustained protest movement in Israeli history and a reservist refusal crisis in the months immediately preceding 7 October. That history is itself the exposure: any campaign that reopens the judicial file in 2023 terms revives the coalition's worst period. The agenda has not been abandoned, but it has been comprehensively restructured.

The restructuring is the most sophisticated element of the coalition's entire position, and it works by making the election the activation mechanism for legislation that already exists. The March 2025 amendment to the Judicial Selection Committee, which replaces Bar Association representatives with coalition- and opposition-appointed jurists and introduces reciprocal political vetoes over Supreme Court appointments, takes effect only when the Twenty-Sixth Knesset convenes.

The July 2026 Attorney General law, permitting governmental divergence from most Attorney General opinions and ending that office's near-monopoly over state representation, is scheduled for 1 January 2027. Both are already on the statute book. The election therefore does not authorise a future reform; it determines who holds the switch on a restructuring already enacted.

For the constituency that wants it, a Likud vote is not an expression of preference but an operative instrument—and this is a materially stronger proposition than any campaign promise could be.

Precisely because no further legislation is required, the file does not need to be campaigned on, and campaigning on it would activate the 55 to 64% who oppose its components. Expect the judicial agenda to be almost entirely absent from paid advertising and present only in base-facing communication. Where it does surface, it does so obliquely, through a technique of consolidation: the judiciary is presented as the common obstacle across three otherwise unrelated grievances – the court blocked a communal conscription settlement, the Attorney General obstructed the conduct of the war, and the prosecution service manufactured the Prime Minister's trial. One antagonist, three files. This is what makes the constitutional agenda electorally viable in a year when it could not survive being argued on its own terms.

Landmark legislation is also not the only instrument available. Appointment delays, acting officeholders, selective non-convening of statutory committees, budget control and sustained pressure on watchdogs alter institutions without a vote and without generating the kind of mobilising event that 2023 produced. Previous attempts to dismiss the Attorney General and the Shin Bet director were invalidated, but they demonstrated that the restructuring proceeds by accumulation rather than by single decisive acts, and accumulation is far harder to campaign against. Overlaying all of this is the pre-framing of the result itself: the warning of a "fascist regime" that would close sympathetic media outlets mobilises the base and simultaneously pre-positions a grievance narrative should the coalition lose. It is also the campaign's highest-risk rhetoric, given that the survey recording anxiety about election integrity records it among his own bloc's voters as well as his opponents'.

This file is directed almost exclusively at the committed bloc – roughly the 30 to 35% for whom judicial restructuring is a positive good – and makes no attempt at the marginal voter, who opposes it. Its campaign function is retention and turnout, not persuasion. Between now and polling day, expect continued public silence on judicial selection, punctuated by attacks on the court framed as responses to specific rulings rather than as constitutional arguments; no attempt to legislate further, since the incentive runs entirely the other way; and an increasing emphasis on election-integrity themes as polling day approaches, particularly if the deficit does not close.

This is the coalition's most successful file, and its success is measured precisely by its invisibility. The restructuring has been legislated, its activation made contingent on the election result, and the campaign structured so that voters who want it can deliver it without the subject being argued in public. The residual risk is that institutional anxiety has itself become a vote-choice issue rather than an elite preoccupation—an IDI survey in August 2026 found 72% of Jewish and 58.5% of Arab respondents perceiving a danger to the integrity of the election, 64% opposing the expanded gender-separation law and 55% opposing the Attorney General law—which converts a silent asset into a mobilising factor for the other side.

The War Economy, the Budget, and the Cost of Living

The macroeconomic position permits a resilience message, and the coalition is entitled to make it. The Bank of Israel estimates the fiscal cost of the war at approximately NIS 350 billion over 2023-26. Debt stood at 68.5% of GDP at the end of 2025 against 60.5% at the start of 2023; sovereign ratings—Moody's Baa1, S&P A, and Fitch A—remain below pre-war levels but have stabilised, with two of the three agencies at a stable outlook by mid-2026, and equity markets performed strongly through the first half of 2026. This is a narrowing-margins story rather than an insolvency story, and no serious analyst should describe it otherwise.

The household position is different, and it is the one that votes. VAT rose from 17 to 18% in 2025. On 1 January 2026 a further wave took effect: electricity up approximately 1.5%, cooking gas 5%, water tariffs up to 2.5%, municipal rates 1.6% nationally with local discretion above that, and income tax brackets and credits frozen without inflation adjustment—a tax increase by omission. Israeli consumer prices sit roughly 29% above the average of developed economies.

Meanwhile, the Bank of Israel cut its 2026 growth forecast to 3.8% from 5.2% before the Iran campaign, and Governor Amir Yaron has warned of "a growing challenge in identifying sources that will allow for a reduction in the debt-to-GDP ratio", with a medium-term deficit of roughly 3.2% required merely to stabilise the debt ratio—below both current and projected outturns.

The political vulnerability is distributive rather than aggregate. Coalition allocations to Haredi education and religious institutions continued while broad-based taxation and civilian cuts financed the war, and IDI documented weak transparency and conditionality in the 2025 allocations, particularly for institutions exempt from core-curriculum or labour-force requirements. The high-technology sector, which generated 18.3% of GDP and 58% of exports in 2025, recorded its first decline in research and development employment in a decade, while the State Comptroller found emergency credit underused or poorly matched to micro-enterprises and reservist owners.

From this material the opposition has built its "productive majority" frame—the claim that those who serve and produce are financing those who do neither—which is potent because it fuses the economic and conscription files into a single argument about reciprocity and limited because it can alienate poorer Haredi and Arab households if it treats subsidy as cultural favouritism rather than distinguishing poverty relief from institutions that reproduce low employment.

