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What the Democratic Tidal Wave Means for Israel

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The Democrats' sweeping victory in the U.S. midterm elections is likely to reshape the U.S.-Israel relationship. With President Trump moving to end military assistance two years before the current Memorandum of Understanding expires, and Vice President Vance attributing the Republican defeat to the Iran war and support for Israel, the $3.3 billion annual commitment can no longer be taken for granted, and a successor agreement faces steeper odds. Democrats will set the agenda, and sanctions over settler violence and new settlement construction, along with conditions on arms sales, may advance quickly. Their fate, however, turns on a divided caucus. While most Democrats back punitive measures against settler violence, fewer support limits on arms sales, meaning pro-Israel Democrats and Republicans may still block some bills. Israel is not powerless: its own elections create an opening to shift the terms of debate. Seizing that opportunity, however, will require forming a new government and acting swiftly on Democrats' central concerns: settler violence, new settlement construction, and implementation of the 20-Point Plan for Gaza.

In this week's U.S. midterm elections, Democrats have won sweeping victories in both houses of Congress, securing majorities that exceed all forecasts.

All 435 House seats were in play, and Democrats are on track to win about 260 seats, and possibly more. The Senate turns over more slowly, with only one-third of seats up this cycle. Even so, Democrats won every race in the so-called "blue" and "purple" states, as well as in some Republican strongholds such as Kansas, Iowa, Texas, and possibly Mississippi.

Midterm elections typically favor the party opposed to the president, but the scope of this shift is historic. It is a sweeping repudiation of the Trump administration in an election that focused on cost of living, the Iran war, allegations of corruption, and concerns about AI and data centers.

Israel was a prominent issue in many campaigns, with Democrats calling to end or condition foreign military aid and downgrade the U.S.-Israel alliance. In Michigan, Democratic Senate candidate Dr. Abdul El-Sayed defeated his Republican opponent by a comfortable margin. El-Sayed is known for harsh criticism of Israel and, most recently, declined to condemn outright a political ad by his supporters that blamed Israel for high grocery prices.

In an apparent nod to the unpopularity of U.S. military assistance to Israel, President Trump announced on election day that he had reached an agreement with Prime Minister Netanyahu to end U.S. support next month, two years before the current Memorandum of Understanding expires and before an alternative is in place. As the magnitude of the Republican defeat became evident, Vice President Vance

published a post on X attributing the loss to the Iran war and U.S. support for Israel. President Trump later characterized Vance's assessment as "largely true."

Taking control of both chambers, Democrats will set the agenda for the new Congress. In an Election Day post on X, Sen. Chris Coons, the incoming chair of the Senate Foreign Relations Committee, sought to reassure Israelis:

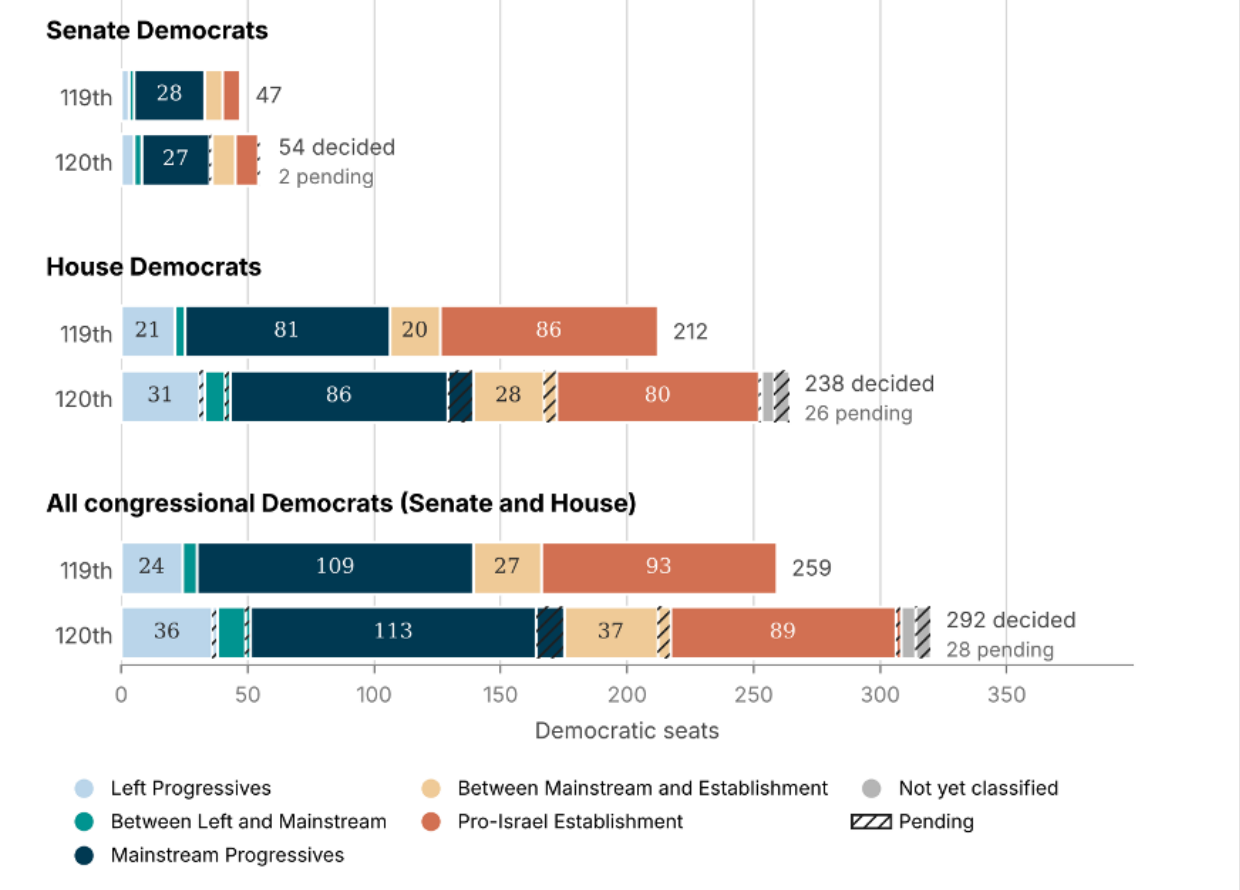
"As the U.S. goes to the polls today, I am encouraged by statements from Israeli leaders following last week's election. They are signaling a potential path forward that could set Israel on a positive new trajectory. While uncertainty remains, I applaud Gadi Eisenkot and other Israeli opposition leaders for their willingness to make courageous choices. Core values as democratic societies form the basis of our partnership, and we know protecting them is worth the effort."

