THE LONDON INITIATIVE

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

Data Pack, February 2026

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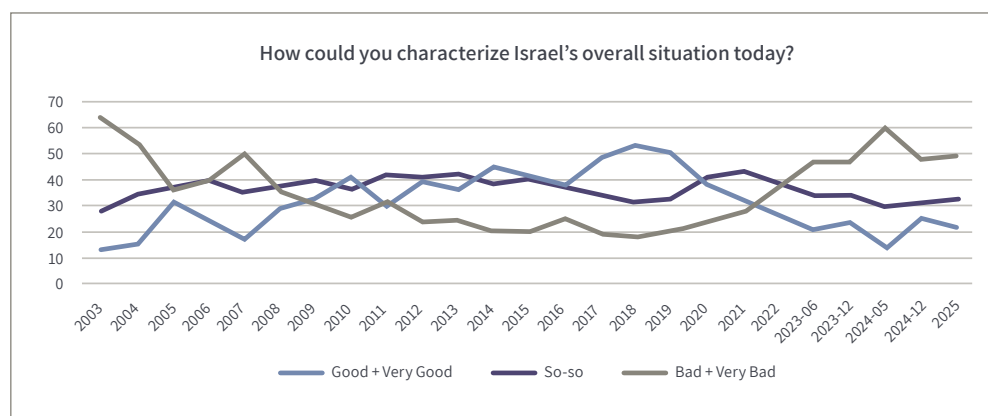
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The London Initiative Foreword

This, The London Initiative's (TLI's) third data pack, is published ahead of our third London retreat at the beginning of an Israeli election year of historical importance. The elections are arguably the most significant since the establishment of the State. The structure and policies of the government that will emerge will impact every aspect of the work required to reverse the currently negative trajectory of Israeli society, Israel's relationship with world Jewry, international allies and stakeholders in Israel's future.

This data pack certainly sets out many challenges. Of the fifteen "must-know" facts selected by Dr. Shai Agmon and Dr. Tal Elovits, our research partners at Molad – The Center for the Renewal of Israeli Democracy, at least two-thirds can only be read by us as significant challenges. This ratio of challenges to opportunities is probably indicative of the overall balance of the impressive array of expanded and updated data from the previous pack collated and analysed herein.

Most Israelis Think that Israel's Situation Today is Bad, 2025

How could you characterize Israel's overall situation today?

Legend: Good + Very Good — So-so — Bad + Very Bad

Source: IDI Polls, 2003-2025

Yet, as Dr. Shai Agmon rightly reminds us, "data is not destiny". Properly understood, it is a starting point for informed decision-making and action that must be driven by clear values and acted upon by courageous leaders. Bold democratic leadership cannot be driven by polling and tainted by populism. It must certainly be informed by data and deliver effective policies, but it must be grounded in non-negotiable value propositions.

TLI's mission, even more critical over the coming months, is to support and strengthen members who share our values and vision as you work in your respective fields to change Israel's current direction of travel. Our task is to provide vision, language and conceptual clarity concerning the Triangle of mature liberal democracy, societal fairness and secure peace. It is to provide confidence, community and hope, grounded in data that show that you lead and represent "the endangered majority". It is to provide you all the benefits of a strong Network allowing each of us to achieve more for our common goal, both individually and through collaboration.

Your work is to boldly lead change in your respective fields. TLI's is to strengthen each of you and our collective "team".

Throughout this work, we must all remember, as change leaders, that the future is never determined. It is always ours to shape.

We invite and encourage you – as we know do our partners at Molad – to engage with the data herein and to consult with them. We urge you to do so in the spirit in which this pack is conceived and curated: as a springboard to boldly bring about the changes that we all so want and need.

Sir Mick Davis – Co-Founder TLI

Mike Prashker – Co-Founder and Director TLI

15 Must Know Facts

1. By the end of 2025, Israel's population is 10 million. Israel now surpasses most European countries in size, equalling or exceeding 44 out of 58 nations. Including Palestinians in the West Bank and Gaza Strip, there are over 15 million living between the Jordan River and the sea.

2. Israel has the youngest population among OECD and developed countries when observing those aged under 15, with the highest increase in the youth population aged 0–24 since 2010.

3. 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.

4. Between 2023 and 2025 more than 220,000 Israelis emigrated for the long term with only 72,300 returning. That's a net loss of 138,000 Israelis.

5. Israel lost its long-time status as a liberal democracy in 2023. The leading international democracy think tank, V-Dem, downgraded Israel from a liberal to an electoral democracy – for the first time in over 50 years.

6. 77.8% of Arabs in Israel support the participation of an Arab party in the government.

7. Concern that the Jewish component of the state outweighs its democratic character has reached a ten-year high in 2025, shared by roughly half of Israelis, but is significantly weaker among younger generations.

8. Half of coalition voters believe in the "betrayal from within" conspiracy regarding October 7th. This narrative posits that elements within the security establishment (IDF, Shin Bet) conspired against the government to facilitate or allow the massacre.

9. The years 2023–2025 saw a vertical spike in the establishment of new illegal outposts and settlers' violence in the West Bank.

10. The state subsidizes religious Jewish education 16% more than other streams. After several years of narrowing, the gap between Jewish and Arab education funding widened again in 2023–2024.

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

12. 30% of children in Israel live below the poverty line.

13. In 2025, Arab citizens of Israel were 17.5 times more likely to be murdered than Jewish citizens. One in 8,414 was murdered.

14. A widening gap is emerging among diaspora Jews between attitudes toward Israel and its government. For instance, while 78% of British Jews feel attached to Israel, 80% disapprove of Netanyahu's leadership.

15. Antisemitic incidents in the US, UK, France, and Australia have more than doubled since 2022.

Molad's Foreword

There is a familiar cliché that says that in every crisis lies an opportunity. If that cliché were ever going to apply, it should have applied after October 7. Israel suffered the most devastating security failure in its history under the most right-wing government it has ever known, following more than fifteen years of near-continuous right-wing rule. That rule was guided by a coherent doctrine: managing the conflict. Strengthening Hamas as a counterweight to more moderate Palestinian actors. Weakening potential partners for peace. Treating the conflict as something that could be contained indefinitely at an acceptable cost. This was not a marginal experiment. It shaped Israeli governance for a generation. And it ended in catastrophe.

In a functioning democracy, especially one where security is the central political question, such a failure should have forced a reckoning. It should have discredited not only individual leaders, but the worldview that led the country here, and opened space for a genuine alternative to emerge. Political leaders should have been able to say plainly and forcefully: this model failed; try another. That has not happened, or at least not with anything close to

the clarity or urgency the moment demands. This is the core failure of Israeli politics today. But it is also the central opportunity—and mission—for the liberal camp as it enters the 2026 general election: to articulate and organise a viable alternative.

At the first TLI retreat last year, we wrote that Israel stood at a crossroads. On one path was a renewed sense of military strength. The army had reasserted itself in Lebanon, the collapse of the Assad regime in Syria appeared to open regional possibilities, and talks with Arab states raised hopes of a different strategic order. On the other path, the warning signs were already clear. The war in Gaza dragged on without a horizon, hostages remained in captivity, and the judicial coup advanced relentlessly. Israel balanced uneasily between restored strength abroad and deepening political disarray at home.

A year later, there is some good news. All of the hostages are home. The ceasefire continues to hold, and it appears as if Israel will soon enter Phase Two of President Trump's plan. Netanyahu's government, despite regaining ground, still lacks a stable majority. Leaders from   protest

movement and from families of the hostages have stepped into politics, translating moral authority into civic engagement. But when it comes to the government's strategic choices, the fog has lifted. The path chosen is bleak.

What began as a just war in response to the massacre of October 7 was captured and distorted by a government dominated by extremists advancing a messianic vision: conquering Gaza, turning Israel into a permanent Sparta, and sacrificing both hostages and soldiers while inflicting devastation on Gaza on a scale few imagined the Jewish state would ever commit. This vision has come at an unbearable cost. Two years on, after the longest war in Israel's history, the campaign has failed to achieve its stated aims and has pushed Israel toward pariah status. Another conflict with Hezbollah continues to loom. Hamas remains in power in Gaza. Another escalation with Iran is on the horizon, even if its timing is impossible to predict due to current developments. In the West Bank, violence has reached unprecedented levels, driven by armed settler groups, collapsing governance, and systematic impunity.

Inside Israel, attacks on **liberal democracy** have intensified. The Attorney General and the Supreme Court have faced sustained political and physical pressure, including attempts to disrupt proceedings inside court chambers themselves. The judicial coup has not been abandoned; it has been normalised. The media environment has further deteriorated. The closure of Galei Tzahal marked another step in the dismantling of independent journalism and shared civic space. Trust in the media has collapsed, creating fertile ground for misinformation and conspiracy theories.

The data are clear. A majority of Israelis and world Jewry are dissatisfied, pessimistic, and increasingly detached from the current government. The task now is not simply to endure. It is to change the trajectory and offer **the endangered majority** a different future.

That begins with **secure peace**. October 7 shattered the illusion that the conflict with the Palestinians could be managed indefinitely while Israel pursued normalisation abroad. The conflict has returned to the centre of Israeli politics, yet belief in peace has collapsed. Israelis remain open, in principle, to negotiations, but no longer

believe peace is achievable. This loss of confidence reflects not only regional realities, but the absence of a political vision capable of sustaining hope. Rebuilding that vision will be difficult. It is also indispensable.

The same logic applies to Israel's social and economic foundations. Israel has generated extraordinary wealth and innovation, yet many citizens continue to experience poverty and food insecurity. Public services are overstretched, and the education system struggles to prepare the next generation. For many Israelis, prosperity is remote. This imbalance corrodes trust and leaves society vulnerable to division. Addressing it requires renewed investment in **societal fairness** and inclusion, so that national success is more widely shared and democracy strengthened at its base.

The Overton Window has narrowed sharply. Ideas once marginal, such as population transfer, are now discussed openly, sometimes legitimised by senior leaders. Core democratic commitments including peace, equality, and human rights have been pushed to the margins. Longstanding taboos have hardened. Cooperation with Arab political partners is ruled out in

advance. Alternative security visions are muted for fear of being branded naïve or "left." Silence replaces substance on the issues that matter most. Yet political debate is not fixed. With leadership and organisation, the space for alternatives can be reopened. The endangered majority has not disappeared. The question is whether it can recover the confidence to shape events rather than merely react to them.

Beyond Israel's borders, relations with world Jewry have reached a critical moment. The horror of October 7 inspired extraordinary solidarity, but also growing unease, as many in the diaspora feel their values undermined by a government acting in their name. While anti-liberal forces in the diaspora have been highly active in Israeli affairs, the liberal camp has often remained cautious and restrained. That silence is no longer sustainable. What is needed now is not only solidarity, but genuine **partnership** rooted in candour, engagement, and moral leadership. The recent antisemitic attacks in Manchester and Sydney have only sharpened this urgency. Jewish freedom and security cannot be defended by Israel alone, nor by world Jewry in isolation. They require

About the Data Pack

a shared effort, grounded in liberal values, to fight antisemitism together and to protect the moral foundations on which Israel itself depends.

We are living through tectonic times. They are unsettling, but they are not fixed. Alongside the dangers lie real possibilities for renewal, if old certainties are questioned and false inevitabilities abandoned. The data presented here should not narrow our imagination, but ground it. These trends clarify reality. They do not dictate destiny. Our responsibility is to face the facts honestly while refusing to confuse realism with resignation. Realism is the floor on which imagination and determination must stand. The question before Israel is not whether it has a future, but what kind of future we are prepared to compete for and build.

This data pack is designed to support discussions, exchanges, and decision-making among TLI Network members and likeminded allies and stake-holders. 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 continue to 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.