Netanyahu's answer begins with a substitution of metrics. Growth, credit ratings, market performance and the resilience of the shekel are foregrounded; household price indices and the freeze on tax brackets are not. The figures chosen are true, verifiable and largely irrelevant to the voter's experience, which is precisely their utility. Reinforcing this is an externalisation of cause: fiscal pressure is attributed to a war imposed on Israel and to the Iranian campaign, converting a budgetary argument into a security one, where the coalition's standing is stronger and where the opposition is reluctant to press.

More concretely, the 2026 budget already contains targeted relief aimed at middle- and upper-middle-income employees: reported cuts to income tax grades 8 and 9 alone are costed at roughly NIS 5 billion annually, alongside a proposal for retroactive mortgage interest relief. The offsetting revenue—property tax on undeveloped land, tourism levies, e-cigarette taxes, and rental registry enforcement—is drawn from less electorally sensitive bases. This is a conventional incumbent play, and its timing is not coincidental. Where coalition transfers are raised despite it, the response is to reframe them as welfare for large low-income families rather than as institutional subsidy, a reframing that is partially accurate and wholly convenient, since it converts a governance argument about conditionality into an argument about compassion for the poor. The technology sector receives similar treatment: its headline contribution to GDP and exports is cited, while the decline in R&D employment, the falling share of senior staff based in Israel and the sub-trend output are not—and the coalition is unlikely to be pressed hard on the omission, because the constituency that understands it has already left.

The economic message is aimed at the periphery and at traditional Mizrahi voters in development towns—the cost-of-living electorate that is also Likud's historic base—and not at the high-technology and professional constituencies the "productive majority" frame addresses. This is the correct allocation of effort: the second group is not recoverable, and the first is both larger and more responsive to direct fiscal transfers than to arguments about allocative efficiency.

On that logic, expect at least one further cost-of-living gesture in the first half of October—a targeted transfer, a levy deferral, or an energy-price measure—presented as administrative rather than electoral, together with sustained emphasis on ratings stabilisation in response to any attack on the fiscal position and no engagement whatever with the coalition-allocations data beyond reframing.

The overall position is adequate rather than strong. The aggregate case is defensible, and the targeted disbursement is well aimed at the segment that matters most to Likud. But the distributive argument is unanswered, and the January 2026 price and tax increases are recent, personally felt, and easily communicated. This file will not by itself decide the election; it will determine turnout intensity in precisely the peripheral communities whose participation Likud most needs.

Gaza and the Governance of the Day After

The strategic problem is no longer hypothetical. The October 2025 agreement reduced major hostilities and returned the hostages; UN Security Council Resolution 2803 of November 2025 authorised a Board of Peace, a Palestinian technocratic administration, and an International Stabilisation Force. Implementation remains incomplete on every material question: Hamas disarmament, the sequencing of Israeli withdrawal, force contributions, finance, and the body's relationship with the Palestinian Authority.

The coalition's exposure has two components. The first is rhetorical residue: "total victory" was promised, and what was delivered is a negotiated arrangement with an armed Hamas still present on the ground. The second, and more constraining, is that any specific position on the day after splits the bloc. The security establishment's preferred trajectory – demilitarisation, regional participation, a reformed PA-linked horizon, reconstruction conditionality and continuing Israeli freedom of action – is unacceptable to Ben Gvir and Smotrich.

Their preferred trajectory, indefinite military control with civilian resettlement and "voluntary emigration", is unacceptable both to the centre-right voters Likud needs and to Washington. The opposition exploits this by attacking from two directions at once, which is unusual and effective: from the centre, that the war was prolonged after realistic aims had narrowed and the hostages could have been recovered earlier at lower cost; from the right, that the outcome falls short of what was promised. Netanyahu is thus criticised for having done too much and too little by constituencies he needs to hold together.

His response is to claim the agreement while disclaiming the delay. The return of the hostages is presented as a personal achievement delivered under conditions that only sustained military pressure made possible, and the counterfactual – that an equivalent arrangement was available considerably earlier – is met not with argument but with the flat assertion that pressure produced the outcome. This is the campaign's single most dangerous line of attack and the one on which its answer is thinnest, which is why the response is assertion rather than evidence: the evidentiary terrain does not favour him, and engaging on it would extend the exchange.

Beyond that, the position is one of studied ambiguity, and the ambiguity is itself the position. No cabinet decision on resettlement will be taken, and no repudiation of resettlement will be issued, which permits Ben Gvir's voters to believe the option remains open and centre-right voters to believe it does not. The mechanism that sustains this is a delegation of maximalism: Ben Gvir published a detailed emigration proposal on 3 September 2026, following repeated mobilisation for a revival of Gush Katif, and Netanyahu neither adopts nor disowns such positions. It is an efficient division of labour, in which the far right mobilises its constituency at no formal cost to the government's international standing while the Prime Minister retains deniability – and it becomes a liability only at the point where centre-right voters conclude that he is a hostage to that flank rather than its manager.

Where the coalition does take a position, it takes the negative one. Opposition to Palestinian statehood is the strongest ground available on this file, because it is genuinely majoritarian and because most of the opposition shares it; every time the Gaza debate is pulled towards what Israel will not accept rather than towards what it will actually do, the coalition gains. Complementing this, the Board of Peace, the stabilisation force and the reconstruction mechanism are treated as administrative matters for professionals rather than as choices for the electorate. Depoliticising implementation prevents the emergence of a "who governs Gaza" question that the coalition cannot answer without splitting, and the slowness of the international mechanism is, from Netanyahu's perspective, politically useful rather than frustrating.

