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The Morning After the Vote

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The Morning After the Vote

Four questions will define the next Knesset, and the vote settles them at four completely different resolutions.

Accurate as of 21 October 2026.

GADI Eisenkot has led Likud in almost every poll published since the summer. Channel 12's poll of 21 October and Walla's of 19 October both put his Yashar party ahead of Likud, 23 to 19, and Channel 12 had 44 percent of respondents calling him the better fit for prime minister against Netanyahu's 33. Read the headlines and you'd think Israel is about to change prime ministers.

Then read those two polls down to the bloc lines. Netanyahu's side lands on 51 in Channel 12's, counting Ofer Winter's four seats, and 48 in Walla's. The four parties of the Zionist opposition take 55 and 54. The Arab parties hold 14 in both, and the rest is Hendel and Zelekha's Reservists, under the threshold for Channel 12 and on four seats for Walla. One house has been showing something else all autumn. Channel 14 has had Netanyahu's side at 61 or better in nineteen of the 117 polls we have logged since 2 August, including 62 on 21 October, and it is the only house that has. It also puts Likud at 30, where every house but i24 has him at 17 to 21. The other nine have both Jewish blocs short, which is why people close to Eisenkot were briefing the Times of Israel in August on how you swear in a government with 58 MKs, while Likud officials worked through a rotation in which Netanyahu serves first and hands over later, perhaps when Herzog's term at the President's Residence ends. Both camps are planning for a Knesset where their own side has no 61. The coverage is describing neither plan.

I want to be fair about the coverage, because it isn't bad. Israel Policy Forum's 120 Project is the best English-language election hub anyone has put up this cycle — a real polling tracker, thirteen party profiles, two timelines, printable guides for whoever has to explain all this to a synagogue board. Under the heading Coalition Builder there's a seat chart of the blocs, with a line drawn at sixty. The explainer tells you a prime minister typically needs 61 MKs behind him, and gives one line to a minority government propped up from outside.

Israeli law doesn't require 61. A government takes office on a simple majority of the members present and voting, which is how you get sworn in 59 to 50, and that is precisely what Eisenkot is preparing to do. To IPF's credit, its weekly note caught up on 18 September, and it now lists a minority Eisenkot government, kept alive from outside by the Joint List, among the four scenarios in play.

That's the small version of the problem, and they've fixed it. Ask anybody who follows this election why it matters and you'll get some subset of four answers: whether anyone ever properly investigates October 7, what happens to the courts and the Basic Laws, whether religion and state moves an inch, and what Israel does about Gaza and the Saudis. All four are real questions.

The vote settles them at four wildly different resolutions — on one it is close to the entire answer, and on another it barely signifies, because those decisions are being taken in Washington and Riyadh and Tehran. The 120 Project hasn't drawn that map. I went through the rest of what's out there in English, and nobody else has either. The closest is Shai Feldman in the National Interest, who splits the issues into two the vote is a referendum on and two it'll shape, and then reads the result as Netanyahu in or Netanyahu out.

Executive Summary

The four questions that will define Israel's 26th Knesset do not all stand in the same relation to the vote that produces it, and sorting them by that relation is worth more to a reader than any seat projection.

October 7 sits at one end. The Commissions of Inquiry Law hands out two keys: the government decides whether a state commission happens at all, and the High Court's president decides who sits on it. That two-key design is why this coalition will not turn the first key, and why it has spent a year building an alternative of its own — Likud MK Ariel Kallner's bill, which cleared a first reading 59-0 last December and would let a commission open with three politically chosen members and set its own terms of reference. Eisenkot launched Yashar's campaign promising the state commission. On this one, the election really is most of the answer.

The judiciary sits in the middle, and the reason is worth more than the position. On 13 July, four days before it dissolved itself, the outgoing Knesset passed a Basic Law declaring Torah study a foundational value of the state, by 63 votes to 52. There is no constitution here and no entrenchment, so a Basic Law costs whatever a simple majority costs on the day. Which coalition forms sets the direction of travel. It does nothing about the reason the direction can move that fast, in either direction, in a single week.

Conversion, the Kotel, the Rabbinate and the grandchild clause of the Law of Return all run through Religious Services and Interior, and only one plausible coalition puts those desks anywhere new. That is what we argued in May and it has survived the summer, with one correction we owe the reader: we said a Basic Law on Torah study was unlikely to pass. It passed nine weeks later.

Gaza and the Saudi file sit at the far end, where the election barely reaches. Israel accepted UN Security Council Resolution 2803. It is not a party to the Board of Peace roadmap that Hamas accepted, and Netanyahu rejected that roadmap on the record on 9 August. Eisenkot's own line on the central Saudi precondition is that there is no Palestinian state. Tehran's terms for reopening Hormuz reach Lebanon and Gaza as well.

One number on election night matters more than the seat count: whether anybody can reach 61 without the Arab parties. One house says Netanyahu can. The other nine say nobody can, and they have said it every week since the summer.