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1: Introduction - 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, 1948-2025
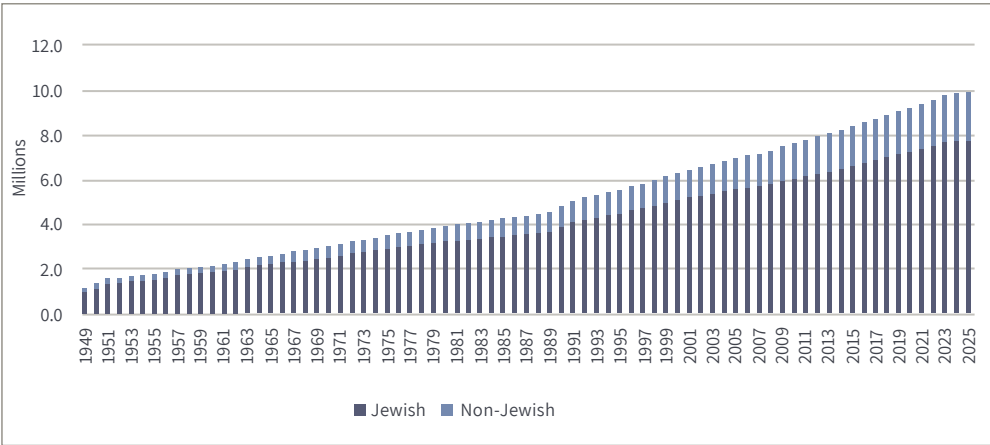
Source: CBS, 2025

FE 1: In 2023, Israel's population reached 10 million. Israel now surpasses most European countries in size, equalling or exceeding 44 out of 58 nations.

FE 2: 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 - Core Jewish Population (Conservative Estimation) – Top 10 Countries (w/o Israel and USA), 2021-2024
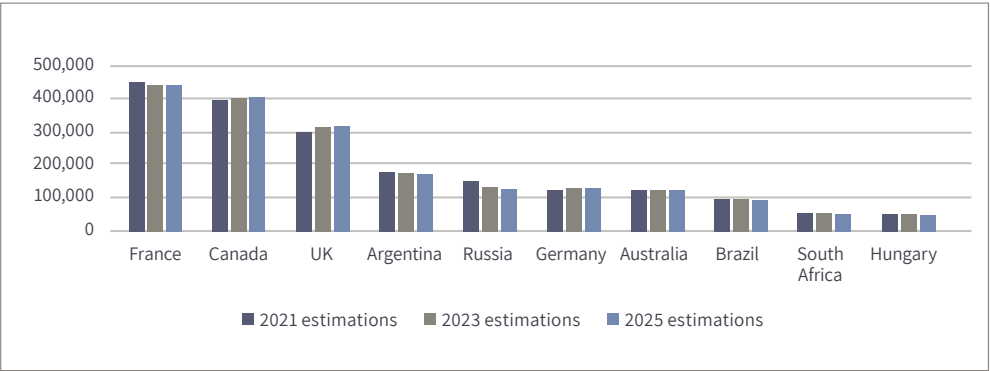
Source: Sergio DellaPergola, 2021; 2023; 2025

Figure 1.3 - Israelis Abroad - Israeli Born Jewish in the Diaspora (Incl. dual Citizenship), 2025
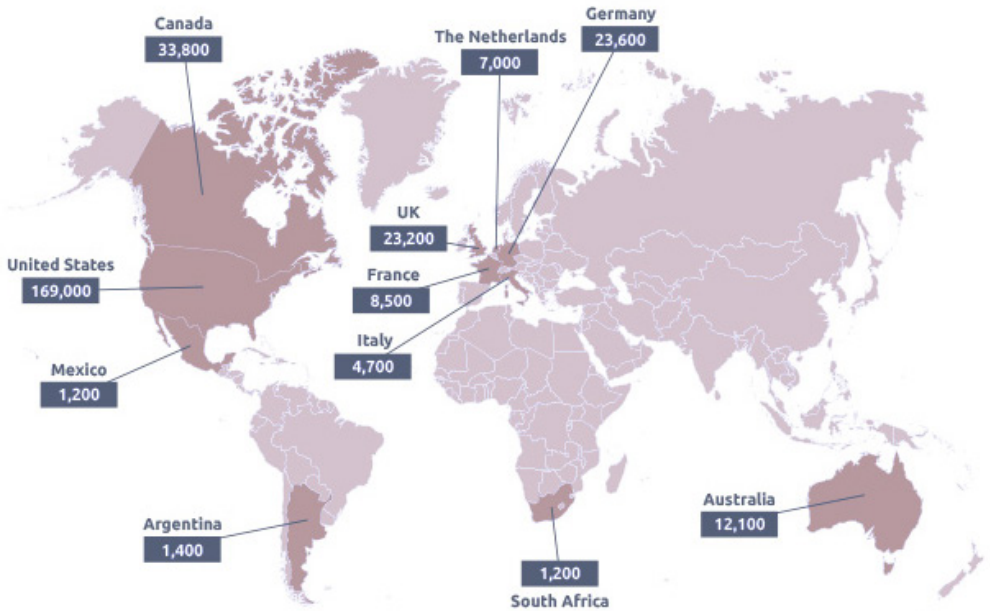
Source: Staetsky, 2025

FE: There are an estimated 15.8 million Jews worldwide, with 7.3 million living in Israel and 8.5 million in the diaspora, including 6.3 million in the United States. These figures reflect a conservative count, based on the traditional religious

definition of Jewish identity through maternal lineage. According to a 2020 Pew Research survey, 37% of American Jews identify as Reform, 17% as Conservative, and 9% as Orthodox, while the remainder do not affiliate with specific branches. The Jewish Agency further estimates that an additional 10 million people in the diaspora, though not included in this conservative reading, are eligible for Aliyah under Israel's Law of Return.

Figure 1.4 - Israel's Population Forecast, 2015–2065
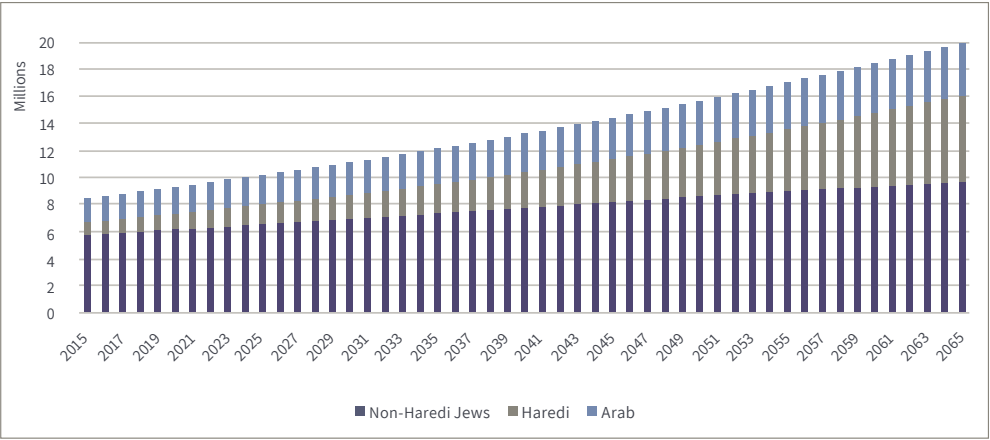
Source: CBS, 2017

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 1.5 - Jewish Settlements in the West Bank, 2024
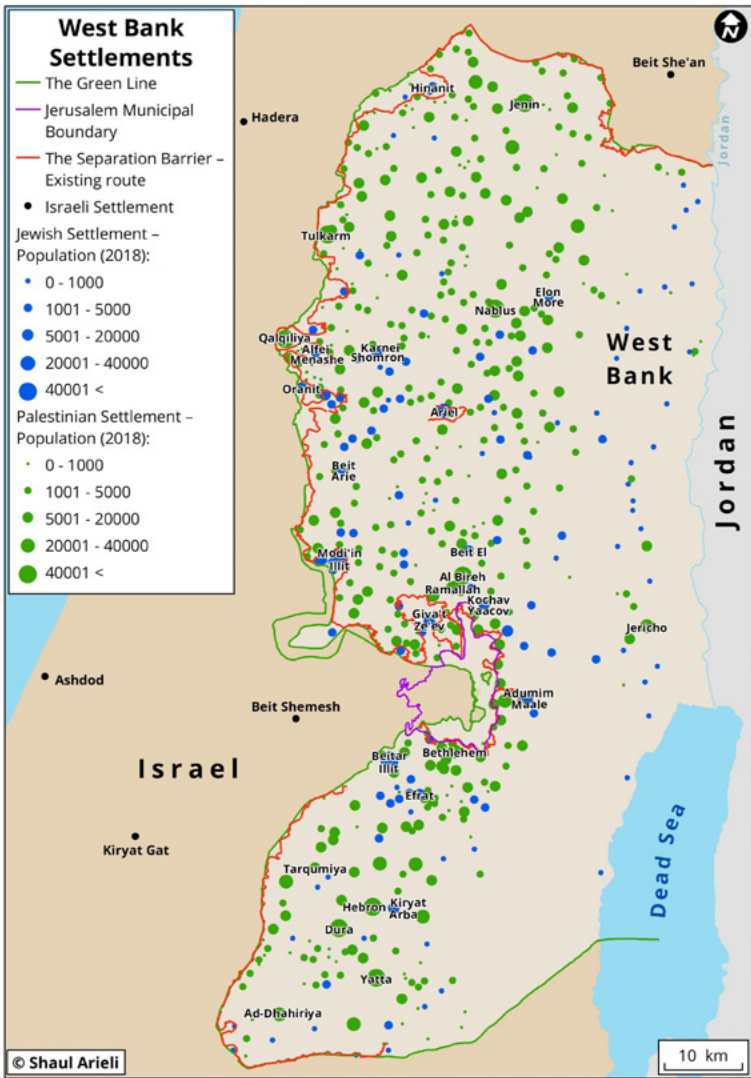
Figure 1.6 - Jewish Population in the West Bank, 1967-2025
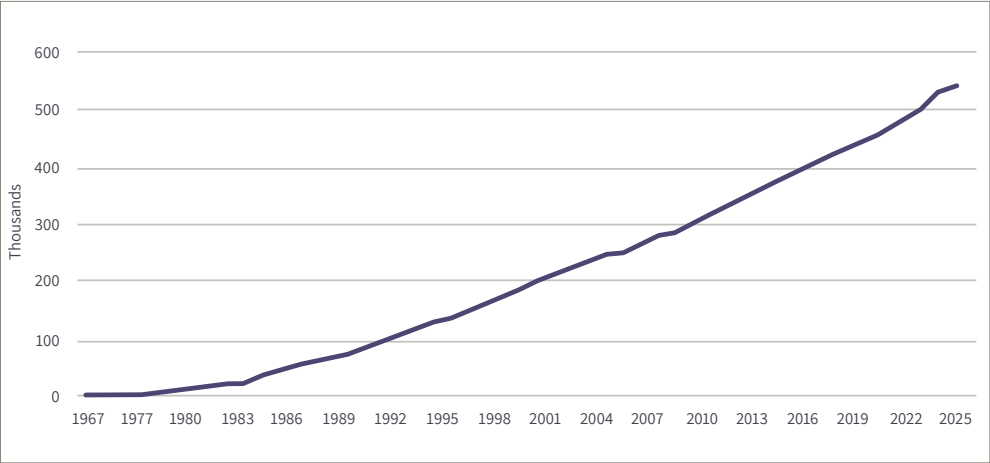
FE: The Jewish population in the West Bank has grown to nearly 512,000 (excluding the Jewish population in east Jerusalem). According to 2025 Peace Now data, this includes 141 official settlements, five cities, and over 250 outposts.

Figure 1.7 - Illegal New Outposts by Year – 1991-2025
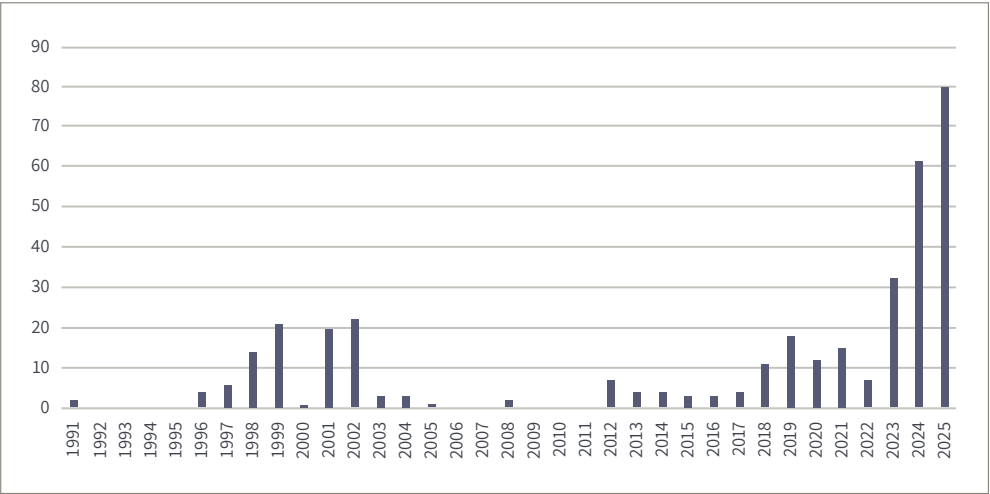
FE: Since the current government came to power, the number of legalised outposts has risen, presented as an effort to incentivise Jewish settlement in the West Bank and expand control over Palestinian land.