The public distribution explains why ambiguity is the correct choice. Pre-agreement polling showed both exhaustion and caution: almost half of Jewish respondents preferred multinational control and just over a third Israeli control; majorities of Jews and Arabs opposed Jewish settlement in Gaza—although 61% of the Jewish right supported it—and only 28% of Jews believed society could sustain war "as long as necessary", down from nearly 40% in March 2024. This is a bloc whose right flank holds a minority position that the bloc as a whole cannot adopt, and a strategy of deliberate vagueness is the only one that keeps both parts of it inside the tent. Accordingly, expect no new Gaza initiative and no cabinet decision that would force the ambiguity to resolve; expect any resumption of operations to be framed as enforcement of the existing agreement rather than as renewed war, a formulation that protects the achievement narrative while leaving room for escalation; and expect continued deferral of the disarmament question to the international mechanism.

The position is well constructed for an election and unsustainable after one. Ambiguity is a campaign asset and a governing liability: the moment a coalition must be formed, the day-after question becomes a clause in a coalition agreement, and both available answers cost him a partner.

The immediate risk is exogenous – a collapse of the ceasefire arrangement before 27 October would return the war to the centre of the campaign on terms the coalition cannot control.

The West Bank: Annexation without a Statute

This is the file on which the coalition has delivered most and is challenged least, and the disparity is instructive. The February 2023 division-of-authority agreement created a Settlement Administration under Bezalel Smotrich inside the Defence Ministry, shifting settlement planning, land registration and expropriation, outpost legalisation, infrastructure and much Area C enforcement from a military chain towards civilian political control, while civil administration for Palestinians remained under military structures. In July 2026 the government made the administration a permanent Defence Ministry body and lengthened the civilian deputy's term specifically to create continuity beyond the election. This is de facto administrative annexation rather than completed de jure annexation—Israel has not formally applied sovereignty, and core security authority remains with the Defence Minister and the IDF – but the dual structure progressively applies civilian Israeli governance to settlers while retaining military law for Palestinians in the same territory, and it changes the default: approvals and legalisations become routine bureaucratic outputs rather than exceptional cabinet decisions.

The opposition's difficulty here is that its own coalition is divided. Bennett and Liberman do not oppose settlement expansion in principle; the Democrats do. The attack therefore focuses on cost—international exposure, the diversion of security resources to protect outposts, and settler violence as a manpower burden—rather than on the policy itself, which is why a file of considerable strategic consequence generates comparatively little campaign traffic and why Netanyahu is under no pressure to defend it.

The choice of administrative rather than legislative annexation is deliberate and is the whole of the strategy. A sovereignty statute would require a vote, generate a crisis with Washington, and mobilise an international response inside the campaign period; administrative transfer achieves cumulative irreversibility without incurring any of those costs. Each road, neighbourhood and recognised outpost creates a constituency against reversal, and while a successor could legally revoke the authorities, the facts on the ground are not revocable at the same speed. Making the administration permanent and extending the civilian deputy's term in July 2026 completes the design: it is institutional architecture as electoral insurance, built to survive a change of government.

Alongside this runs a deliberately contradictory management of the Palestinian Authority. The far right treats the PA as hostile and an obstacle to sovereignty and withholds clearance revenues accordingly; the security establishment treats PA security coordination and municipal administration as load-bearing systems whose collapse would force the IDF to assume policing and civilian functions in population centres, magnifying reserve and budget demands.

Israel's September 2026 extension of correspondent banking through year-end—preserving channels on which roughly 90% of Palestinian trade depends—captures the contradiction exactly: fiscal and settlement policy weakens the PA while financial and security authorities preserve it to prevent systemic breakdown. Netanyahu manages both simultaneously and campaigns on neither, allowing Smotrich to make maximalist sovereignty claims that the government does not adopt, which has the secondary benefit of keeping a threshold-vulnerable bloc partner viable at no cost to Likud.

The audience is the settler constituency and the national-religious right, who judge the government by delivery rather than by declaration, and the strategy requires no message to the wider electorate—which is why there is none.

Before polling day, expect continued routine approvals and legalisations without cabinet-level announcement, no sovereignty legislation, ministerial statements of intent unaccompanied by government action, and continued financial life support for the PA conducted quietly and denied rhetorically, with American pressure supplying the stated justification.

In pure delivery terms this is the coalition's most successful file and, correspondingly, the least visible in the campaign. The long-run implication is one that no party is addressing: permanent territorial control without a credible separation horizon produces pressure towards either unequal political arrangements or equal citizenship in a single polity. That is not an immediate administrative fact, but it is the endpoint towards which conflict management is increasingly failing to defer, and its absence from a national election campaign is itself a finding.

Religion and State: Paying the Partners Quietly

The religion-state conflict has moved from symbolic skirmishing to a package linking coercion, public funds and service exemption. In July 2026 the Knesset repealed the 2021 kashrut competition reform, restoring centralised Chief Rabbinate and local-rabbi certification, and expanded gender-separated higher education to advanced degrees, additional fields and groups, and in some cases public campus space; March 2026 legislation expanded religious-court civil arbitration. The older monopolies persist: no general civil marriage route inside Israel, Orthodox control of Jewish marriage and divorce, and highly limited public transport on Shabbat. Public opinion is not close to this position.

An IDI religion-state yearbook found 43% of Jewish adults saying they would probably or certainly use broad Shabbat transport, rising to 76% among secular Jews; a 2025 Hiddush index reported 83% support for freedom of religion and 68% favouring a broad coalition without Haredi vetoes over conscription, funding, transport, marriage or core curriculum; and 64% opposed the gender-separation law.

