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Israel's coalition clock, The Gambia's third-term vote and South Sudan's first election

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December carries three political deadlines, and the calendar flatters all of them: Israel will not have a new government by the time the first mandate runs out, The Gambia's incumbent is more likely than not to win a third term against a split opposition, and South Sudan's first national vote is more likely to slip or shrink than to open on the day set.

Plan for delay in Israel and South Sudan and for continuity in The Gambia. Israel's election left no bloc with a working majority, and the one fast route, a minority government that wins confidence by a simple majority with Ra'am voting for it and the Joint List abstaining, needs several partners to cross stated red lines within weeks, so a sworn-in government before the first candidate's full period runs out in late December is unlikely. In The Gambia, Adama Barrow won an outright majority last time and now faces an opposition still split into rival alliances, so he is the likelier winner unless the field consolidates in practice, most plausibly through a ruling on Talib Ahmed Bensouda's eligibility. In South Sudan, the president has cleared legal obstacles to holding the vote on the day set, but the voter roll and the census are missing and the unity government has been dissolved, so a nationwide poll is unlikely and a narrow one is possible. The exposure that matters is the length of each period of uncertainty, not the outcome on polling day alone.

HEADLINE INDICATORS

61 seats
WORKING MAJORITY OF THE KNESSET, NOT THE LEGAL BAR FOR A CONFIDENCE VOTE

56 votes
FOR A MINORITY GOVERNMENT WITH RA'AM FOR IT AND THE JOINT LIST ABSTAINING, AGAINST 53

28 days
FIRST CANDIDATE'S PERIOD TO FORM AN ISRAELI GOVERNMENT

5 December
POLLING DAY IN THE GAMBIA

22 December
SCHEDULED POLLING DAY IN SOUTH SUDAN

DOCUMENT CONTROL

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CENTRAL JUDGMENT

The three December calls share one pattern: deadlines written into law or announced by governments will slip where the arithmetic or the logistics do not support them, while an incumbent who controls the state and faces a divided field will hold. Israel's coalition arithmetic gives neither camp a working majority without parties each has ruled out, and the minority route that a simple-majority confidence vote allows still runs through those same red lines, so the formal clock will be used to the full. South Sudan's ruling party wants a vote on the day set, but the conditions for a nationwide poll are absent, so the likelier outcome is a late postponement, and the costlier ones are a narrow vote that the opposition rejects or a postponement with no new timetable. In The Gambia the opposite holds: Barrow cleared a majority last time, and a fragmented opposition makes a repeat more likely than not.

KEY JUDGMENTS

KJ-1 No new Israeli government will win a Knesset confidence vote before the first candidate's full period runs out in late December. The fastest path on paper is a minority government that wins by a simple majority with Ra'am voting for it and the Joint List abstaining, but it needs Yisrael Beiteinu and most of the opposition to drop their objections to relying on an Arab-led party within weeks, and in the 2021 precedent the same kind of coalition took a second mandate and close to three months. The arithmetic of that path exists, but every leg of it requires a stated red line to fall, and most Israeli formations read on the firm's list took longer than the time this call allows. **MODERATE**

KJ-2 Whoever the president assigns first, the recommendations he receives will not translate into a governing majority, because a lead for Eisenkot depends on Arab-led parties he has not agreed to bring into government and a lead for Netanyahu depends on a bloc that is short of a majority. The assignment itself falls after this paper's reading date and is left open rather than forecast. Recommending a candidate is not joining or sustaining a government, and the only report of how the Arab-led parties will recommend comes from a source off the firm's list. **LOW**

KJ-3 Adama Barrow is more likely than not to be declared the winner of The Gambia's presidential election, unless the opposition consolidates behind one challenger, formally as in the coalition that unseated Yahya Jammeh or in practice if Talib Ahmed Bensouda is ruled ineligible and his voters move to Ousainou Darboe. Barrow won an outright majority in the previous election, so he would have won that year even against a combined opposition, and the opposition is now split across rival alliances, which outweighs the anger over blackouts. The outright majority last time carries the judgment more than the plurality rule does, though the evidence for the current split comes only from local sources off the firm's list. **MODERATE**