T: As Dror Etkes's findings indicate, the new wave of legal outposts reflects a strategic shift: settlement expansion is now less about demographic growth and more about land appropriation and territorial control, focused primarily on capturing agricultural land rather than constructing new housing or towns.

Figure 1.8 - Palestinian Population, West Bank + Gaza Strip, 1955-2024
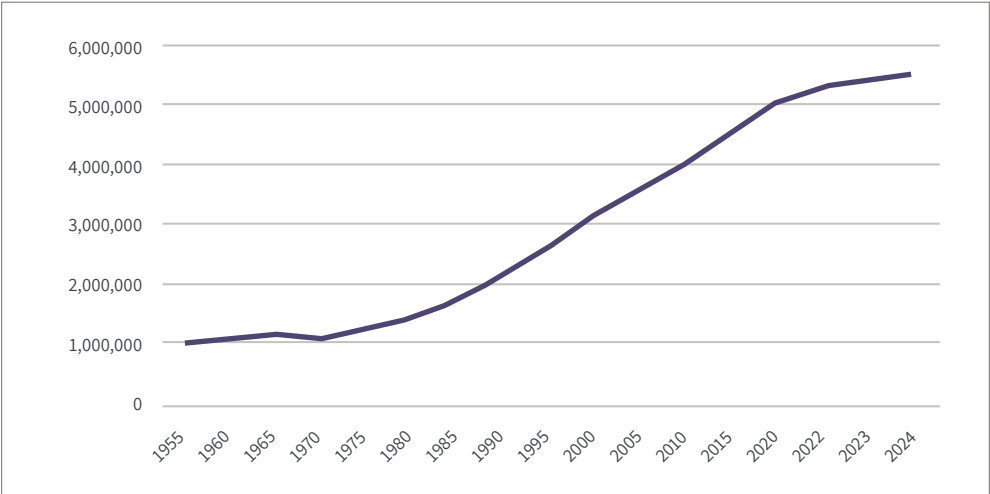
Source: UN, 2025

FE: At the end 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 1.9 - Long-Term Leaving and Returning Trends in Israel, 2010-2025
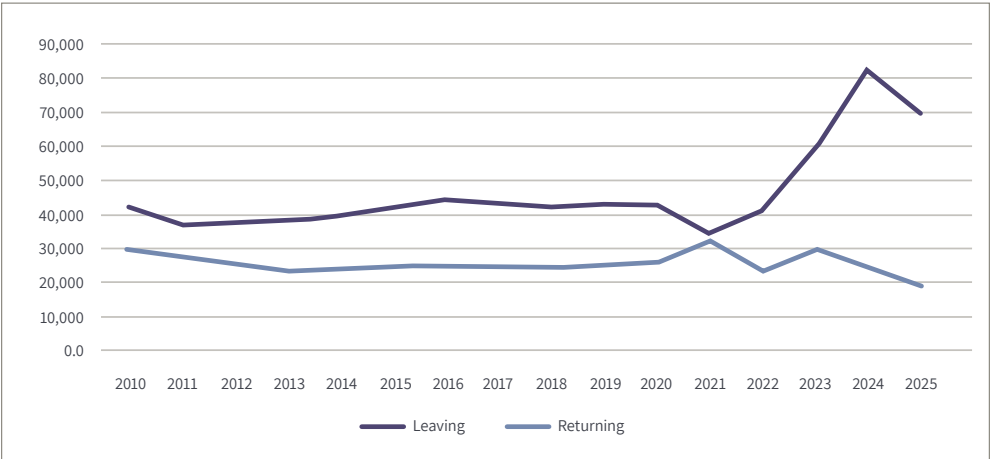
Figure 1.10 - Israeli Born Emigrants and Returnees, 2010-2024
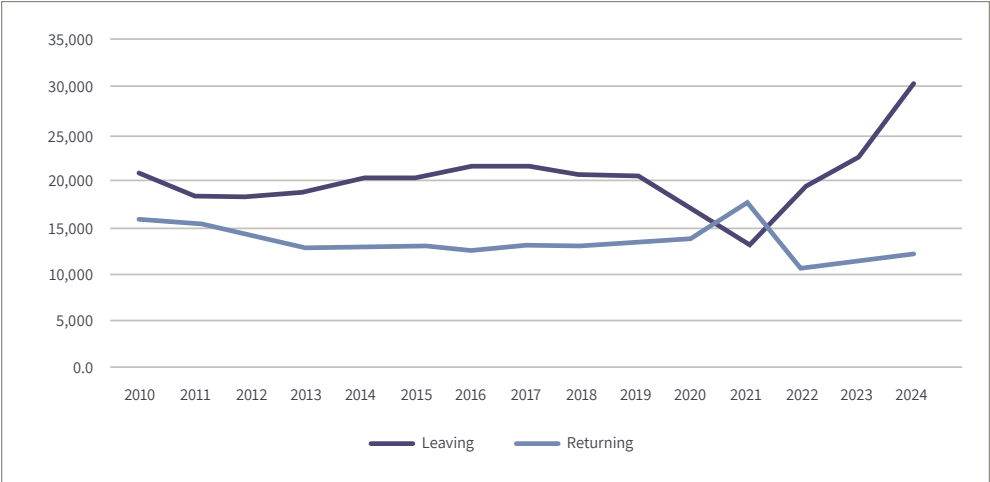
FE 1: Israeli emigration spiked in 2023, following the launch of the judicial coup, with a 43 percent increase in departures. This trend sharpened further after October 7th. Since 2023, approximately 211,000 Israelis have left the country for the long term. After accounting for return migration, the net balance stands at –138,679. Long-term emigrants are defined as individuals who spent fewer than 90 days in Israel during the previous 12 months. Each year reflects the number of

Israelis who left in that year and remained abroad thereafter, alongside those who returned in that year and continued living in Israel. Even when accounting only for native-born Israelis (excluding those that made Aliyah and decided to leave) the trend is visible and significant.

FE 2: Emigration has also begun to affect Israel's broader demographic profile. According to analysis by the Taub Center, Israel's natural population growth rate fell to 0.9 percent in 2025, down from 1.6 percent in 2020, marking the lowest growth rate on record.

T: The scale of net emigration since 2023 is electorally and demographically significant—plausibly equivalent to three to four Knesset seats.

Figure 1.11 - Extent of Religiosity, Jews in Israel, 2002-2024
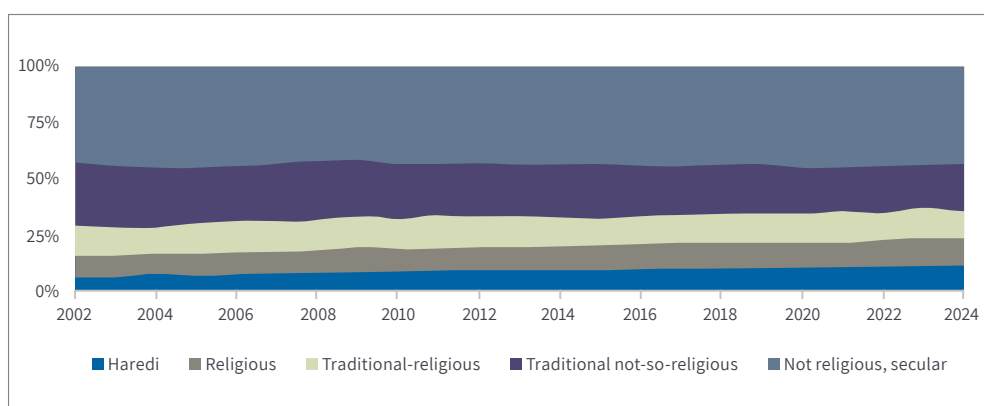
Source: CBS, 2025

FE 1: 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.

T: The proportion of Israelis identifying as traditional is declining, while the secular population continues to grow. This runs counter to the widespread assumption that Israeli society is becoming more religious. A more convincing explanation for the increased visibility of religious symbols and language in public life lies in the rise of nationalist politics, which selectively adopts and repurposes religious imagery. In this context, religious symbols function less as markers of personal faith and more as instruments of nationalist expression and political identity.

Figure 1.12 - Joining and Leaving the Haredi Community (% by Year of Birth), 2021
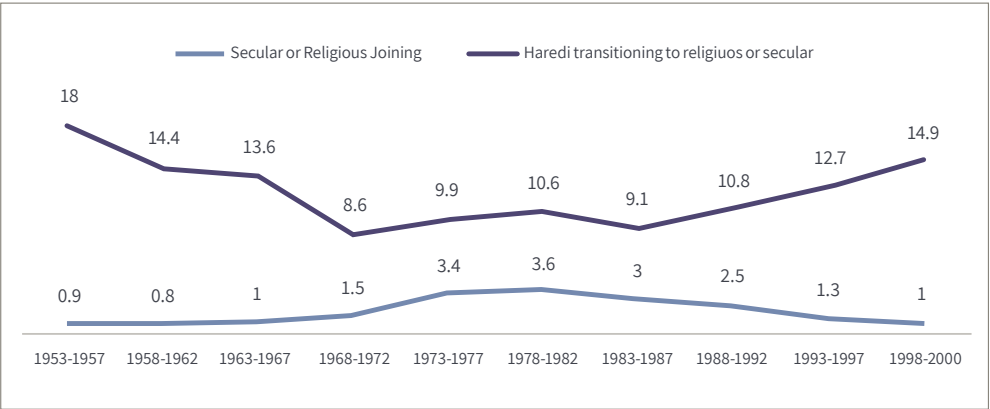
Source: Regev & Gordon, 2021

T: Economic incentives, education, integration policies, and cultural shifts have historically shaped the social and political orientation of groups in Israel. As this graph shows, religiosity trends are already shifting, suggesting that future trajectories of group size and affiliation may be more fluid than commonly assumed. A slight trend of leaving the Haredi community should not be read as evidence of imminent integration - rapidly growing groups will naturally see more individuals moving out. What it does indicate, however, is that the broader integration of Haredi communities into Israeli society is not predetermined, but remains open to change, particularly in the areas of education, employment, and civic participation.

Figure 1.13 - Share of Under-15 Population – OECD Countries, 2024
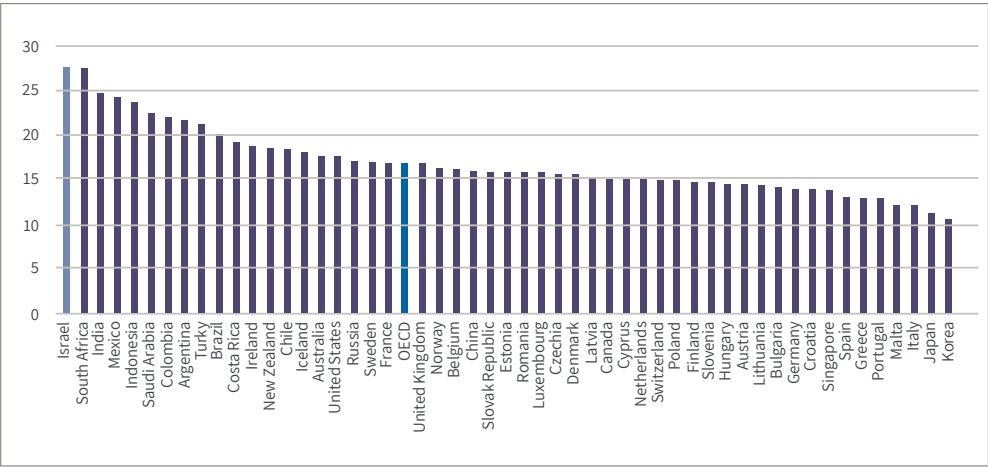
Source: OECD, 2025