What makes this file dangerous is the identity of the voter it moves. Liberman has built an entire political career on it, and Bennett, Eisenkot and the reservist lists all address it, because it does not require a voter to move left. A secular right-wing voter can support annexation and an assertive security posture while opposing exemptions, gender segregation and Sabbath restrictions. The more Likud concedes to its religious partners, the more it converts cultural liberalism and equal service into a centre-right rather than a left-wing cause – which is precisely the conversion that produces a Yashar of twenty-five seats.

Netanyahu's handling is therefore a matter of concealment rather than advocacy. These measures are coalition-maintenance payments, not campaign assets: they are passed with minimal public advocacy and never appear in Likud messaging, the objective being that the recipients notice and the wider electorate does not. Their timing reinforces the effect – concentrating the kashrut repeal, the gender-separation expansion and the arbitration law in the first half of 2026 ensures they are old news by October, which makes legislative scheduling a message-management technique in its own right. Where the file must nonetheless be defended, the response is to characterise secular demands as an assault on the Jewish character of the state rather than as opposition to sectoral privilege, converting a distributive argument the coalition loses into an identity argument in which it is competitive.

The calculation that makes this viable is demographic. Likud's Masorti Mizrahi core does not experience the existing religion-state arrangements as coercion and is largely unmoved by the file, so the coalition can absorb secular-right defection without losing its own centre of gravity. What it protects, accordingly, are Shas, United Torah Judaism and that traditional base; what it concedes is the secular right in full, a defection that has already occurred and is priced into current polling, making the strategy one of containment rather than recovery. Expect no further religion-state legislation before the election, no public discussion of what was passed, and the deflection of any direct question towards conscription framing, where the "civil peace" argument is stronger.

The approach is partially effective and structurally constrained. The payments are necessary – without them the coalition does not exist – and containment is the correct response to a loss that cannot be reversed. But this file is the mechanism by which the secular right has been converted from a Likud constituency into a swing constituency, and that conversion is the largest single change in the Israeli electoral map since 2019.

Arab Citizens: a Governance Failure Converted into an Electoral Instrument

Violent deaths in Arab society rose from about 109 in 2022 to roughly 233 in 2023, remained near 230 in 2024 and reached approximately 252 in 2025, with nearly 150 Arab citizens killed in the first half of 2026. The sharper indicator is the clearance gap: indictments or clearances in Arab-community homicides run at roughly 8 to 12%, against about two-thirds in Jewish society. Attribution requires care, since organised crime in Arab communities predates Itamar Ben Gvir's tenure as National Security Minister, and "solved", "cleared", and "indicted" are not identical measures; the defensible judgement is deterioration during his tenure alongside low investigative effectiveness, weak witness protection, and the erosion or diversion of multi-year socioeconomic and anti-crime programmes.

The political data are unambiguous. An IDI election survey found roughly three-quarters of Arab respondents saying anti-crime policy would materially affect their vote and 49% naming cost of living as the most important issue; only about a third believed the state successfully provides personal security, and 76% said no party closely represents them. The opposition's difficulty is that it can attack the failure but cannot promise the remedy without incurring the cost. It therefore campaigns on state capacity – policing, clearance rates, witness protection – while declining to commit to the political inclusion that would give Arab voters reason to believe delivery would follow. That gap is the space in which Netanyahu operates.

His first move is to displace the governance question with an identity question: not "why has the state failed to protect these citizens?" but "should parties representing them sit in government?" The AI-generated advertisement of 23 July 2026, depicting Eisenkot passing a young man resembling his fallen son in order to embrace Mansour Abbas – described by President Herzog as "the lowest of the low" – was not in substance an argument about Eisenkot at all. It was the establishment of a general proposition about any government resting on Arab mandates, and its function was to fix that proposition in place early enough that it would frame every subsequent coalition discussion.

The second and more consequential half of the strategy is less remarked upon, because it operates through absence rather than through messaging. Netanyahu benefits more from Arab abstention than from Jewish counter-mobilisation, since abstention reduces the opposition's seat count directly and raises the probability that a list falls below the threshold. Every demonstration that no available government will include or deliver for Arab citizens makes abstention a rational response – and the opposition's own refusals do much of that work on his behalf.

The tactic is, in this sense, designed to be echoed by his opponents: each time Eisenkot, Bennett or Liberman restates that he will not rely on Arab lists, the proposition is confirmed by a more credible messenger than Likud could ever supply. Retaining Ben Gvir in the National Security Ministry is itself part of the message, and the deterioration in clearance rates carries no political cost because the affected population does not vote for the coalition; from the government's perspective this is a governance failure with no electoral penalty attached. The one qualification is segmentation: Bedouin and Druze communities have been approached separately in previous cycles on service, land and municipal grounds, and limited quiet outreach of that kind should be expected again, conducted through local intermediaries rather than national messaging so that it does not contaminate the general framing.

What the strategy protects is the Jewish right, for whom the boundary proposition is mobilising, and the marginal centre-right voter for whom reliance on Arab lists is genuinely disqualifying. The Arab electorate is not a target in any sense; it is treated as a quantity to be minimised rather than a constituency to be won. Before polling day, expect at least one further high-salience message built on an individual incident, most probably in the final fortnight when its half-life exceeds the news cycle's capacity to contextualise it; no substantive anti-crime initiative, since delivery would undercut the framing; and sustained pressure on the opposition leaders to restate their refusal, every restatement being a Likud gain regardless of who makes it.

