PUBLISHED MARKET RESEARCH

Eisenkot's 42 days: the mandate ladder to a government or a repeat election

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AIG-GOV-26-014 · 12 NOVEMBER 2026

PUBLIC RELEASE

THE AEGEAN REGISTER

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Gadi Eisenkot holds the first mandate to form Israel's next government on the strength of a majority that agrees on removing Benjamin Netanyahu and on little else. This paper sets out the legal ladder from that mandate to a government or a repeat election, the routes open to him counted in votes cast and not only in seats, and the dated tests that will show which rung Israel is on.

Eisenkot is more likely to hand back his mandate than to win a confidence vote inside it. Confidence is won on votes cast, so abstentions open more routes than the seat count suggests, but every one of them still needs a partner to break a public pledge on Arab-led support, on conscription or on serving with Netanyahu. The speaker vote is the first hard test: it shows whether the recommending majority can act together in the plenum and take the agenda, not whether it can govern. Expect the first period to run out without a government and the president to be asked for more time. A failed mandate does not mean an election: the law offers a second assignment and a Knesset-led round first, and only the president, the second candidate or a Knesset majority passing a dissolution law can cut that ladder short. Until a government wins confidence, the outgoing cabinet stays on as a caretaker with limited powers.

HEADLINE INDICATORS

67 of 120
KNESSET MEMBERS WHO RECOMMENDED EISENKOT TO THE PRESIDENT

48 seats
EISENKOT'S OWN FOUR-PARTY BLOC, AGAINST 61 FOR A MAJORITY

17 November 2026
DAY SET FOR THE KNESSET VOTE ON A NEW SPEAKER

6 December 2026
END OF THE FIRST 28 DAYS, COUNTED FROM THE 8 NOVEMBER ASSIGNMENT

20 December 2026
LATEST END OF THE FIRST MANDATE IF THE FULL 14-DAY EXTENSION IS GRANTED

2 of 5
FAILED FIRST MANDATES FROM 2008 TO 2021, IN THE CASES READ, THAT WERE FOLLOWED BY A SECOND PRESIDENTIAL ASSIGNMENT

DOCUMENT CONTROL

REGISTER NUMBER	AIG-GOV-26-014 · formerly PMR-2026-1112-GLB-014
PRODUCT	Assessment · Publishable Market Research
DESK	political-risk
ISSUED	2026-11-12 · Aegean Intelligence Group
TIMELINESS	CURRENT
DISTRIBUTION	Public release · The Aegean Register · aegeanintel.com/research

CITE THIS REPORT

Aegean Intelligence Group, “Eisenkot's 42 days: the mandate ladder to a government or a repeat election,” AIG-GOV-26-014, The Aegean Register, 2026-11-12.

CENTRAL JUDGMENT

A recommendation is a vote against the incumbent; a government needs votes for a programme, or at least enough members willing to stand aside. Eisenkot's majority at the president's residence was built from groups that exclude one another in government: his own bloc and the Arab-led parties, with an ultra-Orthodox party that declined to recommend anyone standing at the edge of it. The bar is a majority of the votes cast and not a fixed number of seats, which widens the arithmetic without removing the politics: every route to a confidence vote, including those that run through abstention, requires one of his partners to break a campaign pledge, on Arab support, on conscription or on sitting with Likud. The law gives him up to six weeks and then moves the task down a ladder of further rungs, each of which favours delay over resolution. The most probable path is therefore a first mandate that expires or is returned. What follows is less settled: the president may assign a second member, which this paper rates a little less likely than not, or send the task straight to the Knesset, where the question becomes whether shared fear of an election can do what shared dislike of Netanyahu could not.

KEY JUDGMENTS

KJ-1 Eisenkot is unlikely to win a Knesset confidence vote within his first mandate, including a full extension. The three routes usually named are not exhaustive, because confidence is won on votes cast: a government could also pass with United Torah Judaism staying outside and abstaining, but that variant needs the Arab-led parties not to vote against it. Every route, the abstention variant included, requires a partner to break a public pledge on Arab-led support, on conscription or on serving with Netanyahu, and those conflicts are built into the parties' positions and are not a matter of timing. **MODERATE**