Figure 1.14 - 0-20 Population Growth Developed Countries, 2010-2024
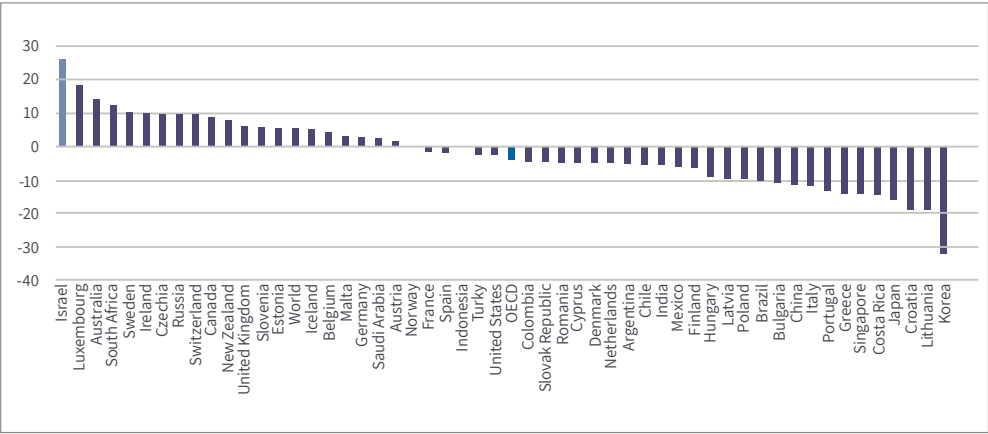
Source: OECD, 2025

FE: Israel has the youngest population among developed 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 1.15 - Fertility Rate by Religious and Ethnic Group, 1990-2023
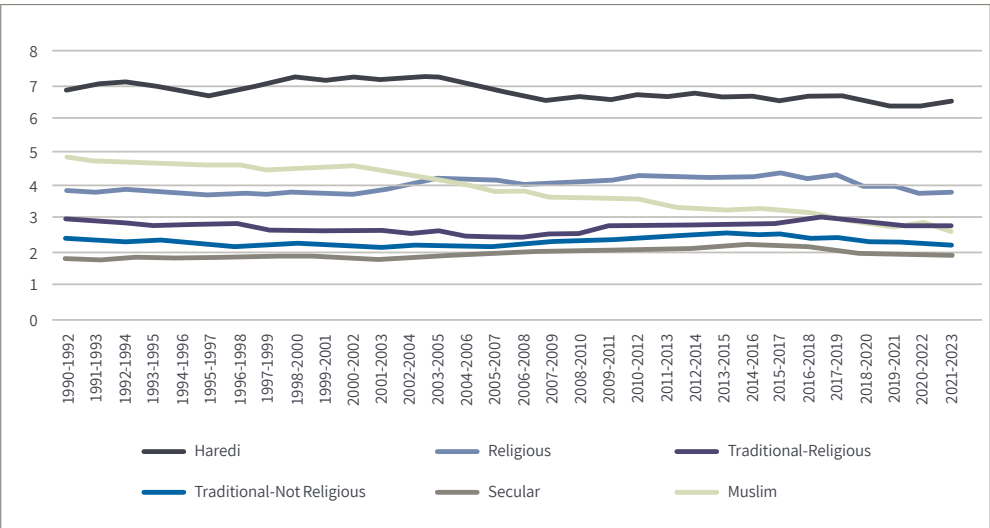
Source: CBS, 2025

FE: Fertility rates among different communities in Israel have shifted in recent years, with notable 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 reshaping fertility patterns across Israel. Preliminary data for 2024–2025, analysed by Taub Institution, indicate that Jewish women are the only sector to experience an increase - a development that researchers attribute to the impact of the war. These fluctuations highlight the sensitivity of fertility patterns to wider social and political events, and suggest that long-term demographic trends are more fluid than often assumed. Fertility rates are shaped by policy decisions and external shocks, rather than being determined solely by "natural" factors.

Figure 1.16 - 1st Grade Pupils in Israel Across Different Education Systems, 2005-2025
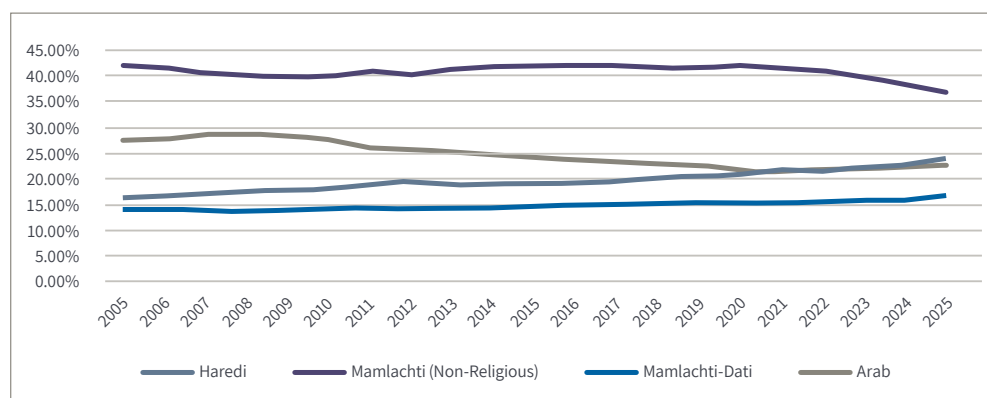
Source: Ministry of Education, 2025

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

Figure 1.17 - Pupils Forecast by Education System, 2025-2050
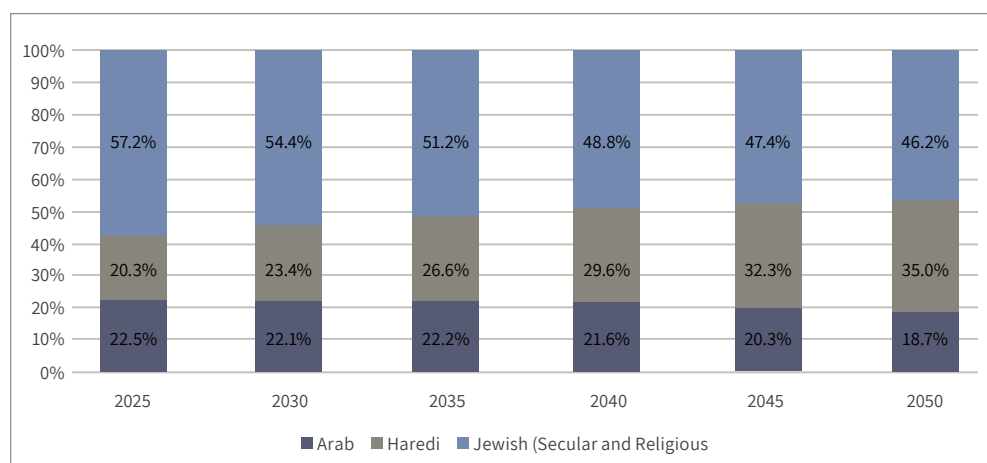
Source: CBS, 2023

FE 1: According to the CBS forecast for 2050, 35% of Israeli pupils are projected to be enrolled in the Haredi education system.

FE 2: The share of pupils enrolled in the Mamlachti (state) education system fell below the CBS forecast for 2025, which projected 40.68 percent. Actual data for 2025 shows only 37.01 percent, suggesting that official forecasts may not be adjusting quickly enough to recent shifts in Israel's youth demographics.

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 indicators such as voter turnout, press freedom, and public trust in institutions. It then turns to public opinion on peace and security, including attitudes towards war and generational shifts in support for a Palestinian state. Finally, it assesses Israel's standing as a modern welfare state, focusing on poverty, food insecurity, social mobility, gender gaps, and homicide rates.

2a: Mature Liberal Democracy

This subsection presents data on the state of Israel's democratic health as it approaches its 80th year, highlighting both acute vulnerabilities and enduring strengths. After several consecutive years of direct government-led attacks on democratic institutions, the data point to a democracy under strain: most Israelis believe democracy is in danger, trust in the media is low, and the information environment no longer reliably reflects reality. Fears about lifestyle changes across different communities also run deep.

Yet across multiple indicators of democratic norms, there are also reasons for cautious optimism. Violence as a means of political change is widely rejected, voter turnout remains high, nearly half of Israelis believe the Jewish component of the state has become too dominant, and Israeli youth continue to endorse core democratic values such as minority rights. Taken together, the data suggest that while the challenges are urgent and severe, the resilience of key democratic norms and practices still provides a meaningful foundation for democratic renewal and recovery.

Figure 2.1 - Israel V-Dem Score, 1959-2024
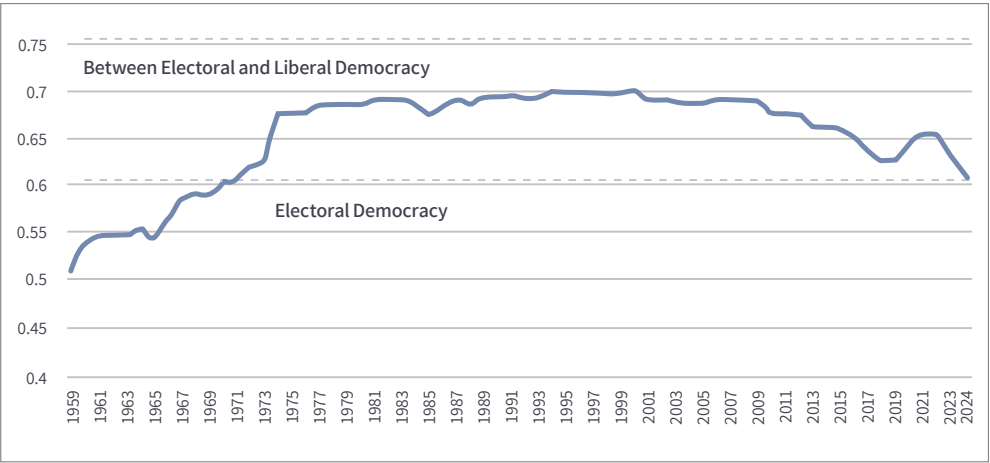
Source: V-Dem, 2025

FE: Israel's democracy classification by the V-Dem Institute has been downgraded to an "electoral democracy". The country's Liberal Democracy score declined in 2023, reflecting the government's attempts at judicial coup. In 2024, Israel's score fell further to 6.17, down from 6.3 the previous year. Considering recent developments, including efforts to curtail the independence of the Attorney General, it is plausible that Israel's 2025 score will decline again, potentially dropping below the threshold of electoral democracy. V-Dem is widely regarded as one of the world's most authoritative indices measuring the quality of democracy.

Figure 2.2 - Changes in Views of Democracy Between 2012 and 2022 by Country, 2025
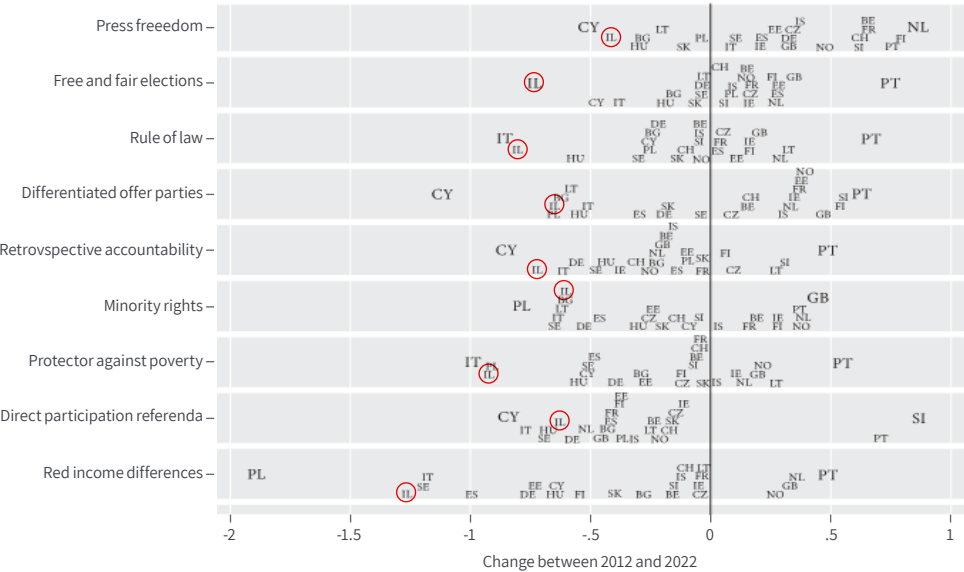
Source: Hernández, 2025

FE: Over the past decade, Israelis have attached steadily less importance to core democratic principles such as the rule of law, the protection of minority rights, and even the holding of free and fair elections. These findings are drawn from a comparative study by Mónica Ferrín and Hanspeter Kriesi, which examined public perceptions of democracy across countries between 2012 and 2022.