THE RACE IS BEING COVERED AT THE WRONG RESOLUTION

Open the 120 Project and you get a polling tracker pulling from Channel 13, Kan 11 and Channel 12, profiles of more than a dozen parties with leaders and seat projections and enough history to place them, two timelines running the path to the new Knesset alongside the 25th Knesset's milestones back to 2022, dated weekly updates, analysis, podcasts, three webinars, and printable guides for whoever has to stand in front of a synagogue board and explain how an Israeli election works. Israel Policy Forum has been at this since 1993. It argues for a two-state outcome and says so on the page. I disagree with the advocacy, and none of what follows turns on that.

The question the hub answers is how many seats each party gets. Everything on the page serves it. The tracker, the profiles, the bloc chart under the Coalition Builder heading — all of it is seat arithmetic, done carefully. The hub explains the 3.25 percent threshold, which is four seats, without modelling what happens when a party lands near it, and there is no probabilistic work anywhere on it. On what any particular coalition would then do about October 7, the courts, religion and state, or Gaza, there is nothing. I went looking. The party profiles carry the haredi draft fight, because you cannot describe Shas or United Torah Judaism without it, and that is as close as the hub comes to connecting a government to a consequence.

The hub's explainer leads with 61, and so does every English-language explainer of Israeli politics. To be fair to it, it does say in one sentence that a minority government with outside support is possible. Israeli law does not require 61. A government takes office when the Knesset votes it confidence by a simple majority of the members present and voting. Sixty-one is what keeps you safe from the other side once you are in. Getting in costs less than that. Fifty-nine to fifty seats you a government, and so does 58 to 57.

That stopped being a technicality in the third week of August, when people close to Eisenkot briefed the Times of Israel that he is preparing for precisely that outcome — a government sworn in on a plurality of the room, with the Arab parties declining to vote it down rather than joining it. The briefing put it at 58 or 59, which is what his bloc was polling then. On 14 October he said it himself: he would form a government on 58 or 59 seats and widen it afterwards with more Zionist MKs. His bloc polls lower now, and the mechanic is the same at any number. Read the polling honestly and that is the most plausible route to a change of prime minister anywhere in the numbers. Nothing on the hub treats it as the front-runner's plan, and its weekly note didn't list that government as a live scenario until 18 September.

A seat model is a model of an election. Government formation is a different process with different rules, and the interesting part of it happens in the three to six weeks after the count, in rooms nobody polls, under a Basic Law most readers have never opened. The tracker cannot reach into that period, so the coverage stops at the threshold and hands the reader a number. The reader, reasonably, treats the number as the answer.

Then the reader asks what the election means for the thing they actually care about — whether there is ever a real accounting for October 7, whether the

courts survive the next Knesset in recognisable shape, whether their non-Orthodox conversion will be recognised if they make aliyah, whether any of this changes what happens in Gaza — and the number does not answer. It cannot. It was never built to.

If you believe the seat count is the answer, you believe all four questions move together: Netanyahu out and all four improve, Netanyahu in and all four stay. That is not how any of it works. One of the four turns almost entirely on which coalition forms. One turns on it partly. One turns on which two ministries get traded away in week three of the negotiation. And one has already largely been decided by people who are not standing in this election and do not answer to it.

Nobody has done the sorting, so here it is.

FIVE COALITIONS ARE LIVE, NOT TWO

Channel 12, fielded 21 October on 505 respondents with a margin of error of 4.4 points: Yashar 23, Likud 19, B'Yachad 15, the Democrats 9, the Joint List 9, Shas 8, Yisrael Beytenu 8, Otzma Yehudit 7, United Torah Judaism 7, Religious Zionist Party 6, Ra'am 5, People of Israel 4. Walla, also fielded on 19 October, on 601 with a margin of 4.0 and published on 20 October: Yashar 23, Likud 19, B'Yachad 14, the Democrats 9, Yisrael Beytenu 8, Shas 8, Otzma Yehudit 8, the Joint List 8, United Torah Judaism 7, Religious Zionist Party 6, Ra'am 6, the Reservists 4.

The Reservists are Yoaz Hendel and Yaron Zelekha's new list, and the August coverage did not have them. They want a Zionist-only government, a universal draft law, and a state commission on October 7. They cleared the threshold in eight of the eighteen polls fielded since 13 October and missed it in ten, Channel 12's newest among them. Four seats held by people who will vote for a government they refuse to sit in is the difference between several of the branches below. Winter's party clears it with four seats in Channel 12's and misses it in Walla's. Benny Gantz took Blue and White out of the race on the evening of 19 October, with his party at 1.4 percent in Channel 12's poll that day.

Add Netanyahu's partners and you get 47 in Channel 12, 51 with Winter's four, and 48 in Walla. Add Eisenkot's four and you get 55 and 54. The Arab parties hold 14 in both. Across the eighteen polls fielded since 13 October, Netanyahu's five parties and Eisenkot's four both sit at a median of about 50, and the pact has not touched 61 in any of the 117 polls since 2 August. Different pollsters, different party orderings, and the blocs keep landing in the same place — which is the most durable finding in the whole polling record and the one that gets the least attention, because it isn't a horse race, it's a wall.