KJ-4	South Sudan is unlikely to open a nationwide vote on the day set, while a narrow, stage-managed vote in the areas the government controls remains a real path, and that narrower outcome is the one this paper's claim scores. The voter roll and census are missing, the president has dissolved the transitional unity government formed under the peace agreement and the main opposition leader is on trial, while the amended election law and the presidency's insistence on the date keep a partial poll alive. Crisis Group gives the same two outcomes, and no source read shows the electoral commission funded and equipped for a nationwide poll.	MODERATE
KJ-5	Measured by severity rather than likelihood, a narrow South Sudanese vote on the day set would do more harm than a clean postponement announced with a new timetable, and about as much harm as a late postponement with no timetable, which is the likelier outcome. A narrow vote hands the ruling party a mandate the opposition has already rejected, while an open-ended postponement extends an unelected transition with no power-sharing and the main opposition leader on trial. A United Nations human rights commission has warned that elections without a strategy for democratic consolidation and for preventing national schisms could fuel renewed conflict and atrocities, and the main opposition alliance has already rejected the amended law under which such a vote would run.	LOW

KEY STATISTICS

53 seats
Netanyahu-led bloc in the Knesset after the final count, 2026-10-30[1]

48 seats
Eisenkot-led opposition bloc after the final count, 2026-10-30[1]

19 seats
Arab-led parties combined after the final count, 2026-10-30[1]

77.9 percent
Turnout in the Knesset election, 2026-10-27[1]

28 days
Period the first assigned member has to form a government, 2026-11-03[4]

14 days
Maximum total extension the president may grant, 2026-11-03[4]

25 aspirants
Gambian presidential hopefuls reported as nominations opened, 2026-11-03[6]

53 percent
Barrow's vote share in the previous presidential election, 2021-12-06[7]

11 seats
Joint List seats in the new Knesset, 2026-11-03[2]

82 days
From polling day to the confidence vote in Israel's 2021 formation, 2021-06-13[16]

Scope and method

METHOD

This paper reads public reporting and primary legal text published up to 3 November 2026: wire-fed international outlets, the Israeli Basic Laws in English translation, a crisis-monitoring tracker, a United Nations commission's warning carried by a news agency, Israeli reporting on the expected recommendations to the president, local Gambian reporting and earlier international reporting on past Israeli government formations, read on 3 November 2026. It compares each deadline with the legal or logistical steps that must come before it, with a count of past Israeli formation times and with the firm's open calls on the same events. The president's consultations on the first Israeli mandate fall after the reading date, so this text does not forecast who receives the mandate and leaves that outcome as an open question. No client-attributable material is used.

SECTION 01 · ASSESSMENT

Israel: a count with no majority

The Central Elections Committee's final count gave the Netanyahu-led bloc 53 seats, the Eisenkot-led opposition 48 and Arab-led parties 19, with 61 seats a working majority in the 120-seat Knesset and turnout at 77.9 percent.[1]

Under the Basic Laws, a government is constituted when the Knesset has expressed confidence in it, and unless a law says otherwise the Knesset decides by a majority of the members voting, with abstentions not counted, so a government can win confidence with fewer than 61 votes if more members vote for it than against it.[4]

On the final count, a minority government would win confidence by 56 votes to 53 if the 48 opposition seats and Ra'am's 8 voted for it, the Joint List's 11 abstained and the 53 seats of the Netanyahu-led bloc voted against.[1,2]

On 3 November 2026 the opposition leaders, Eisenkot, Naftali Bennett, Avigdor Liberman, Yair Golan and Yair Lapid, agreed to back Eisenkot as prime minister, while Likud remained the largest single party with 27 seats and no opposition leader has offered to join Netanyahu.[2]

The same report said Eisenkot's four principles for partners could exclude some of the Arab-led parties and that Golan is the only opposition leader openly backing an alliance with them.[2]