T: Compared with all other countries in the study, Israel registered the steepest decline in the importance attributed to free and fair elections.

Figure 2.3 - Voter Turnout vs. Public Trust in Democracy, 2003–2022
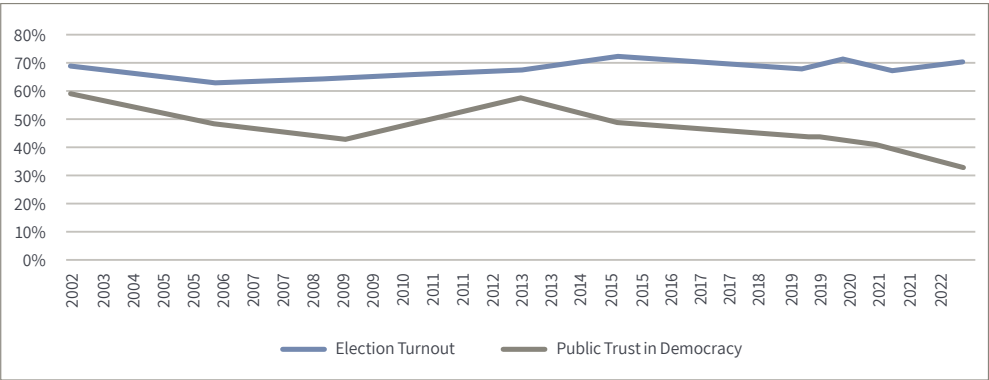
Source: Israel Election Board for Turnout; IDI Polls for Trust

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.

Figure 2.4 - Arab Community Turnout vs. Overall Turnout, 1999–2022
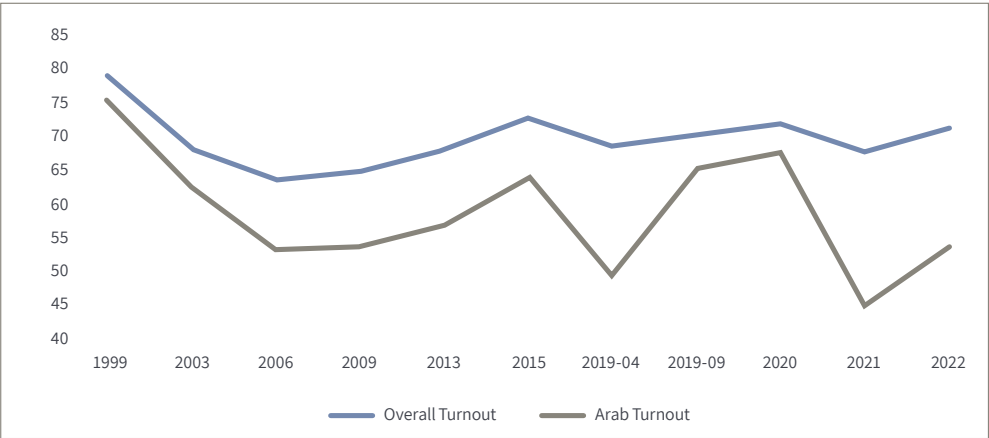
Source: Roditski, 2023

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 voter participation is closely tied to the political opportunities available in a given election. When Arab citizens believe their vote can meaningfully influence outcomes, turnout rises significantly – as seen in 1999 and the 2019–20 elections, when Ehud Barak and Benny Gantz signalled a willingness to share power. This pattern indicates that participation depends less on get-out-the-vote efforts alone and more on credible political inclusion and cooperation between Arab parties and liberal Zionist parties.

Figure 2.5 - Israeli Arab Voting Distribution 1999-2022: Arab vs. Jewish Parties, 2023
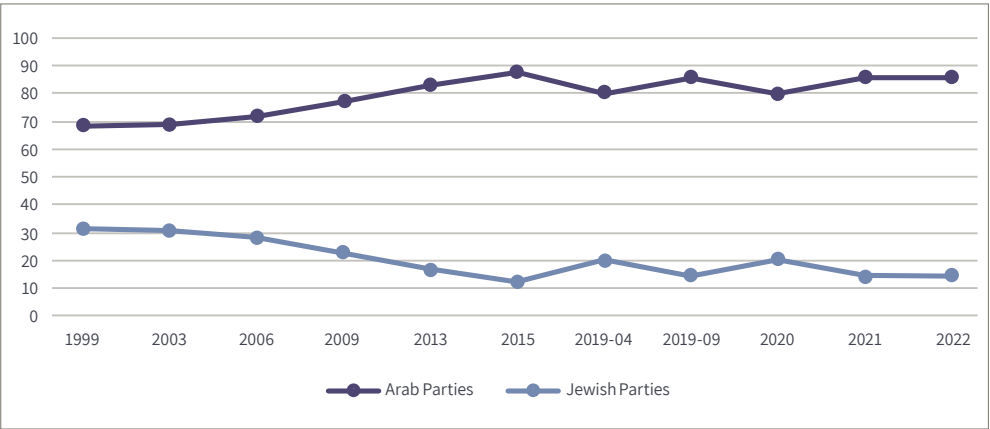
Source: Roditski, 2023

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 2.6 - Is Israeli Democracy in Danger? Agree/Disagree, 2017-2024
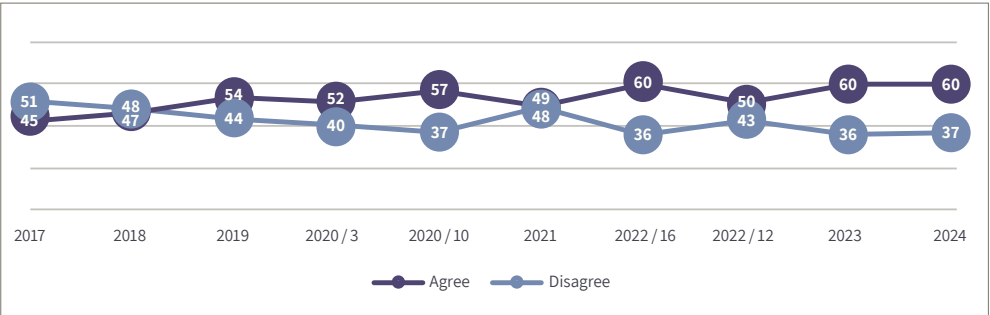
FE: Most Israelis believe democracy is in danger. The most recent poll, conducted in 2024, shows the highest rate of concern in the past decade.

Figure 2.7 - Fear about Israel's Democracy Across Political Affiliations, 2017-2024
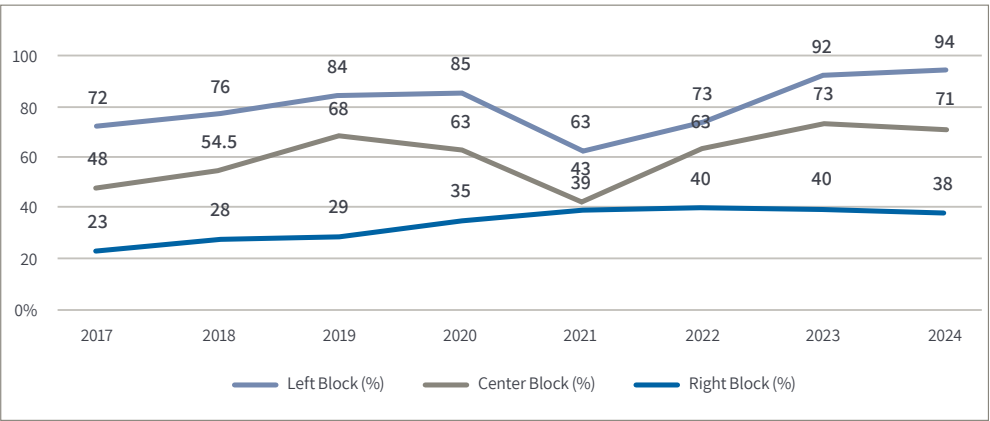
FE: Concerns about the state of democracy vary widely across Israel's political spectrum. Among Jewish voters, 94% of left-wing voters, 71% of centrists, and 38% of right-wing voters feel democracy is in danger.

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

Figure 2.8 - Public Trust in the Police - 2023-2025
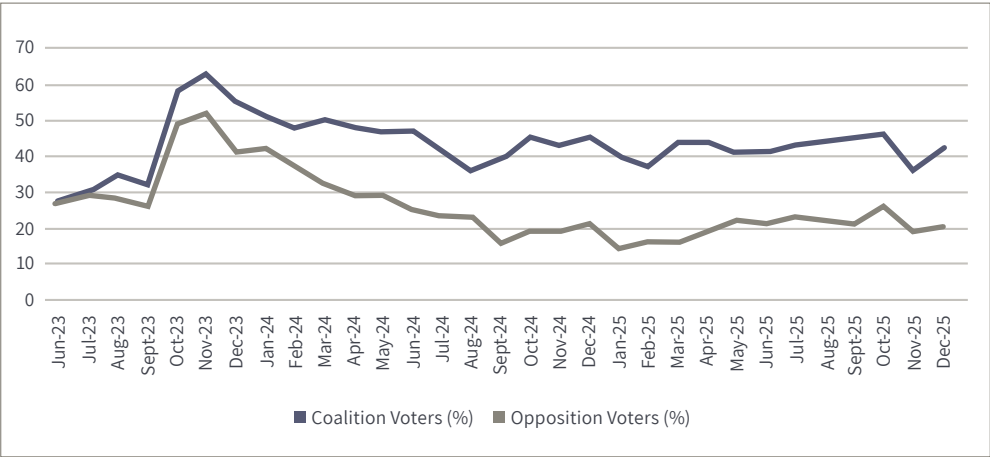
FE: Up to October 7th, public trust in the police was low, polarised, and highly politicised - largely due to the takeover of the police by Minister of National Security Itamar Ben-Gvir. A brief surge in trust followed the October 7th attacks, reflecting a moment of national unity and a classic "rally around the flag" effect. During this period, the gap between coalition and opposition voters narrowed noticeably. However, the effect was short-lived: trust soon declined again, with polarisation re-emerging and distrust in the police once more on the rise, particularly among opposition voters.

T: The rapid decline in trust after the brief rise following the October 7th massacre shows that empty calls for unity are insufficient. Polarisation does not arise from a lack of solidarity or mutual hostility among Israelis, but from the corruption and misuse of institutions by the current government.

Figure 2.9 - Pessimistic Feelings About the Future of Israel's Political System, 2023-2025
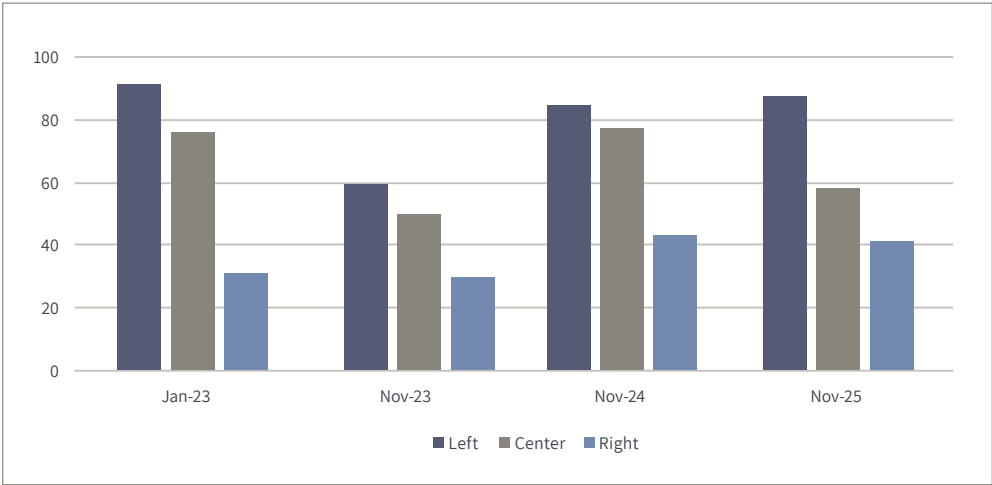
Source: IDI Polls, 2023-2025

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 2.10 - Support for a Strong Leader, 2014–2025
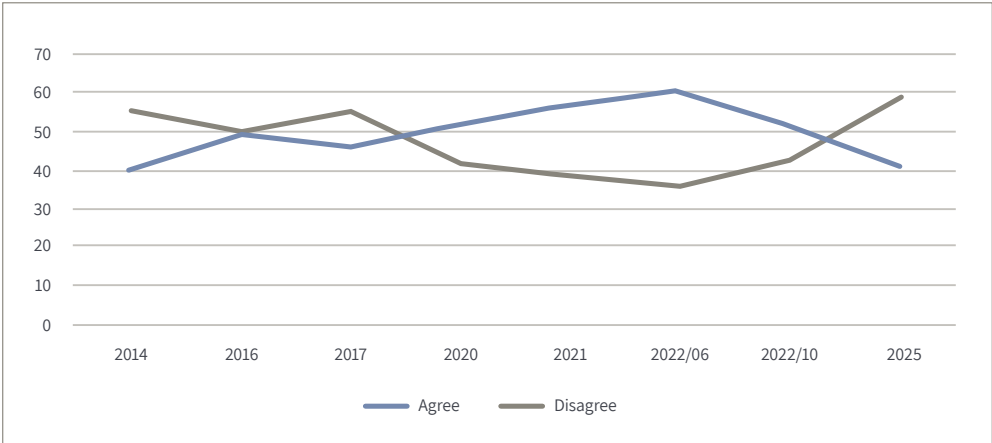
Source: IDI Polls, 2014-2022, INES, 2025

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, reaching in 2025 to the lowest rate since 2014.