Washington, legitimacy, and the Trump Asset

The institutional relationship remains exceptionally deep. The 2016 memorandum of understanding provides \$38 billion over FY2019-28, Israel was exempted from the US foreign-aid pause of January 2025, Congress rejected attempts to block \$8.8 billion in arms sales, and 2026 legislation continued to promote co-production. Friction concerns sequencing and legitimacy—humanitarian access, rules of engagement, annexation, the Gaza governing framework, and whether Hamas disarmament precedes or follows Israeli withdrawal—rather than abandonment.

Legal and diplomatic exposure is real but frequently overstated in both directions. The ICC warrants for Netanyahu and Yoav Gallant remain valid on a pre-trial “reasonable ground” standard, and there has been no conviction; the ICJ's 2024 provisional measures are binding interim orders rather than a merit finding, Israel filed its counter-memorial in March 2026, and the schedule now runs into 2029. The 2024 NSM-20 review found it reasonable to assess that US-supplied weapons had in some cases been used inconsistently with humanitarian-law obligations or best practice, while concluding that case-specific evidence and Israeli assurances did not justify a general cut-off.

Diplomatic isolation has nonetheless broadened, with the United Kingdom, Canada, Australia, France and several other European states recognising Palestine in 2025, following Norway, Ireland, Spain, and Slovenia in 2024. The consequential risk, however, is generational and partisan: IDI found 73% of Israelis saying the country's international standing had worsened since 7 October, and Pew recorded favorable US views of Israel falling from 55% in 2022 to 37% in 2026, with markedly negative attitudes among younger Americans.

Eisenkot and Bennett argue from this that Netanyahu has converted a bipartisan strategic relationship into a partisan personal one, mortgaging the alliance to a single administration and to a domestic American coalition that is shrinking. The argument is aimed at educated, internationally exposed voters and at the business constituency, and it is unusually hard for Likud to rebut, because its evidence is a trend line rather than an event.

Netanyahu's answer is to lean into the personalisation rather than deny it. The July 2026 White House meeting and President Trump's formal intervention in support of the pardon request are deployed as evidence of a rapport that is personal and therefore non-transferable; the implicit claim is not that he manages the alliance well but that no one else could manage this President at all. Around this he builds a second argument that converts criticism into credibility: European recognitions, British sanctions on settlement-linked entities, and international legal proceedings are presented as evidence that Israel is being singled out and therefore as confirmation that only a leader willing to absorb international pressure can be trusted with the office. This is domestically productive in a threat-sensitive electorate and costs nothing in a campaign whose voters are not the audience for the criticism.

The most elegant element is the fusion of the international and domestic legal narratives. The ICC warrants and the Jerusalem prosecution are folded into a single account of politicised lawfare – one story covering both The Hague and the district court – which makes the Prime Minister's personal legal difficulties an instance of a national grievance rather than a private predicament and simultaneously reinforces the constitutional argument.

Supporting all of it is the citation of concrete deliverables: aid exemptions, arms approvals and co-production legislation are offered as proof that the relationship functions, deliberately conflating institutional continuity with political warmth.

The audience is the sovereignty-minded right, for whom defiance of international opinion is itself a credential, and the security-anxious centre-right, for whom the alliance is an insurance policy; the internationally exposed professional constituency is not addressed.

Expect at least one further high-visibility interaction with the Trump administration timed for the closing phase, the immediate framing of any European or UN measure as external interference in an Israeli election, and careful avoidance of any dispute that would expose daylight with Washington—a public rift with Trump before polling day would be the single most damaging exogenous event available to the campaign, and the coalition knows it. The approach is effective in the short term and quietly self-defeating in the long term. Presenting the alliance as contingent on one leader's personal rapport is a strong claim in September 2026 and an admission that its institutional foundations have weakened. The vulnerability is asymmetric: it delivers modest gains if Washington cooperates and severe losses if it does not, and the variable is not under Netanyahu's control.

The Legal File: Trial, Pardon, and the Persecution Narrative

Netanyahu completed his testimony in June 2026 across Cases 1000, 2000 and 4000, the last carrying a bribery charge with a maximum term of ten years. In November 2025 he submitted an 111-page petition for a presidential pardon to Isaac Herzog, supported by a formal request from President Trump describing the prosecution as "political, unjustified". A pardon before conviction would be unprecedented in Israeli law. Channel 12 found 38% supporting a pardon, while Yair Lapid has argued that any pardon requires an admission of guilt and withdrawal from political life.

The opposition's argument on this file is not primarily about guilt. It is that the entire constitutional programme – judicial selection, the Attorney General law, the pressure on gatekeepers – is explicable as the defence of one man's legal position, and that a prime minister under indictment cannot properly make appointments to the institutions prosecuting him. It is the single most economical explanation available for a complex legislative agenda, and its economy is what makes it dangerous.

Netanyahu's counter is to present the trial as the domestic instance of the same phenomenon as the ICC warrants: unelected institutions substituting legal process for electoral judgement. This is the connective tissue of the campaign's entire institutional argument, which is why the legal file cannot simply be set aside even though it depresses his ceiling. The pardon petition operates alongside it as a managed ambiguity, and much of its value lies in remaining unresolved – it signals to weary voters that a resolution is conceivable and to the base that he is conceding nothing, whereas a decision either way removes an asset. A refusal confirms that the trial will continue through the next term; a pardon conditioned on withdrawal from politics would end his candidacy outright.

Beneath these sits a longer-running technique of scheduling as attrition. Repeated applications to delay, shorten or cancel hearings on security and diplomatic grounds have extended proceedings across years, and the objective is not acquittal by delay but the reduction of the trial to background noise – a file so protracted that it ceases to be news.