Netanyahu's bloc is about ten seats short and there is nowhere obvious for ten seats to come from. Eisenkot's four parties are about as far off, where in August they were two or three short, and the places those seats could come from are all places somebody in his own bloc has ruled out.

Right-religious reconstruction. Likud, Shas, United Torah Judaism, Otzma Yehudit and the Religious Zionist Party reassemble the outgoing coalition. The arithmetic says 51 in Channel 12 with Winter inside it, and 48 in Walla, and neither is a government. It becomes one if the polls are wrong by the margin Israeli polls are sometimes wrong by, if Ofer Winter's People of Israel converts the four seats it gets where it clears the threshold and brings them in, and if the smaller lists on that side clear 3.25 percent instead of dying under it. Winter is the live variable, and a week ago he was close to a coin flip. He cleared the threshold in five of the eighteen polls fielded since 13 October, Channel 12's of 21 October among them, and missed it in the other thirteen. On 13 October Ben Gvir refused him a surplus agreement, so his votes may be thrown away instead of pooled with somebody's. Netanyahu spent the weekend of 10 October trading insults with him in public, Likud and its allies have been pressing him to quit the race, and when Gantz pulled out on 19 October, Smotrich's party called on Winter by name to follow. On 21 October Smotrich offered him a ministry to step aside, and Winter turned it down: "I am not surrendering today." A party sitting under the threshold, needed by the bloc it says it will recommend, and at odds with the men it needs most, is exactly the sort of thing that decides which of these five scenarios happens.

The rotation. In the last week of August the Jerusalem Post reported that Likud officials and people around Netanyahu are working through a broad government with a rotation between Netanyahu and Eisenkot, Netanyahu serving first, the handover possibly pegged to Netanyahu leaving for the President's Residence when Herzog's term ends. Read that carefully before you get excited about it. It is Likud scenario analysis, it appeared in a Likud-adjacent briefing, and Yashar said nothing in response — the report carries no comment from Eisenkot or his party at all. What it tells you is that the people closest to the prime minister have already accepted, privately, that 61 is not there. Since then Eisenkot has ruled out governing with Netanyahu, and on 16 October Liberman accused him of it anyway, saying that what Eisenkot is really after is "overtaking Likud and entering negotiations to form a government with Netanyahu from a position of strength." Eisenkot answered that he wants "more than 61 Zionist seats for change." On 21 October he went further, on Radio 103FM: "I unequivocally pledge that I will not serve under Netanyahu in a rotation agreement. Period." If it happened, he said, "you would see me resign an hour later." Neither man can prove his version before the count.

A change government at 61. Eisenkot forms with B'Yachad, Yisrael Beytenu and the Democrats, and closes the gap with Ra'am inside the coalition. On both of those polls even that leaves him at 60, so this branch needs the Reservists in as well. This is the version the campaign is being sold on and it is the one with the hardest internal problem. Bennett has ruled out sitting with the haredi parties or the Arab factions and wants state funding cut off from anyone evading service. Avigdor Liberman wants conscription with no exemptions at all, and on 15 October he spelled out who he won't sit with: "Without Ra'am, without the Joint List, without Shas and without United Torah Judaism." Between them Bennett and Liberman carry 22 or 23

of the bloc's 54 or 55 seats. Eisenkot, meanwhile, has signalled he would sit with Shas and holds the softest conscription position in his own camp. The man leading this bloc and the two men holding two-fifths of it want different governments.

The minority government. On 23 August the Times of Israel reported Eisenkot is readying a contingency to be sworn in under 61, on the strength of a plain reading of Israeli law: a government takes office on a simple majority of those present and voting, so a vote of 58 to 49 seats a government while the Arab parties abstain rather than join. It's been done before. Rabin's second government lost Shas in 1993, fell to the 56 seats of Labor and Meretz, and survived on the outside support of the Arab parties.

On Saturday 10 October the Joint List's chair, Yousef Jabareen, said in a video statement that his party would use every tool it has to remove Netanyahu. "After the election, we'll impose our conditions on any political constellation in Israel," he said. "We have full freedom of action, with no limits." He means backing a government from outside without joining it, and he was equally clear it is not a blank cheque. He wants a budgeted plan on violent crime in Arab municipalities, an end to punitive home demolitions, and a commitment to a diplomatic avenue toward a Palestinian state. The Times of Israel's own read is that those conditions could be a nonstarter. The statement was made in Arabic and reached Hebrew readers in translation, so read the wording as reported and not as a signed undertaking.