Figure 2.11 - Majority Opposes Political Violence, 2003-2025
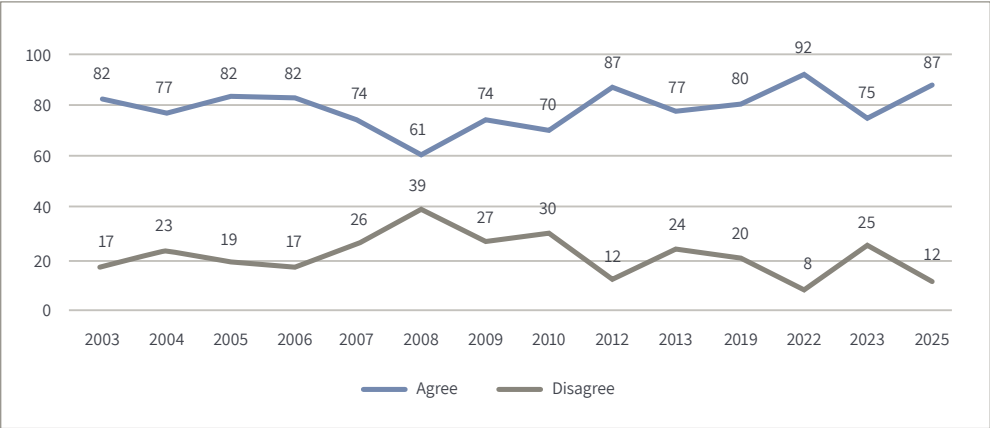
FE: The majority of the public firmly opposes political violence.

T: This reflects a vital characteristic of a democratic society: the shared understanding that violence is not a legitimate means to achieve political goals. Disagreement with this principle rose after the Gaza disengagement plan in 2005, suggesting that support for political violence became more prevalent among segments of the right. Recent polling shows a significant drop in support for political violence from 25% in 2022 to 12% in 2025.

Figure 2.12 - Should Jewish Halacha Rule the Public Sphere? 2003-2025
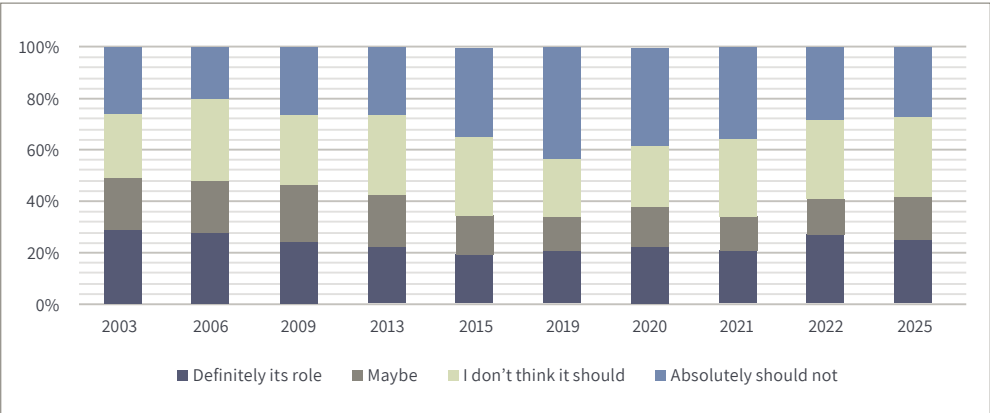
FE: Opposition to Jewish Halacha rule has increased over time. In 2003, 50 percent of Israelis opposed the idea. This rose to 64 percent in 2021, before settling at 58 percent in 2025 – still well above early-2000s levels.

T: While parts of Israeli society are moving in more anti-liberal and anti-democratic directions, other attitudes – such as opposition to Halacha rule and tolerance toward the LGBTQ community – continue to show a countervailing liberal trend.

Figure 2.13 – Half of the Israelis think the Jewish Component is too strong, 2025
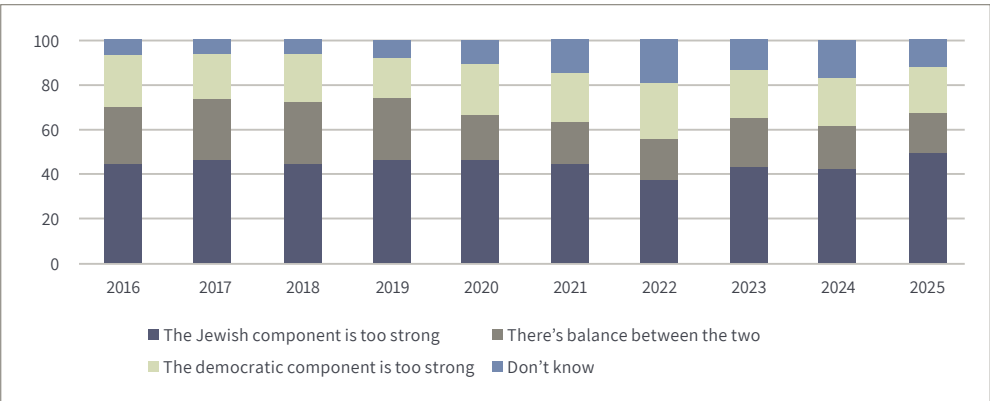
Figure 2.14 - Jewish Vs. Democratic Elements, by Age Group, 2016-2025
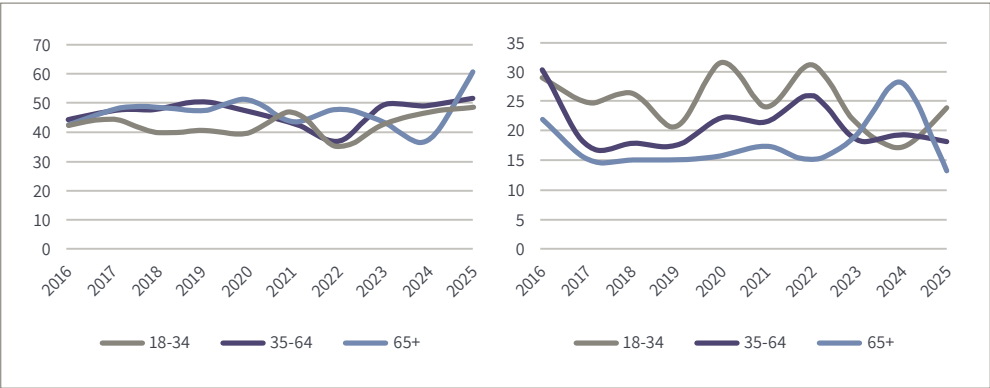
FE: Most Israelis believe that the "Jewish" component of the state is too strong relative to its democratic component. In 2025, the share of respondents holding this view reached a ten-year high, reflecting growing unease with the rising influence of the ultra-religious right and with tensions surrounding the exemption of ultra-Orthodox citizens from military service. While this concern is shared across all age groups, **there is a growing minority among younger Israelis who view the democratic component of the state as overly dominant**.

T: The division between Israel's Jewish and democratic character has taken root in Israeli political discourse, but it is not inevitable. The idea that there is an inherent tension between being a Jewish and a democratic state is a relatively recent development. In earlier Zionist conceptions, a Jewish state was understood as securing a space in which Jews could be free - free to choose how to live, believe, or act. On this reading, the Jewish character of the state was by definition democratic; without that commitment, the Zionist project itself would have been undercut. The current debate should therefore be read in its political and historical context, not as expressing an unavoidable conceptual tension.

Figure 2.15 - Concerns About the Ability to Maintain a Desired Lifestyle by Political Camps (Jewish Population), 2017–2024
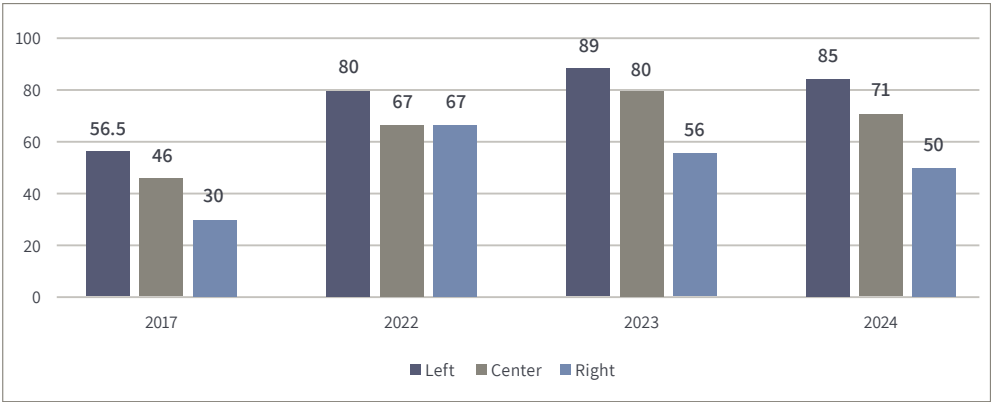
Source: IDI, 2024

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 2.16 - Strongest Tension in Israeli Society, 2025
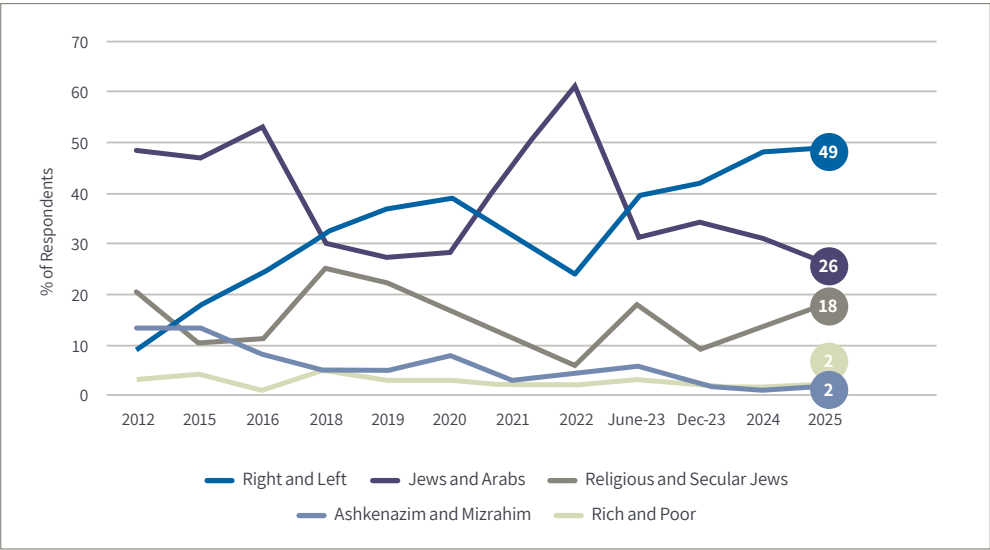
FE: According to citizens' self-reported assessments, the left–right divide has become the most dominant perceived conflict in Israeli society. By contrast, perceived divisions between Jews and Arabs, Mizrahim and Ashkenazim, and rich and poor have declined. While this measure reflects subjective self-identification rather than objective levels of conflict, it nonetheless reveals important shifts in how Israelis understand the main lines of social and political tension.