KJ-2 The ultra-Orthodox route is his most plausible path to a government and it is still more likely to fail than to succeed. It does not require Shas, because United Torah Judaism's members change the count on their own by abstaining or voting in favour, and the bloc's stated condition accepts national or civil service, so the collision is over sequencing and sanctions and not over the principle alone. The most detailed reporting on these talks comes from unverified sources and is weighed accordingly. United Torah Judaism wants a conscription law before a government is formed, which asks Naftali Bennett's and Yair Golan's parties to vote for a compromise as their first act after campaigning against exemptions, and no source read shows either willing. **MODERATE**

KJ-3 A minority government carried by Arab-led votes is arithmetically available and politically closed for now, behind two locks: Avigdor Liberman's refusal to support any government that relies on the Arab-led parties, and Eisenkot's own refusal to bring those parties into a government, on conditions that no source read shows the Joint List accepting. Liberman reversing himself is neither necessary nor sufficient to open the route. On the reported seat figures the bloc without Liberman's party, with both Arab-led parties, casts 60 votes, which pass against 53 if his party abstains, tie against 60 and so fail if it votes against, and pass against 53 again if it votes against while United Torah Judaism abstains. **LOW**

KJ-4	The recommending majority will elect its nominee as speaker on the scheduled day. The High confidence attaches to that vote alone; that the result will say little about a government is the author's reading, and the vote does hand the bloc the Knesset's agenda, including the power to bring a dissolution bill. Two listed publishers report the request of 67 members and the outgoing speaker's decision to hold the vote, electing a speaker asks the signatories only to vote against the outgoing coalition again, and the nominee wins on votes cast even if Ra'am stays away.	HIGH
KJ-5	A failed first mandate leads to further rungs of the ladder, not directly to an election, and dispersal of the Knesset before the ladder has run its course requires someone to cut it short: the president, the second candidate, or a Knesset majority passing a dissolution law. Polling day follows dispersal by months on any path, so it cannot come before late winter. The law gives the president a second assignment and the Knesset its own round, a dissolution law needs 61 of the same members to choose an election they have reason to fear with Netanyahu as caretaker throughout, and the full ladder runs by this paper's count to about 10 February 2027.	MODERATE

KEY STATISTICS

67 recommendations
For Eisenkot at the president's consultations, 2026-11-07[1]

46 recommendations
For Netanyahu at the president's consultations, 2026-11-07[1]

48 seats
Held by Eisenkot's four-party alliance, 2026-11-07[1]

53 seats
Held by Netanyahu's right-wing and religious bloc, 2026-11-07[1]

19 seats
Held by the Arab-led parties, a record, 2026-11-07[1]

13 seats
Held together by Shas and United Torah Judaism, 2026-11-10[21]

28 days
First period the law gives an assigned member to form a government, 2026-11-12[3]

14 days
Longest total extension the president may add to that period, 2026-11-12[3]

21 days
Window in which a Knesset majority may name its own candidate once the president's assignments are exhausted, 2026-11-12[3]

67 members
Who asked for a Knesset vote on a new speaker, 2026-11-10[4,21]

Scope and method

METHOD

This paper reads public reporting on Israel's government formation published from 15 October to 12 November 2026, and the English translation of the Basic Laws for the legal periods and voting rules. Reporting was read on 12 November 2026 from Al Jazeera, Haaretz, France 24, Middle East Eye and the Associated Press, the last as carried by a US public broadcaster. Israeli outlets outside this publisher's vetted source list were read for detail on party positions; each is labelled [UNVERIFIED] in the Source Registry, and no High judgment rests on them. Only English-language reporting was read: Hebrew-language reporting and the parties' own statements were not, which limits what this paper can say about positions inside Likud and inside the ultra-Orthodox parties. Vote counts for each route are this paper's own arithmetic from the reported seat figures, on the rule that confidence is decided by a majority of the votes cast. Calendar dates for the legal periods are this paper's own count from the assignment on 8 November 2026 and are not official dates. Precedent is a count of six earlier assignments, from 2008 to 2022, read in the reporting of the time; it is a small sample drawn mostly from the deadlocked years and is treated as such. Probabilities are the author's own judgment unless a base rate is stated. No client-attributable material is used.

