

THE LONDON INITIATIVE

SHAPING A BETTER **SHARED FUTURE** FOR
WORLD JEWRY, ALL ISRAELIS AND ISRAEL

Data Pack, February 2025

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TLI Foreword

Fellow London Initiative Network members,

One of our first determinations as we began to imagine what has evolved into “The London Initiative” was that effective change must be data driven.

Consequently, we are very pleased with the partnership which has been forged with the team at Molad - the Center for the Renewal of Israeli Democracy, led by Dr Shai Agmon, who were commissioned to aggregate and compile data from reputable sources according to TLI’s specifications.

Our current thinking is to revise the Data Pack twice each year, in the lead-up to each London Retreat. Each new edition will incorporate new findings and be shared with all Network members to encourage deliberation and informed decision-making.

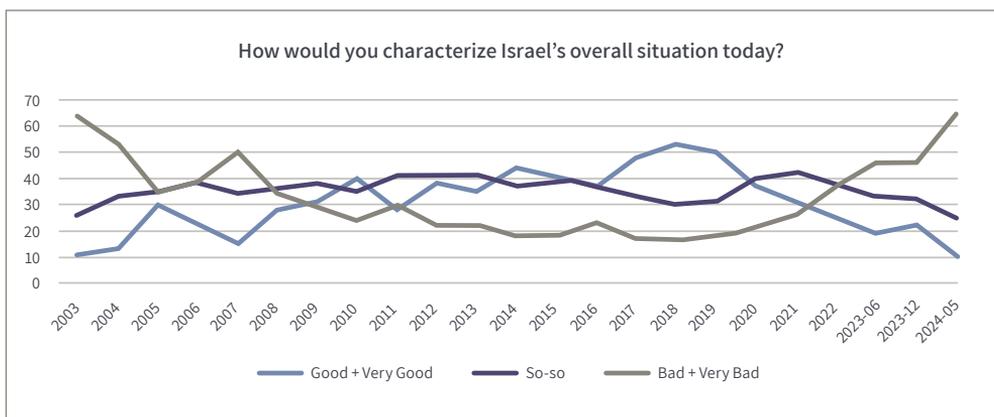
Inevitably, even when selected with appropriate due diligence from reputable

sources, data is open to debate and interpretation. Accordingly, some of the data in this pack is itself contested – also among the TLI team!

Happily, Dr. Shai Agmon is himself a member of the TLI Network, and ready to debate and re-visit the choices and interpretations set out in these pages.

In truth, the way all data is selected and read also comes down to one of the most basic and unscientific of life choices; whether to see the glass as half empty or half-full.

In this regard, our choice and the choice of all who have chosen to join TLI is clear. We choose optimism and hope and unfaltering determination to work to create a better future based on our shared TLI vision and values.



Source: Israel Democracy Institute Data Project (IDI, 2003-2024)

It is in this light that we choose to interpret the recent IDI survey on Israel's overall situation, one of several studies in this pack. The fact that an overwhelming majority of Israelis share our negative view of Israel's current situation is no source of pleasure. But it is important evidence that the great majority want a radical change of direction and a better future and therefore represents a strategic opportunity.

We have founded TLI aspiring to serve that better shared future grounded in our shared values and we thank you for joining with us in this endeavor.

Sir Mick Davis – Co-Founder TLI

Mike Prashker – Co-Founder and Director TLI

14 Must Know Facts

1. By the end of 2024, Israel's population exceeded 10 million. Israel now surpasses most European countries in size, equalling or exceeding 44 out of 58 nations.
2. By 2065, Israel's population is projected to reach 20 million, with Haredi Jews comprising 33%—double their current share, according to the Central Bureau of Statistics (CBS) forecasts.
3. Israel has the youngest population among OECD countries when observing those aged under 15, with the highest increase in the youth population aged 0–24 since 2010.
4. Israel lost its long-time status as a liberal democracy in 2023. The leading international democracy watchdog V-Dem classified downgraded Israel from a liberal to an electoral democracy – for the first time in over 50 years.
5. Participation in elections remains relatively stable, with a turnout of around 70%.
6. Most Israelis believe democracy is in danger. The most recent poll, conducted in 2024, shows the highest concern rate in the past decade.
7. The majority of the Israeli public firmly opposes political violence.
8. While the trend is negative, a narrow overall majority of Israeli youth currently support equal rights for minorities, with Arab youth showing even higher levels of agreement.
9. Despite a temporary decline following the Gaza Disengagement Plan, most Israelis continue to believe that peace talks should be the government's primary focus to prevent war and achieve security.
10. 30% of children in Israel live below the poverty line.
11. Israel subsidises the religious Jewish education system 16% more than others, including the Arab system, despite recent reductions in the funding gap.
12. The skills of Israeli adults are significantly below the OECD average across all age groups in literacy, numeracy, and adaptive problem-solving.
13. In 2022, an Arab-Palestinian citizen of Israel was 11 times more likely to be murdered than a Jewish-Israeli citizen.
14. A November 2024 survey of Jewish students worldwide by Mosaic United found that 94% feel emotionally attached to Israel.

Molad's Foreword

Israel is no longer the small, besieged country it still imagines itself to be. With a population surpassing Hungary and Switzerland and soon to overtake Greece, Sweden, and Portugal, it has grown into a regional military power and a global technological leader. Stable peace agreements anchor its longest borders, and recent accords with Gulf states signal a new era of diplomatic opportunity. Even peace with Saudi Arabia or Lebanon, once dismissed as implausible, now seems within reach—bolstered by Israel's military achievements in Lebanon and new developments in Syria. Yet, despite this outward strength, the mood within Israel is sombre. When asked how they are, many Israelis respond with a weary refrain: "Fine, considering the circumstances." And the circumstances are anything but fine.

An ongoing war in Gaza rages with no end in sight. Soldiers are sacrificing their lives without a strategic goal, while thousands of Palestinians suffer and die—dire evidence of devastation reaches Israel daily. Expansionist rhetoric about settling Gaza and a hopeless resignation to "living by the sword" dominate public discourse. Over a hundred hostages remain in captivity. The trauma of October 7th still looms, with many Israeli families yet to return to their homes and injured soldiers beginning long recoveries. At the same time, democratic norms and political stability are unravelling

at an alarming rate. Beneath these immediate crises lies a deeper existential struggle over the identity of the state.

Israel stands at a crossroads: will it chart a future as a liberal democracy, or descend into becoming a fundamentalist, illiberal, and isolated entity? Those leading the charge toward the latter path are in power, organised, and advancing their vision with determination—and the country is well on its way in that direction. Yet, the liberal majority within Israel, along with a global Jewish diaspora yearning for change, holds significant potential to alter the course of history. The trends shaping Israeli society over the past two decades reveal a complex picture of progress and peril. What is clear from the data is that the time for avoiding hard decisions has passed.

For decades, the occupation of Palestinian territories has raised questions about Israel as **a mature liberal democracy**. What was once seen as a temporary situation has become entrenched, increasingly violent, and morally corrosive. In recent years, new (and some would say deeply related) challenges have emerged within Israel's borders (the Green Line), with judicial independence under threat, dissent marginalised, and Israel's liberal character subjected to direct and brutal attacks—all of which have steepened the slope of Israel's democratic backsliding. The data highlight declines in democratic

indices, growing distrust in institutions and media, and widespread pessimism. Yet, hope remains. Democratic values persist—for instance, younger generations still believe in protecting minority rights, while the majority of Israelis reject theocratic governance and oppose political violence.

After the October 7th massacre, the illusion that the conflict with the Palestinians could be managed indefinitely—while Israel pursued normalisation with its neighbours and deepened its occupation of Palestinian territories—was shattered. The Israeli Palestinian conflict can no longer be dismissed as a “shrapnel in the butt” with which Israel must simply live. Instead, it has re-emerged as the most urgent issue in Israeli politics, demanding a stable and just resolution. “Solutionism” is no longer a term of derision used to belittle advocates for peace; it has become a prerequisite for relevance in Israeli politics. Yet, a clear political alternative has yet to emerge. While many Israelis support negotiations and the vision of **secure peace**, growing pessimism about its feasibility continues to dominate. The persistent “no-partner” narrative stifles political imagination, leaving the path to peace clouded by doubt. Bridging this confidence gap—while countering a growing messianic camp and a reliance on force as the default solution—requires the consolidation of a serious, viable political alternative to secure a better future.

Meanwhile, Israel’s **societal fairness** is under severe strain, despite its extraordinary economic growth. The country has become a global hub of innovation and entrepreneurship, but this success has not been shared evenly. Inequality has soared, with wealth concentrated in a small elite, while public services are overstretched and struggling to keep pace with the demands of a growing and diverse population. The education system, once a cornerstone of opportunity, now struggles to prepare the next generation, leaving many Israelis disconnected from the prosperity around them. For many, this economic success feels distant, fostering a mix of pride in national achievements and frustration with persistent inequities. Economic hardship fuels extremism and deepens social and political divisions, eroding the cohesion that underpins Israel’s democratic fabric. Without decisive and bold action, these challenges will only intensify, further threatening the stability and future of the state.

Perhaps most concerning, the country’s **Overton Window has shifted sharply to the right, narrowing** the spectrum of acceptable political discourse. Once-central issues, such as peace and human rights, have been marginalised. Political competition now plays out within a narrow range between centre-right and

About the Data Pack

hard-right populism. Liberal and pro-peace voices have struggled to regain relevance, with Kahanist ideologies no longer confined to the fringe. Reclaiming space for justice and equality will require bold and organised efforts to challenge this trajectory and redefine the possibilities for political discourse.

And these challenges resonate far beyond Israel's borders. The tragic events of October 7th have profoundly impacted Israel's **partnership** with global Jewry. While many diaspora communities have shown unprecedented levels of support and solidarity with Israel, a deep unease is also taking hold. Frustration with the Israeli government—exacerbated by the attempted judicial overhaul and the policies in the ongoing war in Gaza—has collided with the liberal values many diaspora Jews hold dear. Yet, this moment offers a rare opportunity for a renewed partnership—one grounded in democratic ideals and mutual respect—to influence Israel's future and reaffirm its commitment to justice and democracy.

This data pack is designed to support discussions, exchanges, and decision-making among TLI Network members. It offers a factual benchmark and identifies opportunities for more effective action at the individual, organisational, network, and strategic levels. While not exhaustive, it provides a comprehensive overview of the main trends in Israeli society over the past two decades.

The document aims to inspire informed dialogue and strategic action by Network members and will be updated twice a year in the lead-up to retreats. It will be shared with all Network members, and suggestions for the inclusion of additional data in future editions are warmly welcomed.

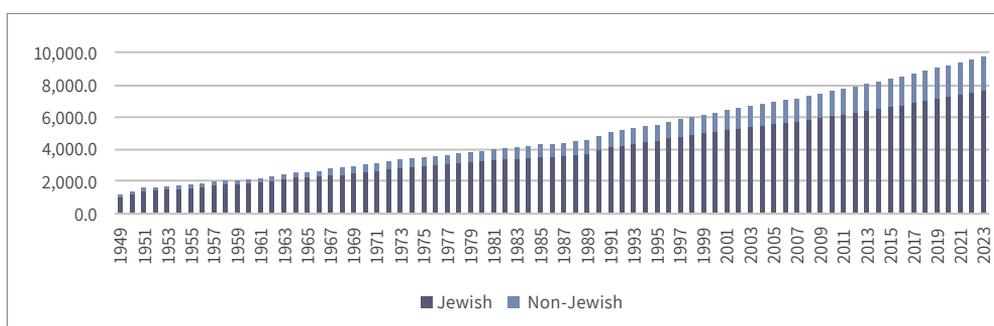
The data is drawn from reliable sources, with significant contributions from TLI members, to whom we extend our sincere gratitude for their cooperation and insights.

Please note that the abbreviation T denotes Takeaway, while FE stands for Further Explanation.

Section 1: Introduction - General Demographic Data on Israel, Palestine and World Jewry

This section provides an overview of the demographic and social dynamics shaping Israel, Palestine, and World Jewry. It highlights trends in population growth, religious and cultural composition, and long-term projections, offering a detailed picture of the structure of Israeli society. These insights lay a critical foundation for understanding the broader political, social, and economic challenges addressed in the sections that follow.

Figure 1.1 – Israel Population, 1948-2023



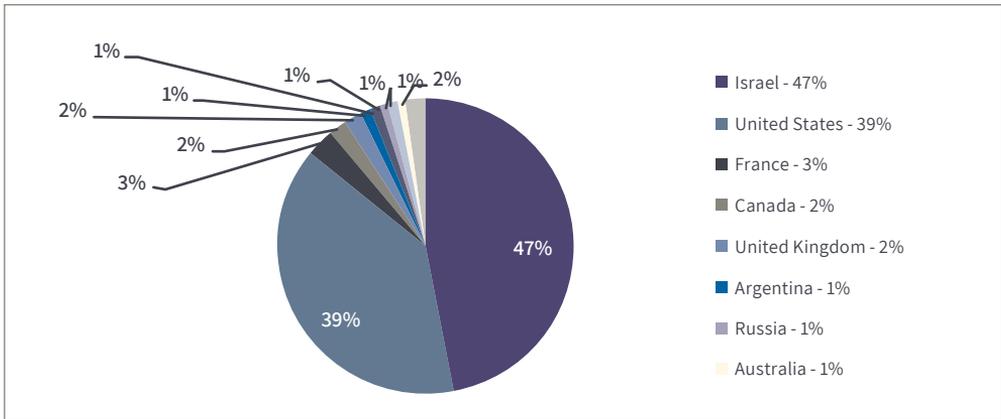
CBS, 2023

FE1: In 2023, Israel's population reached 10 million. Israel now surpasses most European countries in size, equalling or exceeding 44 out of 58 nations.

FE2: Israel's Arab population is composed of 85.5% Sunni Muslims, 7.4% Druze, and 6.9% Christians and constitutes 21.3% of Israel's citizens.

T: Israel's demographic growth challenges its self-perception as a "small state".

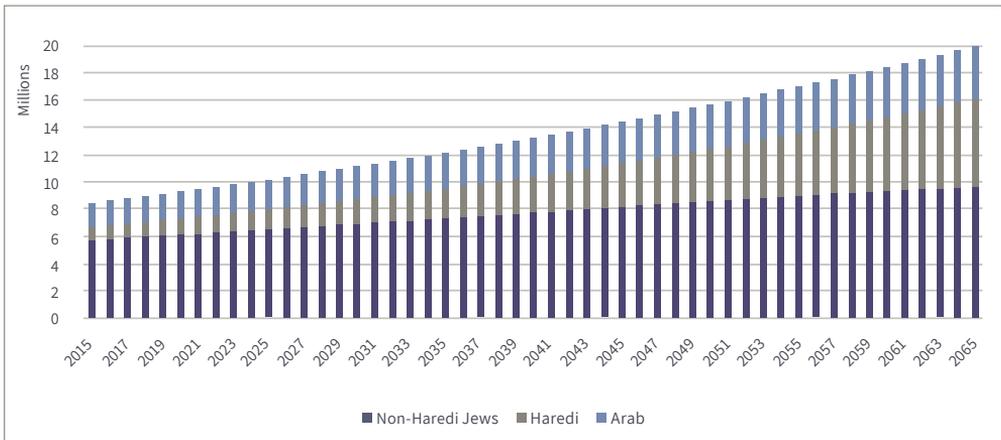
Figure 1.2 – Jewish Population Worldwide, 2023



Jewish Agency for Israel, 2024

FE: There are currently 15.8 million Jews worldwide, with 7.3 million living in Israel and 8.5 million in the diaspora, of whom 6.3 million reside in the United States. According to a 2020 Pew Research survey, 37% of American Jews identify as Reform, 17% as Conservative, and only 9% as Orthodox, while the remainder do not affiliate with specific branches.

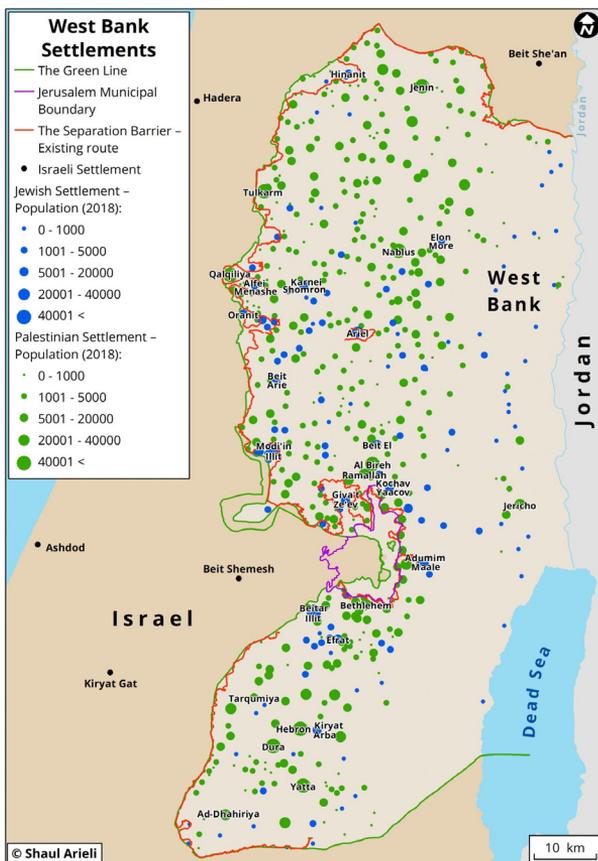
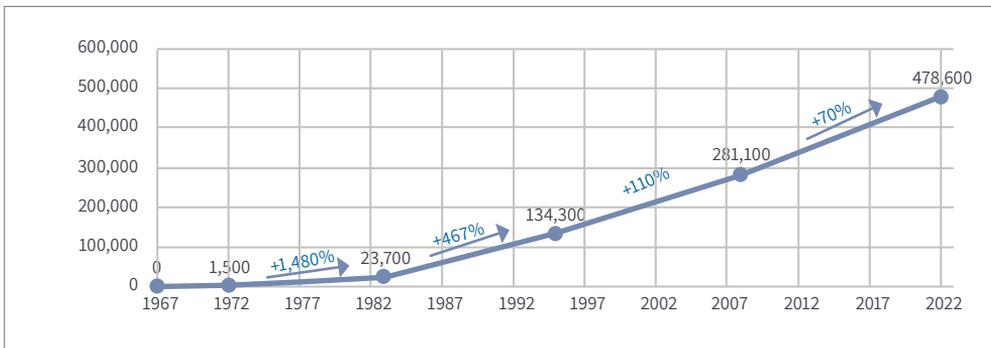
Figure 1.3 – Israel’s Population Forecast, 2015–2065



CBS, 2022

FE: By 2065, Israel’s population is projected to reach 20 million, with Haredi Jews comprising 33%—double their current share, according to CBS forecasts.

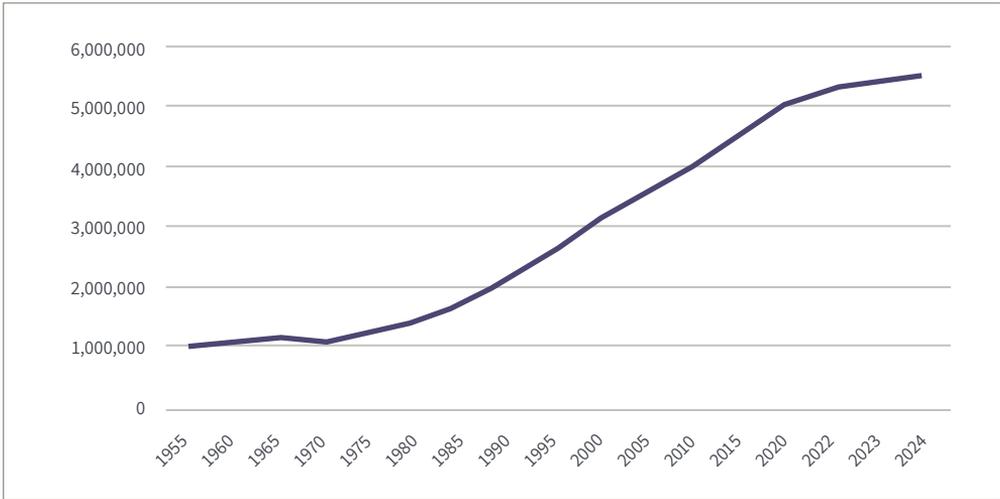
Figure 1.4 – Jewish Population in the West Bank, 1967-2022



CBS, 2023

FE: The Jewish population in the West Bank has grown to nearly 500,000 (excluding the Jewish population in east Jerusalem). According to 2023 Peace Now data, this includes 142 official settlements, five cities, and over 200 outposts.

Figure 1.5 – Palestinian Population, West Bank + Gaza Strip, 1955-2024

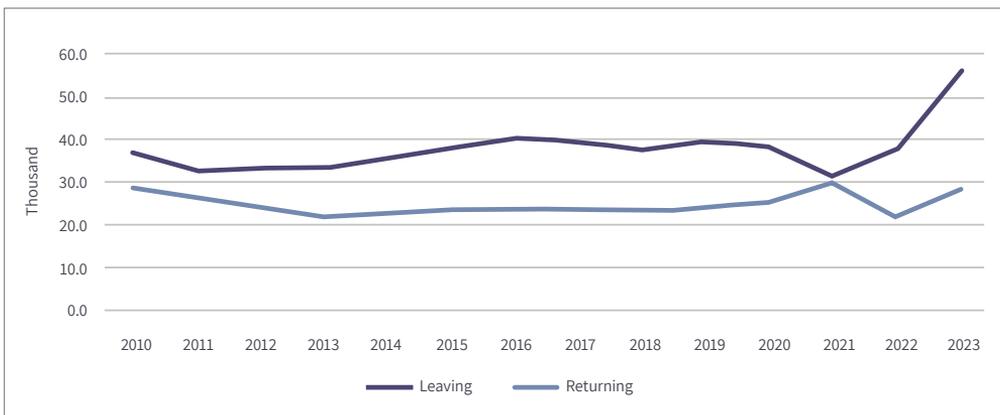


UN, 2024

FE: At the start of 2024, there were 3.26 million Palestinians in the West Bank and 2.22 million in Gaza, according to United Nations data.

T: Over 15 million people live between the Mediterranean Sea and the Jordan River, roughly half of them Jewish.