T: The prominence of the left–right divide reflects growing political polarisation, driven in part by populist politics that frame competition as a struggle between "the people" and internal enemies or elites. Delegitimisation of the liberal camp has become especially central, amplifying this divide. In Israel, the left–right axis is still primarily defined by security and the core ideological question of territorial division, which has long structured political competition. The recent rise in religious–secular tension can plausibly be linked to post–October 7 dynamics, particularly disputes surrounding ultra-Orthodox military conscription. At the same time, the decline in perceived Jewish–Arab conflict offers grounds for cautious optimism, pointing to the continued potential for Jewish–Arab political partnership.

Figure 2.17 - Youth Position on Equal Rights for Minorities, 2020-2024
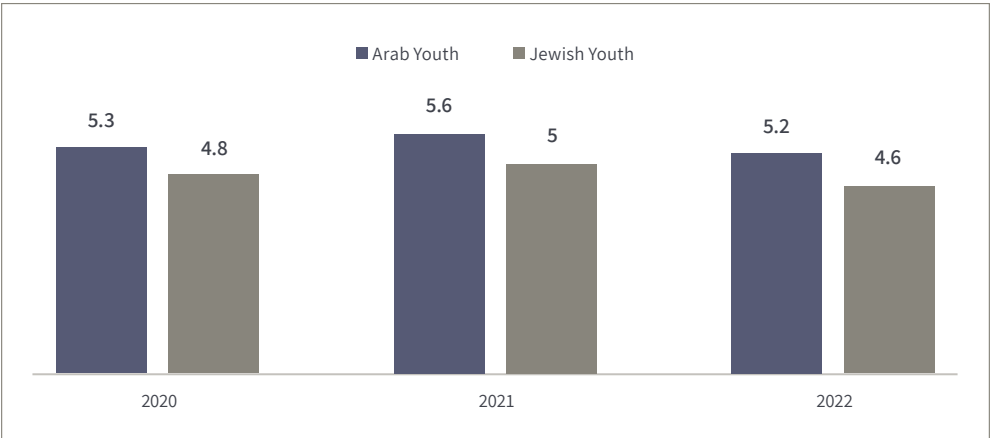
Source: aChord, 2024

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

Figure 2.18 - Freedom of the Press Index 2013-2025
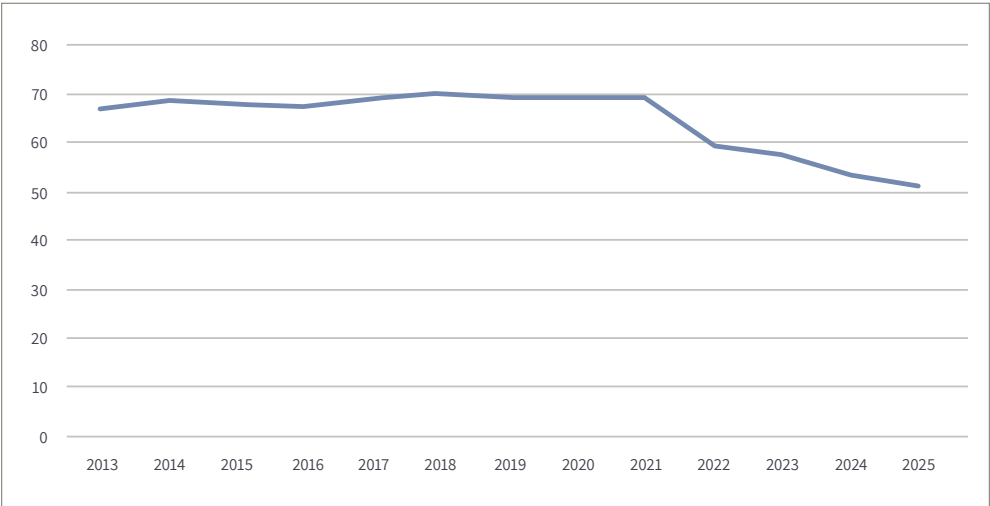
Source: RSF, 2025

FE: In recent years, press freedom in Israel has come under increasing pressure from government-led initiatives that undermine media independence. According to the latest Freedom of the Press Index by Reporters Without Borders (RSF), Israel ranks 112th out of 180 countries, a drop of 11 places in just one year. Alongside

V-Dem, RSF remains one of the most widely recognised global measures of media freedom and democratic health.

T: The anti-liberal media environment in Israel extends far beyond Channel 14 and Israel Today, encompassing broader pressures on press freedom and independent journalism. Current efforts to dismantle the Israeli Public Broadcasting Corporation, including a controversial bill that would mandate its privatisation or closure within two years, represent a significant threat to democratic pluralism. The elimination of a national public broadcaster that serves diverse communities risks further eroding public trust and weakening social cohesion.

These developments are reinforced by actions taken by Communications Minister Shlomo Karhi, including sustained efforts to marginalise the IPBC, moves to centralise control over television ratings, and government boycotts of critical outlets such as Haaretz, alongside the recent closure of Galei Tzahal. Together, these measures underscore the multifaceted and institutional nature of current attacks on media independence in Israel.

Figure 2.19 - Polarisation in Media Criticism, 2022
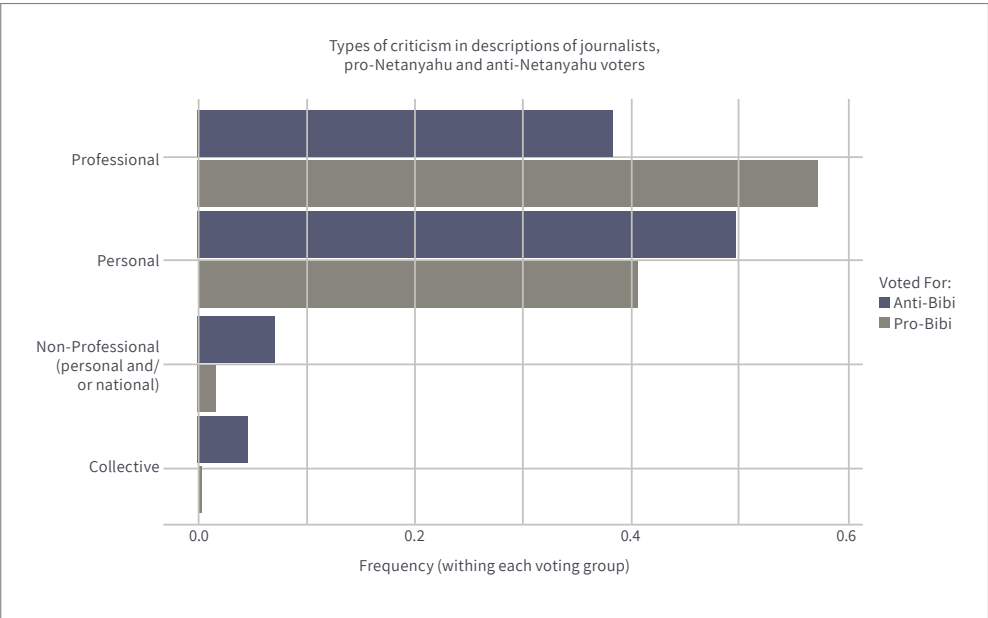
Source: Panievsky, 2022

FE: A study by Dr. Ayala Panievsky revealed significant differences in how media criticism is expressed across Israel's political camps, which she categorises as "pro-Bibi" and "anti-Bibi" (terms intended to capture attitudes toward governments led by Netanyahu). The "pro-Bibi" camp tends to view the media as a unified body with hostile intent, directing criticism at it in a personal and delegitimising manner rather than focusing on professional standards.

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.

Figure 2.20 - Media Coverage During First Three Months of Iron Sword, 2025

Media Representation During First Three Months of Iron Swords War.
Out of 721 Items Analyzed

Security establishment actors	142
Government of Israel / Coalition	106
Palestinians from Gaza	26
Hamas and terror organizations	17
Civil society	13
Opposition	10
Israeli Arabs	6
Palestinian Authority	1

Source: Panievsky & Benbaji, 2025
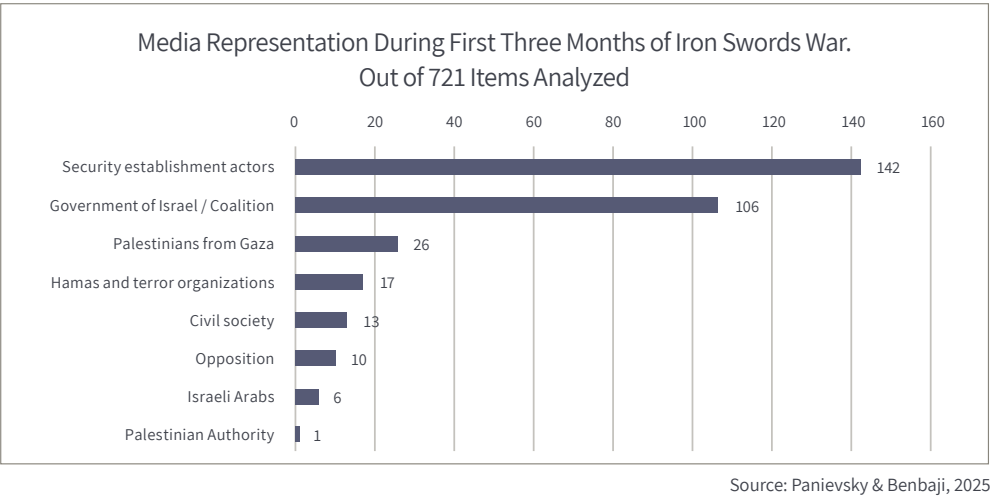
FE: During the war, Israeli news coverage has given very limited space to opposition MKs, civil society actors, and minority group perspectives. Reporting over the past two years has largely obscured conditions on the ground in Gaza, particularly the costs borne by Palestinians, while showing strong deference to military sources.

T: As a result, war reporting has created a distorted information environment, limiting Israelis' understanding of events in Gaza and the West Bank and narrowing the range of oppositional perspectives available to the public.

Figure 2.21 - Half of Coalition Voters Believe in the "Betrayal from Within" Conspiracy, 2025
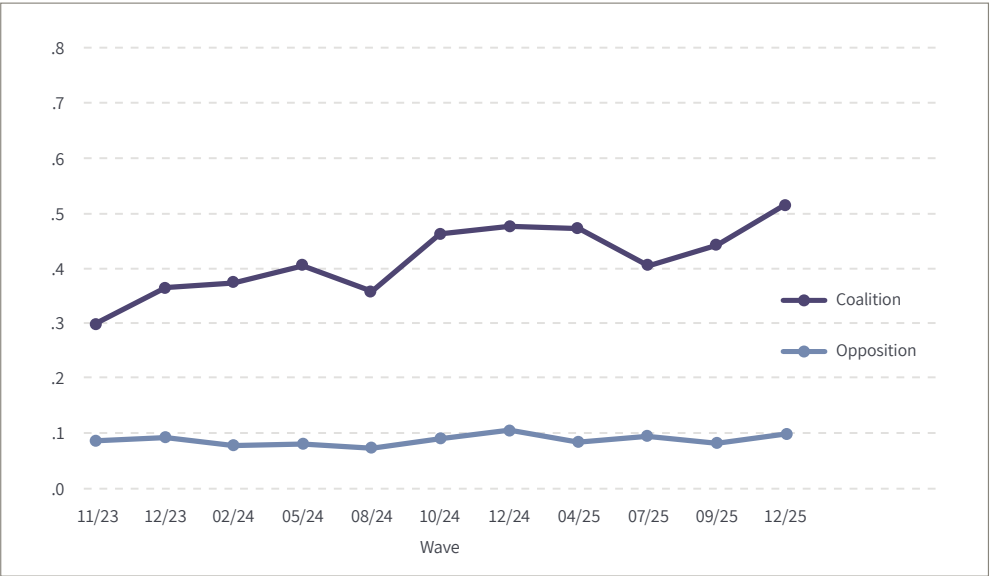
FE: There is a growing share of Israelis who believe in the "betrayal from within" conspiracy theory – the idea that actors within state institutions such as the Shin Bet or the Israel Defense Forces planned, enabled, or facilitated the events of October 7th, allegedly for political, ideological, or criminal reasons.

T: This trend encapsulates the consequences of Israel's distorted media environment: where trust in the media is low and the information environment is fragmented, conspiracy theories are more likely to take hold and spread.