Consistently with this, the trial appears in base-facing communication and sympathetic outlets but not in general advertising: among committed supporters it mobilises, and among marginal voters it merely reminds. The file is thus a floor-raiser and a ceiling-setter simultaneously. It consolidates roughly a third of the electorate and forecloses the marginal voter who might otherwise be recoverable on security or economic grounds, and no campaign technique separates these two effects, because both are produced by the same content.

Expect continued procedural applications and a strong incentive for the pardon question to remain formally open through polling day, together with an escalation of the persecution frame in direct proportion to any widening of the polling deficit.

The most likely destabilising event in the remaining campaign period is a decision by President Herzog. A refusal is manageable. A pardon conditioned on retirement from political life would end the campaign, and it is the one variable in this analysis that depends on the judgement of a single individual rather than on the behaviour of an electorate.

Where the Centre Stands

The anti-Netanyahu bloc is not a party but a coalition of convenience assembled from at least four distinct political projects - Eisenkot's Yashar, Bennett-Lapid's B'Yachad, Lieberman's Yisrael Beiteinu, and the Democrats - that share a negative consensus (removing Netanyahu) more firmly than a positive programme. Analytically, this matters more than any single policy position; the bloc's stance on each issue below is constrained not just by what its voters want, but by what keeps Yashar, B'Yachad, Yisrael Beiteinu and the Democrats mutually tolerable coalition partners while still courting soft-right and traditional voters who supplied Netanyahu's past majorities. Where the pro-Netanyahu camp's problem is consolidation on the right, the change camp's problem is programmatic coherence across a wider ideological span, from Lieberman's hawkish secularism to the Democrats' social democracy.

1. National Security and the Collapse of the Conceptzia

The bloc's core asset is biographical rather than ideological. Eisenkot is a former IDF chief of staff who lost a son in combat, and much of the anti-Netanyahu camp's security credibility rests on personnel rather than platform. This lets the bloc make an argument Netanyahu structurally cannot.

that October 7 was a failure of political judgement layered on top of operational failure, and that accountability requires removing the political leadership that owned the conceptzia rather than merely reshuffling its implementers. The stance is therefore less "different threat assessment" than "different theory of responsibility"; the bloc broadly accepts the post-war shift toward forward defence and reduced tolerance for adversary buildup that the security establishment itself has embraced, while arguing that Netanyahu's continued incumbency is itself a security liability because it obstructs honest institutional learning. This is a genuinely strong argument given the 64% who wanted resignation-track accountability, but it weakens as memory of October 7 recedes and as the government banks credit from subsequent military operations, which is precisely why the bloc has needed the draft and judicial issues to sustain momentum independent of the security narrative.

2. Hostages, "Total Victory", and the Commission of Inquiry

This issue has changed category since the earlier phase of the war, and the centre coalition's stance has had to change with it. Before October 2025, "total victory versus a hostage deal" was a genuine forward-looking fork: the government argued that continued military pressure would eventually force Hamas to capitulate without Israel conceding a full ceasefire or withdrawal, while the anti-Netanyahu bloc argued that this maximalism prioritised the coalition's political survival over hostages' lives, at a time when 62% of Jewish respondents and 81% of Arab respondents already supported an all-hostage, end-war, full-withdrawal arrangement, and even Religious Zionism voters were nearly split on it. With all living hostages returned in October 2025 and the last remains recovered in January 2026, that fork no longer exists as a live choice; there is no deal left to advocate for or against. This means the centre coalition can no longer campaign on "we would have delivered the deal you didn't"; the deal already happened, on the government's watch, at the end of its own timeline. What remains is not a policy dispute but a retrospective one: not whether to make a deal, but how much longer the war continued after a viable deal was realistically available, whose political incentives account for that delay, and what it cost in hostage deaths, IDF casualties, and international standing.

This retrospective framing is why the hostage question has effectively merged with the demand for a state commission of inquiry, rather than remaining a separate campaign issue. The centre coalition's argument runs in two connected steps. First, the war's actual endpoint, a negotiated release without the indefinite military victory the government had promised, retroactively vindicates the bloc's original position that a deal was achievable earlier, which strengthens the claim that the intervening delay served political rather than strategic purposes. Second, establishing that claim requires a forum insulated from the people it would be investigating: a statutory commission chaired through the judicial appointments mechanism, with compulsory investigative authority, rather than the government's preferred "state-national" alternative, whose membership and mandate would be negotiated by the same coalition under scrutiny.

Eisenkot has made this the bloc's most unhedged pledge, committing explicitly to a state commission of inquiry into the government's failures on October 7 and accusing the government of using the attack itself to evade responsibility, and unlike the draft or religion-state questions, this is a position Yashar, B'Yachad, Yisrael Beiteinu and the Democrats can hold without needing to negotiate with each other, since the demand for independent inquiry carries no distributive cost across the bloc's factions the way conscription or rabbinic-authority policy does.

The position nonetheless carries an internal tension the bloc has not resolved. A genuinely independent commission investigating "who owned the failure" would not confine itself to political leadership; it would also examine IDF and Shin Bet command decisions before and during the war, including choices made under officers now running on bloc-aligned lists, most notably Eisenkot himself as a former chief of staff. This cuts both ways analytically.

It gives the demand more credibility than a purely partisan attack line would, since the bloc is calling for scrutiny that could implicate its own candidates rather than only its opponents, but it also constrains how far figures with security backgrounds inside the coalition can push the "blame" framing without inviting comparable scrutiny of their own tenure, which is likely why Eisenkot's public language has stayed closer to institutional accountability ("the government used the attack to evade responsibility") than to naming individual culpability within the security establishment itself.