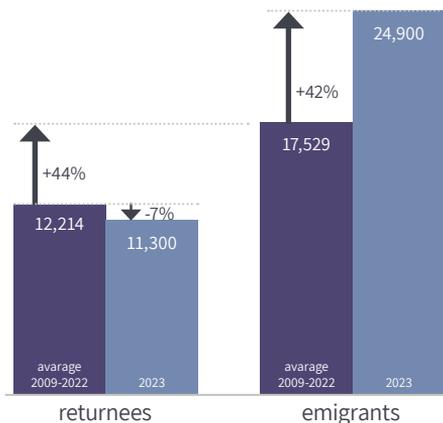
Figure 1.6+1.7 – Long-Term Leaving and Returning Trends in Israel, 2010-2023



CBS, 2024

Number of native-born Israeli emigrants and returnees* during January-September in each year, 2009-2023

Each year represents the number of those who left that year and were still abroad in the following year, and those who returned that year and were still in Israel in the following year. These are native-born Israelis who remained abroad, or in Israel, a minimum of 275 out of the 365 days since their departure (with first 90 days continuously).



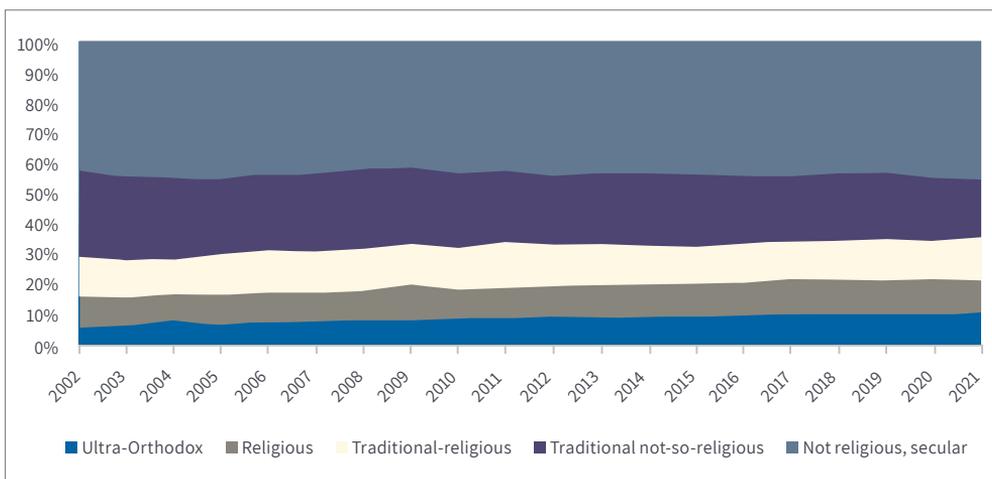
Source: Dan Ben-David, Shoresh Institution and Tel Aviv University Data: Eilat Cohen-Kastro, Marina Sheps, Alaa Atrash and Ahmad Hleihel from the Central Bureau of Statistics

Dan Ben-David, Shoresh Institute 2024

FE: In recent years, and more prominently since October 7th, there has been a steady increase in long-term emigration among Israelis—defined as those spending fewer than 90 days in Israel over the previous 12 months.

T: The trend spiked in 2023, coinciding with the Judicial Overhaul, with a 43% rise in departures. Credible data for 2024 is not yet available.

Figure 1.8 – Extent of Religiosity, Jews in Israel, 2002-2021



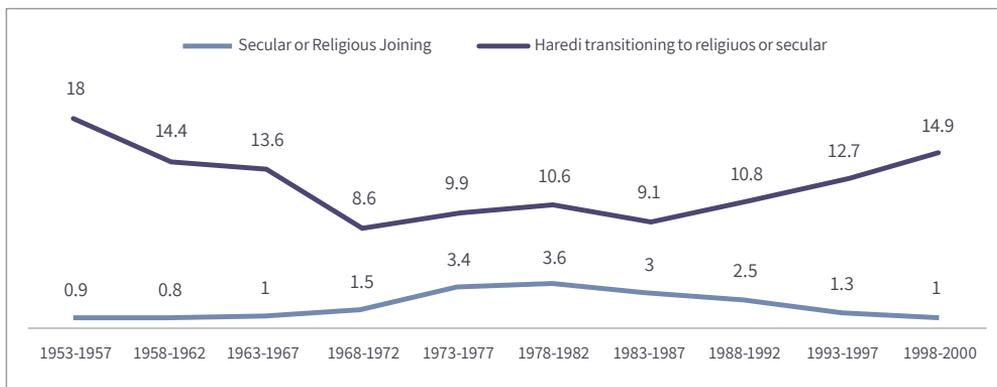
CBS Social Survey, 2022

FE1: Among Israel’s Jewish population, the largest group self-identifies as ‘secular’. When combined with traditional Jews who consider themselves ‘not so religious’, a significant majority of Israeli society is non-religious.

FE2: A 2013 Israel Democracy Institute (IDI) poll found that 3.9% of Jewish Israelis identify as Reform and 3.2% as Conservative.

T1: The share of Israelis identifying as traditional is shrinking, while the secular community continues to grow. This challenges the common perception that secular individuals are becoming more religious or traditional. A plausible explanation for the increased use of religious symbols and language in the public sphere is Israel’s growing nationalism, which often co-opts religious symbols as nationalistic kitsch rather than reflecting a genuine rise in religiosity.

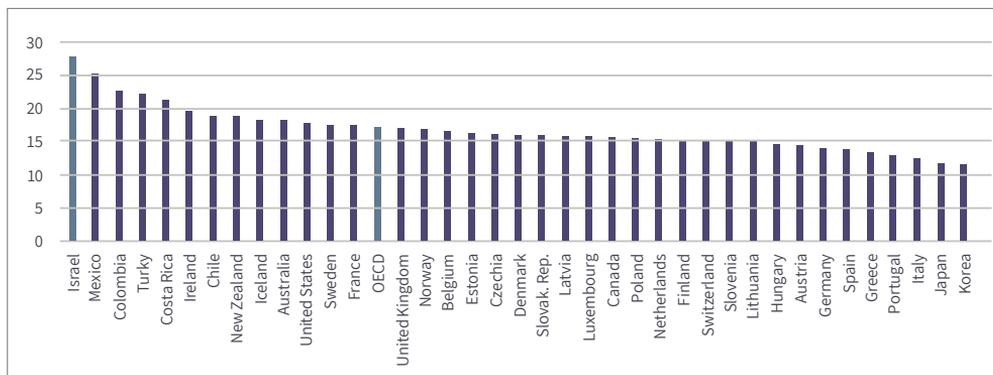
Figure 1.9 – Joining and Leaving the Haredi Community (% by Year of Birth), 1953-2000



Regev & Gordon, 2021

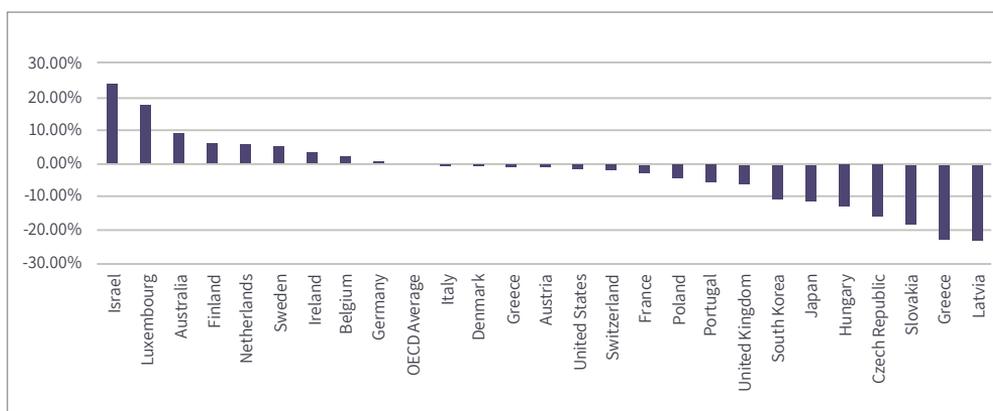
T: Changing religiosity trends create opportunities to integrate Haredim more fully into broader Israeli society.

Figure 1.10 - Share of Under-15 Population – OECD Countries, 2022



OECD, 2023

Figure 1.11 – 0-24 Population Increase – OECD Countries, 2010-2022

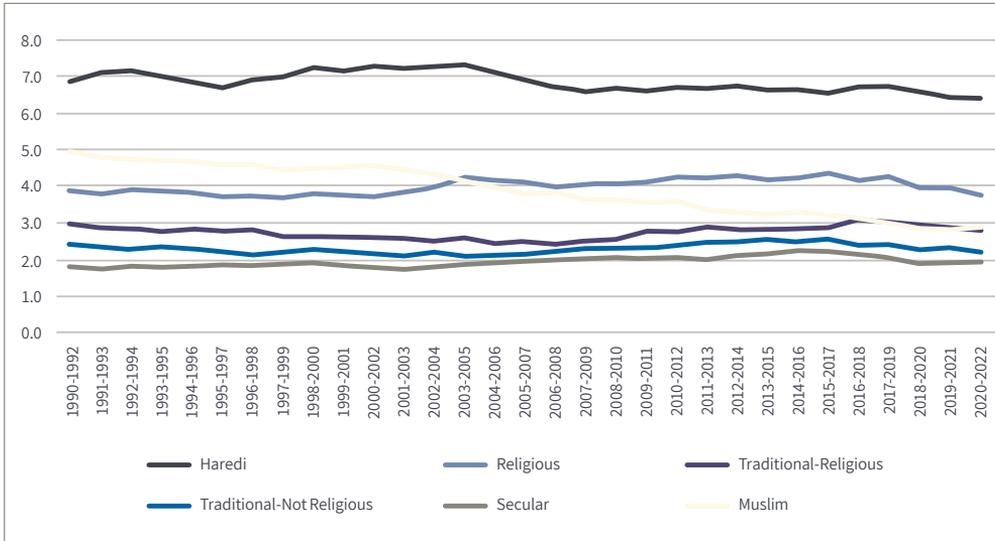


OECD, 2023

FE: Israel has the youngest population among OECD countries when observing those aged under 15, with the highest increase in the youth population aged 0-24 since 2010.

T: Being the youngest country in the industrialised world presents both opportunities and challenges. A young population offers significant productivity potential but also increases population density and places immense pressure on public systems and infrastructure—particularly given Israel’s rapid growth from 3.8 million in the 1980s to 10 million today. Moreover, the majority of Jewish newborns are from the Ultra-Orthodox community, which currently contributes less to economic productivity and is educated within an anti-liberal system.

Figure 1.12 – Fertility Rate, 1990-2022

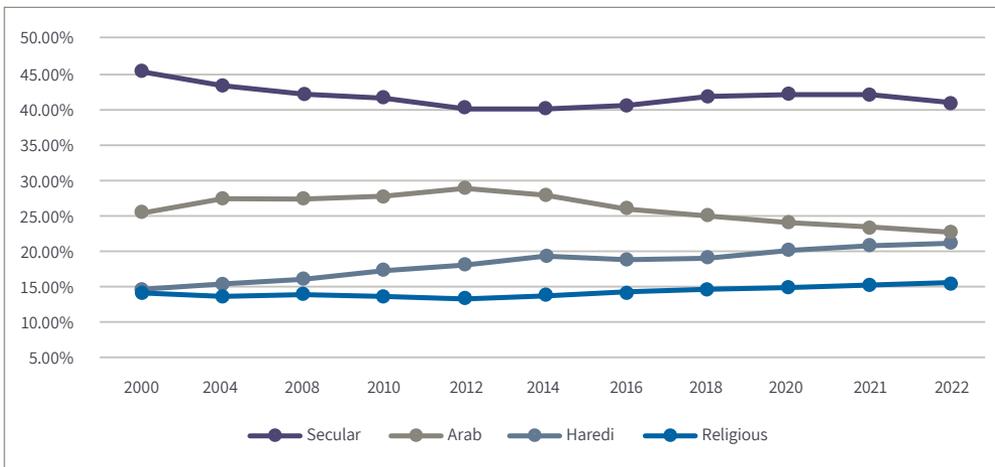


CBS, 2023

FE: Fertility rates among different communities in Israel have shifted, with declines observed in the Haredi community and a sharp drop in the Arab community.

T: The 2003 child support reform, which significantly reduced social benefits, played a key role in these changes, demonstrating that fertility rates are influenced by policy and not solely based on natural factors.

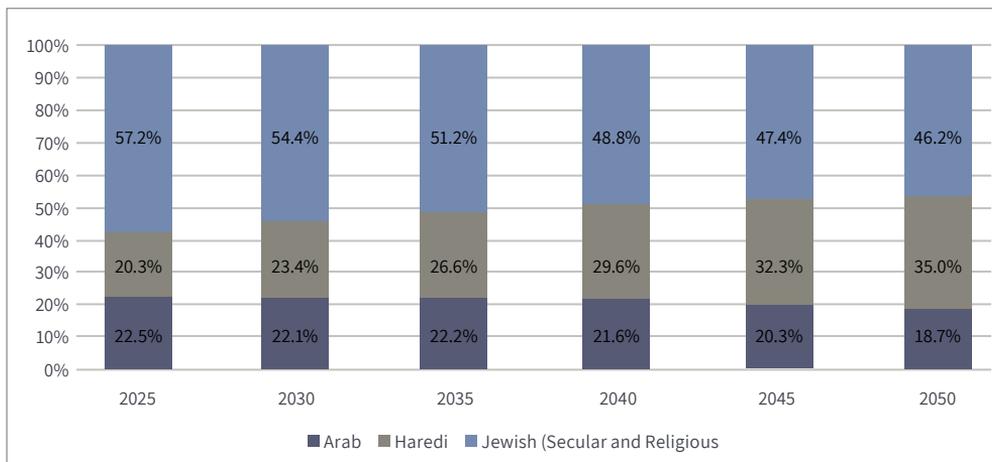
Figure 1.13 – 1st Grade Pupils in Israel Across Different Education Systems, 2000-2022



Knesset Data Center, 2023

FE: The share of Orthodox students among first-grade students is steadily increasing.

Figure 1.14 – Pupils Forecast by Education System, 2025-2050



CBS, 2023

FE: According to the CBS forecast for 2050, 35% of Israeli pupils are projected to be enrolled in the Haredi education system

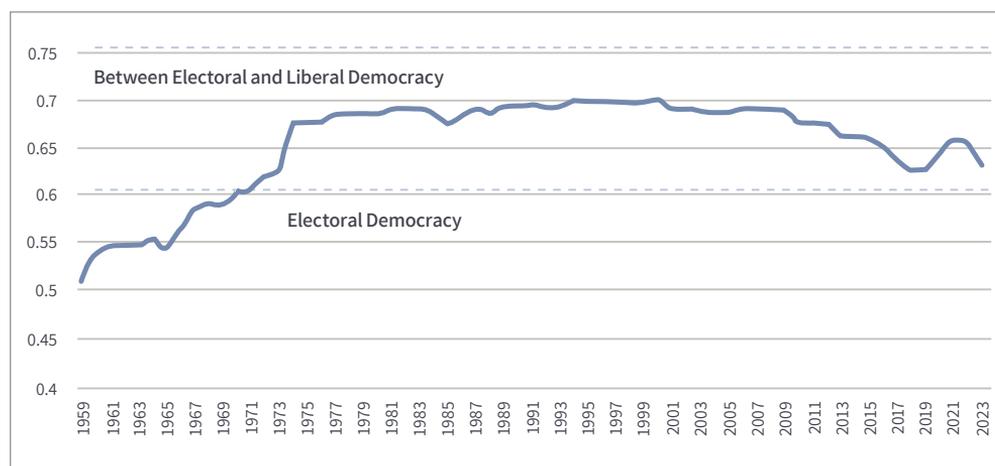
Section 2: The Triangle

This section unpacks the TLI framework's three interconnected pillars: mature liberal democracy, secure peace, and societal fairness. It begins with data-driven insights into Israel's democratic health, examining key indicators such as voter turnout, press freedom, and public trust. It then turns to public opinion on peace and security, addressing topics like attitudes towards war and generational shifts in support for a Palestinian state. Finally, it explores Israel's standing as a modern welfare state, tackling issues such as poverty, food insecurity, social mobility, gender gaps, and homicide rates. Together, the graphs present a vivid snapshot of the opportunities and challenges shaping Israel's future.

2a Mature Liberal Democracy

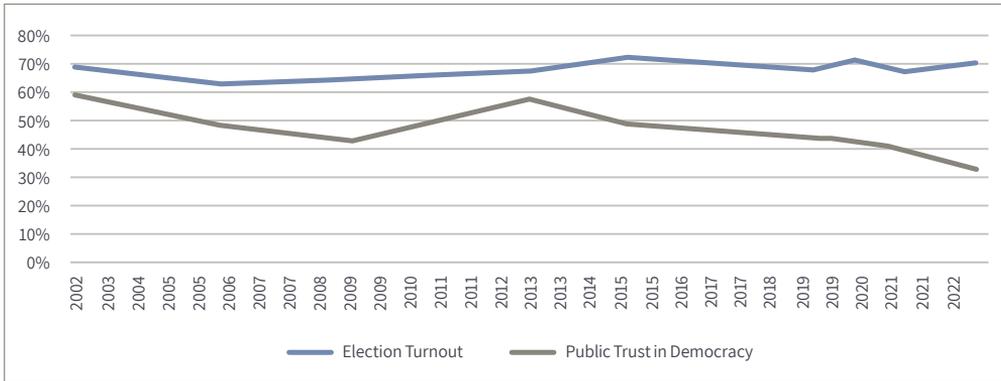
This subsection presents data on the state of Israel's democratic health as it approaches its 80th year, highlighting both vulnerabilities and enduring strengths. The data reveals a democracy under strain: most Israelis see democracy as being in peril, trust in the media is low, and fears about lifestyle changes across different communities run deep. Yet, amidst these concerns, there are reasons for cautious optimism. Violence as a means of change is largely rejected, voter turnout remains high, and Israeli youth continue to champion core democratic values like minority rights. While the challenges are urgent and significant, the resilience of key democratic norms and institutions offers a foundation for renewal and progress.

Figure 2.a.1 – Israel V-Dem Score, 1959-2023



FE: Israel’s democracy classification by the V-Dem Institute has been downgraded to ‘electoral democracy.’ The country’s Liberal Democracy score decreased in 2023 due to the government’s judicial overhaul legislation program. V-Dem is regarded as one of the dominant democracy indices in the world.

Figure 2.a.2 – Voter Turnout vs .Public Trust in Democracy ,2003–2022

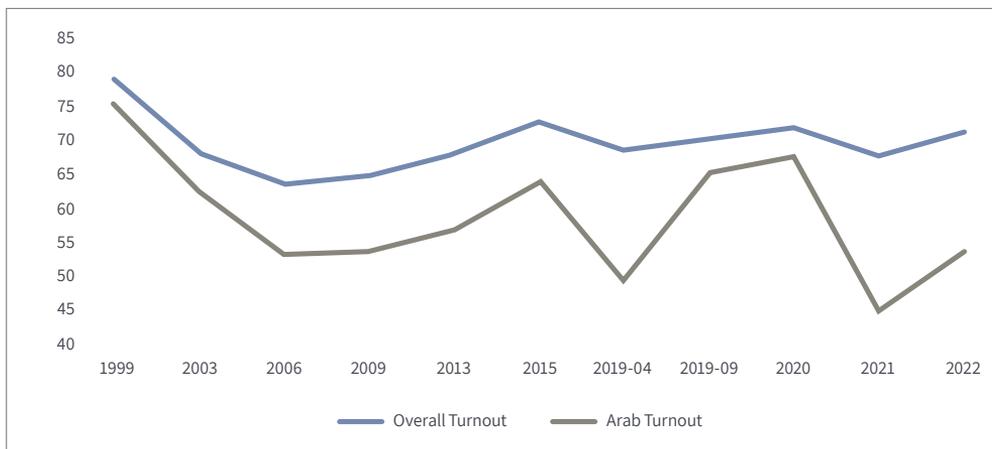


IDI & Election Board, 2003-2022

FE: Participation in elections remains relatively stable, with a turnout of around 70%. This is despite the ongoing decline in public trust in democracy, which has reached an all-time low.

T: General ‘Get Out the Vote’ campaigns might not significantly boost turnout in a society with consistently high and stable participation, though they can help sustain current levels. To increase turnout, campaigns must be nuanced and targeted, focusing on long-term incremental gains—particularly within the Arab community.

Figure 2.a.3 – Arab Community Turnout vs. Overall Turnout, 1999–2022

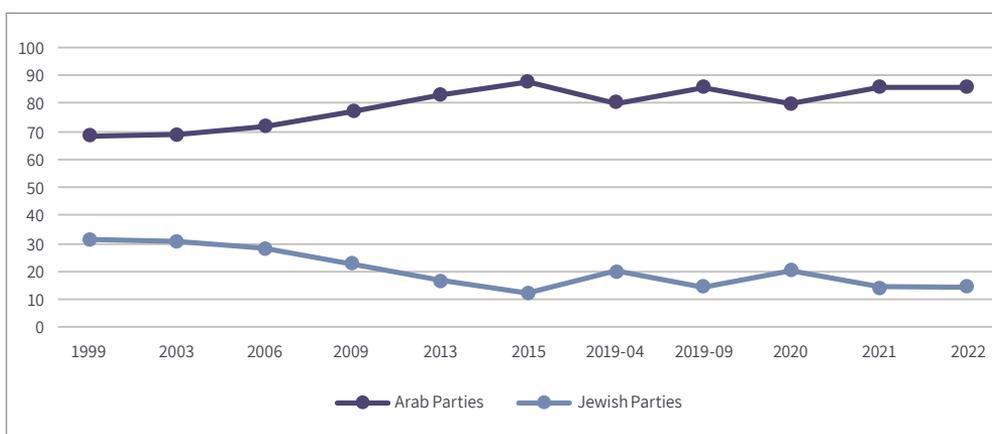


Roditski, 2023

FE: There is a significant gap in voter turnout between the overall population and the Arab community, though this trend is unstable and fluctuates between elections.

T: This fluctuation suggests that Arab participation responds to the political opportunities presented in an election. When Arab citizens believe their vote matters, they are more likely to turn out. This indicates that the key to increasing Arab participation lies not in GOTV efforts alone but in fostering genuine political cooperation and inclusion.

Figure 2.a.4 – Israeli Arab Voting Distribution :Arab vs .Jewish Parties ,1999-2022

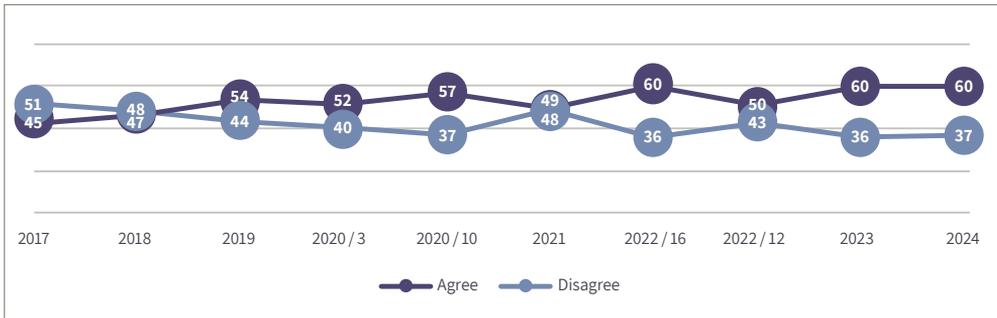


Roditski, 2023

FE: A stable trend visible in Arab voters' behaviour is the steady decrease in voting for Jewish parties, from 31.4% in 1999 to just 14.2% in 2022.