Liberman's eight seats sit inside the 54 or 55 Eisenkot would be building from, and he has refused in terms that leave nothing to negotiate. "I want to make it clear here and now that Yisrael Beytenu will not be a partner in any constellation of minority government, period," he wrote on 17 August. In an Army Radio interview he put a number on it: "when it comes to 58 seats, there won't be a minority government. I won't be there." Then, on 15 October, the day after Eisenkot said he would form one on 58 or 59, Liberman ruled that out as well, at an Israel Democracy Institute conference: "We will not support any minority government, not even a temporary minority government. We need a Zionist majority government, period." Eisenkot spoke at that conference too, and didn't answer him. Liberman has also made a conscription law covering everyone a condition of joining any government, which is a second reason his seats are hard to move, and he says he knows Likud MKs who would cross over to a Zionist coalition once Netanyahu is gone. Run the confidence vote against the newest poll from each of the ten houses and the minority government carries in eight of them. Have Liberman abstain instead of voting yes and it carries in one, Walla's of 19 October, by 50 to 48. Have him vote against and it carries in none. Ra'am and the Joint List are the part of this arrangement that is working.

Channel 13 asked on 14 October whether people would back a government formed with the Arab parties' support or abstention if that were the only way to replace Netanyahu. Forty percent said yes and 43 percent said no. Opposition voters were for it, 61 to 20.

What it costs, if it forms, is stability — a government that survives on abstention has to keep earning the abstention, every budget, every vote of no confidence.

No government. Neither side assembles anything, the mandate periods run out under Basic Law: The Government, and Israel votes again in 2027. Before you dismiss it, remember that this country ran four elections between April 2019 and March 2021 and spent most of that stretch without a budget.

Only one of the five is the scenario the horse-race coverage describes. The tracker's implied question — does Eisenkot beat Netanyahu — is answered “yes, probably” and the answer generates a government in exactly one branch.

Lists closed on 8 September with 38 parties filed. Bennett's Together filed its own slate the day before, which ended the late-August talk of a merger with Yashar. Unity pulled out. Smotrich's party runs jointly with Zehut. Hadash, Ta'al and Balad run together as the Joint List, and Mansour Abbas runs Ra'am on its own, with the former Yesh Atid MK Yoav Segalovitz on the slate.

Then the Central Elections Committee voted in late September to bar Ra'am, the Joint List, Hadash's Ofer Cassif and Balad's chairman, Sami Abu Shehadeh. Nine justices heard all four cases on 1 October and ruled the next day. Ra'am and the Joint List went back on the ballot unanimously. Cassif went back on seven to two. Abu Shehadeh withdrew that morning, after all nine justices recommended he consider it, so the court never ruled on him. The Arab lists are running, and every route to a change of prime minister in this piece runs through what they do with their seats.

On 21 October every Blue and White candidate resigned, and the Central Elections Committee pulled its slips from the polling stations. A Blue and White ballot will now count as invalid. By the noon deadline for surplus-vote deals on 16 October, Likud had signed with Smotrich's party, Shas with United Torah Judaism, Yashar with the Democrats, B'Yachad with Yisrael Beytenu, and Ra'am with the Joint List. Otzma Yehudit, Winter's party, and the Reservists have none.

So treat every number in this piece as what it is: a reading taken on 21 October, in a field that has been fixed since the lists closed. The blocs have held their shape since June. The parties inside them have not, and two of them, Winter's and the Reservists, are sitting on the threshold.

TWO PARTIES HAVE SET TERMS THAT CANNOT BOTH BE MET

On 2 September, Ofer Winter told his party that it will not enter a government that has not already passed a conscription law. Not a commitment in the coalition agreement, not a promise for the first session — passed, before the government is sworn in. “We will not enter a government that does not pass, before its establishment, a law that puts an end to draft evasion and requires everyone to present themselves and contribute.” And then, in case anybody wanted to negotiate around it: “If that doesn't happen, we won't be in the government, and that's that.”

Winter's People of Israel will recommend only Netanyahu for prime minister. So he's staying in the bloc and telling Netanyahu what his seats will cost, at the start, in public, where climbing down would cost him more than holding out.

Yoav Ben Tzur's position is that Shas will not join a government until a law is passed exempting the men who are learning, and that the party's error last term was failing to make government formation conditional on the draft law in advance. Same structure, same timing demand, opposite content. One party will not sit without a law ending exemption. Another will not sit without a law granting it.

Both of them intend to recommend Netanyahu for prime minister.

On 11 October Shas signed a surplus-vote deal with United Torah Judaism, and the two promised a united front in the next Knesset on "the status of yeshiva students." Netanyahu was asked on 20 October, on the haredi radio station Kol Barama, whether a conscription law could pass before a new government is sworn in. "I wish we could do that," he said. "Will we be able to do it before the government is formed? Who knows?" Eisenkot, Bennett and Liberman answered within hours that he had just promised the haredi parties an exemption law. Likud's reply was that "anyone who says, 'We will die rather than enlist,' will go to prison."

Netanyahu's five partners polled at 47 in Channel 12's newest survey and 48 in Walla's. He needs thirteen or fourteen more, and the most available four sit with a man who is under the threshold in most polls and who has made the haredi parties' central demand a disqualifier for his own participation. Winter, incidentally, spent the summer arguing the opposite position — that no draft law was needed at all — before reversing. Whatever produced the reversal, it did not produce room to manoeuvre.