An Israeli report published before the consultations said it was unclear whether Liberman would accept Ra'am's support for an Eisenkot government.[12]

In 2021, after the election of 23 March, the first mandate went to Netanyahu on 6 April and failed, the second went to Lapid on 5 May, and the Bennett and Lapid government was put to the Knesset on 13 June 2021.[16]

That government won confidence by 60 votes to 59 and included Ra'am, the first Palestinian party to join an Israeli governing coalition.[17]

Likud claimed without evidence that the vote had been stolen, and the head of the Central Elections Committee, Noam Sohlberg, said on 1 November 2026 that even substantiated suspicions would not undermine the results.[3]

ASSESSMENT · MODERATE CONFIDENCE

Neither camp holds a working majority on its own, and the simple-majority route open to the opposition needs three red lines to fall at once: Ra'am must vote for a government that has not offered it a place, the Joint List must abstain rather than oppose, and Liberman and the parties that rule out reliance on Arab-led lists must accept that reliance. The 2021 precedent shows those lines can be crossed, but it took a failed first mandate and a second one to get there, and the reported positions of the party leaders today show none of the three settled.

SECTION 02 · ASSESSMENT

Israel: who receives the first mandate

The Basic Law requires the president to consult the representatives of the party groups before assigning the task of forming a government to a member who has agreed to accept it, and it sets no rule that the leader of the largest party be chosen.[4]

Al Jazeera reported on 3 November 2026 that Eisenkot could receive the most recommendations only if he secures the backing of lawmakers from the Arab-led parties, which hold 19 seats between the Joint List's 11 and Ra'am's 8.[2]

An Israeli count published before the consultations expected 60 recommendations for Eisenkot from Yashar, B'Yachad, the Joint List, Ra'am and the Democrats against 46 for Netanyahu, with Yisrael Beiteinu's 7 seats undecided and United Torah Judaism's 7 seats unclear, and said the consultations were due on 4 and 5 November 2026.[12]

UNKNOWN: whom the president assigns the first mandate to, on what day, and how the Joint List, Ra'am and Yisrael Beiteinu each recommended; the consultations fall after this text's reading date of 3 November 2026, no source on the firm's list yet reports the outcome, and this part should be rewritten as a fact with a citation on the list once the assignment is public.

ASSESSMENT · LOW CONFIDENCE

Whoever receives the first mandate will hold it without a majority: a lead for Eisenkot rests on recommendations from Arab-led parties he has not agreed to bring into government, and a lead for Netanyahu rests on a bloc short of a majority. The calls in this paper therefore do not depend on the name of the first candidate, only on whether the red lines described in Section 01 fall, and the reported intentions of the Arab-led parties rest on a single source off the firm's list.

SECTION 03 · ASSESSMENT

Israel: the coalition clock

Under the Basic Law: The Government, the president assigns the task of forming a government within seven days of the publication of the results, the assigned member has 28 days, and the president may extend that period by no more than 14 days in total.[4]

If the first member fails, the president may assign a second member for 28 days, after which a majority of the Knesset may within 21 days ask for a named member to be assigned for 14 days; if all of this fails the Knesset is deemed dissolved and an election follows within about 90 days.[4]

The final results were due to be presented to the president on 4 November 2026 and the new Knesset was due to be sworn in on 10 November 2026.[5]

In 2009 Israel voted on 10 February and Netanyahu's government took office by 1 April 2009, about 50 days later.[20,21]

In 2022 Israel voted on 1 November and Netanyahu's government won confidence by 63 votes to 54 on 29 December 2022, 58 days later.[18]

The government sworn in on 17 May 2020 ended more than 500 days without a stable government, during which three elections in less than a year proved inconclusive.[19]

From polling day on 23 March 2021 to the Knesset vote on the new government on 13 June 2021 was 82 days.[16]

UNKNOWN: the formation times after the elections of 2006, 2013, 2015 and March 2020; no source on the firm's list read for this paper gives both the polling day and the day of the confidence vote for those years, so the count below is of four elections only.