T: This can lead to one of two conclusions. One is that Arab society in Israel is more cohesive than it used to be, and the divide between the Arab and Jewish communities has sharpened. If this is the case, the future of Arab-Jewish relations will be shaped between parties, not within them. The other is that Jewish parties have failed in recent decades to open their ranks to the Arab community, and offer them effective concern and representation, which still leaves room for hope and change within parties as well.

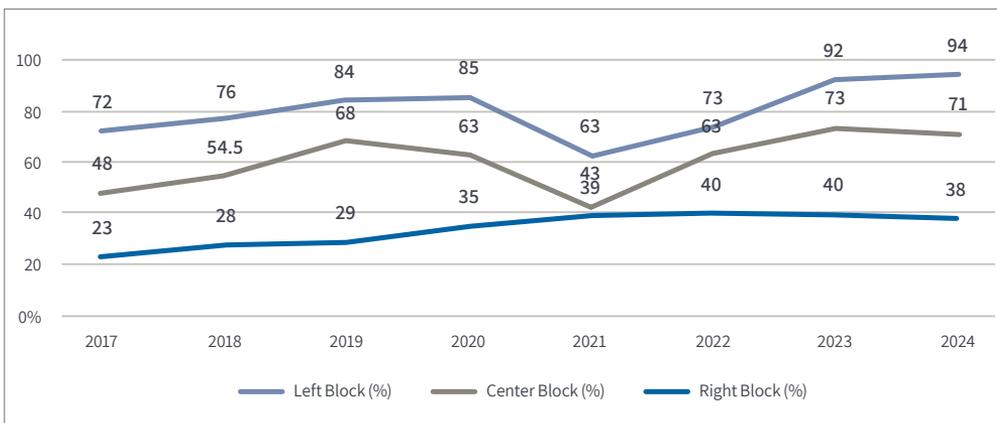
Figure 2.a.5 – Is Israeli Democracy in Danger? Agree/Disagree, 2017-2024



IDI Democracy Index, 2024

FE: Most Israelis believe democracy is in danger. The most recent poll, conducted in 2023, shows the highest rate of concern in the past decade.

Figure 2.a.6 – Fear about Israel’s Democracy Across Political Affiliations, 2017-2024

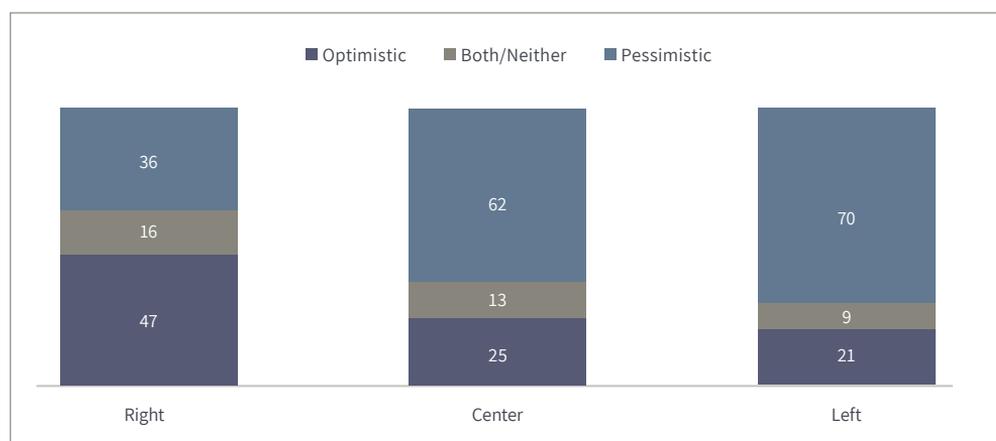


IDI Democracy Index, 2024

FE: Concerns about the state of democracy vary widely across Israel’s political spectrum. Among Jewish voters, 94% of left-wing voters, 71% of centrists, and 38% of right-wing voters feel democracy is in danger.

T: As other studies suggest, the reasons behind these fears differ: the left is alarmed by the judicial overhaul, while the right fears the influence of an unelected ‘deep state’. Understanding these distinctions is crucial for addressing the challenges facing Israeli democracy.

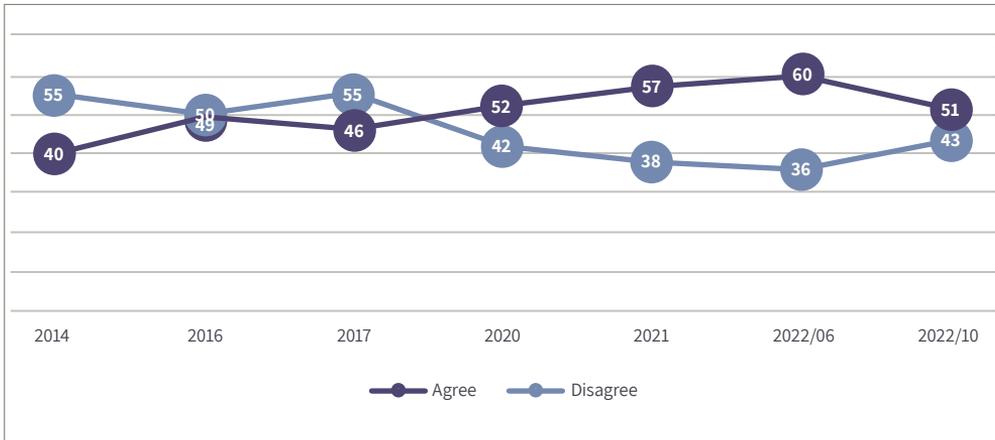
Figure 2.a.7 – Optimistic and Pessimistic Feelings About the Future of Israel’s Political System, 2024



Pew, 2024

FE: This trend of increased fear for democracy is also reflected in the proportion of the public who feel pessimistic about the future of the country’s political system. This sentiment is more prominent among those in the political centre and left.

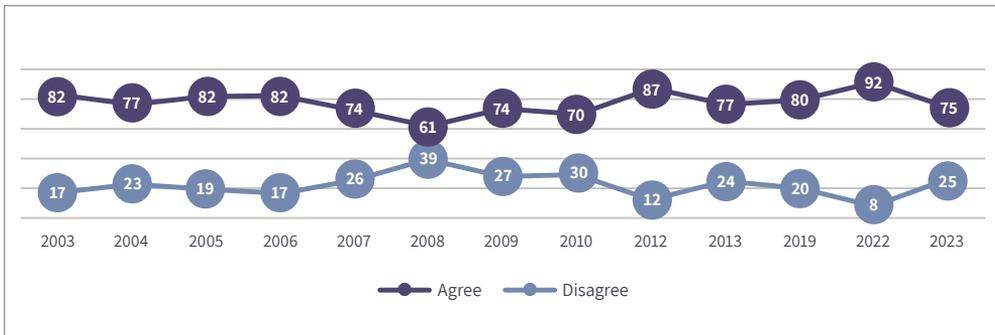
Figure 2.a.8 – Support for a Strong Leader, 2014–2022



IDI, 2014-2022

FE: Israelis are increasingly willing to support a strong leader who would disregard the parliament, media, and public opinion. However, despite the overall increase in recent years, there is a noticeable decline in the most recent poll, and the trend remains fluctuating and inconsistent.

Figure 2.a.9 – Majority Opposes Political Violence

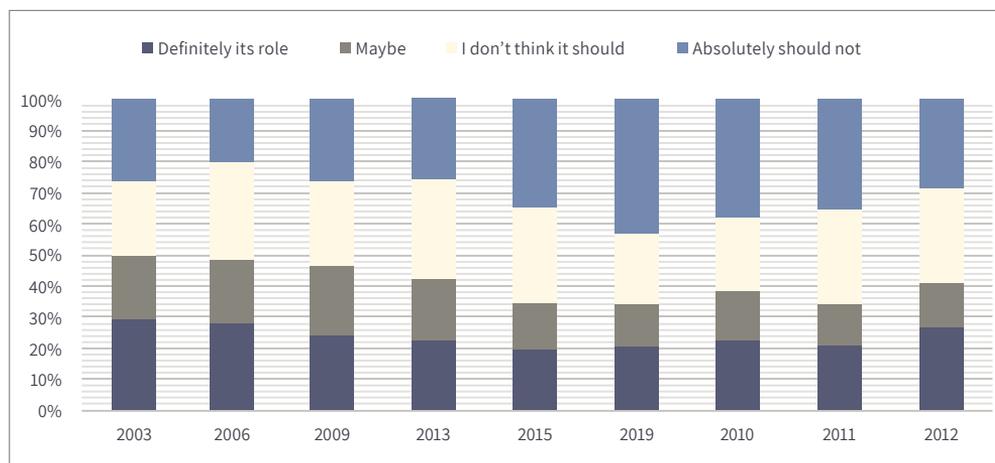


IDI, 2003-2023

FE: While there is an apparent willingness to support a strong leader, the majority of the public firmly opposes political violence.

T: This reflects a vital characteristic of a democratic society: the shared understanding that violence is unacceptable as a means to achieve political goals.

Figure 2.a.10 – Should Jewish Halacha Rule the Public Sphere? 2022

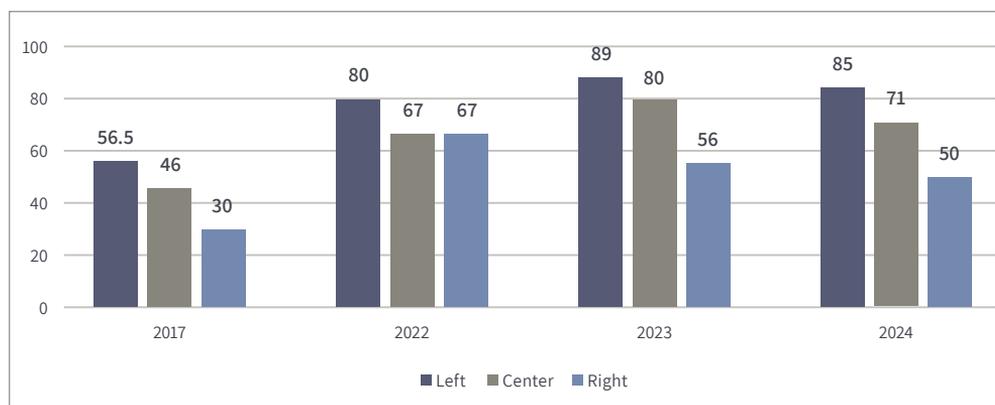


INES

FE: Opposition to Jewish Halacha rule has increased over time. In 2003, 50% opposed the idea, rising to 60% in 2023 (with 64% opposing it in 2022).

T: While parts of Israeli society are becoming more anti-liberal and anti-democratic, other areas, such as tolerance for the LGBTQ community and opposition to Halacha rule, show a growing liberal trend.

Figure 2.a.11 – Concerns About the Ability to Maintain a Desired Lifestyle by Political Camps (Jewish Population), 2017–2024



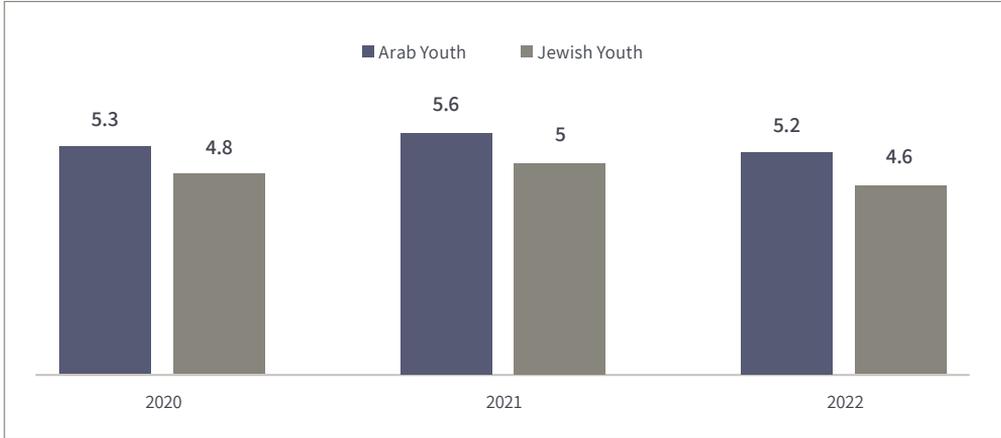
IDI Democracy Index, 2024

FE: Among secular Jews, 77.5% express fear for their ability to maintain their lifestyle.

T: A common trope in Israeli politics is that centre-left voters are wealthy, content with the status quo, and unaffected by broader issues like the occupation or societal fairness,

making them unlikely to mobilise for change. However, the increasing share of centre-aligned individuals expressing fear highlights an opportunity for renewed mobilisation.

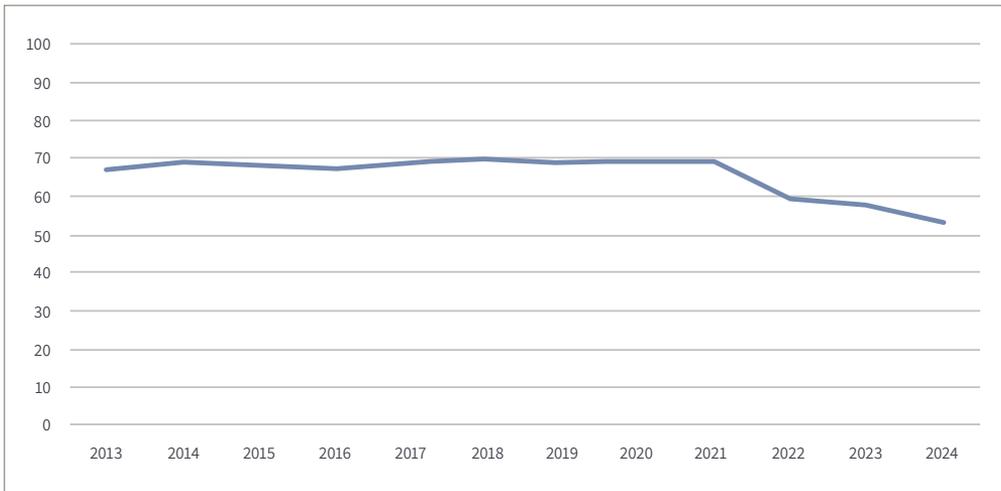
Figure 2.a.12 – Youth Position on Equal Rights for Minorities, 2020-2024



aChord, 2024

FE: A majority of Israeli youth support equal rights for minorities, with Arab youth showing even higher levels of agreement.

Figure 2.a.13 – Freedom of the Press Index 2013-2024

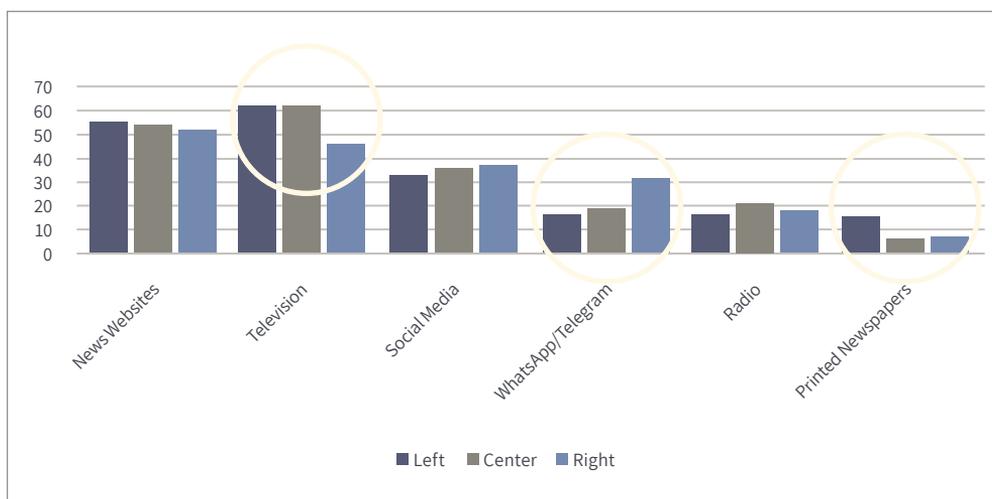


RSF, 2024

FE: In recent years, the concept of a free press in Israel has faced challenges from government-led initiatives undermining media independence. The latest Freedom of the Press Index by RSF ranks Israel 101st out of 180, reflecting a decline in press freedom. Alongside V-Dem, it remains one of the most important global indicators.

T: The anti-liberal media environment in Israel extends far beyond Channel 14 and *Israel Today*, encompassing broader attacks on press freedom and independent journalism. Current efforts to dismantle the Israeli Public Broadcasting Corporation (IPBC), including a controversial bill mandating its privatization or closure within two years, highlight a significant threat to democracy. The destruction of a national broadcaster that serves diverse communities undermines public trust and erodes social cohesion. Communications Minister Shlomo Karhi's pushes to sideline the IPBC, along with moves to centralize control over media ratings and government boycotts of critical outlets like *Haaretz*, underscores the multifaceted nature of these attacks on the free press.

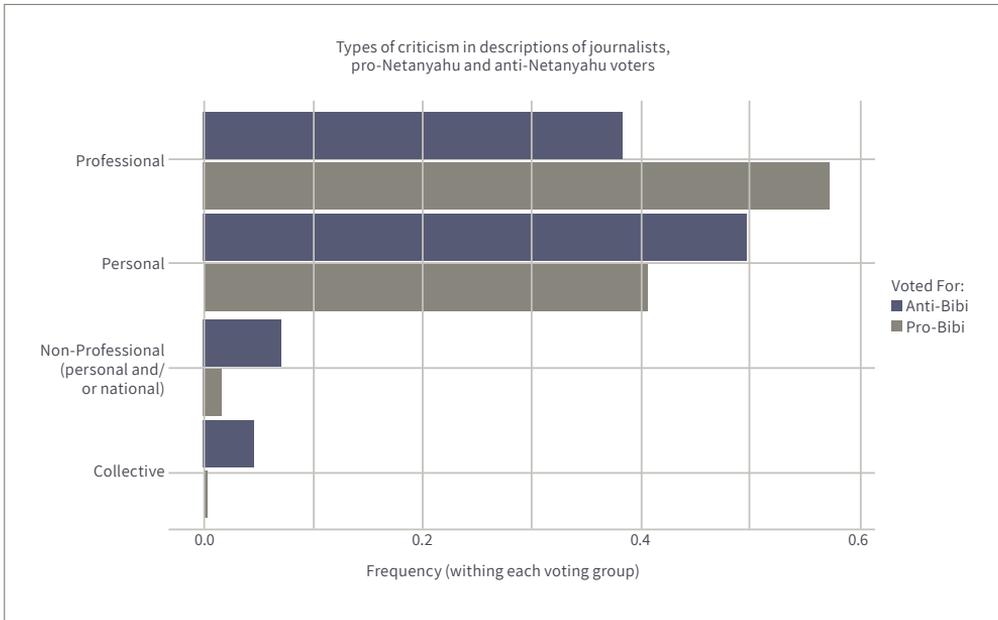
Figure 2.a.14 – Main Source of News Consumption by Political Camp (Jewish Population), 2024



Schwartz Altshuler, 2024

FE: Television remain the most popular source of news for Israelis. Yet, supporters of right-wing parties rely more heavily on ‘underground’ media channels distributed through messaging services, creating a direct and controlled environment for their leaders to convey messages.

Figure 2.a.15 – Polarisation in Media Criticism, 2022



Panievsky, 2022

FE: A study by Dr. Ayala Panievsky revealed differences in media criticism between pro-Bibi and anti-Bibi political camps. The pro-Bibi camp tends to see the media as a unified entity with malignant intentions, criticising it more personally than professionally.

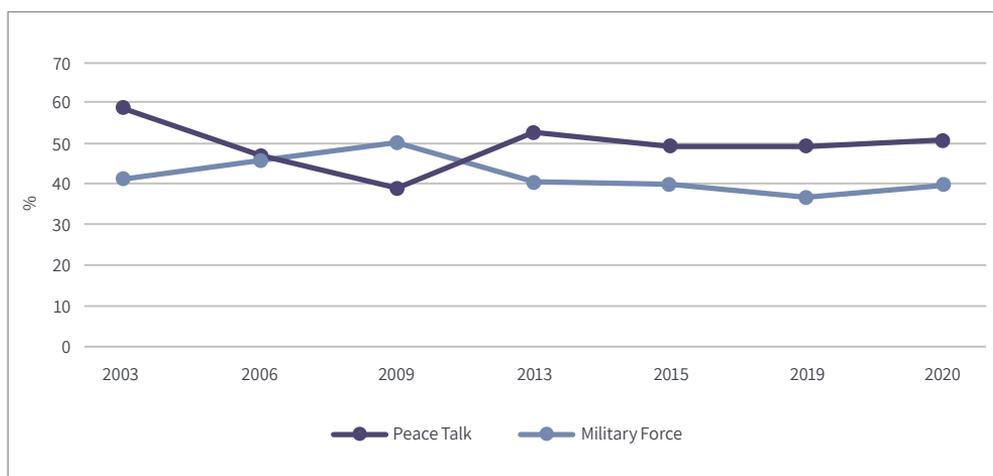
T: In an environment where the media is viewed as untrustworthy and politically motivated, elite capture by anti-liberal leadership becomes easier. It is far more difficult to hold politicians accountable when critical journalists are disregarded. This mistrust stems from multiple factors, including the failings of Israel’s mainstream media, but it is also the result of a deliberate and sustained campaign by the anti-liberal right.

2b Secure Peace

This subsection delves into public opinion in Israel regarding security and peace. In the aftermath of an unprecedented and brutal war—the worst security failure and massacre in Israel’s history—it is no surprise that attitudes toward peace and coexistence have reached a low point. Yet, a year later, a majority of Israelis recognise that true security cannot depend solely on military force; peace talks are essential. The challenge lies in bridging a deep and enduring confidence gap. While many Israelis support negotiations and the vision of peace, growing pessimism about its feasibility continues to overshadow these

aspirations. The persistent “no-partner” narrative further limits political imagination, leaving the path to peace mired in doubt.