On Monday 13 July, four days before it dissolved itself, the outgoing Knesset passed a Basic Law declaring Torah study a foundational value of the Jewish people and the State of Israel, by 63 votes to 52. It is the only value explicitly written into one of Israel's Basic Laws. The version that passed had the language equating Torah study with military service stripped out of it, under pressure from inside Likud, and it does not exempt a single yeshiva student from anything. What it does is give the High Court a constitutional-rank obstacle to sit across from the next time it rules that haredi non-service is illegal and discriminatory. Yuli Edelstein and Dan Illouz voted against it and left Likud over it.

In May I wrote that a Basic Law: Torah Study was the theoretical way out of this fight and that its passage was quite unlikely. It passed nine weeks later, and the reason I got it wrong is the same reason the rest of this section matters: I was reading the coalition's capacity to legislate rather than its willingness to spend its last week doing it.

So the state of play going into the vote is that the constitutional groundwork got laid in July, by a Knesset that was already dead, and the operative law — the one that actually says who serves and who does not — remains unwritten.

Both of the men demanding it want it written first. Neither has produced a draft.

About 101,000 Israelis liable for service have now either been issued a Section 12 order or been declared draft evaders, some 59,000 more than at the end of the draft year before. Of the 60,217 declared evaders, about 50,000 are haredi, which is five in six. The community has stopped waiting on Jerusalem to resolve this. A fund called Prison 1,000 pays a man a thousand shekels for every day military prison holds him, and its organizers say they have the blessing of Rabbis Dov Landau and Moshe Hillel Hirsch. The state can still send an induction order and follow it with an arrest. It did on 20 October, when military police met some 50 Chabad yeshiva students off a flight from New York at Ben Gurion and gave the ones they held a choice between enlisting on the spot and a trial for desertion. Shas blamed the attorney general for “political interference in the election campaign.” An arrest stops deterring anybody once the community has worked out its exposure and built something to cover it.

The draft question is a precondition set on government formation before a single ballot is cast, by two parties who cannot both be satisfied, over a law neither of them has written, in a Knesset that already used its constitutional majority on the half of the problem that conscripts nobody.

The election decides which of them gets told no.

ON OCTOBER 7, THE ELECTION REALLY IS MOST OF THE ANSWER

The Commissions of Inquiry Law of 1968 hands out two keys and gives them to different people. The government decides whether to set up a state commission at all, when it sees a matter of vital public importance that needs clearing up. The High Court’s president then appoints the chairman and every other member, and the chairman has to be a High Court justice or a district judge, sitting or retired. Once seated, it can summon a witness and summon him again, demand his documents, force him in if he won’t come, and fine him for an answer he knows is evasive.

The two-key design is the whole story of why Israel still has no state commission into October 7 nearly three years on.

On 22 July the government told the High Court that the court should hold off ruling on the petitions demanding a commission until after the vote, because “the way in which the [October 7] events are investigated is at the heart of a political argument between the parties standing for election.” It is the government saying that the composition of the inquiry into the worst day in the country’s history is itself an election issue — which is true, and which is exactly the reason the government will not hand the second key to a judge.

Likud MK Ariel Kallner’s bill seats a politically appointed commission instead. An 80-MK supermajority picks a six-member committee and a chairman. If no consensus arrives inside two weeks, the coalition and the opposition each name three, joined by four supervisory representatives drawn from bereaved families. The commission then sets its own investigative scope and

can begin work with only three of its members appointed. It cleared a first reading 59 to nil on 24 December 2025, with the opposition walking out of the vote.

The 80-seat threshold will never be met — nothing in this Knesset or the next one gets 80 votes on October 7 — so the two-week clause is the operative provision, wearing a fallback's clothes. And a commission that can open with three appointed members, writing its own terms of reference, is a commission whose character is decided by whichever side is holding the pen when the two weeks expire.

Eisenkot opened Yashar's campaign on 30 June promising a state commission if he forms a government. He is a former chief of staff running on the failure of the security establishment he used to lead, which makes the promise credible and also makes it expensive to him personally, which is rarer in this fight than you'd think.

The judicially appointed commission is a good deal less clean than its advocates present it as being. A panel whose members are chosen by the president of the same High Court that spent the last decade expanding its own review authority puts one of the parties to the fight in charge of picking the referee. And the deeper problem is that October 7 was a political failure, an intelligence failure, a military failure, and a failure of an entire institutional class that includes the courts and the legal establishment. There is no untainted hand in Israel to pick this panel. There is no arrangement under which the people who would be investigated are not also, through one channel or another, choosing the investigators.

Which does not make the coalition's bill good. It makes both of them partisan, and it moves the honest question to which side gets to build the one that actually happens.

A Netanyahu-led government, in any of its forms, seats the Kallner commission or seats nothing. An Eisenkot-led government — at 61, or sworn in in the high fifties with the Arab parties abstaining — establishes the state commission, because he has staked his campaign on it and because a new prime minister has every reason to want the previous one's decisions examined by a body he did not appoint. A rotation government with Netanyahu serving first probably produces nothing for two years and then an argument.