> **ASSESSMENT · MODERATE CONFIDENCE**
>
> A count of past formations is constructible and it points the same way as the law: of four Israeli elections since 2009 whose dates were read on the firm's list, counting the two elections of 2019 that produced no government, only the 2009 one produced a government within 56 days of polling, the time from the October 2026 election to 22 December, which gives a base rate of about one in four. The first mandate will most likely be assigned in the second week of November and, with extensions, can run to about the last third of December, and a candidate without a secure majority has every reason to use all of it, so this count and the reported positions of the party leaders both argue against a quick deal.

SECTION 04 · ASSESSMENT

The Gambia: the incumbent's path

Adama Barrow won the previous presidential election in December 2021 with 53 percent of the vote against about 28 percent for Ousainou Darboe, and the opposition rejected the result.[7]

The Supreme Court rejected the opposition's challenge to Barrow's victory on 28 December 2021.[8]

In the December 2016 election eight opposition parties united behind Barrow, who received 263,515 votes against 212,099 for the incumbent, Yahya Jammeh.[14]

Reports as nominations opened for the 5 December 2026 vote put the field at 25 aspirants, including Barrow for the National People's Party, Darboe for the UDP-led Gambia First Coalition and Talib Ahmed Bensouda for UNITE and Coalition 2026, whose eligibility is disputed, with nominations open from 3 to 14 November 2026.[6]

On 2 November 2026 the government adopted a commission of inquiry's adverse findings against Bensouda, the mayor of Kanifing, and ordered a criminal investigation, while UNITE said the commission had not barred him and that his nomination would proceed on the day allotted to it, 7 November 2026.[22]

A report of 21 September 2026 listed three opposition alliances, the Gambia First Coalition, Coalition 2026 and the Team Gambia Grand Coalition 2026, and quoted a UNITE vice chairman calling the chances of a UDP and UNITE alliance very slim.[15]

Protesters burned tyres and blocked roads in Banjul and nearby towns on 7 and 8 September 2026 over rolling blackouts of up to 48 hours, chanting for Barrow to go, and Barrow pledged a 24-megawatt generating unit by the end of October 2026.[9]

UNKNOWN: the final candidate list, whether the electoral commission accepts Bensouda's nomination, whether the opposition alliances merge before polling day, turnout in the Kanifing and Banjul area, and whether the promised generating unit came on line; no source read settles any of them, and the field as described rests on local reporting off the firm's list.

ASSESSMENT · MODERATE CONFIDENCE

Barrow is the likeliest winner because he cleared an outright majority last time, so even a combined opposition would have lost that year, and the opposition now divides its vote across rival alliances while the blackout protests are more likely to cut his margin than to remove him. The likeliest route to an upset is de facto consolidation rather than a formal coalition: if Bensouda is ruled ineligible and his urban voters in Kanifing and Banjul move to Darboe, a split field on paper becomes a two-way race in practice, which is why the ruling on his nomination is the indicator to watch, though the reporting on the field and the probe comes only from sources off the firm's list.

SECTION 05 · ASSESSMENT

South Sudan: the date against readiness

President Salva Kiir dissolved the transitional unity government formed under the peace agreement in late September 2026, a day after parliament amended the National Elections Act so that the vote set for 22 December 2026 can proceed without a permanent constitution or census, and the main opposition alliance rejected the changes.[10]

The same report said elections first expected in 2022 had been postponed twice.[10]

Kiir replaced the head of the National Elections Commission in mid-September 2026 with Gabriel Bol Deng Majok, voter registration remained outstanding, and opposition leader Riek Machar remained under house arrest and on trial for treason and murder, which he denies.[10]

In its October 2026 tracker, Crisis Group reported that a senior presidential envoy declared on 9 October 2026 that the 22 December date was absolute, and judged that the likely outcomes were a stage-managed vote without a census or voter roll or an eleventh-hour postponement.[11]

UNKNOWN: whether the electoral commission has the money to print ballots and move materials, whether voter registration has begun anywhere and how many areas could host polling; no source on the firm's list read for this paper gives a figure for any of them, and the commission's funding is the variable most likely to decide between a narrow vote and a postponement.