SECTION 01 · ASSESSMENT

The clock and the ladder

President Isaac Herzog told Eisenkot of his decision on the evening of 7 November 2026 and formally assigned him the task on the evening of 8 November 2026.[2]

Under Basic Law: The Government, the member assigned the task has 28 days, and the president may extend that period by up to 14 days in total.[3]

Counted from the assignment on 8 November 2026, the first 28 days end on 6 December 2026 and a full extension would end on 20 December 2026; the Associated Press described the total as up to six weeks.[2,3]

If the period lapses, the president may within three days assign the task to another member, who also has 28 days; after that, a majority of Knesset members has 21 days to ask in writing for a named member, who then has 14 days.[3]

By this paper's count, if every period were used in full from 8 November 2026, a second assignment would end on about 20 January 2027 and the 21-day window on about 10 February 2027.[3]

If no such request is made or that last period lapses, the Knesset is deemed to have decided to disperse and an election is held on the last Tuesday before the end of 90 days.[3]

Under Basic Law: The Knesset, the Knesset may also dissolve itself before the end of its term, but only by a law passed by a majority of its members, which is 61 of 120, and that law sets an election date no later than five months after it is passed.[3]

A government is constituted when the Knesset expresses confidence in it, and unless a law provides otherwise the Knesset decides by a majority of those taking part in the vote, with abstentions not counted.[3]

The members of the new Knesset were sworn in on 10 November 2026, and Netanyahu and his cabinet remain in office as a caretaker government with limited powers until a coalition is formed.[2,6]

UNKNOWN: the official calendar dates of the legal deadlines. The dates used here are this paper's count from the assignment; the president's office had not published them in the sources read.

UNKNOWN: the shortest interval the election law allows between a dissolution law and polling day. The Basic Law text read here gives only the longest, five months.

ASSESSMENT · HIGH CONFIDENCE

The ladder is long and each rung is optional for the person holding it, so the law itself pushes toward delay, and it can be cut short at three points: by the president, by the second candidate, or by a majority of members passing a dissolution law. The periods and the voting rules are fixed in the Basic Laws and two independent news reports describe the same sequence.

SECTION 02 · ASSESSMENT

A majority to recommend, not to govern

The election of 27 October 2026 gave neither side a majority, on a turnout of 77.9 percent.[7]

Eisenkot received 67 recommendations against 46 for Netanyahu; his own four-party alliance holds 48 seats, Netanyahu's bloc 53 and the Arab-led parties 19, in a Knesset where 61 is a majority.[1]

The 67 are the alliance's 48 seats and the 19 seats of the Arab-led parties, the Joint List with 11 and Ra'am with 8.[1,6]

France 24 reported on 10 November 2026 that the two ultra-Orthodox parties hold 13 seats, of which United Torah Judaism holds 7, which leaves Shas with 6; Agence France-Presse, as carried by France 24, put Yisrael Beiteinu at 7 seats on 9 November 2026.[21,22]

United Torah Judaism's representatives told the president on 5 November 2026 that they would not endorse any candidate and that the party was not committed to either bloc, so the 46 for Netanyahu are his bloc without that party.[39]

Eisenkot has ruled out bringing the Arab-led parties into a government, and Al Jazeera reported that he could also govern with fewer than 61 seats if he won a confidence vote.[1,27]

Haaretz reported on 6 November 2026 that Eisenkot called for an emergency government without ruling out a minority government.[26]

The Associated Press set out his three options as an agreement with the Arab-led parties, a power-sharing deal with Netanyahu, or a deal with the ultra-Orthodox parties, and reported four conditions for any partner: recognising Israel as a Jewish and democratic state, accepting the declaration of independence, supporting military, national or civil service for all citizens, and declaring Hamas a terrorist group.[2]

France 24 reported on 8 November 2026 that it was unclear whether the Arab-led parties would accept those conditions, and the Associated Press reported on 7 November 2026 that other

members of Eisenkot's bloc had said they would reject a minority government backed by Arab-led parties from outside.[34,35]

On receiving the task on 8 November 2026, Eisenkot said a national emergency government would require creative and unconventional political acts, and did not say which route he would take.[10]

> **ASSESSMENT · MODERATE CONFIDENCE**
>
> The recommendation count overstates Eisenkot's position by the full weight of the Arab-led parties, because their votes are offered to remove Netanyahu and are refused as a basis for governing by part of the bloc they were offered to. It also understates his options in one respect: the three named routes are not exhaustive, since the bar is a majority of votes cast and any party that stands aside lowers it. The seat figures are well sourced on listed publishers, but the private positions of the party leaders are not visible in public reporting.

