Kingmakers and A House Divided: A Hung Knesset and Two Possible Directions

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Sophie Rieckmann



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Netanyahu's bloc leads but falls short, and the next coalition will set the tone on foreign policy

Israel's 27 October election has produced a hung Knesset. With 89.8% of votes counted, Benjamin Netanyahu's right-wing bloc holds 53 of 120 seats, Gadi Eisenkot's opposition bloc 48 and Arab-led parties a record 19. 61 are needed to govern, so, neither bloc forms a majority alone. Likud remains the largest party (26), ahead of Eisenkot's Yashar (21). President Isaac Herzog has urged parties to work together to avoid another election. But until a coalition forms, Netanyahu will remain caretaker prime minister with full war powers.

A Netanyahu-led coalition government would include Likud, the two Haredi parties and the far-right Otzma Yehudit, and Religious Zionism. Every opposition party has ruled out joining him. If he found defectors from other parties, foreign policy would be Iran-dominated. Ultimately, Netanyahu seeks regime change and is closely aligned with Donald Trump, who has vowed to "finish the job" in Iran with Israel. Smotrich's pledge to resettle Gaza and pressure to annex the West Bank would stall the ceasefire's second phase and deepen rifts with the EU, Jordan, Turkey, and the wider region.

Eisenkot's bloc, Ra'am and an externally supportive Joint List, could reach 67 seats. But it is fragile: Eisenkot demands that Arab partners recognise Israel as a Jewish state and call Hamas extremist, while Lieberman and Bennett reject Arab support. Without Lieberman's seven seats the majority vanishes. Such a government would stay hawkish, rejecting a Palestinian state and favouring US-enforced limits on Iran's nuclear programme over regime change. Eisenkot's foreign policy shift would entail curbs on settler violence in the West Bank, faster progress on Trump's Gaza Peace Plan, a narrower security buffer zone in Lebanon, and closer ties with Europe, Jordan and US Democrats.

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