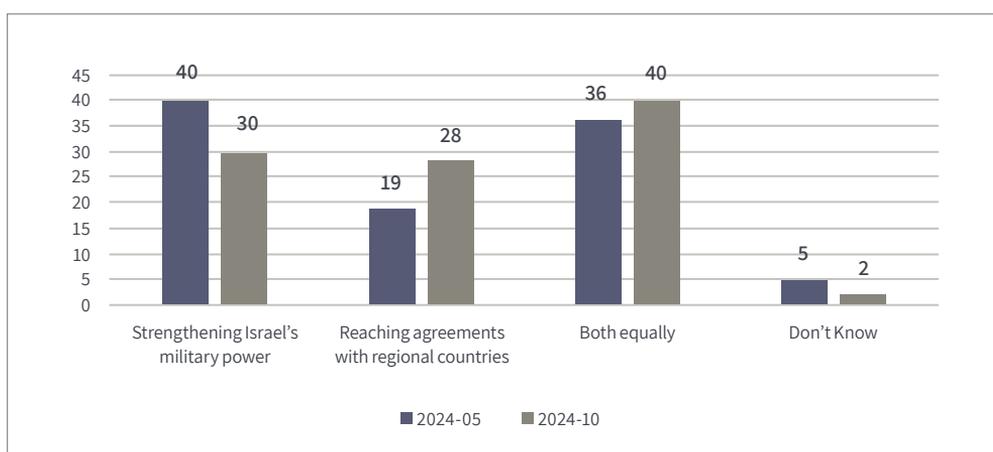
Figure 2.b.1 – To Achieve Security, Should Israel Focus on Peace Talks or Military Force? 2003–2020



INES

FE: Despite a temporary decline following the Gaza Disengagement Plan, most Israelis continue to believe that peace talks should be the government’s primary focus to prevent war and achieve security.

Figure 2.b.2 – What Will Ensure Israel’s Security the Most in the Short Term, 2024

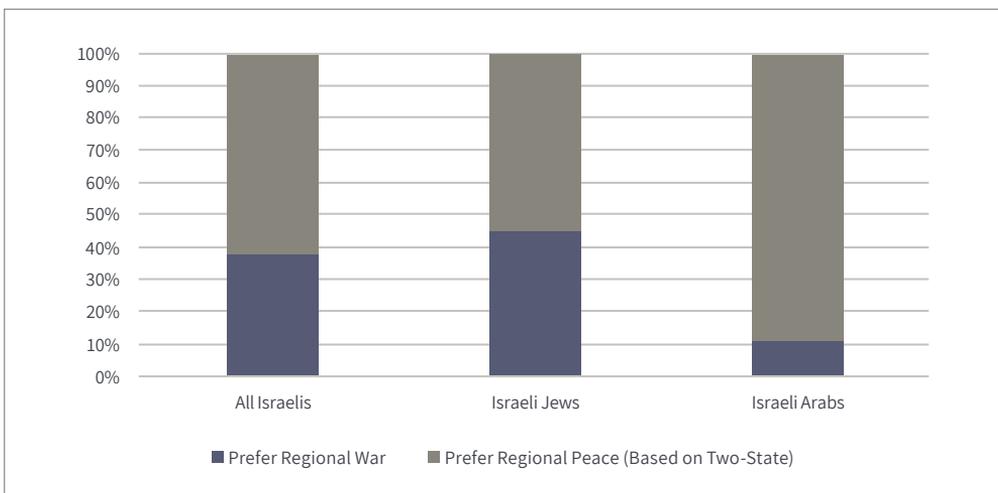


IDI, 2024

FE: As the war progresses, more Israelis support pursuing regional agreements, while fewer back military actions as the primary means to secure Israel's short-term security.

T: Despite experiencing one of its most violent periods and an ongoing government narrative promoting total victory through force, most Israelis still recognise that peace is essential for achieving security. This deep connection between peace and security offers a reason for optimism, challenging the stereotype that peace is merely a pursuit for idealistic left-wingers.

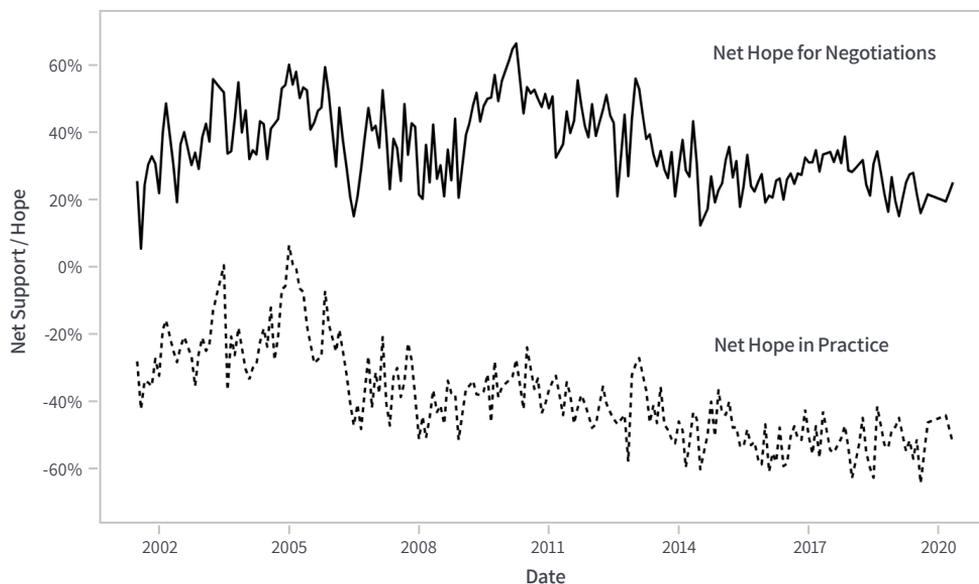
Figure 2.b.3 – Regional War vs. Israeli-Palestinian Peace, 2024



Yakter, 2024

FE: Even after the October 7th war, a July 2024 survey by Dr. Alon Yakter shows 55% of Israeli Jews and 88% of Israeli Arabs prefer peace between Israel and Palestine over regional war.

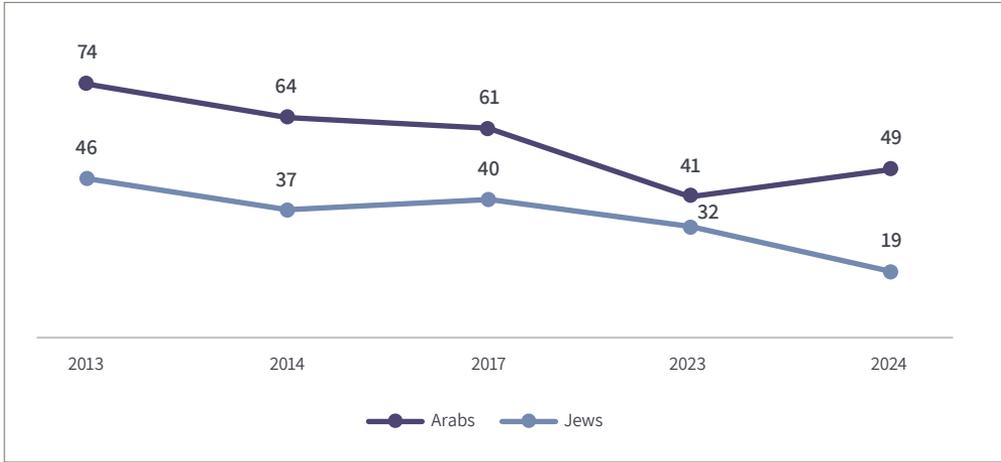
Figure 2.b.4 – The Peace ‘Confidence Gap’, 2002-2020



Yakter & Harsgor, 2022

FE: There is a noticeable gap between the level of support by Israelis for peace negotiations and the belief that peace will be achieved in practice (i.e., the ‘confidence gap’). While support for negotiations remains, there is a growing sense of pessimism regarding the actualisation of peace. This gap has remained consistent within the Israeli public, but there is a negative trend in both support for negotiations and hope for a peaceful resolution.

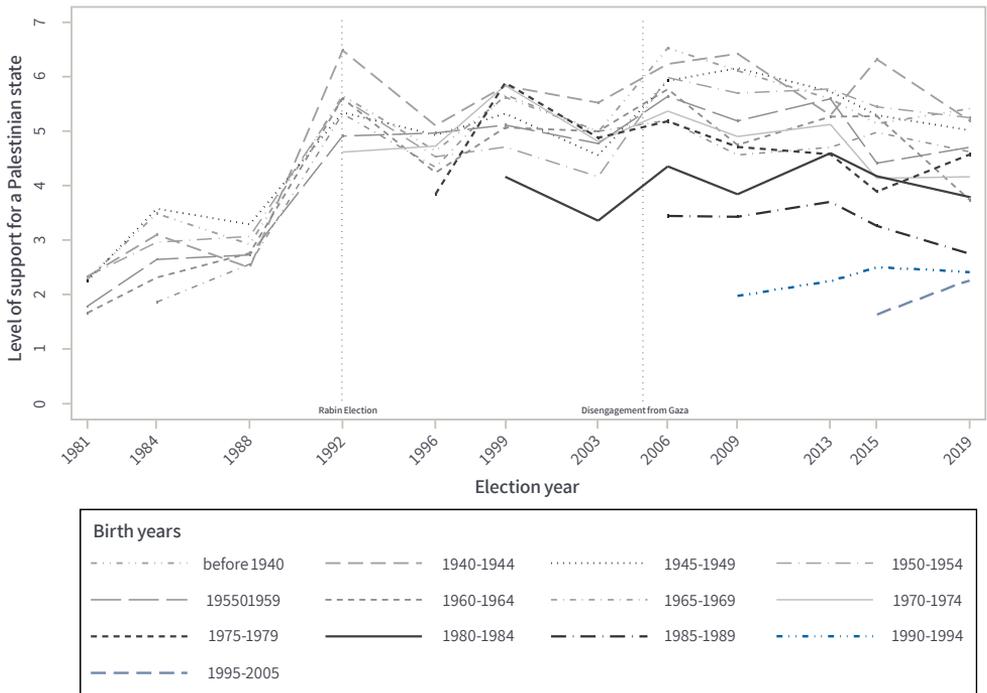
Figure 2.b.5 – Belief in Co-Existence in Jewish and Arab Populations, 2013-2024



Pew, 2024

FE: The 2024 poll reveals a stark contrast in views on peaceful coexistence: only 1 in 5 Israeli Jews believe it is possible, compared to 1 in 2 Israeli Arabs.

Figure 2.b.6 – Generational Support for a Palestinian State, 1981–2019

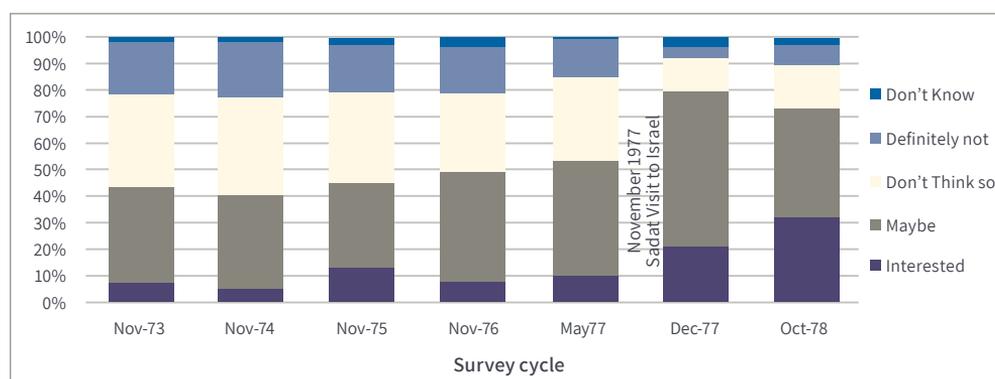


Harsegor, 2024

FE: Younger generations in Israel are less supportive of the creation of a Palestinian state. This ‘hawkish’ generation, born between 1995 and 2005, shows a marked shift in attitudes compared to older generations. Dr. Liran Harsegor’s study indicates that while younger generations have historically been less supportive of a Palestinian state, they tend to become more supportive as they age. The sharp rise in support for a Palestinian state, reflected in the chart, was politically evident in Rabin’s election as Prime Minister in 1992 and the subsequent Oslo Accords.

T: Generational attitudes are shaped by leadership and external events and can shift rapidly. While Israel’s younger generation is currently more right-wing—an anomaly compared to other countries—this could change, offering significant opportunities for the future.

Figure 2.b.7 – Changing beliefs towards peace with Egypt, 1973-1978

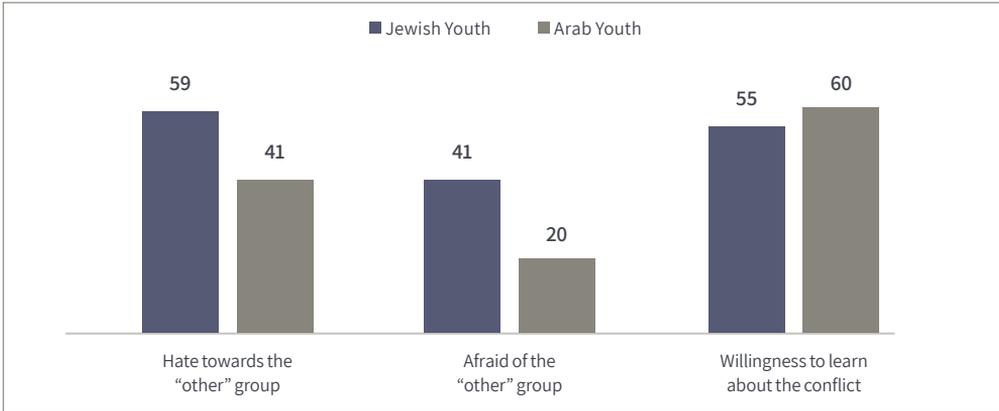


IDI, 1973-1978

FE: Immediately after the Yom Kippur War, most Israelis doubted Egypt’s interest in peace with Israel. However, three years later, over half of the public believed otherwise, and by November 1977, following Sadat’s visit to Israel, the vast majority were convinced of Egypt’s intentions. A peace treaty was signed in March 1979.

T: A historical perspective demonstrates how public opinion can shift significantly within a short period.

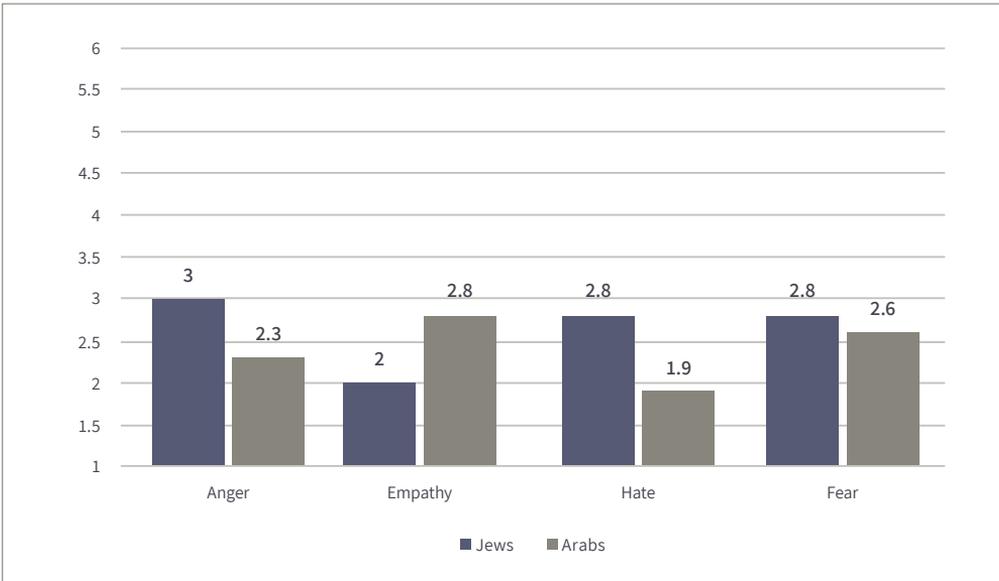
Figure 2.b.8 – High School Students’ Opinions About the ‘Other’ Group (Jewish and Arab), 2024



Friedrich Ebert Foundation, 2023

FE: Jewish pupils show heightened levels of hate and fear toward Arabs, but also a shared willingness to learn about the conflict, suggesting potential for greater tolerance and shifts in attitudes.

Figure 2.b.9 – University Students’ Views on the ‘Other’ Group in Israel, 2024



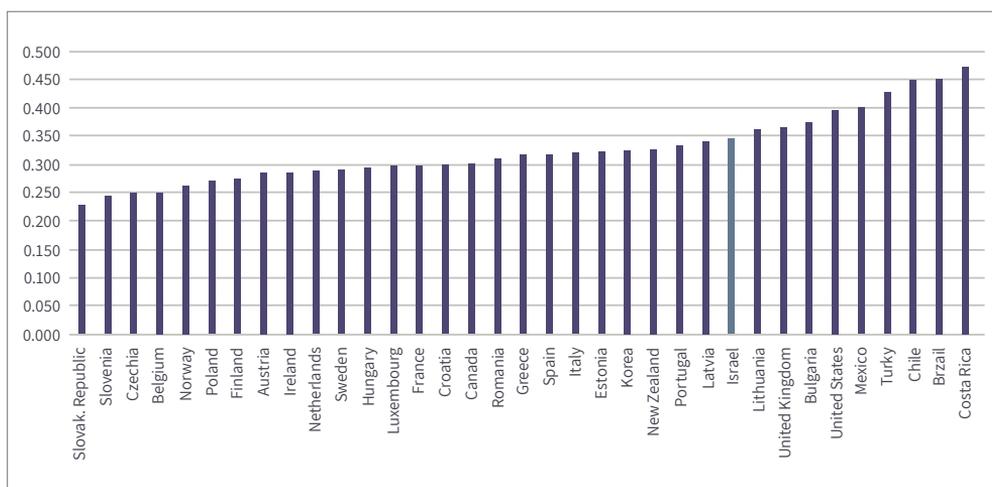
aChord, 2024

FE: University students exhibit lower levels of hate toward the 'other' group, aligning with the 'hawkish generations' trend, which suggests that older generations tend to become more tolerant over time.

2c Societal Fairness

This subsection presents data on the distribution of resources and opportunities within Israeli society, highlighting key indicators of cohesion and fairness. While Israel is a wealthy and innovative country, it remains deeply unequal. Many struggle to make ends meet, with poverty and food insecurity rates among the highest in the OECD. Raising a family is increasingly difficult, and educational standards are in decline. These challenges are further exacerbated by declining investment, sluggish GDP growth, and economic uncertainty stemming from the judicial overhaul, regional conflict, and political turmoil. The data underscores the pressing risks of economic instability, which can drive political radicalisation and violence, but also reveals opportunities to address systemic inequities and chart a more equitable path forward.

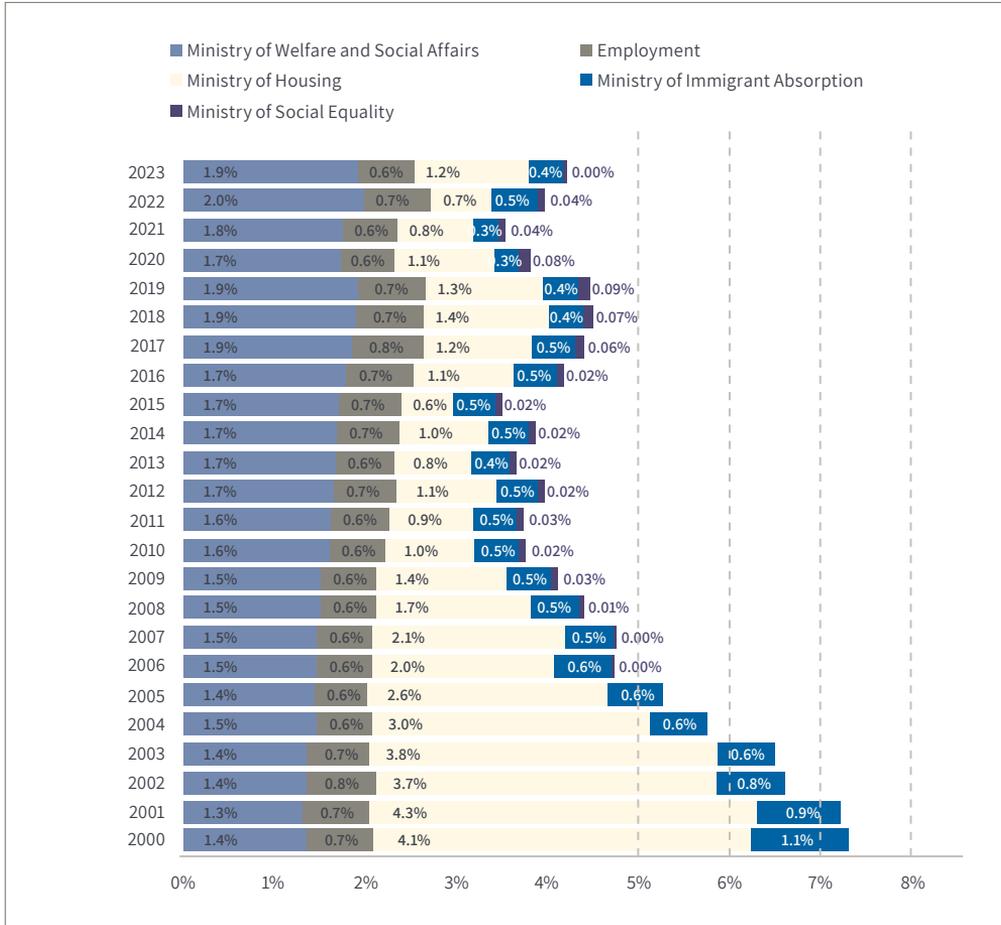
Figure 2.c.1 – Income Inequality, OECD Countries 2022



OECD, 2022

FE: Although the Gini coefficient is a debated, and imperfect measure of inequality, it remains a widely recognised indicator. For years, Israel has been one of the most unequal societies in the OECD. However, due to measures like the 2018 minimum wage increase, Israel's Gini coefficient has improved. In 2011, Israel ranked as the 4th most unequal economy, but by 2022, it had improved to the 8th position.

