

POLICY ANALYSIS

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Will the Next Israeli Election Be About Regional Challenges or Netanyahu's Leadership?

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The long-serving prime minister suddenly is no longer the presumptive favorite against a rapidly consolidating opposition, which will likely spur him to shore up his own right-wing base throughout the campaign season.

On December 3, the Israeli Knesset voted to hold early elections on March 17, only two years since the last election. The move followed Prime Minister Binyamin Netanyahu's announcement that he was disbanding his governing coalition because his political partners -- led by Finance Minister Yair Lapid of the Yesh Atid Party and Justice Minister Tzipi Livni of Hatnua -- were colluding with ultraorthodox factions behind the scenes to replace him. Both ministers have denied even the plausibility of this claim and criticized the move to early elections as superfluous. These and other competing narratives could shape not only the upcoming campaign, but also the direction of Israeli politics once the election is decided.

EXPECTATIONS FOR EARLY ELECTIONS SOWED DIVISION

Netanyahu's justification for moving to early elections is not entirely clear, which is unusual in a country where parties often use the fall of a government to position themselves on pivotal issues ahead of a campaign. What is clear is that his coalition was not functioning well in recent months -- he became convinced it would soon break up and sought a first-mover's advantage in a bid to outmaneuver rivals. As a result, he made several moves that deepened the divide within the coalition and led to negative reaction abroad.

For example, political analysts assert that Netanyahu did not want the budget to pass this month because it would have chalked up an achievement for his erstwhile partner-rival Lapid. The finance minister was counting on the new budget's innovations, including benefits for the middle class, to demonstrate that he was keeping past campaign promises. After initially supporting Lapid's ideas, such as exempting first-time homeowners from Israel's onerous sales tax, Netanyahu has recently derided them as lacking economic sense. Without the budget, Lapid will have a harder time facing the voters again.

Amid anticipation of the breakup, Netanyahu also sought to shore up old friendships at Lapid and Livni's expense. He began eying his traditional ultraorthodox partners outside the coalition, who have been furious at him for what they consider political betrayal -- namely, his decision to support the Lapid-led law on removing military exemptions for yeshiva study, to cut their welfare subsidies, and to scale back his support for their institutions. To placate this constituency, Netanyahu abandoned his pledge to coalition partners that he would loosen the Chief Rabbinate's restrictions on religious conversions.

Moreover, in anticipation of the upcoming Likud Party primary, Netanyahu has sought to assuage the broader political right, who do not like his support of a two-state solution with the Palestinians. Toward that end, he demanded that the cabinet add controversial language to the Basic Law, Israel's quasi-constitution. This proposed "Nationalities Law" -- at least in its preliminary form -- seems to put a premium on Israel's Jewish character at the possible expense of its democratic character.

DIFFERING CAMPAIGN STRATEGIES

Assuming Netanyahu is victorious in the Likud primary, he will likely return to the strategy that worked for him in 2009 and 2013. This means asserting that he is in the best position to continue navigating Israel through turbulent regional waters, especially the threat of a nuclear Iran and Hamas. His critics, however, will argue that the 2015 election most resembles the 1999 election, which was viewed as a referendum on Netanyahu's leadership and ousted him after his first term.

Indeed, there are similarities. In 1999, Likud witnessed an exodus of political stars (Dan Meridor, David Levy, Yitzhak Mordechai, etc.), who chose to run against Netanyahu in competing parties. The same is occurring today. One Likud star, Interior Minister Gideon Saar, has announced that he is taking a break from politics -- amid rumors that he will challenge Netanyahu in the primary.

Additionally, the falling out between Netanyahu and Avigdor Liberman makes the latter's Yisrael Beiteinu faction a key swing party in any coalition arithmetic. Liberman's surprisingly overt support of the peace process during his current tenure as foreign minister bolsters the idea that he is not wedded to the right-of-center Netanyahu.

Another former Likud member who has broken from the party is Moshe Kachlon. While largely unknown abroad, Kachlon became popular in Israel due to his humble Sephardic roots and his deregulation of the cell phone industry, which led to plummeting consumer prices during his tenure as communications minister. Almost every Israeli election cycle has a political meteor, as one constituency or another looks for a new star. If the past is prologue, this person tends to be somewhat short on political experience and often vague on policy prescriptions, but shines with promise.