SECTION 03 · ASSESSMENT

The ultra-Orthodox route

Al Jazeera reported on 7 November 2026 that winning over United Torah Judaism and Shas would give Eisenkot exactly 61 seats.[1]

The Associated Press reported on 8 November 2026 that United Torah Judaism had left the door open to cooperating with Eisenkot, that the ultra-Orthodox parties want to preserve draft exemptions for their community, and that Eisenkot and his partners seek an end to those exemptions.[2]

A United Torah Judaism source told Haaretz on 10 November 2026 that the party was holding separate talks with Yisrael Beiteinu and with Yashar, and that its demand was a law regulating the draft before a government is formed.[5]

Haaretz reported on 6 November 2026 that Liberman said the opposition must avoid another election even at the price of compromise on key issues, including the draft bill, and that United Torah Judaism's chairman called the flexibility encouraging.[25]

France 24 reported on 6 November 2026 that Bennett had campaigned on ending the exemption and had not commented on Liberman's shift, and that United Torah Judaism's rabbis would assess any formal proposal.[23]

By this paper's count the route does not require Shas: if United Torah Judaism's 7 members abstained, the bloc's 48 votes would face the 46 that recommended Netanyahu, and the

government would pass if the 19 members of the Arab-led parties abstained or voted for it and fail if they voted against.[1,21]

Israeli reporting on 29 October 2026 said United Torah Judaism was weighing support from outside for a minority government led by Eisenkot, abstaining and not voting against it, in return for legislation on exemptions, and that the contacts were at junior levels.[36]

Israeli reporting on 8 November 2026 said Liberman was prepared to sit with ultra-Orthodox parties and accept painful compromises on enlistment to form a government without Netanyahu or the Arab-led parties, and said Shas had described reports of its openness as false and itself as part of the right-wing bloc.[9]

Israeli reporting on 9 November 2026 said United Torah Judaism's chairman rejected the bloc's invitation to help replace the Knesset speaker now, saying the speaker should change when a new government is formed.[38]

Israeli reporting on 12 November 2026 said the senior rabbi who authorised United Torah Judaism's representatives to negotiate had called an agreement with Eisenkot not very realistic, that his priority was the legal status of yeshiva students, and that three students arrested that week were sentenced to 20 days in military prison.[11]

UNKNOWN: whether Shas would vote against, abstain or stay away in a confidence vote on a government that United Torah Judaism joined or let through. Its public line is that it belongs to the Netanyahu bloc.

UNKNOWN: whether Naftali Bennett's and Yair Golan's parties would vote for a government whose founding act is a conscription compromise. Neither had committed in the sources read.

UNKNOWN: whether United Torah Judaism would abstain in a confidence vote without a conscription law passed first. The only reporting of that option is unverified and dates from before the mandate.

ASSESSMENT · MODERATE CONFIDENCE

This is the route with real negotiation behind it, and it is more likely to fail than to succeed inside the mandate. The collision is narrower than a clash of principle, because the bloc's own condition accepts national or civil service and Liberman has signalled flexibility, so what divides the sides is sequencing and sanctions: United Torah Judaism wants the law before the government. The abstention variant lowers the bar but moves the problem, since it leaves the government dependent on the Arab-led parties not voting against it, which Liberman has refused. A deal needs Bennett's and Golan's parties to vote a conscription compromise as their first act within weeks, and the most detailed reporting on the talks comes from unverified sources.

SECTION 04 · ASSESSMENT

The Arab-backed and unity routes

The Associated Press reported on 8 November 2026 that Ra'am says it will support Eisenkot, that the Joint List has offered to back him from outside the coalition, and that Yisrael Beiteinu has said it will not join a coalition with Arab-led parties.[2]

Ra'am's leader, Mansour Abbas, said on 10 November 2026 that he aspires to be part of a government led by Eisenkot and that Liberman refuses to form a government with the Arab-led parties.[5]

The Joint List's leader said before the consultations that the party does not plan to join a government but would vote with it in the Knesset, which could allow a minority government with fewer than 61 seats.[6]

A Joint List member, Ahmad Tibi, said on 7 November 2026 that he expects a minority government with outside support from Arab-led parties.[1]

Haaretz reported on 15 October 2026 that Liberman said he would not support any minority government, not even one intended as a transitional government.[24]