Figure 2.c.2 – Share of Government Expenditures on Social Welfare, 2000-2023

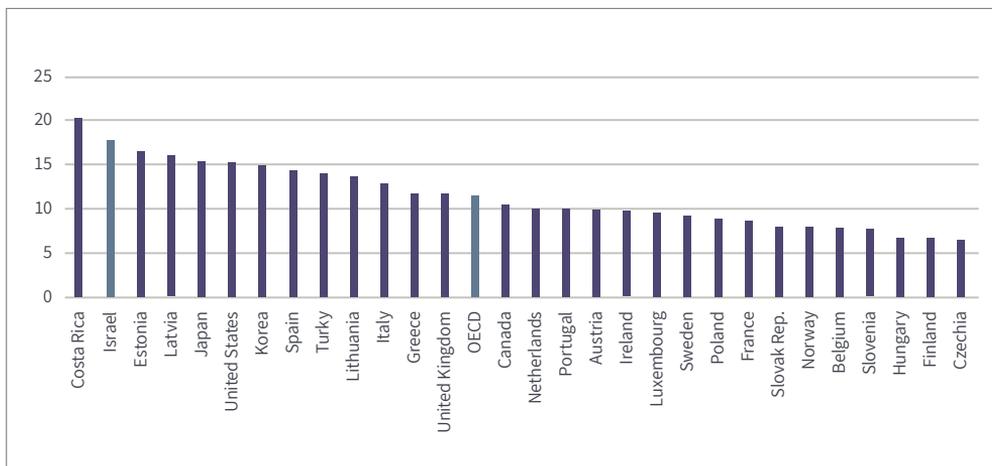


Taub, 2024

FE: Government expenditure on social welfare as a share of the total budget has been dramatically reduced over the past twenty years.

T: While making a significant investment in welfare will be challenging in the coming years due to the cost of war, there remains a substantial opportunity to improve the welfare of Israelis, especially given the ongoing neglect in this area.

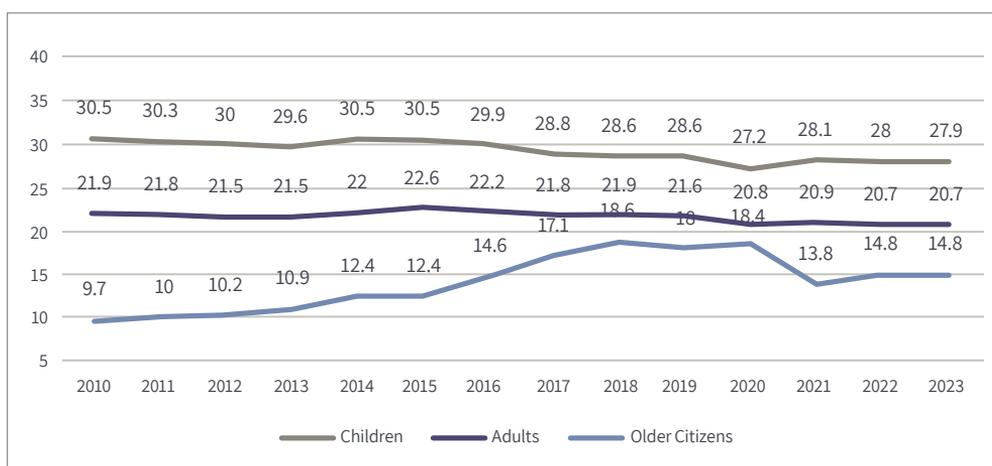
Figure 2.c.3 – Percentage Below Poverty Rate – OECD Countries, 2021



OECD, 2023

FE: One in six people in Israel lives in poverty, with the poverty rate being one of the highest among OECD countries. Data by age group reveals that nearly 30% of children are below the poverty line. This is especially concerning given that Israel is the youngest nation in the developed world.

Figure 2.c.4 – Percentage Below Poverty Threshold by Age Group, 2010-2023



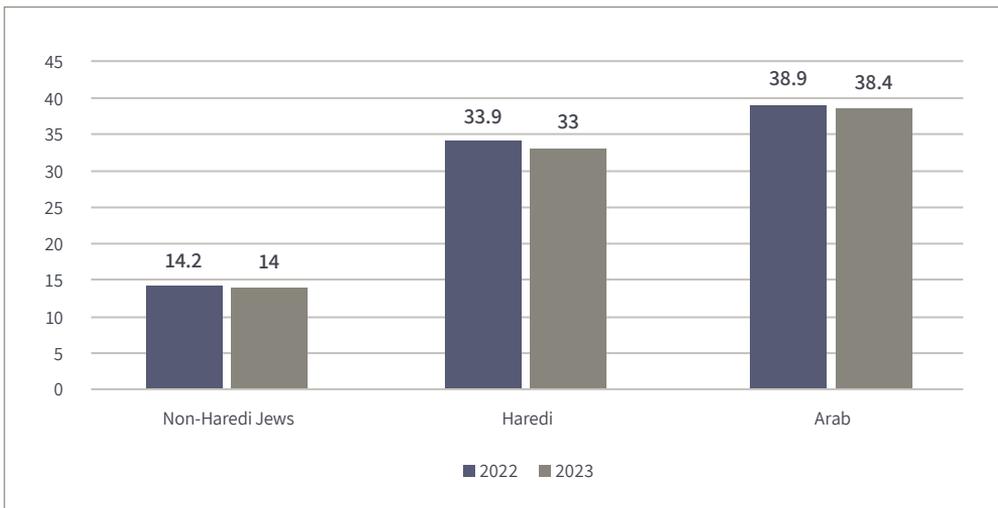
BTL, 2024

FE: In Israel, 27.9% of children, 20.7% of adults, and 14.8% of older citizens live in poverty.

T: Addressing poverty, particularly among children, is a key challenge for Israel's future. The high rate of child poverty not only affects the present but also has long-term

implications for the country's socio-economic development. The younger generation's growing political influence will be shaped by their experiences with inequality and poverty. In addition, the attached graph, which shows poverty rates across different groups, reflects broader economic inequality. As Mike Prashker emphasizes in *A Place for Us All – Social Cohesion and The Future of Israel*, economic disparities are strongly linked to weak social cohesion. These inequalities, particularly among vulnerable groups, undermine trust in institutions and hinder the development of a more unified society.

Figure 2.c.5 - Percentage Below Poverty Rate by Communities, 2022-2023

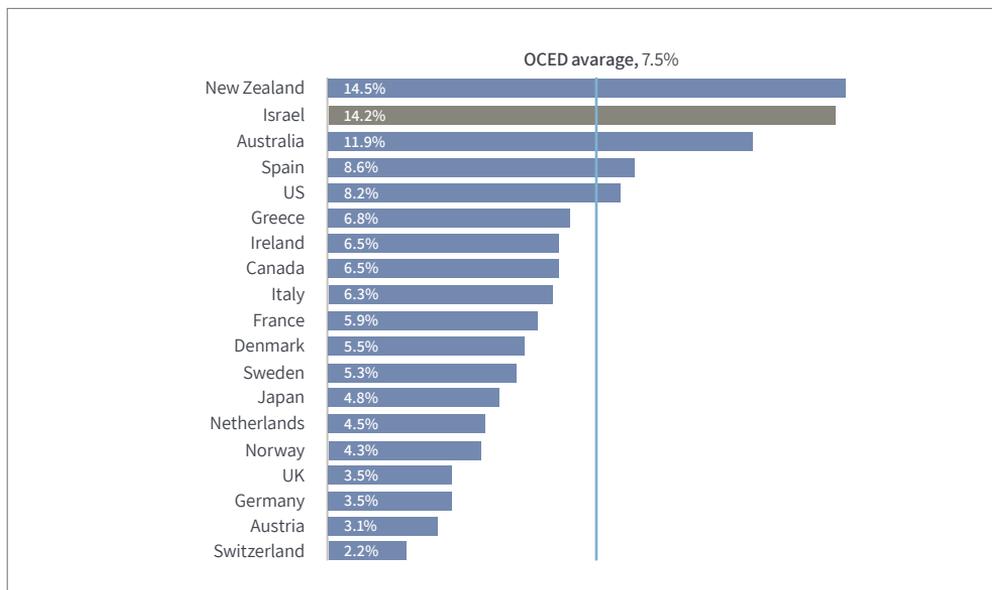


BTL, 2024

FE: The Arab and Haredi communities are the poorest in Israel.

T: Tackling poverty in these groups requires tailored approaches and addresses different challenges. The Haredi community, with significant political power, faces poverty partly due to politically motivated policies. In contrast, the Arab community, historically lacking political power and facing systemic repression, presents a more complex picture.

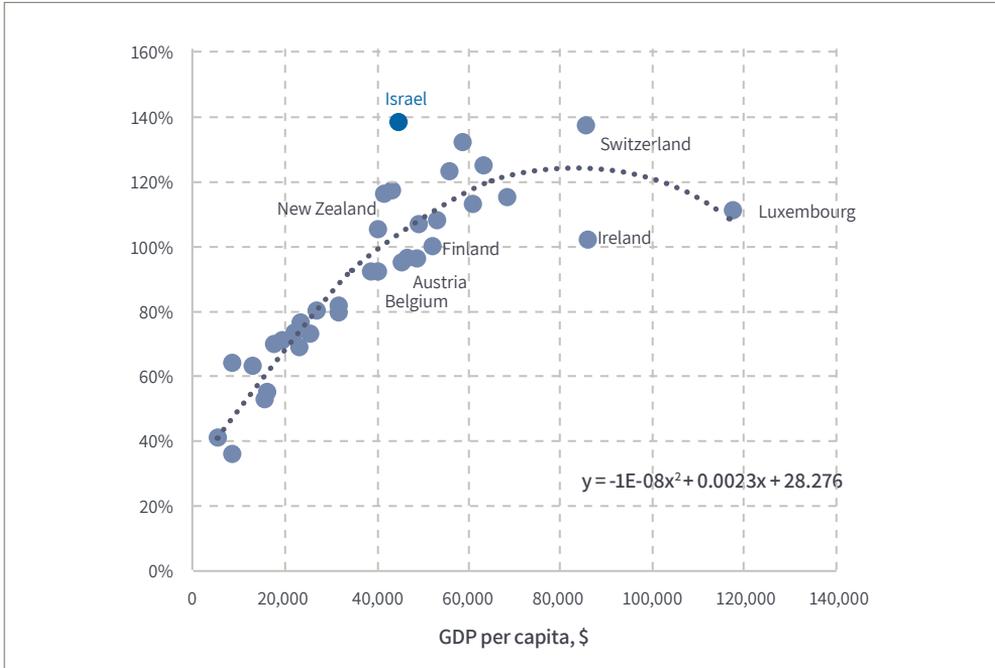
Figure 2.c.6 – Food Insecurity in Welfare States, 2018-2022



Taub, 2024

FE: The high price levels relative to GDP per capita in Israel contribute to the significant proportion of the population experiencing food insecurity, with Israel ranking second highest among OECD welfare states.

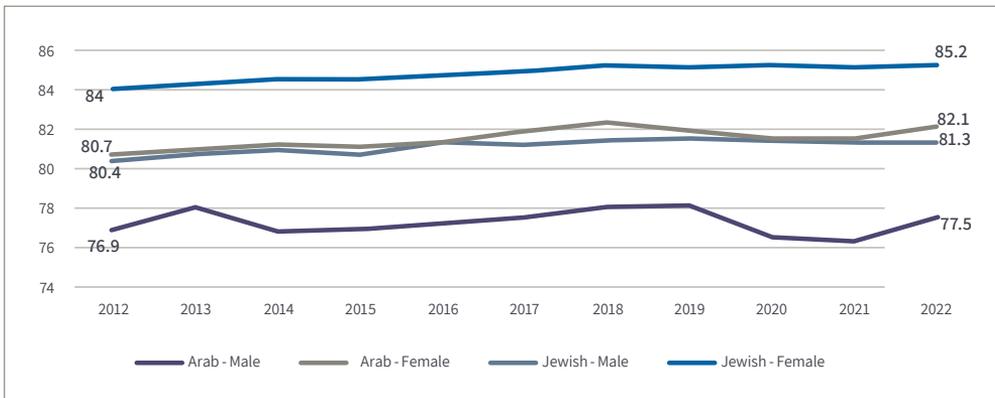
Figure 2.c.7 – Price Level Relative to GDP Per Capita – OECD Countries ,2022



Taub, 2024

FE: Israel is among the most expensive countries to live in within the OECD, with rising costs of living exacerbating poverty, particularly for families with children.

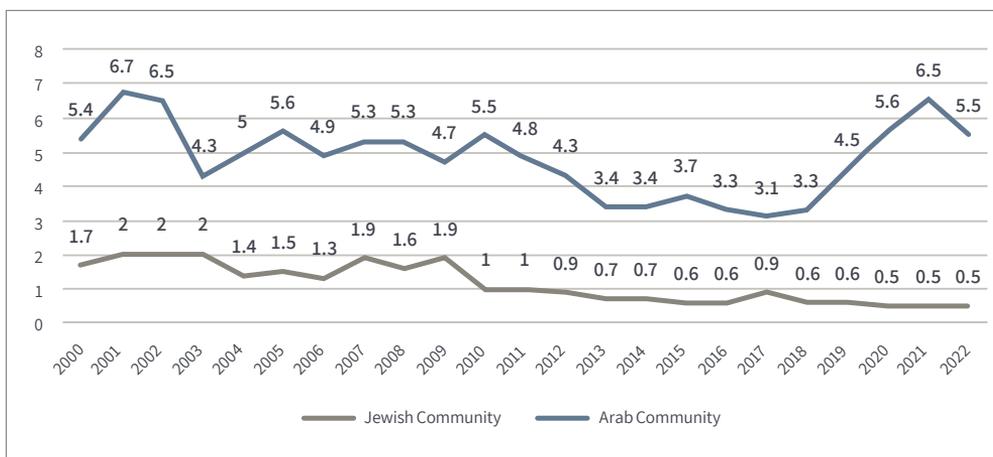
Figure 2.c.8 – Life Expectancy in Israel 2012-2022



Ministry of Health, 2023

FE: Arab male life expectancy in Israel is five years lower than that of Jewish males, while Arab female life expectancy is three years lower than that of Jewish females. These figures highlight significant inequalities between communities despite Israel's overall high life expectancy.

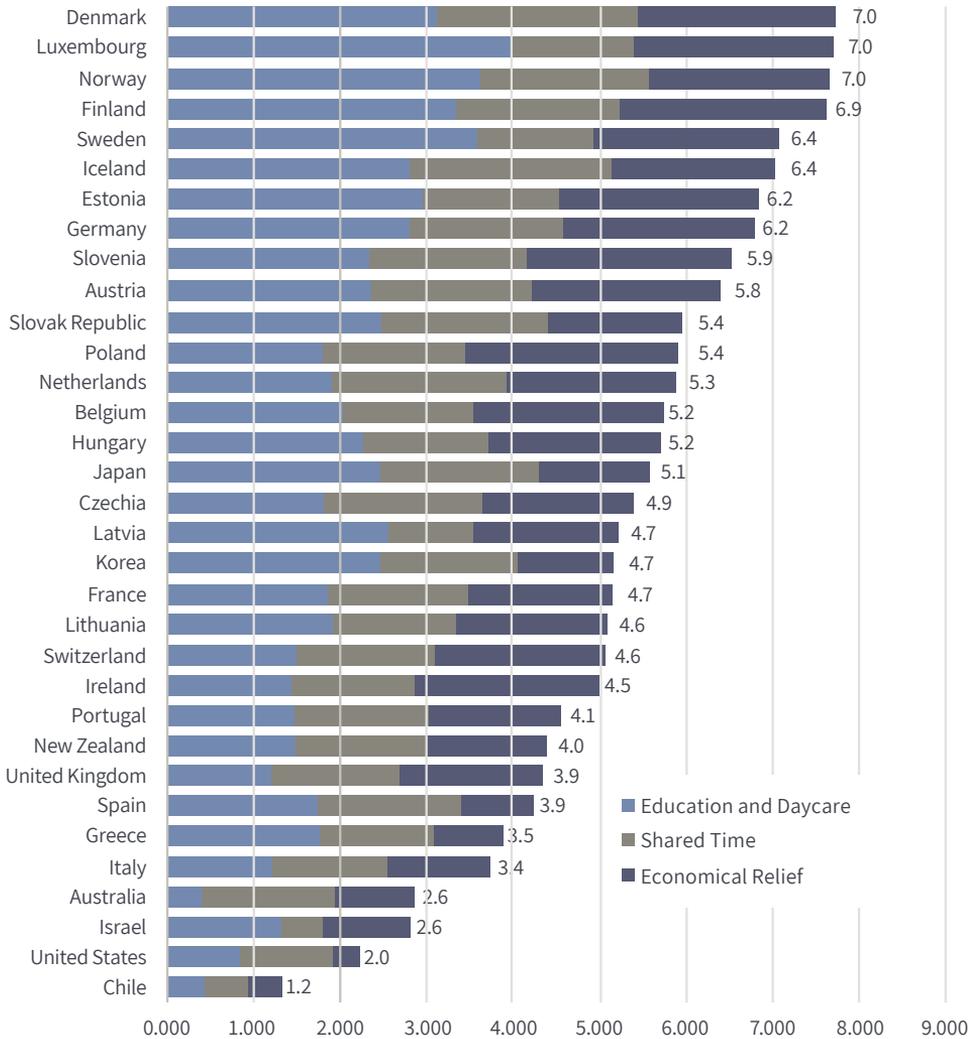
Figure 2.c.9 – Homicide Rates Per 100,000: Comparison Between Jewish and Arab Communities in Israel, 2000-2022



Knesset Data Center, 2023

FE: In 2022, a person from the Arab community in Israel was 11 times more likely to be murdered than a person from the Jewish community.

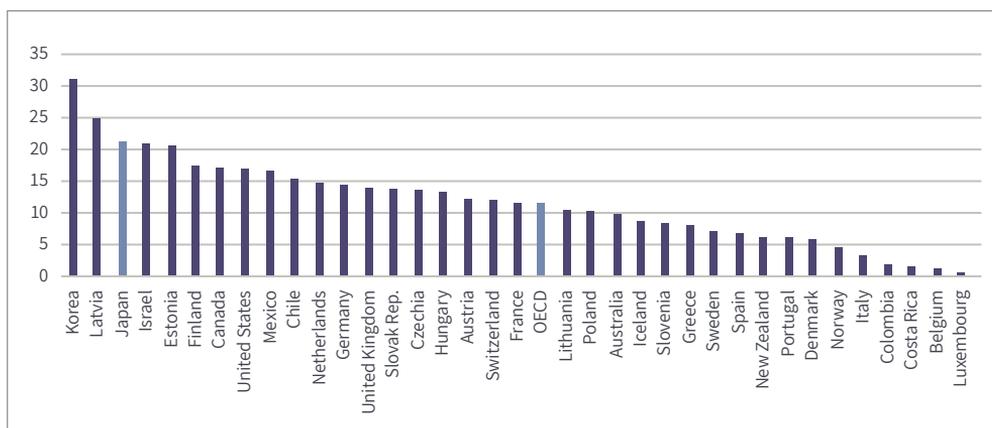
Figure 2.c.10 – The Family Index - How Easy Is It to Raise a Family? 2024



Schecner & Mann, 2024

FE: A recently developed index by the Berl Katznelson Foundation allows for a comparative analysis of Israel’s family-friendly government policies. The index examines factors such as paid parental leave, early childhood education, and healthcare services. The data reveals that Israel ranks far behind most countries, positioned alongside the United States, where such support systems are minimal. A higher score on the index indicates a more equitable and supportive governmental framework for raising a family

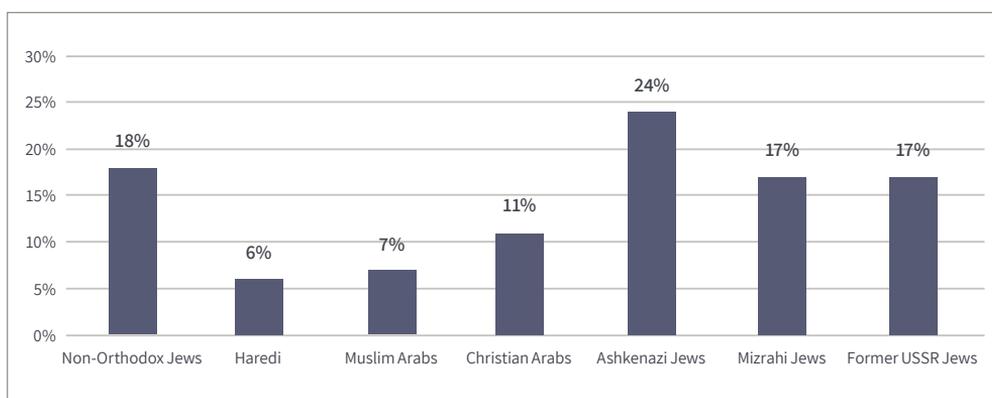
Figure 2.c.11 – Gender Wage Gap in OECD Countries (Percentage of Median Earnings of Men), 2022



OECD, 2022

FE: Israel has a significant gender wage gap of nearly 21%, ranking as the fourth highest among OECD countries.

Figure 2.c.12 – Social Mobility in Israel: Probability of a Child Reaching the Top 25% if Parents Are in the Bottom 25%, by Ethnicity, Community, and Religion, 2022



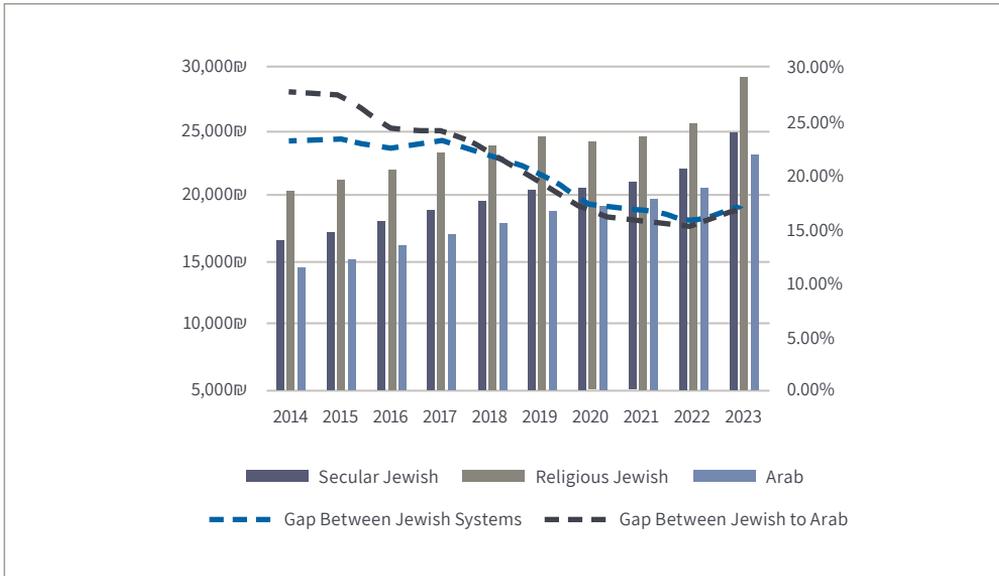
Gordon & Flug & Kenneth Portal, 2022

FE: Social mobility in Israel is highest among Ashkenazi Jews, with 24% of children from the bottom 25% reaching the top 25%. Former USSR Jews and Mizrahi Jews follow at 17%, while Haredi Jews and Arabs rank significantly lower.