3. Regime Identity and the Constitutional Overhaul

This is the bloc's clearest unifying cause and the one most likely to hold the coalition together post-election even where Haredi and Arab-representation questions might otherwise split it. The stance is straightforwardly restorationist: reverse or freeze the Judicial Selection Committee amendment before the 26th Knesset activates it, prevent the Attorney General law from taking effect in January 2027, and re-establish the professional, apolitical character of gatekeeper institutions (AG, Shin Bet directorship, senior civil service appointments) that the outgoing government has spent this term degrading. The bloc frames this not as "pro-court" ideology but as small-c conservatism about institutional stability, restoring pre-overhaul defaults rather than constitutionalising a rival programme, which is a deliberately modest framing designed to reassure voters who are uneasy about judicial power but even more uneasy about unconstrained coalition power. The unresolved question the bloc has not answered is the durable one: reversing this term's legislation without negotiating an entrenched basic law on legislation only resets the cycle for whenever the right next holds 61 seats, and nothing in the bloc's current platform commits to the cross-bloc constitutional negotiation that would actually close the vulnerability.

4. War Economy, Fiscal Discipline, and Cost of Living

On the economy, the centre coalition sounds more united than its actual policy is. The message every bloc leader repeats, Lieberman most bluntly, but Yashar, B'Yachad, and the Democrats all echo it, is simple and appealing: the reason ordinary, working, tax-paying Israelis feel squeezed is that the government keeps protecting funding for Haredi institutions (yeshivas, religious education, exemption-linked benefits) instead of asking that sector to contribute like everyone else. Fix that unfairness, the argument goes, and the burden on "productive" citizens eases.

The problem is that this isn't really true at the scale that matters, and it's arguably the weakest economic argument the bloc makes. Redirecting Haredi-sector funding toward things like core-curriculum requirements and employment conditions is a real saving, but it's small next to the actual size of the problem. The war has cost roughly NIS 350 billion so far, and Israel's deficit is running about 1.7 percentage points of GDP above the level the Bank of Israel says is needed just to stop the debt from growing further. In other words, if Israel wants to stabilize its finances, closing that gap needs cuts or revenue far larger than what could plausibly come from tightening subsidies to one sector, even a full reform of Haredi funding wouldn't come close to closing it. The bigger, harder-to-fix causes are things the OECD and Bank of Israel actually point to: not enough housing being built, heavy regulation that keeps prices high, and a defense budget that's now permanently larger than before the war regardless of who's in government. None of those problems go away just by replacing Netanyahu, they'd still be there under any government, which is exactly why this is the bloc's weakest talking point: it names a real unfairness but overstates how much fixing it would actually help.

Where the bloc's economic argument holds up better is on protecting the tech sector, which is the engine of Israel's economy. Reservist call-ups are pulling skilled workers out of their jobs for long stretches, and ongoing legal and political uncertainty is pushing more tech companies and executives to shift work and staff outside Israel, which is part of why the sector actually lost R&D jobs for the first time in a decade.

On this point, Yashar and B'Yachad can make a straightforward "we'd manage this better" argument about competence and stability, without needing to agree with each other on the harder question of how much to spend on social programs, so it's a safer, easier point of unity for the bloc than the Haredi-funding argument is.

5. Gaza's "Day After"

On what happens to Gaza next, the whole centre coalition lands in roughly the same place, which is unusual, since this bloc disagrees on almost everything else. Their shared model, close to what Israel's own security establishment (INSS) has proposed, is to disarm Hamas, hand day-to-day civilian administration to international and regional bodies rather than Israel, and let Israel keep the right to strike back in case new threats emerge, without occupying Gaza long-term or putting Israeli civilians (settlers) back into it. In practice this means the coalition does the work of managing daily life, aid, and rebuilding, while Israel stays responsible only for security threats.

This puts every part of the bloc, including Lieberman, who is otherwise one of its more hawkish members, on the same side against Ben-Gvir's proposals to encourage Palestinians to leave Gaza and revive Israeli settlements there. That makes Gaza one of the very few issues where Yashar, B'Yachad, Yisrael Beiteinu, and the Democrats don't need to negotiate or compromise with each other to agree on a position.

The catch is that this isn't actually a unique position, it's also what the current government says it wants, at least on paper. So the centre coalition can't win this argument by offering a different plan; they need to win it by convincing voters they'd actually carry the plan out properly. Their pitch is essentially: "we'll implement the same international framework (the Board of Peace and international stabilization force) with more urgency and less internal sabotage," because a government that depends on pro-settlement ministers has an incentive to slow-walk or undermine a plan that keeps settlers out of Gaza. So the real difference the bloc is selling isn't a different Gaza policy, it's a claim of being more competent and more willing to actually follow through.

6. West Bank Annexation

This is the issue the centre coalition is least willing to say anything specific about, and for a clear strategic reason, not just avoidance. Logically, reversing what happened in July 2026, when the government made the settler-run Settlement Administration a permanent part of the Defense Ministry, shifting more West Bank governance from military to civilian, pro-settlement control, should be an easy call for this bloc. It fits their broader argument everywhere else: that the outgoing government has been quietly restructuring state institutions in ways that will be hard to reverse later, and that a change government's job is to undo that before it becomes permanent. The West Bank fits that pattern perfectly.