Agence France-Presse, as carried by France 24, reported on 9 November 2026 that Liberman vowed that his 7 members will not join any government that relies on Arab-led parties, and Al Jazeera reported on 8 November 2026 that he has repeatedly rejected a minority government dependent on their support.[22,27]

Israeli reporting on 10 November 2026 said Liberman stated that he would not lend a hand to a coalition reliant on the Arab-led parties and that any minority government would quickly return Netanyahu to power.[37]

By this paper's count from the reported seats, the bloc without Yisrael Beiteinu holds 41 seats and reaches 60 votes with both Arab-led parties; with Ra'am alone it reaches 49.[1,6,22]

On the same count, those 60 votes would pass against the Netanyahu bloc's 53 if Yisrael Beiteinu abstained, would tie against 60 and so fail if it voted against, and would pass against 53 if it voted against while United Torah Judaism's 7 members abstained.[1,21,22]

Al Jazeera reported that Ra'am joined the government formed by Bennett in 2021, the first independent Arab party in an Israeli governing coalition, that the Knesset approved that government by 60 votes to 59 on 13 June 2021, and that it collapsed after 18 months.[27,28]

France 24 reported on 10 November 2026 that Netanyahu's bloc targeted Arab members at the swearing-in and that Liberman, after Arab members walked out during the anthem, questioned in public whether a government could be formed with them.[21]

Israeli reporting on 10 November 2026 says the Joint List will back the bloc's nominee for Knesset speaker, and that the bloc's leaders agreed that Liberman will chair the Foreign Affairs and Defense Committee and that a member of Bennett's party will chair the Finance Committee.[12]

On the unity route, Yashar cancelled a meeting with Likud representatives set for 11 November 2026 after Netanyahu's speech at the swearing-in of the Knesset, in which he called Arab members a Trojan horse; Likud said it remained ready to meet any faction that wants unity.[5]

France 24 reported on 8 November 2026 that Eisenkot appealed to Likud to join a government he would lead, and Agence France-Presse reported on 9 November 2026 that Eisenkot and Netanyahu each insist on leading any unity government and that Netanyahu faces corruption charges.[22,35]

Haaretz reported on 15 October 2026 that Liberman said he knows several Likud members who understand the gravity of the moment.[24]

Israeli reporting on 8 November 2026 said Eisenkot will not partner with Netanyahu, while saying Likud could join without him.[9]

UNKNOWN: how Liberman's party would vote, against or by abstaining, on a minority government that Arab-led parties vote for. His refusal to support one is on the record on listed sources; a statement of how his members would vote is not.

UNKNOWN: whether any group inside Likud is prepared to join a government without Netanyahu, and how the state of his trial bears on that. No listed source read reports on his standing inside the party, and Hebrew-language reporting was not read.

UNKNOWN: whether the Joint List accepts the bloc's four conditions. No source read records an answer.

ASSESSMENT · LOW CONFIDENCE

Both routes are closed for now. The Arab-backed route sits behind two locks, Liberman's refusal to support any government that relies on the Arab-led parties and Eisenkot's refusal to bring them into one on terms they have not accepted, and the count shows that Liberman is neither the only lock nor the only key: the route passes if his party abstains, and passes even over his party's votes against if United Torah Judaism abstains. The unity route is closed by Eisenkot's refusal to serve with Netanyahu and by each man's insistence on leading. The precedent of 2021 shows that a pledge against governing with an Arab-led party can be broken, but it is a weaker guide after the attack of 7 October 2023, with Netanyahu's bloc now campaigning against Arab members as such and Liberman repeating his refusal in the week of the mandate. Stated red lines in Israeli coalition talks have a mixed record of holding, and either route could reopen under deadline pressure, so confidence is low.