T: This data highlights the relatively successful integration of the USSR Jewish community, which, as a newer migrant community, has rapidly closed the gap with Mizrahi Jews.

However, it also underscores the enduring ethnic-based structural inequalities in opportunities within Israel.

Figure 2.c.13 – Annual Expenditure per Pupil (1st to 12th Grade) in Israel - Jewish and Arab Education Systems, 2014-2023

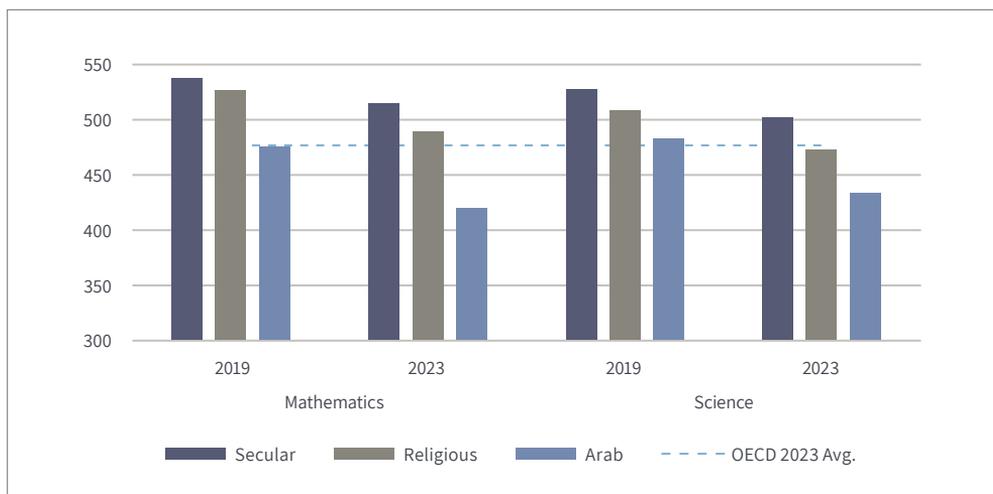


Ministry of Education Finance System, 2024

FE: Israel subsidises the religious Jewish education system more than other education systems, despite recent reductions in the funding gap. The gap remains about 16% in favour of the religious education system, with this preferential funding also evident when compared to the Arab education system.

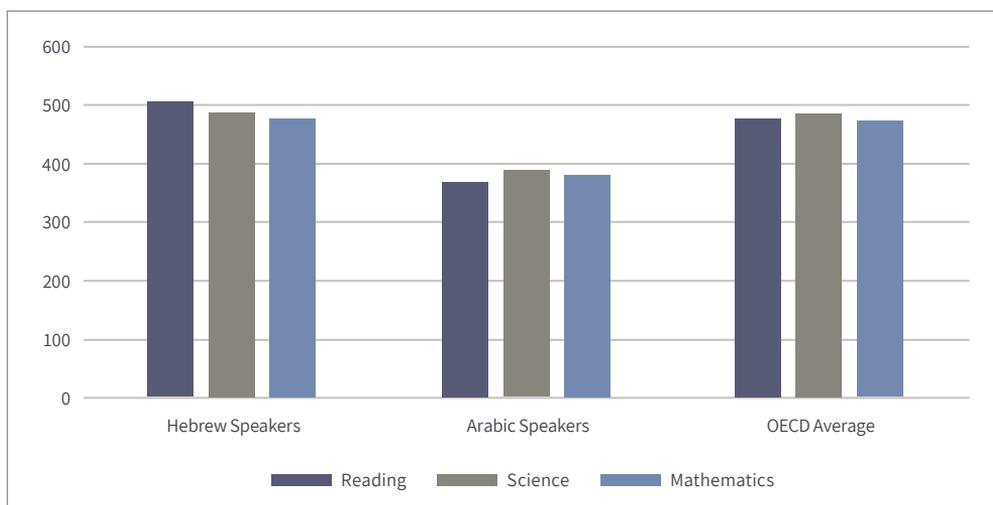
T: Initiatives promoting liberal and democratic education are essential but insufficient to counteract the significant discriminatory investment in anti-liberal education within independent streams in Israel. Meaningful change requires efforts at the government or national campaign level and, in the long term, structural reforms—such as dissolving the four separate school streams or at least softening divisions through shared training, study, and teaching opportunities.

Figure 2.c.14 – TIMSS Educational Test Score in Israel – 8th Grade, by Education System, 2019-2023



Ministry of Education, 2024

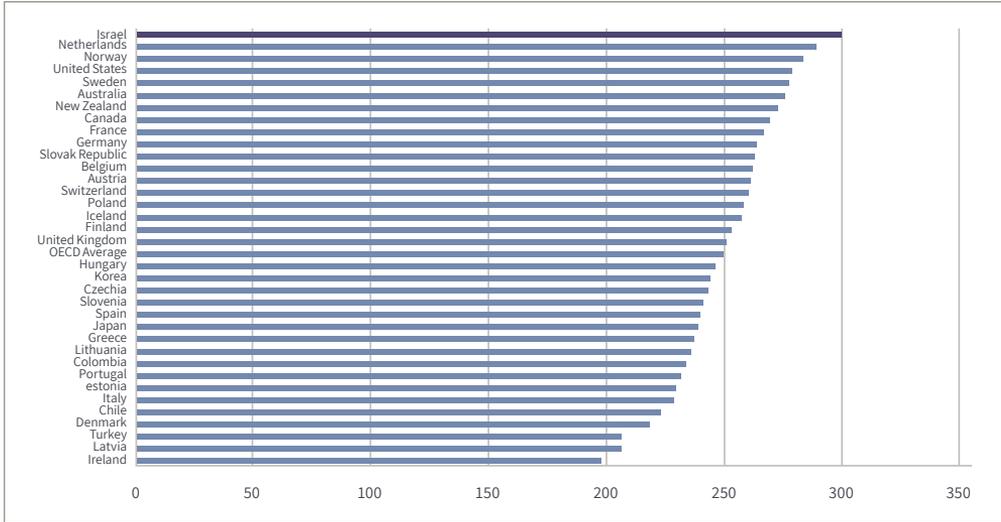
Figure 2.c.15 – PISA Educational Test Score in Israel – 9th Grade, by Primary Language, 2022



OECD, 2023

FE: Israeli students' performance in international education assessments is on a steady decline, with scores falling below the OECD average across both religious and Arab communities.

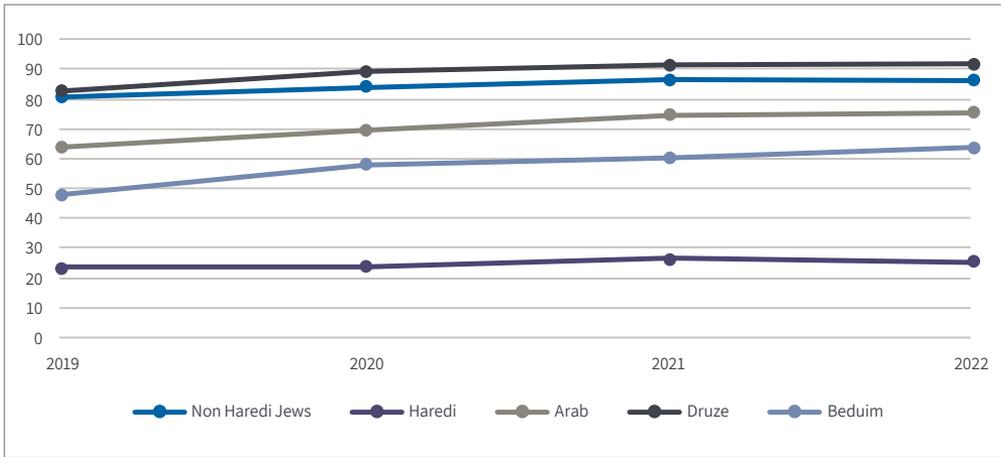
Figure 2.c.16 – Within-Countries Gaps in PISA Educational Test Score – 9th Grade Pupils, OECD Countries, 2022



OECD, 2023

FE: Israel has the highest level of disparities in student achievement among OECD countries, underscoring significant inequities within its education system.

Figure 2.c.17 – High-School Diploma Eligibility Rates Among 12th Graders by Communities, 2019-2022

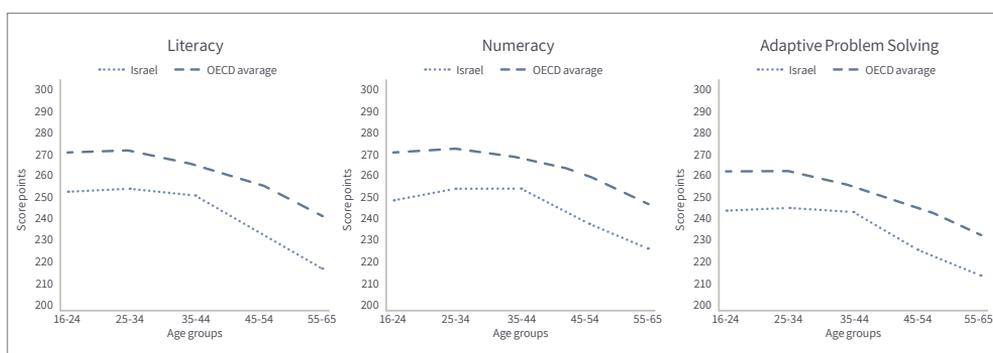


Ministry of Education, 2023

FE: Diploma eligibility rates remain very high and stable among Druze and non-Haredi Jews, while rates in Arab and Bedouin communities are increasing but still significantly lag behind. The Haredi community remains almost entirely outside the system, with a diploma eligibility rate of less than 30%.

T: While performance in international tests declines, stagnant or rising diploma eligibility rates in some communities may indicate a decrease in the overall quality of education in Israel.

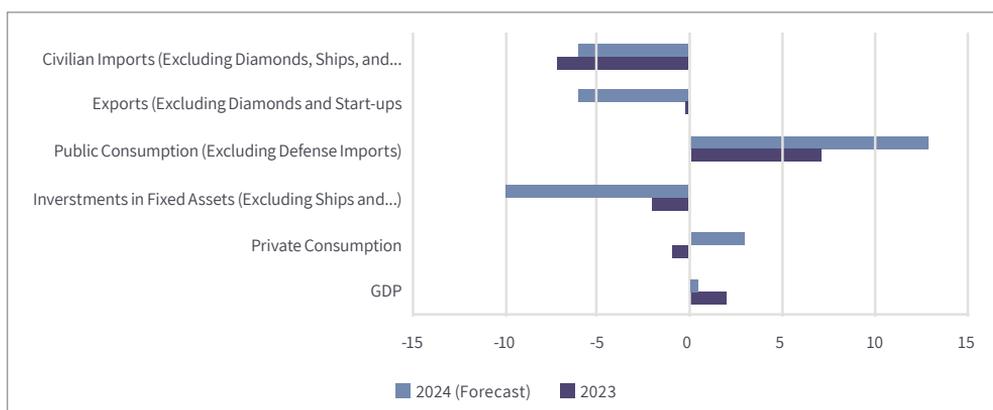
Figure 2.c.18 – Israel’s Adults’ Skills in Comparison to OECD Average, 2024



OECD, 2024

FE: The skills of Israeli adults are significantly below the OECD average across all age groups in literacy, numeracy, and adaptive problem-solving.

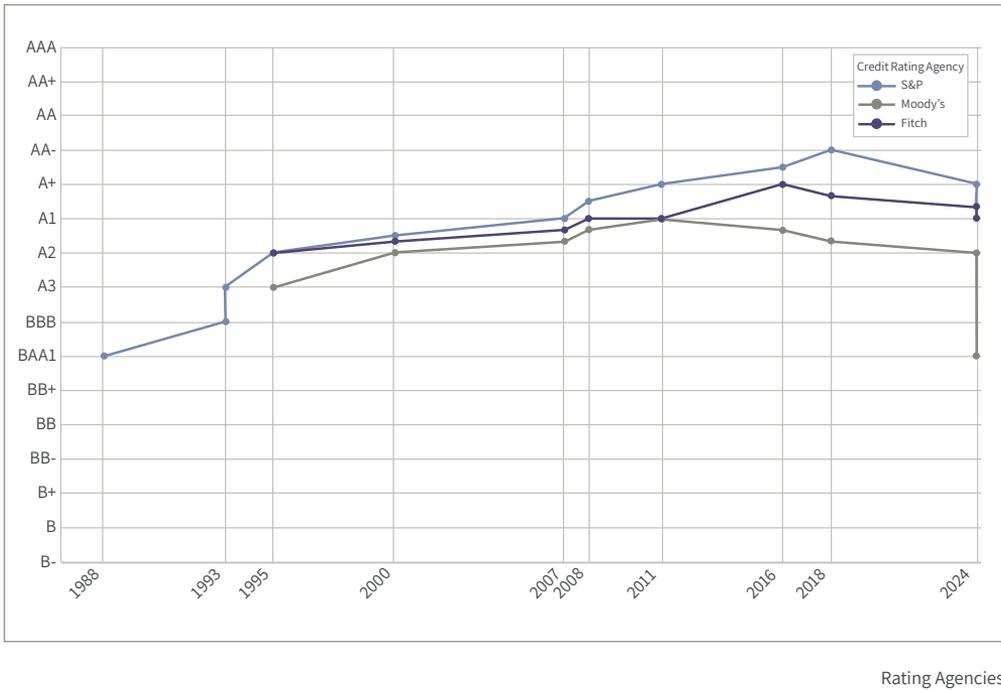
Figure 2.c.19 – Market Indicators Post Judicial Overhaul and October 7th, 2023 and 2024 (forecast)



BOI, 2024

T: These data emphasize some of the existing challenges in Israel’s way for a fairer society. One main concern in the near future in Israel is the potential for an economic crisis post-war. Israel is experiencing the withdrawal of financial investors and the price of having 300,000 people in reserve duty. Most market indicators predict that Israel is facing an unstable economic crisis. The rise in public consumption is an economic illusion because the government fuels it.

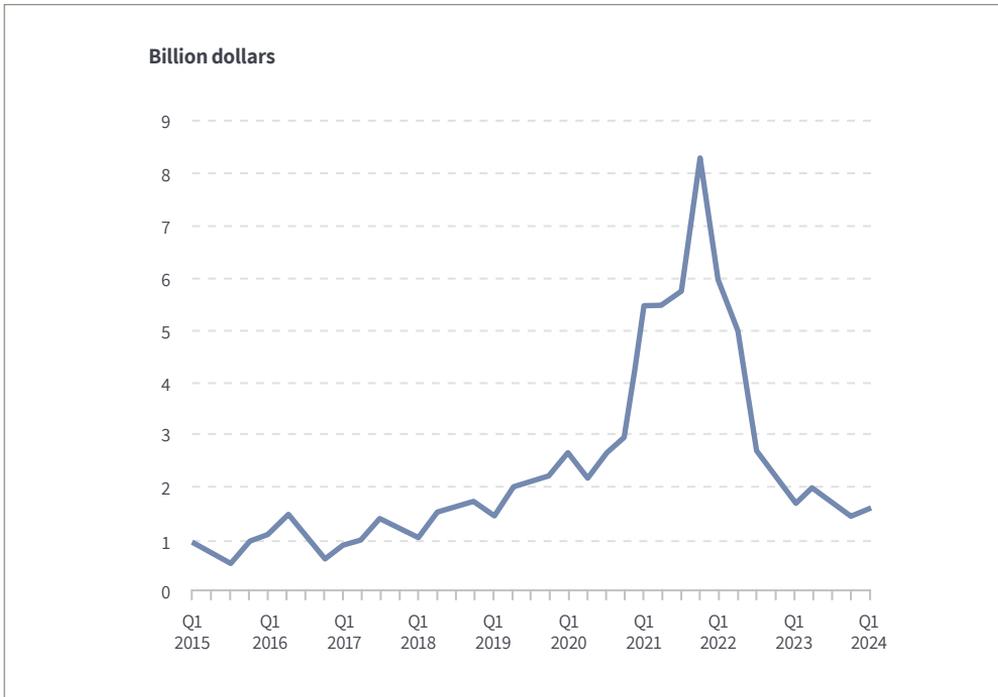
Figure 2.c.20 – Israel’s Credit Rating History by Agency – 1988-2024



Rating Agencies

FE: The risks to Israel’s economy have been reflected in its credit rating, which hit its lowest level in 2024 after being downgraded twice by all major rating agencies.

Figure 2.c.21 – High-Tech Investments in Israel, Q1 2015-2024



Taub, 2024

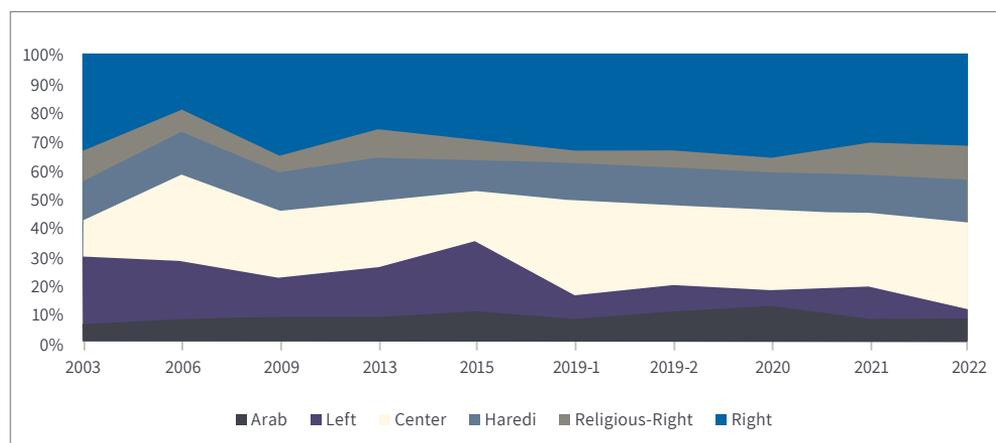
FE: High-tech investments in Israel have seen a sharp decline, dropping from all-time highs in 2021 to levels last observed a decade ago.

Section 3: Political Trends and The Overton Window

This subsection presents data on the shifting Overton Window in Israel—the spectrum of political ideas and policies considered acceptable in public discourse. Measuring these shifts is not straightforward, as the boundaries of what can and cannot be said are often invisible to those within them. Nonetheless, a range of indicators reveals how the Overton Window has evolved, with the data pointing to a pronounced rightward shift in recent years, reflecting broader transformations across the political spectrum.

The section is divided into two parts. The first focuses on general political trends, highlighting the decline of the left, the rise of the centre and hard right, and the connection between socio-economic status and voting patterns. The second delves into the radicalisation of political rhetoric, particularly within Likud, and shifts in voter self-perception. It illustrates how the Israeli right has moved further to the extreme, while the left and its associated views have increasingly been relegated to the margins of public legitimacy.

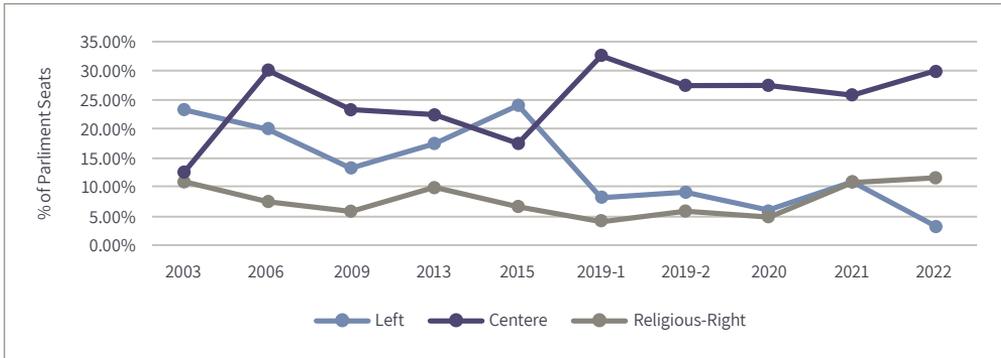
Figure 3.1 – Political Representation in the Knesset, 2003–2022



Board of election

FE: The political Left in Israel is at its lowest point, while secular right-wing parties—such as Likud and Yisrael Beiteinu—have remained relatively stable. In contrast, the Religious Right and Haredi parties have reached their highest levels of influence.

Figure 3.2 – Trends in Percentage of Seats in the Knesset: Left-Centre and Religious Right, 2003–2022

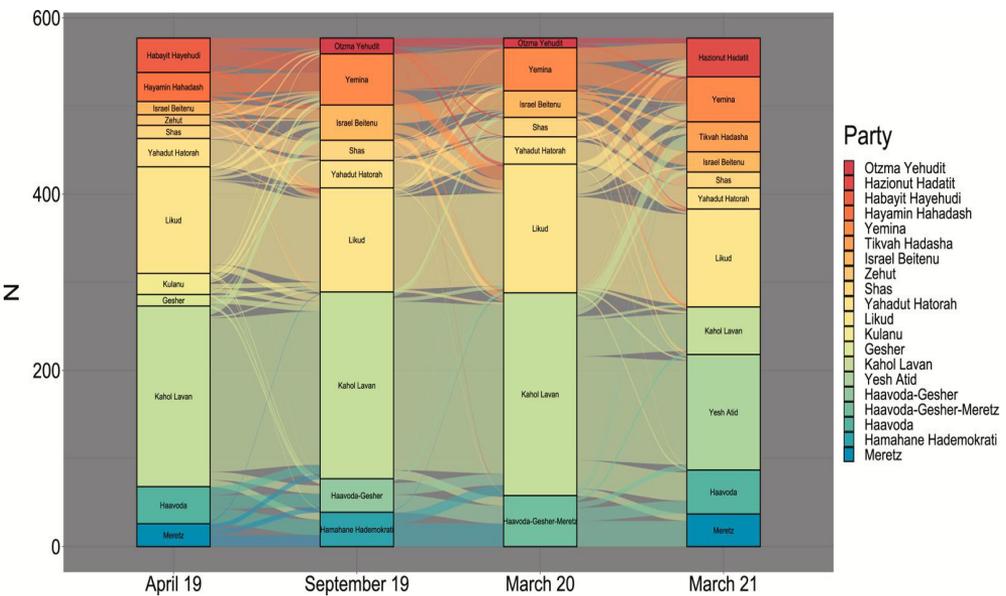


Board of election

FE: For the first time, following the 2022 elections, the share of Knesset seats held by the Left fell below those held by the Religious Right.