Nonetheless, Coons himself has co-sponsored legislation that would impose economic sanctions on Israelis for settler violence and for facilitating settlement construction in the contentious E1 corridor. Such legislation may now be fast-tracked in the incoming Congress, along with bills that limit or condition future arms sales to Israel.

Not all such bills will pass. Most Democrats support the punitive legislation on settler violence in the West Bank, but they are more divided on limiting arms sales. Republicans in the Senate and House have taken a consistently pro-Israel line, almost unanimously, throughout the Biden and Trump presidencies. If that pattern holds, some of the legislation in the pipeline could possibly be thwarted by an alliance of Republicans and pro-Israel Democrats (who make up nearly a third of all congressional Democrats).

The figure below, based on INSS analyses from recent months, compares the distribution of Israel-related factions within the Democratic Party in the current and incoming Congresses, based on nearly complete election results. The Left Progressive camp, which supports a full arms embargo against Israel, is set to grow only modestly. The Mainstream Progressive camp, which supports conditioning arms sales but generally backs the wider U.S.-Israel alliance, will remain the largest faction. Pro-Israel Democrats, the guardians of the "special relationship" between Israel and the United States, will retain considerable weight within the party. Thus, Pro-Israel Democrats combined with Republicans may still comprise narrow majorities in one or both chambers, though this remains uncertain as the final election results are tallied.

Democratic seats by Israel-related faction, 119th and 120th U.S. Congresses



Moreover, these factional alignments are not fixed, and positions that seemed far-fetched a few years ago are increasingly mainstream. Widespread disapproval of Israel's conduct in the Gaza war and its West Bank policies, and opposition to the joint U.S.-Israel war against Iran, have enabled critics of Israel to shape the public debate. Their wins in the midterm elections will not be ignored by incumbents or future challengers. Given this dynamic, more of Israel's stalwart supporters in both parties, like Senator Coons, may embrace legislation that seeks to compel Israel to change its policies or downgrade the "special relationship" between the two countries.

In the near term, continued funding of the United States' annual commitment of $3.3 billion in military assistance under the 2016 Memorandum of Understanding is in jeopardy. Even if President Trump were to reverse his announced decision to terminate such funding next month, the new Congress would still need to approve the budget. At the same time, gaining congressional approval for a new Memorandum of Understanding—one that had been expected to shift military assistance to strategic cooperation in arms development—also faces an uphill battle.

Israel's political leadership is not powerless in the face of this sea change in U.S. politics. It can still seize the opportunity created by Israel's own elections to shift the terms of debate. Doing so, however, will require forming a new Israeli government and acting swiftly to address some of the Democrats' major concerns, particularly settler violence, new settlement construction, and implementation of the 20-Point Plan for Gaza.

Editors of the series: Anat Kurz, Rinat Harash, Eldad Shavit and Keri Rosenbluh