SECTION 05 · ASSESSMENT

The speaker vote as the first test

The outgoing speaker, Amir Ohana of Likud, said on 10 November 2026 that he had scheduled the vote on his successor for 17 November 2026, after a motion signed by 67 members.[4]

France 24 reported on 10 November 2026 that Ohana granted the request of 67 Knesset members to hold the vote the following Tuesday despite his stated opposition to the emerging coalition, and that the bloc's nominee was expected to win with the support of Arab members.[21]

Haaretz's live coverage gave the time as 4 pm and reported Ohana's statement that he would respect the will of the majority of Knesset members despite his opposition to the emerging coalition.[5]

Eisenkot's Yashar party said its member Matan Kahana had been selected to replace Ohana, a day after the bloc agreed that the nominee would come from Yashar.[4,8]

The Basic Law provides that the Knesset elects its speaker from among its members, and that unless a law provides otherwise it decides by a majority of those taking part in the vote.[3]

By this paper's count, if Ra'am's 8 members stayed away the remaining 59 signatories would still outnumber the 53 seats of the Netanyahu bloc.[1,6]

Ahmad Tibi of the Joint List said in an interview published on 30 October 2026 that Arab members would back the opposition's candidate to replace Ohana.[33]

In March 2020 the then speaker did not act on a letter signed by 61 members calling for a vote on his replacement, and he resigned after the Supreme Court ordered him to hold the vote.[32]

On the same day as the scheduling, the bloc submitted bills to establish a state commission of inquiry into the 7 October attack, to limit prime ministers' terms and to revoke laws from the outgoing government's judicial overhaul.[5]

A law dissolving the Knesset needs a majority of its members, 61 of 120, a number the 67 who asked for the speaker vote exceed if they vote together.[3,4]

UNKNOWN: whether Ra'am's members will vote for Kahana. Their signatures are implied by the count of 67 but no source read records a statement from the party on the vote.

UNKNOWN: whether the Knesset's rules of procedure set a bar for electing a speaker other than a majority of the votes cast. The rules were not read; the Basic Law text read here states the general rule only.

> **ASSESSMENT · HIGH CONFIDENCE**
>
> Kahana will very probably be elected on the scheduled day; the High confidence covers that vote and nothing further. What the result means is the author's reading: it is control of the Knesset's agenda and not progress toward a government, because nothing in the vote requires the signatories to share a cabinet. Agenda control is still worth a good deal to a bloc that cannot yet govern, since it lets the bloc move its own bills against the caretaker's programme and bring a dissolution bill that would set an election date on its own terms. Two listed publishers report the request of 67 members and the outgoing speaker's undertaking to hold the vote, and the nominee wins on votes cast even without Ra'am.

SECTION 06 · ASSESSMENT

What earlier ladders did

In 2008 Tzipi Livni failed to form a coalition after the first 28 days expired on 20 October and the president granted a two-week extension; she called for an early election.[13,19]

In May 2019 Netanyahu failed to form a coalition by his deadline and the Knesset voted 74 to 45 to dissolve itself, which prevented the president from asking another candidate.[14]

On 21 October 2019 Netanyahu returned his mandate and the president said he intended to task Benny Gantz, who had 28 days; on 21 November 2019 the president told the Knesset that no

candidate had been able to form a government, which Al Jazeera called a first, and the 21-day period began.[15,16]

In April 2020 Gantz's mandate expired after a two-day extension and the president asked the Knesset to choose a prime minister within three weeks instead of assigning a second candidate.[17]

That Knesset-led round produced a government: on 7 May 2020 the Knesset backed the Netanyahu-Gantz coalition deal by 71 votes to 37, with members expected to ask the president the same day to give Netanyahu the mandate, and on 17 May 2020 the government won confidence by 73 votes to 46.[30,31]

On 5 May 2021, a day after Netanyahu missed his deadline, the president assigned the task to Yair Lapid, who had the pledged backing of 56 members and 28 days.[18]

That second assignment also produced a government: Lapid told the president on 2 June 2021, about 30 minutes before his deadline, that he had struck his coalition deals, and the Knesset approved the government by 60 votes to 59 on 13 June 2021.[28,29]

After the election of 1 November 2022, Netanyahu's government won a confidence vote by 63 to 54 on 29 December 2022, about two months after polling day.[20]

In the five failed first mandates read here, a second presidential assignment followed in two, in October 2019 and May 2021; in the other three the task did not pass to a second candidate.[13,14,15,17,18]

In the same five cases a rung after the first mandate produced a government in two, the Knesset-led round of 2020 and the second assignment of 2021, and the Knesset dissolved itself by law without using a further rung in one, in May 2019.[14,28,30]

UNKNOWN: the outcomes of the first assignments after the elections of 2009, 2013 and 2015, which were not read for this paper. Including them would raise the share of first mandates that produced a government.

UNKNOWN: which steps of the ladder, if any, were used between Livni's failure in 2008 and the election that followed. The sources read do not record them.