While Liberman and Kachlon are expected to be the swing actors, the core axis of opposition to Netanyahu will come from Labor Party leader Isaac (Bogie) Herzog, who earlier today announced a unity deal with Livni that includes an agreement to rotate the premiership if they prevail in March. Herzog comes from a prominent political family and wants Labor to return to its traditional national-security roots after a retreat to exclusively socioeconomic issues under his predecessor. While former Labor leader Shelly Yachimovich seemed proud of her socialist leanings, Herzog is decidedly capitalist.

By making the campaign a referendum on Netanyahu's leadership, Herzog and Livni hope that their prospects of wooing the swing parties will be greater than if it was a strict left-right contest. Their core contention is that Netanyahu lacks political direction and is consumed with personal political survival, even if this leads him into the hands of right-wing settlers and the ultraorthodox, whom Herzog-Livni fear would make Israel an increasingly isolated, de facto binational state. For example, at the Brookings Institution's Saban Forum this weekend, right-wing politician Naftali Bennett asserted that he and Netanyahu have agreed to form a joint bloc and will refrain from attacking each other during the election cycle. Herzog-Livni will no doubt use such statements as ammunition.

Netanyahu's critics are counting on several other factors as well. The first is fatigue -- Israel has never had a prime minister who served more than eight consecutive years in office. David Ben-Gurion, the longest serving premier with thirteen nonconsecutive years in power, came in just under that tally in 1955-1963. Netanyahu, who is close to nine total years in office, will soon hit six consecutive years, and he could surpass ten years if reelected.

Second, Netanyahu's past campaigns have been lackluster. Only once did he gain in the polls after the start of a campaign, and that was back in 1996, amid four terrorist bombings in nine days. Current polls project his Likud faction to win 22 of the parliament's 120 seats, and three credible polls in the past few days have a Herzog-Livni list outpacing that figure by a couple seats. Whether it is a sign of Israel's splintered demographics or a question of leadership, only one Israeli premier has received more than 40 seats in the past two decades -- Yitzhak Rabin, who won 44 in 1992. Netanyahu's highest count was 34 in 1996 (albeit during a brief electoral experiment in which Israel issued a separate ballot for prime minister, likely affecting the tallies of the major parties). In the last election, running with Liberman, he was at 31.

CONSOLIDATING THE RIGHT AND COUNTING ON CRITICS?

In the United States, political parties tend to be more ideologically oriented during primaries, then aim for the middle voter during general elections. It is far from clear that Netanyahu will follow that approach, however, as he may want to stop the hemorrhaging of Likud voters to Bennett and his Habayit Hayehudi (Jewish Home) Party. As such, he may believe it is more important to consolidate the right throughout the general election campaign, counting on the ultraorthodox to let go of their grievances and take him over the top in the postelection coalition negotiations.

Bennett's appeal is that he has sharply extended his party's reach beyond its religious constituency. Moreover, his hawkish critique of Netanyahu and the military for not knocking out Hamas in this summer's Gaza war resonated among some, even though the army noted that such an approach would have led to many Israeli casualties. Finally, his economic success in the high-tech sector, his combat background, and his use of social media and Israeli slang appeal to young voters, many of whom respond to the simplistic solutions he has offered to complex problems -- such as annexing 60 percent of the West Bank without saying how this will occur, particularly amid talk of potential European economic sanctions.

To consolidate the right, Netanyahu will likely point to the threat posed by a consolidating opposition. This means using the Herzog-Livni merger -- along with expectations that Lapid may join them after the election -- to assert that the right must speak with one voice. Indeed, Bennett is believed to have said this week that his party would consider tactically merging with Likud if the center-left surges in the polls.

Beyond consolidating his base, Netanyahu may be counting on other factors as he finds himself no longer the presumptive favorite. Traditionally, Palestinian terrorist incidents bolster the right, as does low turnout on election day; if recent violence and poll projections are any indicator, both factors could play a role in the coming months. Moreover, a new, higher electoral threshold for political parties to win representation in parliament could depress Arab turnout, unless the Arab parties unite.

Ironically, Netanyahu might also be counting on Palestinian diplomatic action. If Palestinian Authority president Mahmoud Abbas goes to the UN Security Council during the election season to plea for statehood -- which he has already said he will do -- Netanyahu would no doubt exploit this politically by accusing Abbas of circumventing direct negotiations with Israel. Secretary of State John Kerry and Netanyahu are scheduled to hold urgent talks in Rome this Sunday, reportedly to discuss the Palestinian move to the UN. The prime minister likely hopes that this and other regional challenges will help him deal with expected rival narratives during the campaign. Defining the election's central narrative could define the scope of postelection possibilities.

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