T: The rise of the radical right in Israel has occurred alongside the growth of the political centre and the decline of the Left, highlighting the significant rightward shift in Israeli politics and public opinion since 2003.

Figure 3.3 – Voter Movement Between Parties in Israel, 2019–2021

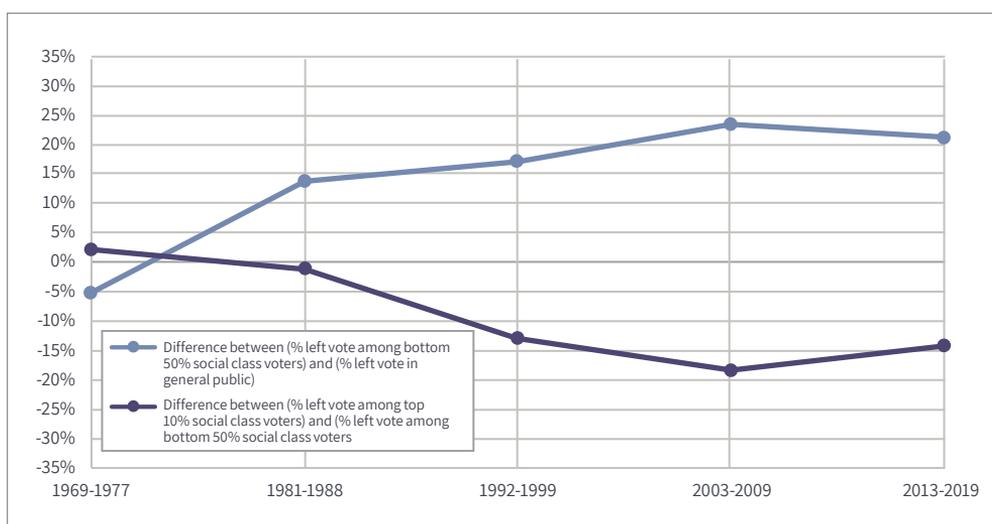


Gidron & Sheffer & Mor, 2022

FE: The Likud remained stable across all four election cycles between 2019 and 2021, with only the ‘Yemina’ party (headed by former Prime Minister Bennett) successfully attracting voters from the ‘pro-Bibi’ camp to the ‘anti-Bibi’ camp.

T: Despite efforts by the Israeli Left and Centre over the past decade to align with the ‘Soft Right’ by adopting more right-wing policies, particularly on peace and security, this strategy has proven unsuccessful. The Centre has grown at the expense of the Left but has largely failed to attract voters from right-wing parties.

Figure 3.4 – Socioeconomic Status of Left-Wing Voters in Israel, 1969–2019

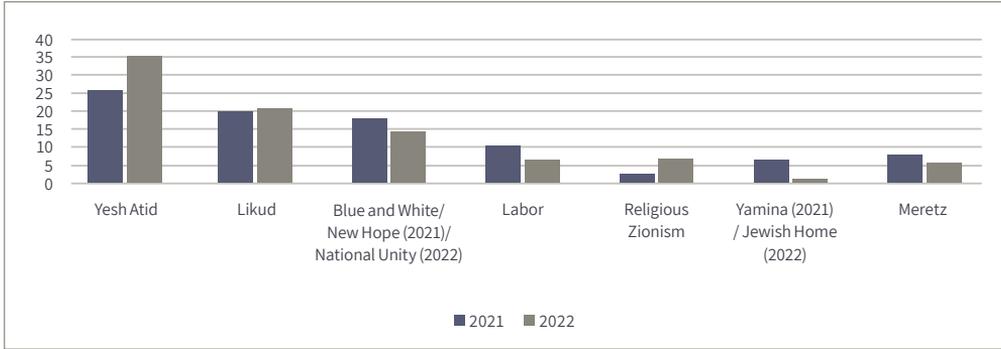


Berman, 2020

FE: The Left parties in Israel have seen a shift in the socio-economic status of their voters. The top 5 socio-economic percentiles are more likely to vote for the Left than the bottom 5. This trend has grown since the 1977 elections, with some decrease by the 2019 elections.

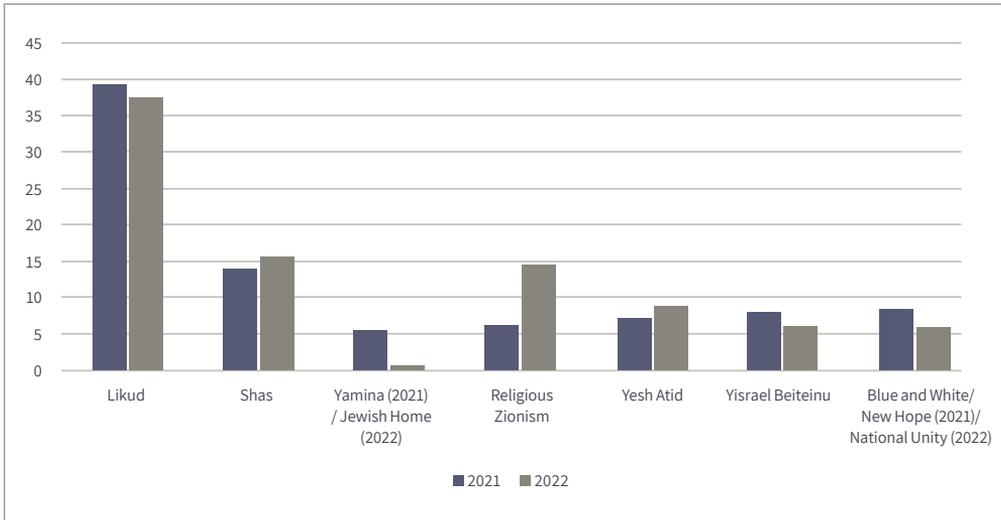
T: While there may be opportunities for left-wing parties to expand their base among lower socio-economic groups, further research is needed to pinpoint which segments hold real potential for the Left. Calls to ‘go to the periphery’—staunch Likud strongholds like Ofakim or Dimona—are common. However, the data below (figures 3.5-3.8) suggests that central cities such as Petah Tikva, Kfar Saba, and Rishon Lezion, along with larger southern cities, offer significant opportunities as they are less dominated by Likud than traditional strongholds.

Figure 3.5 – Voting Distribution in Israel’s Central District Wealthy Cities (% of All Votes), 2021–2022



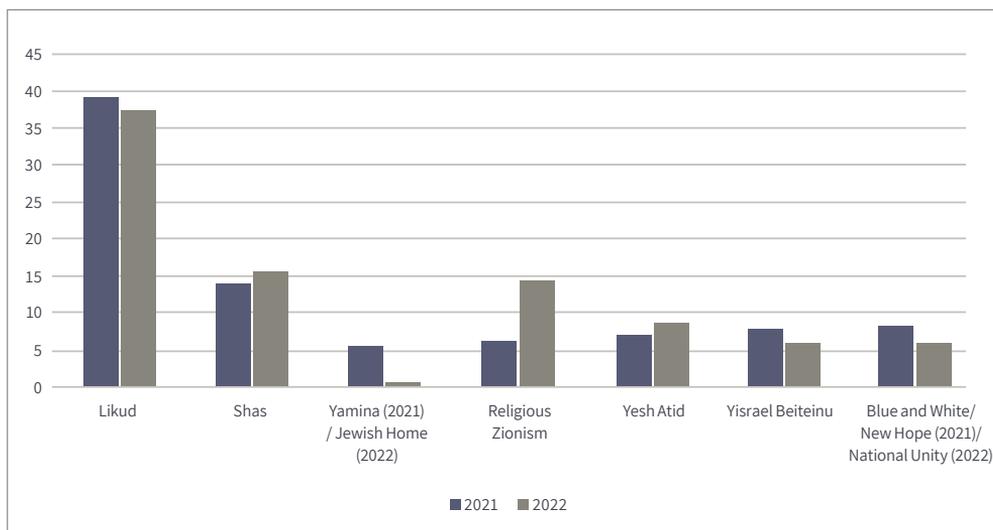
Rahat, 2022

Figure 3.6 – Voting Distribution in Israel’s Development Towns (% of All Votes), 2021–2022



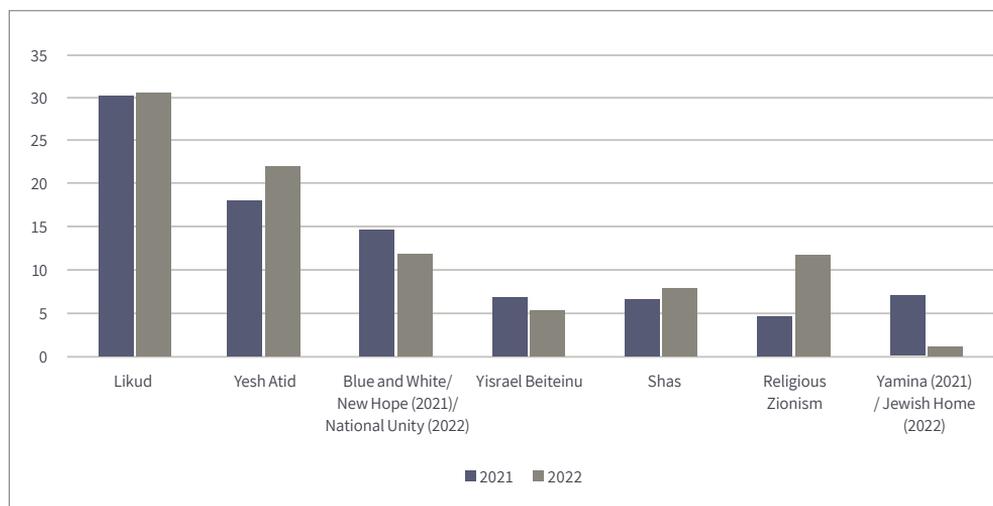
Rahat, 2022

Figure 3.7 – Voting Distribution in Southern Cities of Israel (% of All Votes), 2021-2022



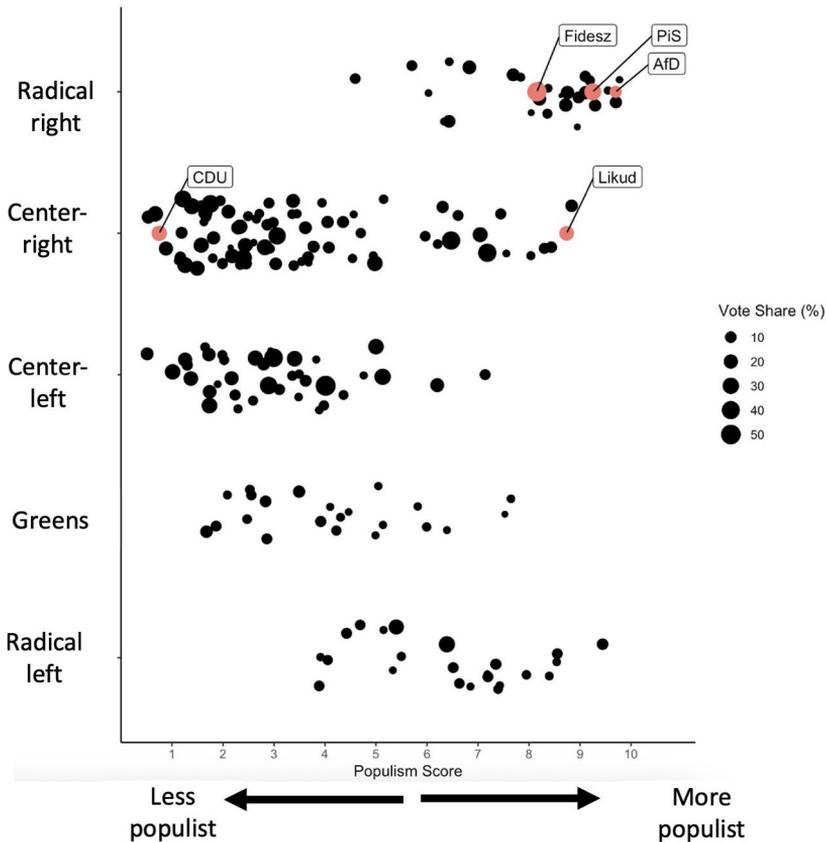
Rahat, 2022

Figure 3.8 – Voting Distribution in Israel’s Central District Middle-Class Cities (% of All Votes), 2021-2022



Rahat, 2022

Figure 3.9 – Comparison of Right-Wing Populism: Likud and European Parties

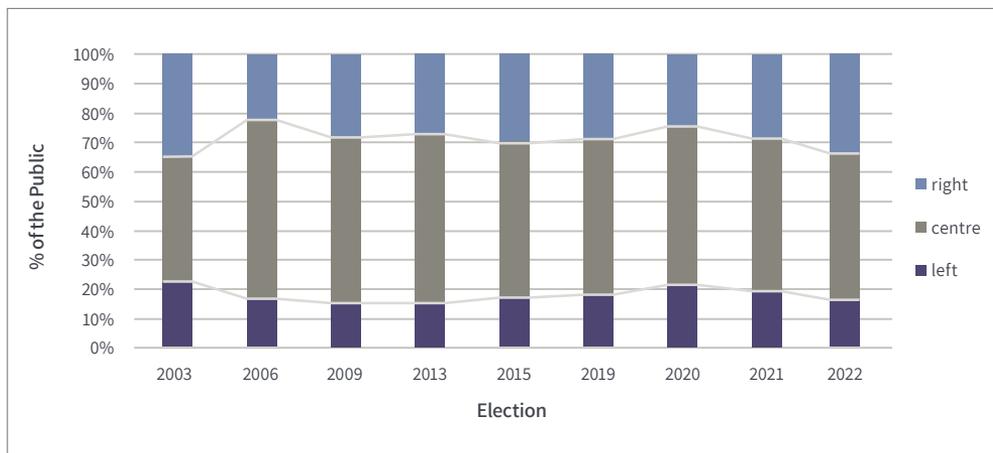


Gidron, 2023

FE: The Likud is a populist party, more extreme than some of the most far-right parties in Europe (such as AfD, Fidesz and PiS). This is a unique development, as most far-right populist parties typically (1) emerge at the fringes of political systems, outside government, and (2) cooperate with centre-right parties while remaining more extreme than them. The Likud, however, has transformed from a centre-right to a radical right party while remaining in government.

T: This underscores the extent of radicalisation within the Israeli centre-right, which has shifted the Overton Window significantly to the right. This shift might explain how Israeli politics evolved from banning the Kahanist extremist party in the 1980s to accepting its political successor into the government in 2023.

Figure 3.10 – Voter Self-Identified Political Position in Israel, 2003–2022

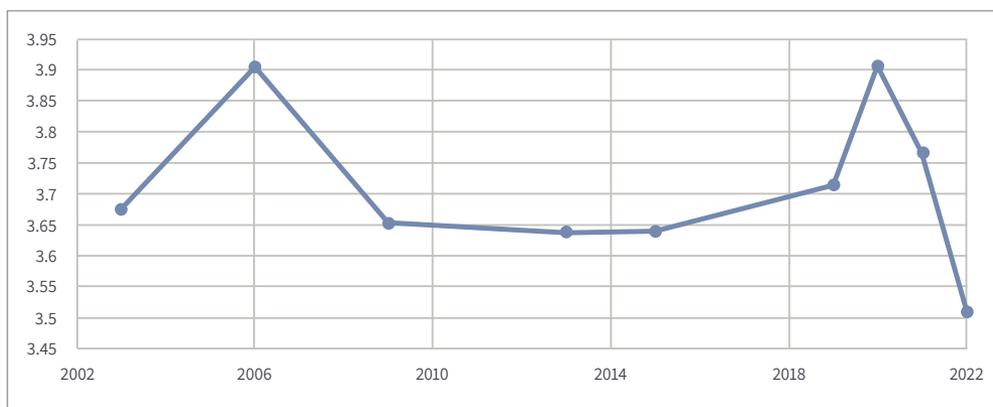


INES

FE: More Israelis self-identify as ideologically right than left. In most elections, when the political centre gains affiliation, it does so at the expense of the left. Interestingly, when identification with the left grows, the centre tends to benefit as well.

T: This trend highlights the delegitimisation of the left, reflecting a rightward shift in the Overton Window. Views traditionally associated with the left in Israel—such as peace advocacy and opposition to the occupation—are increasingly seen as outside the mainstream and illegitimate by many.

Figure 3.11 – Median Political Self-Identity Leaning Score, 2002–2022

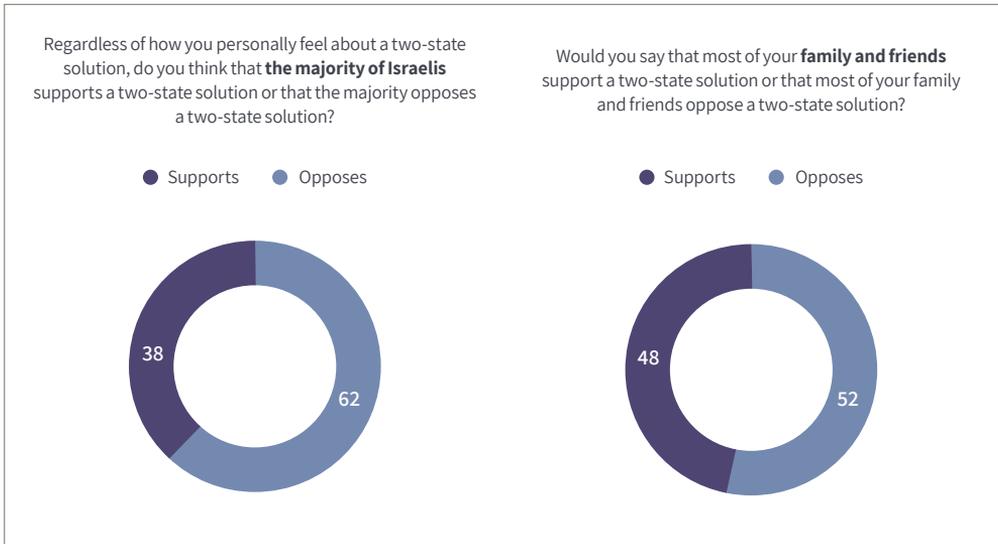


INES

FE: In 2006 and 2019, the Israeli public positioned itself significantly more to the left, contrasting with a notable shift toward the right in the 2021 and 2022 election polling.

T: The centre thrives when the left is seen as more legitimate.

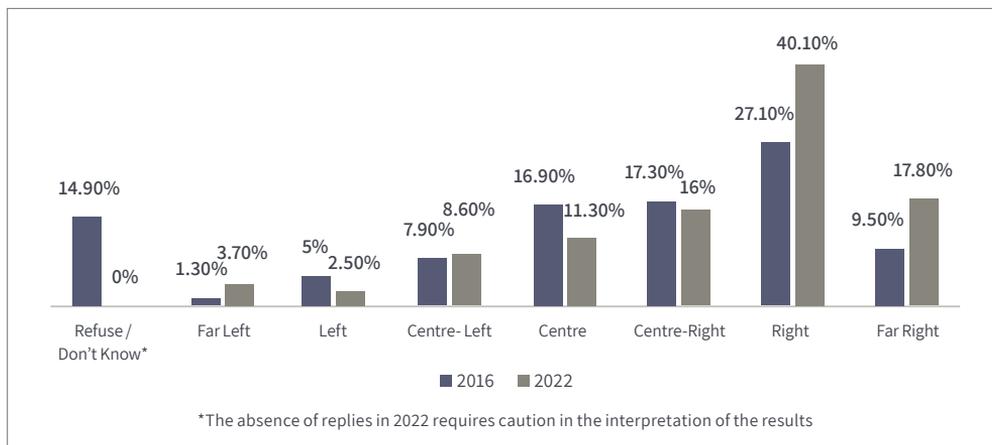
Figure 3.12 – Perception of Support for the Two-State Solution: All Israelis vs. Family and Friends, 2022



Molad, 2022

T: While a majority of Israelis support the two-state solution, most believe this view is held by only a small minority nationally. This disconnect, likely driven by a biased media discourse and the lack of effective political representation advocating for a two-state solution, is self-reinforcing, fostering a sense of marginalisation among peace supporters and cementing an Overton Window that excludes pro-peace views.

Figure 3.13 – Political Positions of Jewish Youth in Israel, 2016–2022



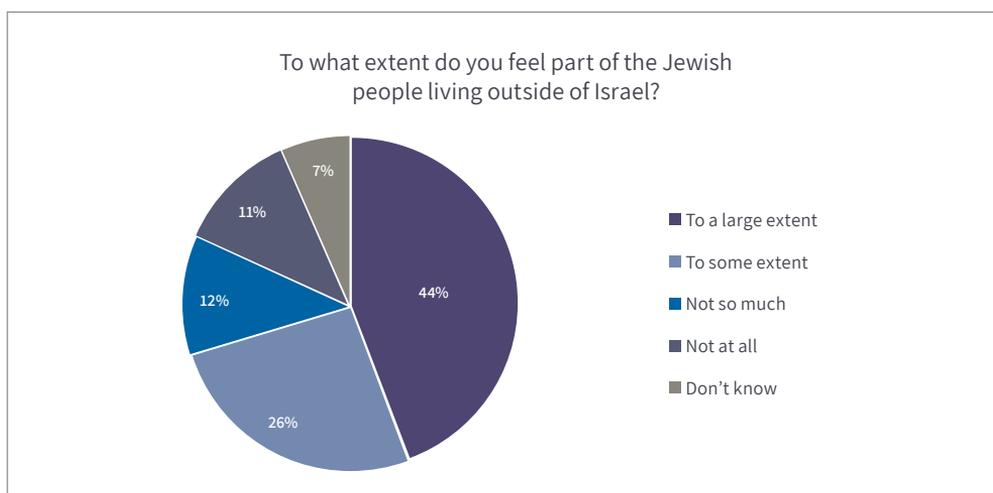
Friedrich Ebert Foundation, 2023

FE: The majority of Jewish youth in Israel now identify as right- or far-right-affiliated, reflecting a significant upward trend in recent years.

Section 4: Partnership

The relationship between World Jewry and Israel is ever-changing. Long-standing generational divides persist, with younger people feeling less connected to Israel than their elders, while new challenges continue to emerge. The aftermath of October 7th and the war has fuelled rising antisemitism, alongside widespread rejection of Netanyahu's government by many Jews outside Israel. This section presents data on this complex relationship, covering public opinion in Jewish communities worldwide, experiences of antisemitism, and patterns of charitable giving, providing a portrayal of the evolving ties between Israel and world Jewry.