ASSESSMENT · MODERATE CONFIDENCE

Precedent says a first mandate without a ready majority usually fails, that what follows is decided by the president's reading of whether anyone else has a chance, and that later rungs are not only delay: two of the five produced governments, one of them in the last half hour of its period. It also shows the ladder being cut by the Knesset itself, when a majority preferred an election to a mandate for the other side. The count is small and drawn from the deadlocked years, so it shows the range of what presidents and parties have done more reliably than it shows how often.

SECTION 07 · DECISION

Decision

Decision	Owner	Trigger	Pre-authorised action
Plan Israel exposure on a caretaker government into January	Country risk lead	No coalition agreement signed by the end of the first 28 days	Keep caretaker assumptions for budget, regulation and procurement decisions; defer any plan that needs a new minister's signature
Re-rate the chance of an early government	Political risk analyst	United Torah Judaism's rabbinic leadership approves a deal or says the party will abstain in a confidence vote, or Liberman states he will not vote against a government backed by Arab-led parties	Move planning to a government within the mandate and review regulatory and conscription-policy exposure within two working days
Prepare for a second assignment	Country risk lead	Eisenkot returns the task or his period lapses	Brief on a Netanyahu-held mandate and on the Knesset-led round; set a review for the day the president announces his next step
Open election contingency planning	Regional operations lead	The president announces that he sees no possibility of forming a government, or a dissolution bill passes a first reading	Start repeat-election planning for staff movement, security posture and contract timing

SECTION 08 · OUTLOOK

Outlook

Baseline. Kahana is elected speaker on the scheduled day and the bloc takes the Knesset's committees. Talks with United Torah Judaism continue without a signed deal, the first period runs out, and the president grants more time. The extension also ends without a confidence vote, and the president either assigns the task to a second member or, a little more likely, sends it to the Knesset. The caretaker cabinet governs through the turn of the year.

Deterioration. Talks with the ultra-Orthodox parties collapse early over conscription, the bloc splits in public over reliance on Arab-led votes, and Eisenkot returns the task before his time is up. The president judges that no second candidate has a chance and the Knesset-led round fails, or the majority that elected the speaker passes a dissolution law to keep the task from passing to Netanyahu. The Knesset is dispersed ahead of a repeat election, with street protest over the draft and over the election-interference claims raising the security temperature.

Stabilization. United Torah Judaism's leadership accepts a transitional conscription arrangement that the bloc's parties can vote for, or agrees to stay outside and abstain, or Liberman lets a minority government through by abstaining. Eisenkot presents a government inside his mandate and it wins confidence by a narrow margin of the votes cast, with one or both Arab-led parties voting for it or abstaining.

Claim C-1. The Knesset elects Matan Kahana as its speaker on or before 17 November 2026. Probability 0.85. Resolves on 2026-11-20 from Haaretz: YES if Haaretz reports that the Knesset plenum elected Matan Kahana as speaker in a vote held on any day up to and including 17 November 2026; NO if the vote is postponed past that day, if another member is elected or if he loses the vote. Horizon 30 days. The request for the vote carries 67 of 120 members on the reporting of two listed publishers, and the outgoing speaker has scheduled the vote and said he will respect the majority. The nominee wins on votes cast, so he would still lead if Ra'am's members stayed away. The risks are a late change of nominee inside the bloc and a procedural delay. No base rate available: no count of contested speaker replacements at the start of a Knesset term was found in the sources read for this paper.

Claim C-2. President Isaac Herzog extends Gadi Eisenkot's period to form a government beyond its first 28 days. Probability 0.70. Resolves on 2026-12-09 from Haaretz: YES if Haaretz reports that the president granted Eisenkot an extension of any length to his period for forming a government on any day up to and including 8 December 2026; NO if by that day a government has won a confidence vote without an extension, Eisenkot has returned the task, or the president has refused an extension. Horizon 30 days. Every route to a government needs a partner to break a public pledge, so the first period is likely to end without one, and a candidate with a majority of

recommendations and live talks is likely to ask for and receive more time. The claim fails if he succeeds early, gives up early or is refused. No base rate available: the earlier cases read for this paper do not record consistently whether an extension was requested and granted.