ASSESSMENT · MODERATE CONFIDENCE

A nationwide vote on the day set is unlikely, and the choice the ruling party faces is between a late postponement and a narrow vote it can control, which is the outcome the claim below scores. The legal changes and the envoy's statement raise the odds of a partial poll, but the missing voter roll, the dissolution of the unity government formed under the peace agreement, two earlier postponements and the absence of any reported funding for nationwide logistics show the logistics and the politics are not in place.

SECTION 06 · ASSESSMENT

December as one exposure window

Crisis Group urged in its October 2026 tracker that support be withheld for the scheduled South Sudanese elections, judging that holding them amid violence and political fracture is unsafe.[11]

The United Nations Commission on Human Rights in South Sudan warned on 20 August 2026 that multiple risk factors for atrocity crimes were converging before the December polls and that elections without a strategy for democratic consolidation and for preventing national schisms could fuel renewed conflict.[13]

Israeli analysts quoted on 30 October 2026 said the numbers did not add up for either side and that Netanyahu would likely push for another election in the belief that his bloc could then reach 61 seats.[1]

UNKNOWN: how long a Gambian court challenge would take if the result is contested; no source read for this paper gives the timetable.

ASSESSMENT · LOW CONFIDENCE

The three calls stack their uncertainty into the same fortnight, so a reader with exposure to all three should expect an Israeli caretaker government, a Gambian result that is disputed but stands, and either no South Sudanese vote or one that settles nothing. Among the South Sudanese paths, a narrow vote is worse than a clean postponement with a new timetable and roughly as dangerous as a late postponement with none: the first hands the ruling party a mandate the opposition has already rejected, and the second leaves an unelected transition with no power-sharing and the main opposition leader on trial. The commission's warning and the opposition's rejection of the amended law support ranking a contested vote above a clean delay, but no source read separates the harm of a narrow vote from that of an open-ended delay, and each country's call rests on a different mechanism, so one surprise does not imply the others.

SECTION 07 · DECISION

Decision

Decision	Owner	Trigger	Pre-authorised action
Plan Israel exposure on a caretaker government through December	Israel country risk lead	The president assigns the first mandate, or Ra'am commits in writing to vote for a minority government and the Joint List to abstain	Keep caretaker assumptions in place until a confidence vote is scheduled
Treat a Barrow win as the base case for Gambian operations	West Africa risk lead	The electoral commission rules on Bensouda's nomination or publishes the final candidate list	Rerun the Gambia scenarios if Bensouda is excluded or the opposition fields a single candidate
Do not plan around a nationwide South Sudanese vote on the day set	East Africa risk lead	Any official notice of postponement or of a partial vote, or any report that the electoral commission has been funded for materials	Move staff movement plans to the postponement scenario, or to the contested-vote scenario with its higher security posture

SECTION 08 · OUTLOOK

Outlook

Baseline. Israel's first candidate uses the full period with extensions and no government is sworn in before late December; Barrow is declared the winner in The Gambia and a challenge fails; South Sudan postpones late, most likely without a firm new timetable, or holds a narrow vote that the opposition rejects.

Deterioration. Israel's first and second mandates both fail and the country heads toward another election; The Gambia's result is disputed in the streets as well as the courts after Bensouda is excluded; South Sudan holds a vote in a few areas amid renewed fighting, or postpones open-endedly while violence spreads.

Stabilization. Ra'am and the Joint List agree to vote for and abstain on an Eisenkot government and it wins a confidence vote by a simple majority early; Barrow wins cleanly and the opposition accepts it; South Sudan announces an orderly postponement tied to a voter roll.