What the families are waiting on now is a coalition.

ON THE JUDICIARY, THE DIRECTION IS ON THE BALLOT AND THE GROUND UNDER IT IS NOT

The clearest thing anybody learned about Israel's constitutional order this year happened on 13 July, and almost nobody outside the country noticed it, because it was filed under the haredi draft.

A Knesset that had four days left to live passed a Basic Law. Sixty-three votes to fifty-two. Torah study became a foundational value of the Jewish people

and the State of Israel, the only value written explicitly into Israel's quasi-constitutional tier, and it went through on the sort of majority that in most weeks passes a budget amendment.

Sixty-three. In a country with no written constitution, no entrenchment clause covering most Basic Laws, and no supermajority requirement, constitutional-rank law costs a bare majority of the people who happen to be in the room, on a Monday, in the last week of a Knesset that had already voted to dissolve itself. This is the argument we made in *The Unfinished State* in December, and July is the cleanest live demonstration of it I have seen.

The people telling you that a Netanyahu-led government would finish the judicial reform are right that it would try. The people telling you an Eisenkot-led government would reverse it are right that it would try. Both are describing direction of travel, which genuinely is on the ballot, and both are assuming a durability that does not exist here. Whatever the 26th Knesset passes, the 27th can unpick with sixty-one votes and an afternoon. Whatever it declines to pass sits there waiting for a coalition that wants it.

Which coalition forms sets the direction, and the direction matters a great deal in the two to four years that coalition holds. Judicial appointments made in that window sit on the bench for decades. An attorney general appointed or removed in that window shapes what the government can be prosecuted for. Those are real, and they are worth voting over.

The law changing how judges get picked passed in March 2025 and only takes effect when the next Knesset is sworn in, so the 26th Knesset is the first that would run the new Judicial Selection Committee. The Bar Association loses its two seats, and the coalition and the opposition each name a lawyer in their place. Eleven justices heard the petitions against it in June, and there's no ruling yet. A second law, passed in the outgoing Knesset's last days, lets the government act on its own reading of the law when the attorney general disagrees. It takes effect in January, and the petitions against it haven't been heard. And the State Comptroller's office has sat empty since Matanyahu Englman's term ran out in early July. In July the High Court voided the second round of the Knesset's 3 June vote that elected Michael Rabello, over a breach of the secret ballot, and Speaker Amir Ohana hasn't set a date for the rerun.

None of the five coalitions in this piece fixes the condition underneath. Not one of them is running on a constitution. Not one of them has the seats for a genuine entrenchment reform even if it wanted one, and the polling says the largest party in the next Knesset lands in the low twenties. A country whose constitutional order can be moved by sixty-three votes in a dissolved Knesset's final week has a structural problem that no election on this ballot addresses, and every side of this fight has an incentive to leave it exactly where it is — because the same cheapness that lets your opponent legislate against you lets you legislate against him the moment you get the room.

The “democracy is at stake” framing gets this backwards, which is one of several reasons I think it arrived here imported and stayed here wrong. Israeli democracy has survived every government that formed and collapsed

in the last twenty-seven years and it will survive this one. What Israel lacks is a settled constitutional order for anyone to attack in the first place, so every Knesset re-litigates the ground rules with whatever majority it can assemble that week, and the exhaustion of doing that over and over is itself the cost.

The election moves the judiciary question. The election does not settle it, and nothing on offer in October proposes to.

RELIGION AND STATE MOVES IN EXACTLY ONE BRANCH

Conversion recognition, the Kotel, the Rabbinate's monopoly on marriage and burial, and the grandchild clause of the Law of Return are the questions diaspora readers ask me about more than all the others combined, and they are the questions on which the seat count tells you the least.

Those questions run through two desks — Religious Services and Interior — plus the leadership of the Conversion Authority, and those get allocated in week three of a coalition negotiation, in a document that gets published, by parties trading portfolios against budget lines.

The Bennett-Lapid government had no haredi party in it, and in its first summer its finance minister, Avigdor Liberman, moved to end daycare subsidies for the children of men studying full-time in yeshiva. The government that replaced it brought Shas and United Torah Judaism back in. Its cabinet approved NIS 13.7 billion in coalition funds in May 2023, mostly for haredi institutions, with about NIS 3.7 billion of it for yeshiva stipends. And in February a bill giving the Chief Rabbinate control over prayer at every part of the Western Wall, the egalitarian section at Ezrat Israel included, and treating non-Orthodox worship there as desecration, passed a preliminary reading 56 to 47.

The variable was who sat in the room when the coalition agreement got written.

A right-religious reconstruction puts Religious Services and Interior back where they were, and everything on the diaspora list stays exactly where it is or moves further. A rotation government with Netanyahu serving first almost certainly does the same, because a rotation needs the haredi parties to sit still for it and the portfolio is what buys that. A change coalition at 61 that reaches its majority through Ra'am still has to hold Bennett and Liberman, both of whom would rather cut haredi funding than fund it — and in that branch the desks change hands with real legislative room behind them. A minority government in the high fifties is the interesting case: it changes the desks but has the least room to legislate anything contested, so expect administrative movement — a Conversion Authority head who can actually process files — and no new statute.