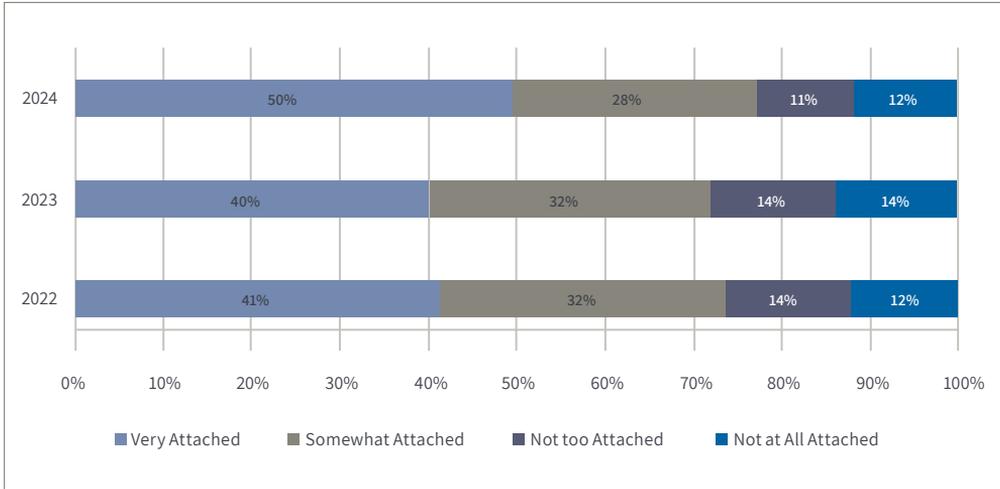
Figure 4.1 – Israelis' Attachment to World Jewry, 2023



CBS Social Survey, 2023

FE: Seventy percent of the Israeli Jewish population feels a connection to the Jewish world outside of Israel.

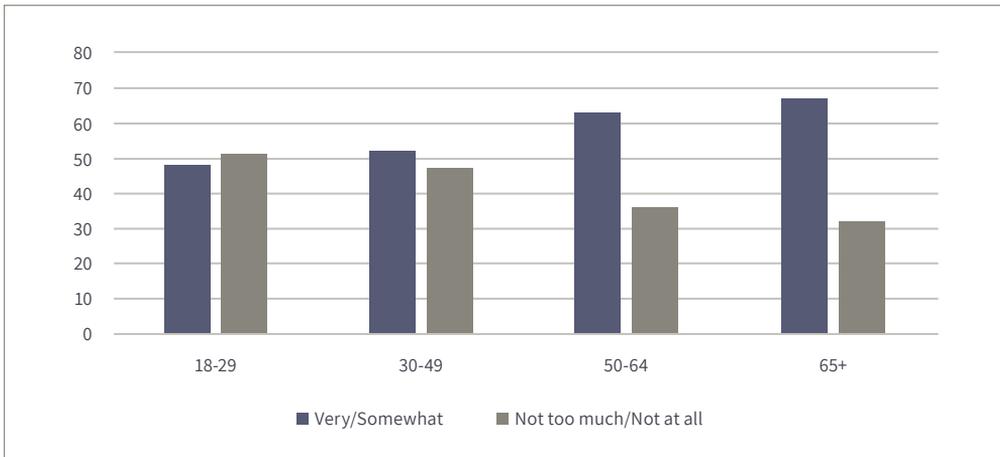
Figure 4.2 – Attachment Levels of British Jews to Israel, 2022–2024



Boyd, 2024

FE: Seventy-eight percent of UK Jews and 90% of US Jews feel somewhat or strongly attached to Israel.

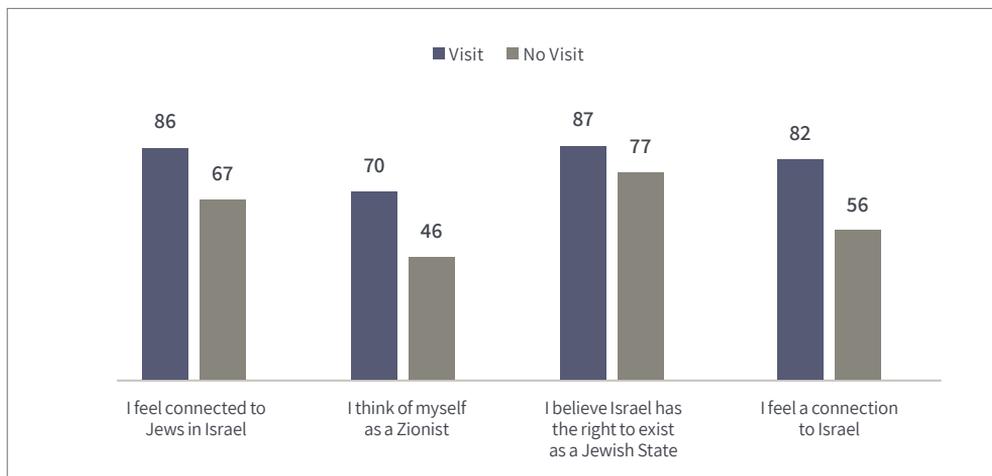
Figure 4.3 – Attachment Levels of U.S. Jews to Israel by Age, 2020



Pew, 2020

FE: Younger generations of Jews in the US show less attachment to Israel, with those aged 18–29 more likely to feel detached than attached.

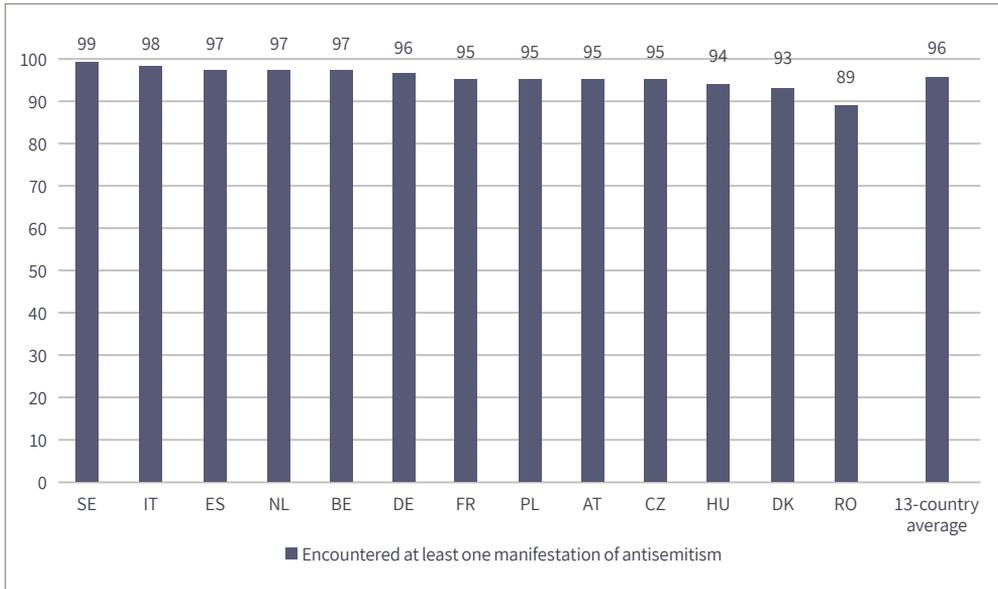
Figure 4.4 – Worldwide Jewish Students’ Perspectives on Israel, 2024



Mosaic, 2024

FE: According to Mosaic United recent poll (November 2024) ninety-four percent of Jewish students feel emotionally attached to Israel. research shows that Those who have visited Israel report more positive feelings and stronger connections to both Israeli Jews and the State of Israel.

Figure 4.5 – Experiences of Antisemitism in the Last 12 Months Among World Jewry, 2024

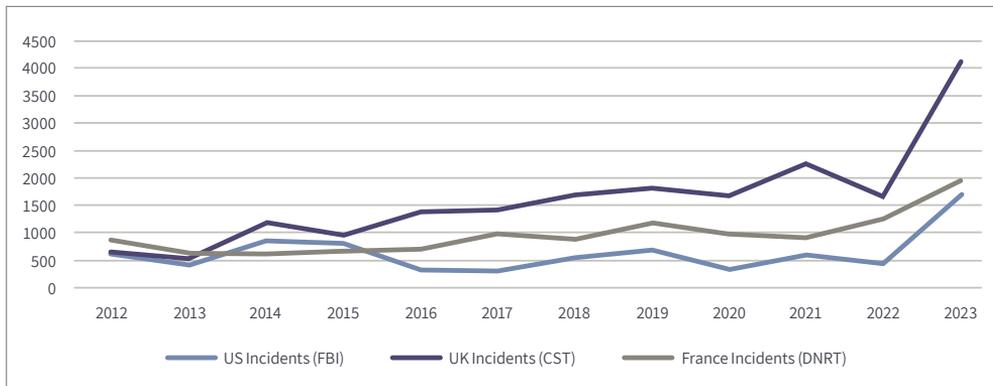


FRA, 2024

FE: The October 7th war led to a dramatic increase in reported acts of antisemitism. A survey by the EU Antisemitism Task Force found that 96% of respondents in 13 EU countries had encountered an act of antisemitism.

T: The growing prevalence of antisemitic incidents is likely to reshape the relationship between world Jewry and Israel. This could lead to increased immigration to Israel, greater recognition of Israel's influence on global Jewish lives, or heightened feelings of alienation from Israel. Regardless of direction, the surge in antisemitism in 2023–2024 has undeniably elevated Israel's prominence in the lives of many Jews worldwide. This moment also presents an opportunity to mobilise the liberal Jewish community globally, as the principles of mature liberal democracy, societal fairness, and secure peace align with the interests of world Jewry.

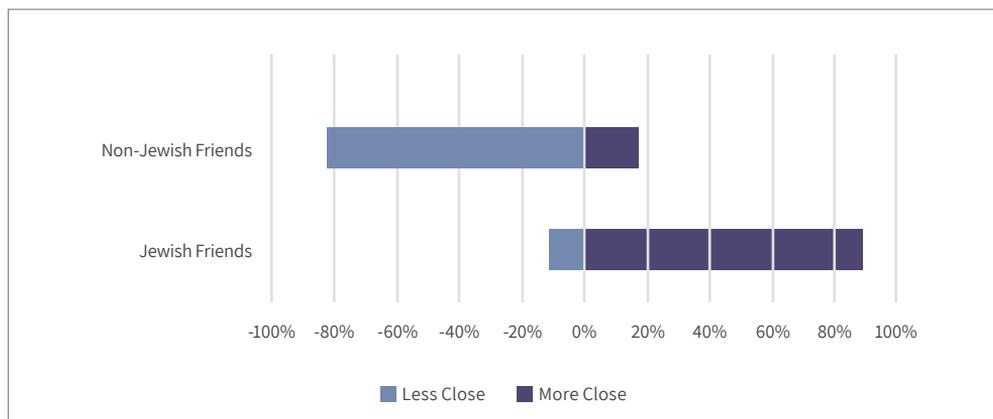
Figure 4.6 – Reported Antisemitic Incidents in the U.K., U.S., and France, 2012–2023



FBI (USA), CST (UK), DNRT (France)

FE: Antisemitic incidents in the US, UK, and France have more than doubled since 2022, following years of stagnation or very gradual increases.

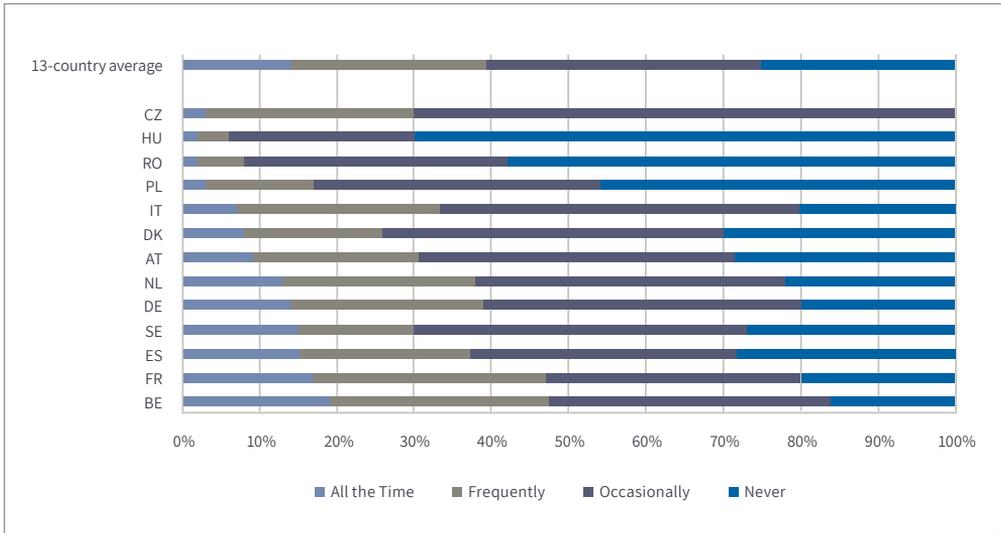
Figure 4.7 – Impact of October 7th and the Gaza War on British Jews’ Friendships with Jews and Non-Jews, 2024



Boyd, 2024

FE: The effects of the October 7th war extend beyond the rise in antisemitic incidents, shaping both relationships within the Jewish community and between Jews and non-Jews. In the UK, many Jews report feeling closer to their Jewish friends while becoming more distant from non-Jews in their daily lives.

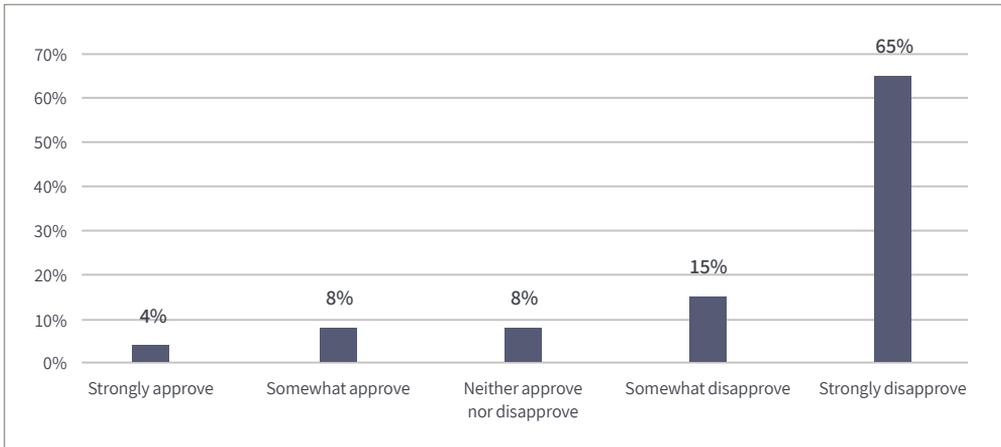
Figure 4.8 – Global Jewry’s Perception of Being Blamed for Israeli Government Actions, 2024



FRA, 2024

FE: 39% of European Jews report being constantly accused of actions taken by the Israeli government, while only 25% say they are never accused.

Figure 4.9 – U.K. Jewish Community’s Approval Ratings of Netanyahu, 2024



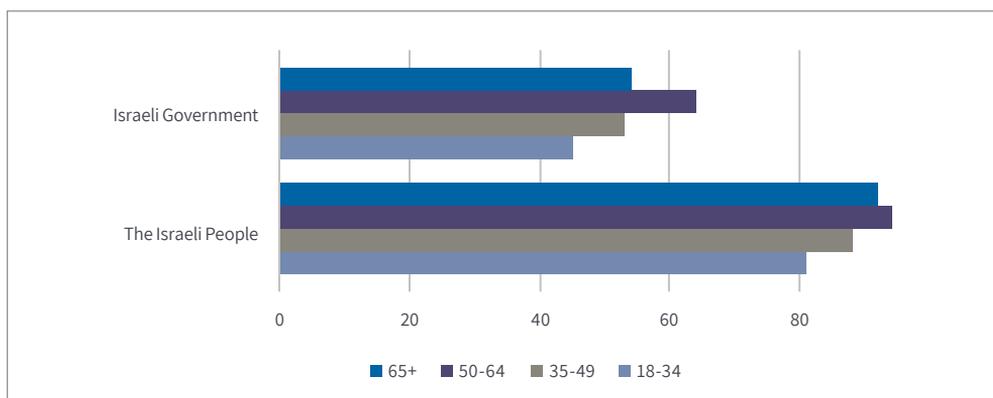
Boyd, 2024

FE: Most Jews in the US and UK maintain a strong attachment to Israel but do not support its government. As of February 2024, 89% of American Jews expressed support for the Israeli people, but only 54% supported the Israeli government. In the UK, 80% disapproved of Netanyahu’s leadership. A similar trend is reflected in French public opinion towards Israel, its citizens, and their government.

T1: This sentiment provides an opportunity to break the association between being “pro-Israel” and supporting Netanyahu’s government.

T2: It also presents a significant chance to mobilise these communities in support of strengthening the liberal camp in Israel.

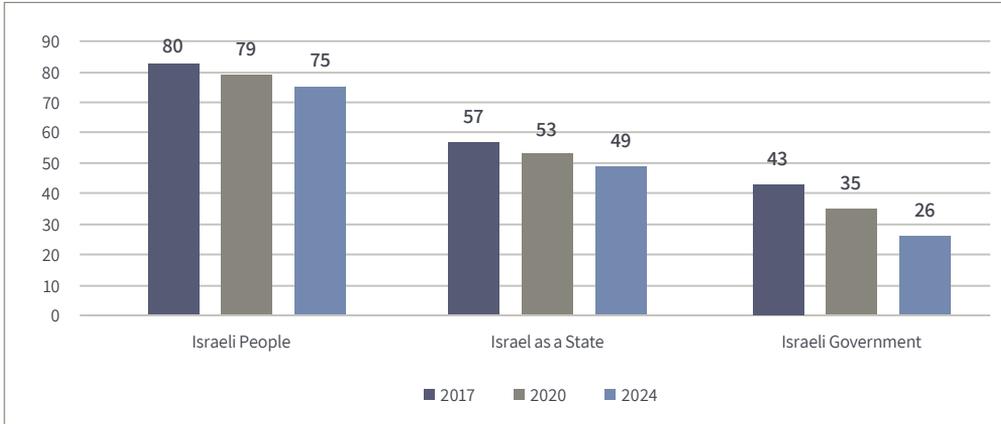
Figure 4.10 – U.S. Jewry’s Opinions on the Israeli People and Government, 2024



Pew, 2024

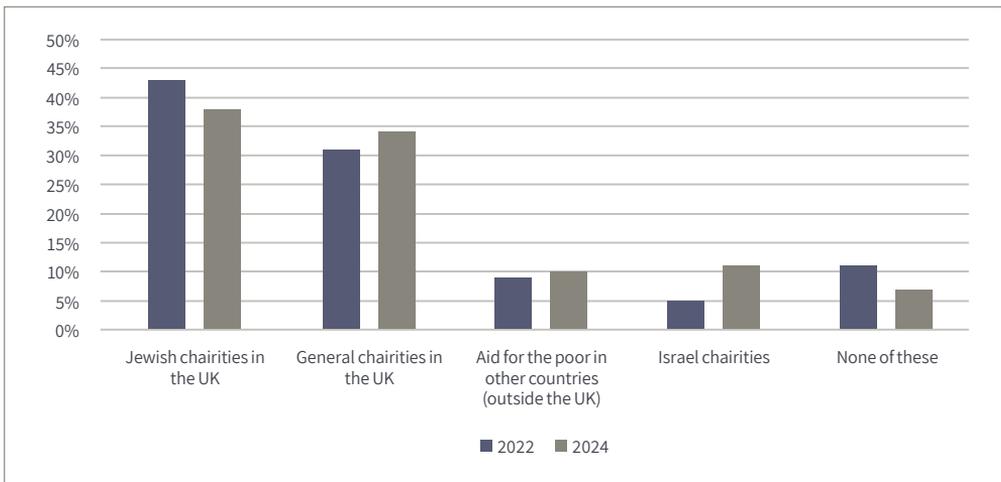
FE: While approximately only half of Jewish Americans support the Israeli government, over 80% across all age groups have a favourable opinion of the Israeli people.

Figure 4.11 – French Public Opinion on Israel (% of Positive Views), 2017-2024



Ipsos, 2024

Figure 4.12 – UK Jews Charity Patterns, 2022-2024

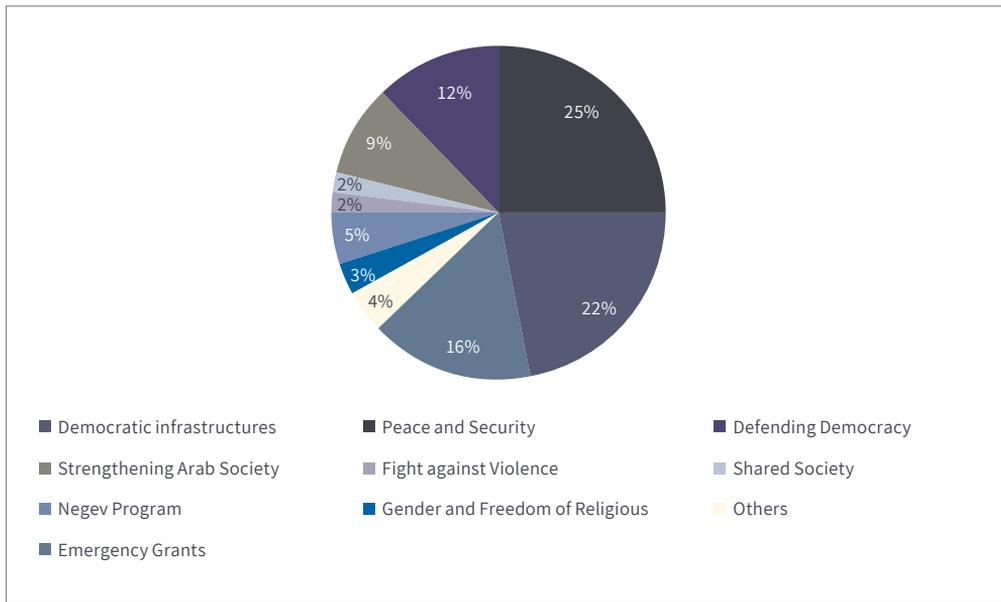


Boyd, 2024

FE: Donations from British Jews to Israeli charities have doubled from 2022 to 2024, likely driven by the events of October 7th.

T: This surge in donations offers a unique opportunity to direct support beyond the IDF and neutral causes like art and medicine, towards political organisations committed to safeguarding Israel’s identity as a Jewish and democratic state while advancing the cause of peace.

Figure 4.13 – New Israel Fund's 2024 grants



NIF, 2024

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Data from the Israel Democracy Institute data project is courtesy of the Viterbi Family Center for Public Opinion and Policy Research at the Israel Democracy Institute.

Data from the Israel National Elections Survey is available at the project website - <https://www.tau.ac.il/~ines/>

Data on New Israel Fund grants for 2024 is courtesy of the New Israel Fund.



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