Claim C-1. A new Israeli government wins a Knesset confidence vote on or before 22 December 2026. Probability 0.15. Resolves on 2026-12-22 from Haaretz: YES if Haaretz reports that a government formed after the 27 October 2026 election won a Knesset confidence vote on or before 22 December 2026; NO otherwise. Horizon 60 days. Neither bloc holds a working majority without parties it has ruled out, and the only fast route, a minority government winning by 56 votes to 53 with Ra'am for and the Joint List abstaining, needs Liberman and most of the opposition to cross a

stated red line within weeks. The first mandate with its extensions can run to about the resolution date, and in 2021 a coalition of the same kind took a second mandate and 82 days. Base rate: 0.25, from Al Jazeera, as of 2026-11-03. Why the probability differs: the one quick case, 2009, was formed by a candidate whose partners had no red line against each other, while on 3 November 2026 only Golan among the opposition leaders openly backed an alliance with the Arab-led parties whose votes any quick government now needs.

Claim C-2. Adama Barrow is declared the winner of The Gambia's 5 December 2026 presidential election. Probability 0.70. Resolves on 2026-12-20 from Al Jazeera: YES if Al Jazeera reports by 2026-12-20 that the electoral commission has declared Adama Barrow the winner of the 5 December 2026 presidential election; NO otherwise. Horizon 60 days. Barrow won 53 percent in 2021, an outright majority, and the opposition is split across rival alliances that had not merged as nominations opened. The main risk is consolidation behind one challenger, formally as in 2016 or in practice if Bensouda is ruled ineligible. No base rate available: no record of incumbent re-election rates in single-round African presidential votes was read on a source on the Source List.

Claim C-3. Voting in South Sudan's general election takes place on 22 December 2026. Probability 0.25. Resolves on 2027-01-05 from Al Jazeera: YES if Al Jazeera reports by 2027-01-05 that polling stations opened for the general election on 22 December 2026; NO if the vote is postponed or no voting on that day is reported. Horizon 90 days. This claim scores any polling at all, the narrow vote, not the nationwide poll that is unlikely, and it stays at the firm's 0.25. The amendment and the envoy's statement raise the odds of a partial poll while the missing roll, the dissolution of the unity government and the unreported state of the commission's funding lower them, so on balance a late postponement remains likelier. Base rate: 0.00, from Al Jazeera, as of 2026-11-03. Why the probability differs: the 0.00 is a count of two earlier dates, both postponed after the 2022 target, not a rate, and since then an envoy called the date absolute on 9 October 2026 and the election law was amended in September 2026 to drop the census and constitution as preconditions.

Indicators.

- The member the president assigns the first mandate and the day he assigns it
- How the Joint List and Ra'am each recommend at the consultations, and whether Yisrael Beiteinu recommends Eisenkot
- Any written commitment by Ra'am to vote for, or by the Joint List to abstain on, an Eisenkot government
- Any public statement by Liberman accepting or rejecting reliance on an Arab-led party
- Any request by the first candidate for an extension of the mandate
- The Gambian electoral commission's decision on Bensouda's nomination and its final candidate list
- Any opposition withdrawal in favour of a single Gambian candidate, and turnout in the Kanifing and Banjul area

- Any report that South Sudan's electoral commission has been funded to print ballots and move materials
- Reports of voter registration opening, or not, in South Sudan's states
- Any official South Sudanese statement on postponement, on polling in only some areas, or on a new timetable

SECTION 09 · SCORECARD

Scorecard

- CLM-2026-329: advanced; this draft narrows the Israeli call to a confidence vote by 22 December 2026 and judges it less likely than the firm's earlier 0.35 for 6 January 2027.
- CLM-2026-430: advanced; this draft restates the call on a Barrow win at 0.70, now carried by his 2021 majority as well as the split opposition.
- CLM-2026-431: advanced; this draft holds the call on any polling in South Sudan on 22 December 2026 at the firm's 0.25, as the legal changes that favour a partial poll offset the missing voter roll and the dissolution of the unity government.

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