The diaspora questions move in one of five branches, and even there they move through appointments and administration, on a timescale of files processed rather than statutes passed.

Yashar has not, as far as I can find, published a religion-and-state position of any substance. Eisenkot is running on October 7, on the draft, and on

security, and he has signalled he would sit with Shas, which is the single most informative thing anybody has said about this file all year and which almost nobody covering the race has connected to conversion or the Kotel. A candidate who will sit with Shas is a candidate who will trade something to Shas. The portfolios are what there is to trade.

THE DAY-AFTER IS BEING SETTLED SOMEWHERE OTHER THAN THE KNESSET

This is the question the campaign shouts about most and the election controls least, and I expect this section to annoy readers in both camps, which is usually a sign it is worth writing.

Start with a fact most people arguing about Gaza have not absorbed: there are two documents, and Israel is a party to only one of them.

The first is Trump's twenty-point plan, which the Security Council endorsed as Resolution 2803 on 17 November 2025. Israel accepted it. Netanyahu said so publicly beside Trump at the White House on 29 September 2025, though the cabinet only ever voted on the hostage-release framework. Under the plan, the tunnels and weapons factories are destroyed and not rebuilt, and the weapons themselves are put permanently beyond use through decommissioning, with independent monitors verifying all of it.

The second is the Board of Peace's fifteen-point roadmap, announced on 30 July 2026 after months of talks with Hamas in Cairo. Hamas accepted it. Israel is not a party to it, and on 9 August Netanyahu called it unacceptable as it stands. Under the roadmap a Palestinian technocratic committee decommissions and stores the heavy weapons, the depots and the tunnels, and Israel pulls back sector by sector as each one is verified clear.

The gap between "permanently beyond use" and "stored by a Palestinian committee" is the whole disarmament question, and Israel's answer to it is currently no. Hamas has handed over no weapons and dissolved no armed formation.

Nobody standing in this election has committed to accepting the Board of Peace roadmap. Not Yashar, not Together, not the Democrats, not Yisrael Beytenu, and obviously not Likud. If somebody has, I have not found it, and the absence is the finding. The document that would actually change what happens in Gaza has no Israeli constituency in this race at all.

When Mansour Abbas raised Palestinian statehood, Eisenkot's answer was that there is no Palestinian state. That is the central Saudi precondition, refused by the opposition's front-runner, in the same terms the current one would use.

Israel held 63 percent of the Strip at the start of October by its Gaza Division commander's count, against the 53 percent the ceasefire line gave it, and Netanyahu says the army won't withdraw until disarmament is complete. The Board of Peace is writing the terms of what happens to the rest of it. The decision to press Israel or to shield it sits in Washington.

Israel and Iran have been at war since late February. Tehran shut the Strait of Hormuz on 28 February, the United States is a belligerent enforcing a naval blockade of Iranian oil, and the terms Mohsen Rezaei set out in August, as secretary of Iran's Supreme National Security Council, for reopening the strait were an end to the war, a ceasefire across the region that reaches Lebanon and Gaza, and the release of Iran's frozen funds. Which means the Gaza settlement is now partly a variable in a negotiation over a waterway, conducted between Washington and Tehran, with Jerusalem consulted rather than seated.

Tone is not nothing. A government that arrives in Washington wanting the same outcome the administration wants gets a different set of meetings than one that arrives having rejected the roadmap on the record. Eisenkot would very likely be granted more latitude on the pullback schedule, more patience on the hostage file, and a warmer hearing at the Board of Peace, and over two years that compounds into something real. A rotation government would produce the most incoherent version of all of this, because the position would change when the chair did.

On 18 October Trump gave Netanyahu his "complete and total endorsement" and wrote that if Israel picks anyone else, "America will have to do this work ourselves, and I am not inclined to do so." The work he meant was Iran. So whatever warmer hearing an Eisenkot government got would come from a White House that has said in writing which prime minister it wanted. Eisenkot and Bennett both answered that Israeli voters will decide. Vice President JD Vance didn't join the endorsement: "I'm not anti-endorsing him, but I'm not pro-endorsing him, I'm not getting involved in Israeli elections." In Channel 12's poll the next day, 12 percent said the endorsement made them likelier to vote Likud and 17 percent less likely.

Tone counts for something either way, and it is still a difference in the pace and the temperature of an outcome whose shape other people are drawing. On the four questions in this piece, the day-after is the one where a reader deciding where to put their attention gets the least return from the seat count. The election changes who argues Israel's case. It does not change who is holding the pen.

SCENARIOS: WHAT EACH COALITION ACTUALLY BUYS

The probabilities below lean hard on two things: that only one house has had either bloc at 61 this autumn, and that an Israeli government forms on a plurality of the room. They also assume this system keeps doing what it has always done, which is take the path of least friction available to it. They are my judgment on the polling through 21 October, with the lists closed since 8 September and no merger possible any more. Gantz pulled out on 19 October, and on 21 October the Central Elections Committee took Blue and White's slips out of the polling stations. More polls will land before the vote and the last of them can publish up to the Friday before it, so read the ranges as the shape of the thing and not as the last word on it.