But saying so out loud is politically dangerous for them. To reach 61 seats without depending on Arab parties, something most of the bloc has ruled out relying on, they need votes from soft-right, national-religious-leaning, and traditional voters who lean hawkish on the West Bank and would likely see "reversing settlement authority" as a red line. So the bloc faces a trade-off: the policy that's consistent with their own logic is also the policy most likely to cost them the voters they need to win. The result is that, as far as anything resembling a position exists, it's administrative rather than principled: quietly pause further transfers of authority and outpost legalisations going forward, without actively rolling back what's already been put in place, and avoid the bigger question of sovereignty (formal annexation vs. eventual separation) entirely. This is a sensible short-term way to hold the coalition together without triggering a fight it can't win before the election.

But it leaves a real gap. The essay's own analysis is that continuing to govern the West Bank this way, with Israeli civilian rule for settlers and military rule for Palestinians, with no plan to ever separate the two, eventually forces a choice between unequal political rights or extending equal citizenship to everyone living there. Avoiding that question is arguably a bigger problem for a coalition built around "change" and institutional accountability than it is for the current government, whose voters were never expecting a resolution to begin with.

In other words, staying vague protects the bloc's coalition arithmetic in the short term, but it means they're heading into government, if they win, without having actually answered the hardest structural question they claim the status quo can't sustain.

7. Diplomatic Deterrence

The bloc's shared argument is that Israel's eroding international standing, 73% of Israelis perceiving it as worsened, is itself a security cost generated by settlement expansion, annexation-adjacent legislation, and confrontational diplomacy, and that a government perceived as more restrained on the West Bank and more committed to the Gaza framework would arrest that decline without requiring any change in the substance of U.S. military cooperation, which has proven durable regardless of government. This is a low-cost, high-consensus position across the bloc because it requires no domestic sacrifice; the harder question, whether the bloc would actually curb settlement activity enough to matter to European and Democratic-leaning American opinion, again runs into the West Bank coalition-management problem above.

8. Religion, State, and Coercion in the Public Sphere

This is the bloc's most electorally efficient cleavage and also its most divisive internally. Lieberman has built his entire brand on rolling back rabbinic monopolies over marriage, kashrut, and Shabbat transit; the Democrats share this as core ideology; B'Yachad (Bennett in particular) is more cautious given his own national-religious base. Eisenkot has been notably more accommodating than the rest of the bloc; he has indicated he would be willing to sit in a government with Shas, a position that puts him closer to a "universal service, negotiated religious status quo" stance than to Lieberman's more confrontational secularism. Analytically, this is the bloc's clearest illustration of the difference between "anti-Netanyahu" and "anti-Haredi coalition politics": Eisenkot needs Haredi-adjacent flexibility to maximise his own path to 61 (including, potentially, peeling off a Haredi party if Netanyahu cannot deliver a government), while Lieberman and the Democrats treat rabbinic-monopoly rollback as non-negotiable. This is a live fault line inside the bloc, not just between it and the right.

9. Burden Sharing and the Haredi Conscription Crisis

The bloc's headline unity claim, universal service, dissolves on inspection into materially different policies, and this is the fault line most likely to determine whether the bloc can actually govern together. Eisenkot has denied intending to grant exemptions to 30% of eligible Haredi men each year, saying instead that there is a draft law for all citizens for military, national, or civil service, with only about 3% of exceptional prodigies in Torah, science, music, and sports exempted per cohort. He was forced to clarify this after a Yashar candidate, former Shin Bet chief Yoram Cohen, told Kan that up to 30% of Haredim could remain exempt under a new government, drawing criticism from other opposition leaders, and Bennett responded by calling universal conscription a "non-negotiable condition for the next government", insisting there would be no compromises on recruitment and that anyone who does not serve the state should receive no state benefits for life.

That public dispute is the clearest evidence available that "universal service" is not yet a shared operational policy inside the anti-Netanyahu bloc; it is a shared slogan covering at least two positions: Eisenkot's narrower, negotiation-open exemption (leaving room, consistent with his openness to Shas, for a bounded scholarly carve-out and a longer enforcement runway) versus Bennett's zero-tolerance framing designed to hold the reservist and secular-right vote that punished Likud for the status quo. This matters for governability, not just messaging: a bloc that wins on a maximalist "no compromise" slogan but needs Haredi or centrist accommodation to actually reach 61 will face exactly the credibility problem, promising more than the coalition math allows, that damaged Netanyahu's own security brand after October 7.

Conclusion

Israel's October 2026 election will be decided less by which leader Israelis prefer than by which fragments of the electorate cross a 3.25% line. That is not a minor technical footnote; it is the central fact of this campaign. Netanyahu's five operating principles are built almost entirely around managing that fact, converting an election he cannot win outright into one he can avoid losing, by deferring the questions that would split his coalition, monetising institutional changes already legislated, and making Arab-party involvement in any alternative government appear disqualifying before the alternative has even been assembled. Eisenkot's bloc, for its part, has assembled a plausible negative majority against Netanyahu without yet resolving what a positive one would look like: its members agree far more firmly on removing the incumbent than on conscription, religion-and-state policy, or how far to rely on the Arab parties whose seats may decide the outcome.

Both campaigns are, in their own way, running out the clock on contradictions that an election can postpone but a coalition agreement cannot. Netanyahu needs the Haredi parties to reach 61 and needs the voters who resent Haredi exemption to make 61 reachable; Eisenkot needs a coalition broad enough to govern without alienating the centre-right voters who make that coalition viable in the first place. Whichever bloc finishes ahead on 27 October, the harder test comes after the polls close, when vague formulas have to become clauses, and ambiguity stops being a campaign asset. The most likely outcome, on the evidence available now, is not a decisive verdict but an unresolved one: a Knesset without a clear governing majority, forcing Israel to discover in negotiation what neither camp has been willing to settle at the ballot box.

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