Claim C-3. The president of Israel assigns the task of forming a government to a Knesset member other than Gadi Eisenkot on or before 6 January 2027. Probability 0.45. Resolves on 2027-01-08 from Haaretz: YES if Haaretz reports that the president assigned the task of forming a government to any Knesset member other than Gadi Eisenkot, at his own choice or at the written request of a majority of Knesset members, on any day up to and including 6 January 2027; NO otherwise. Horizon 60 days. Eisenkot's mandate is more likely than not to end without a government by about 20 December 2026, and the law then lets the president assign a second member within three days. The president may instead send the task straight to the Knesset if he judges that no one else has a chance, as happened in 2020, and Netanyahu's 46 recommendations make that a live option. Base rate: 0.40, from Al Jazeera, as of 2026-11-12.

Claim C-4. The Knesset is dispersed ahead of a repeat election, by operation of the Basic Law or by its own dissolution law, on or before 8 February 2027. Probability 0.20. Resolves on 2027-02-10 from Haaretz: YES if Haaretz reports that, on any day up to and including 8 February 2027, the Knesset passed a law dissolving itself in its final reading or was deemed dispersed under Basic Law: The Government because no government could be formed; NO otherwise. Horizon 90 days. If every period of the ladder is used in full, counted from the assignment on 8 November 2026, the last 21-day window ends on about 10 February 2027, after this date, so a YES needs the ladder to be cut short: an early return of the task, no second assignment, or a dissolution law passed by 61 members. Parties that fear the voters have reason to use all the time the law gives, though a majority that fears a Netanyahu mandate more could dissolve, as happened in May 2019. No base rate available: the earlier cases read for this paper do not date each dispersal on a comparable clock from the first assignment.

Indicators.

- The result and the vote count of the speaker election, and whether Ra'am and the Joint List both vote for the bloc's nominee
- Any ruling by United Torah Judaism's rabbinic leadership for or against a deal, and the text of any transitional conscription arrangement
- Any statement by United Torah Judaism that it would abstain or stay away in a confidence vote
- Whether Shas says it would abstain or stay away in a confidence vote
- Any statement by Liberman on how his members would vote, as distinct from joining, on a government backed by Arab-led votes
- Any answer by the Joint List to the bloc's four conditions
- Any public break by Bennett's or Golan's party over conscription or over Arab-led support

- A request by Eisenkot for an extension, and the length the president grants
- Any resumed meeting between Yashar and Likud, a rotation offer from Netanyahu, or a move inside Likud to join without him
- A dissolution bill tabled by any faction, and which side of the house tables it
- Findings from the security service's election-interference inquiry

SECTION 09 · SCORECARD

Scorecard

- CLM-2026-471: Advanced, not resolved. The assignment of 8 November 2026 starts a period whose latest end, by this paper's count, is 20 December 2026, two days before the claim's date; the 67 recommendations, United Torah Judaism's openness and the abstention arithmetic are modest evidence for it, and the absence of any agreed route and Liberman's repeated refusal are evidence against.
- CLM-2026-329: Advanced, not resolved. A government by 6 January 2027 now needs either success inside Eisenkot's mandate or a second candidate who succeeds within about two weeks of assignment; this paper's baseline is that neither happens.

SECTION 10 · WHAT IS NOT KNOWN

Unknowns

- UNKNOWN: the official calendar dates of the legal deadlines; the dates in this paper are its own count from the assignment on 8 November 2026.
- UNKNOWN: whether the Knesset's rules of procedure set a bar for electing a speaker other than a majority of the votes cast; the Basic Law text read here states the general rule only.
- UNKNOWN: the content of any draft conscription arrangement under discussion; no text had been published in the sources read.
- UNKNOWN: whether the president would assign a second candidate or send the task to the Knesset if Eisenkot fails; he had not said in the sources read.
- UNKNOWN: how Liberman's party, United Torah Judaism and Shas would each vote, against or by abstaining, in a confidence vote on a minority government; no listed source read records it, and the routes through abstention turn on it.
- UNKNOWN: positions inside Likud on joining a government without Netanyahu, and the bearing of his trial on them; no listed source read reports them, and Hebrew-language reporting and the parties' own statements were not read.
- UNKNOWN: the seat counts of each party inside Eisenkot's alliance other than Yisrael Beiteinu; the count used for Shas is a subtraction from the reported figures for the two ultra-Orthodox parties together and for United Torah Judaism.

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