No Government. 32 to 38 percent. Nobody assembles anything, the mandate periods run out, and Israel votes again in 2027. Four elections between April

2019 and March 2021 are what this system does when nobody can form a government. Everything in this piece waits. The October 7 commission waits longest, and the families wait with it. Whatever the outgoing Knesset banked in July — the Basic Law included — stays banked, because a caretaker government legislates nothing and repeals nothing. Voters haven't settled what they'd want instead. Asked by Kan on 18 October what should happen if no bloc wins a majority, 33 percent said a unity government, 27 percent another election, and 20 percent a minority government.

The Minority Government. 21 to 27 percent. Eisenkot is sworn in somewhere between 54 and 58, the Arab parties abstaining rather than joining, on the plain reading of Israeli law his own people were briefing in August. Nobody has to sit with anybody, which is why this survives Bennett's exclusions when nothing else does. It does not survive Liberman's, and that is why it is no longer the likeliest branch in this piece. He refused a minority government twice on the record on 17 August, once in writing and once on Army Radio, and again on 15 October with the temporary kind ruled out too. Without his eight seats in the yes column the confidence vote fails in nine of the ten newest polls, and the tenth, Walla's, carries it by two. October 7 gets its state commission — he has staked the campaign on it and needs no legislation to establish one. The judiciary stops moving in the direction it was moving and does not move far in the other, because a government surviving on abstention cannot pass contested law. Religious Services and Interior change hands, so conversion files start moving and the Kotel bill dies of neglect, with no new statute either way. Gaza and the Saudis get a warmer set of meetings in Washington and the same roadmap Israel has not signed. The cost is that every budget is an existential vote.

The Rotation. 14 to 20 percent. Likud and Yashar form a broad government with Netanyahu serving first, possibly with the handover pegged to Herzog's term ending at the President's Residence. This is the outcome Likud was modelling in August. Eisenkot has since ruled it out, and on 21 October said he would resign an hour after any such deal. Liberman, for one, doesn't believe him. Channel 13 asked on 19 October what people would pick if neither bloc can form a government, and another election beat a rotation between the two men, 52 percent to 32. It answers almost nothing. October 7 gets the Kallner commission or a two-year argument. The judiciary freezes, because neither partner will let the other move it. The haredi parties hold the religious portfolios, which is what keeps them sitting still for the arrangement, so the diaspora list does not move. On Gaza the country's position changes when the chair does, which is worse than either position held consistently.

Right-Religious Reconstruction. 11 to 16 percent. Likud, Shas, United Torah Judaism, Otzma Yehudit and the Religious Zionist Party get back to 61 from a polled 48 to 51. That needs the polls to be wrong by a wide margin, Winter's four seats to arrive and come inside despite the condition he set on 2 September, and the small lists on that side to clear 3.25 percent instead of dying beneath it. Winter has been under the threshold in thirteen of the eighteen polls fielded since 13 October. Add him where he clears and the bloc still runs

at a median of 51 across the ten newest polls, and it reaches 61 in one of them, Channel 14's. If it happens: no state commission, the Kallner panel instead, judicial reform resumes, the religious portfolios stay exactly where they are, and Gaza policy continues as it is. The most consequential branch on three of the four questions, and among the least likely on the arithmetic.

A Change Coalition at 61. 8 to 13 percent. Eisenkot reaches an actual majority by bringing Ra'am inside the coalition, and on the newest polls he needs the Reservists in as well. On the four questions this looks much like the minority government, with one difference that matters: it can legislate. Which is exactly why it is the least likely of the five. Bennett has ruled out both the haredi parties and the Arab factions, Liberman wants conscription with no exemptions, and between them they hold 22 or 23 of the bloc's 54 or 55 seats. Somebody would have to break a public pledge inside the first fortnight.

The October 7 answer changes in four of the five. The judiciary's direction changes in four and its foundation in none. Religion and state changes in two, and only through appointments. Gaza and the Saudi file change in none of them, in the sense of arriving at a different outcome. What changes there is the temperature of the meetings and who sits in them.

The seat count will be on every screen, and it answers one of the four questions properly. The number underneath it decides the rest — whether anybody can assemble 61 without the Arab parties — because a Knesset where nobody reaches 61 produces a government that governs on abstention, or rotates, or never forms at all. Then, in the three weeks after the count, read the coalition agreement, all the way down to the appendices where the portfolios are listed, because conversion and the Kotel and the Rabbinate get settled there, in a document that gets published and that almost nobody reads. On Gaza and the Saudis, move your expectations now: those decisions are being taken by people who are not standing in this election and who will still be taking them the morning after it. Attention is the one thing any of us actually gets to allocate, and most of it this autumn will go to the number that answers the fewest of these questions.

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