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, two years 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 2.22 - Regional War vs. Israeli-Palestinian Peace, 2024
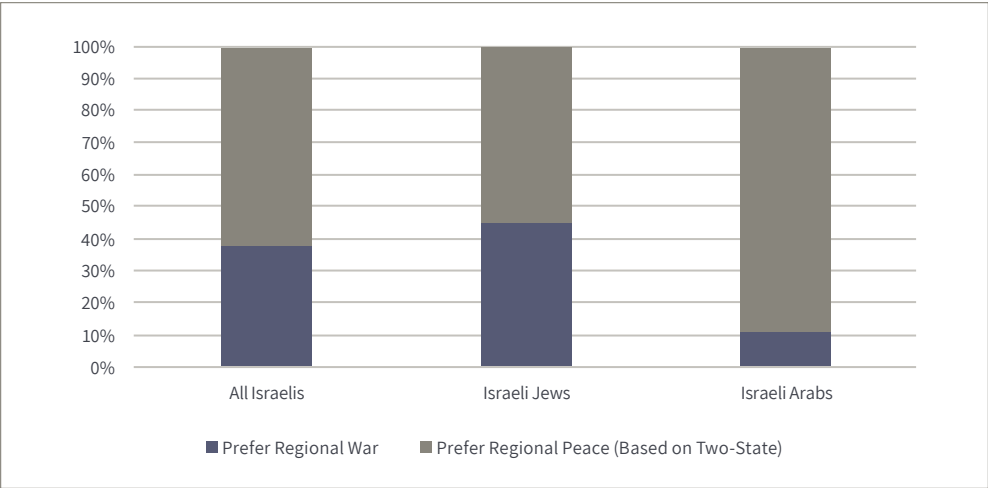
Source: Yakter, 2024

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 2.23 - The Peace 'Confidence Gap', 2002-2020

Source: Yakter & Harsgor, 2022
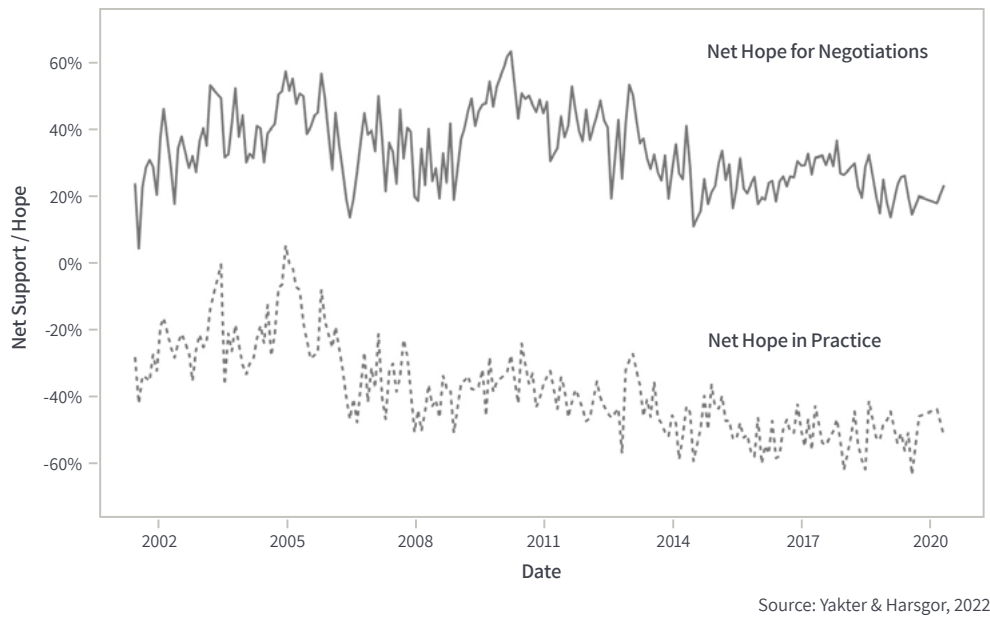
Figure 2.24 - The Peace 'Confidence Gap', 2019-2025

Source: Peace Index, 2019-2025
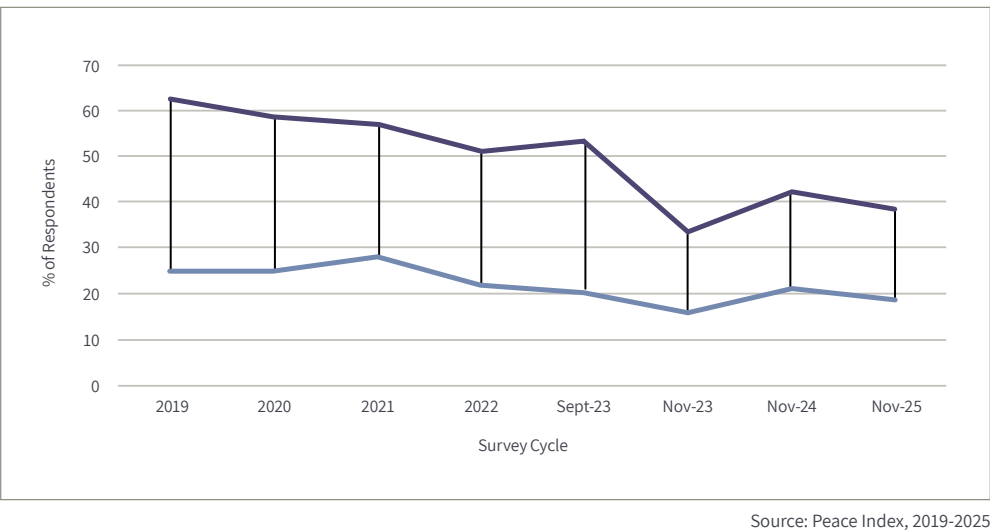
FE: Over the past two decades, a persistent gap has emerged between Israelis' support for peace negotiations and their belief that peace will actually be achieved (the poll does not specify a specific solution, but it is safe to assume

that most Israelis associate peace with some version of a two-state solution)– a phenomenon often described as the "confidence gap." While a majority continues to support negotiations in principle, there is a growing sense of pessimism about the prospects for a durable resolution. As the data in this subsection illustrates, the gap has persisted after October 7th and even widened, as both support for negotiations and optimism about peace have trended downward, reflecting an erosion of confidence alongside declining enthusiasm for talks.

Figure 2.25 - Support for a Two-State Agreement and Perceptions of Arab States' Role, 2023–2025
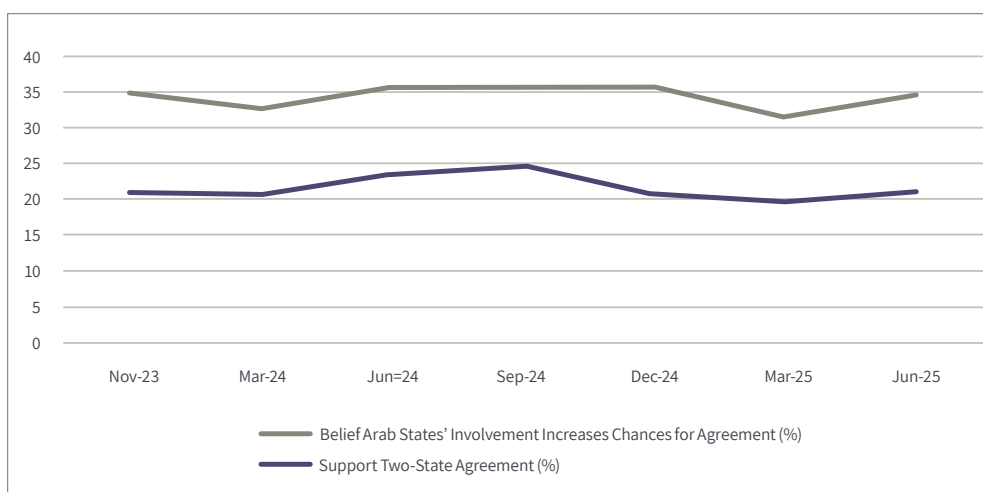
Source: Shaul Arieli – Politography, 2025

FE: In addition to the long-standing "confidence gap" between the desire for peace and the belief in its achievability, a new gap has emerged in recent years, particularly following the signing of the Abraham Accords. This gap is between support for regional involvement by other Arab countries in agreements to stabilise the Middle East, and support for a two-state solution. While support for the two-state solution has steadily declined and now registers at relatively low levels, the idea of a broader regional agreement involving Arab partners has gained significantly more traction among Israelis.

T: This data indicates that the strategy pursued by right-wing governments since 2009, to build peace in the Middle East without the Palestinians, has become firmly embedded in Israeli politics. The core idea has been that Israel can

normalise relations with its neighbours without resolving the Palestinian conflict or halting settlement expansion. After the October 7th massacre, however, Arab leaders consistently reaffirmed that no further normalisation will occur without meaningful progress towards peace with the Palestinians. Yet, perhaps reflecting the declining popularity of the two-state solution, leaders from across the political spectrum continue to speak vaguely about a "regional order," without committing to a concrete resolution of the conflict—sustaining the illusion that peace without Palestinians is achievable.

Figure 2.26 - Belief in Co-Existence in Jewish and Arab Populations, 2013-2025
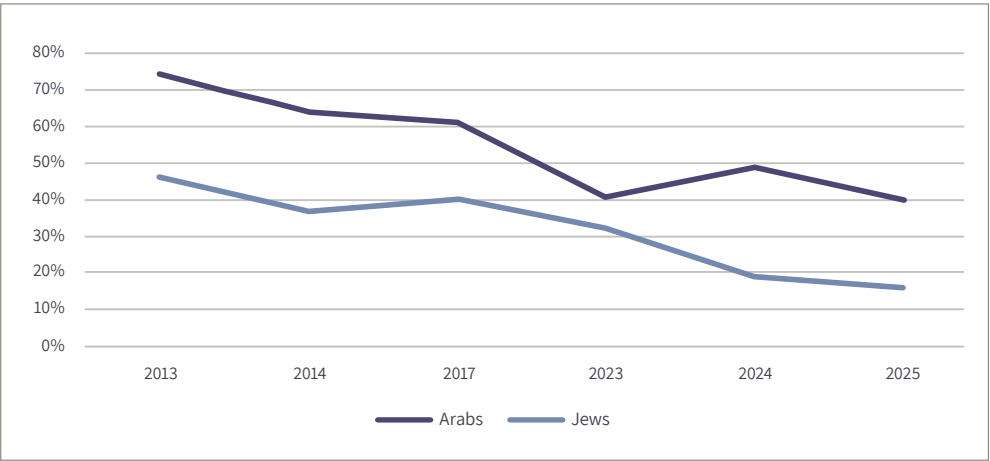
Source: Pew, 2013-2025

FE: Only one in five Israeli Jews believe that peaceful coexistence is possible, compared to one in two Israeli Arabs. Across groups, belief in the possibility of coexistence has declined over time.

T: Support for peaceful coexistence is eroding overall and increasingly fragmented along ethno-national lines, signalling diverging political expectations and a narrowing horizon for shared civic futures.

Figure 2.27 - Net Support (%) for two state solution 1994-2025
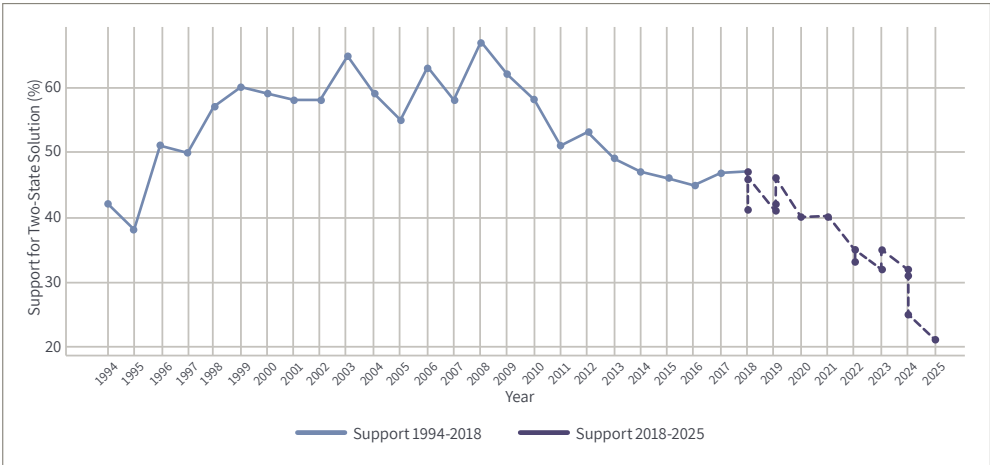
Figure 2.28 – More than Half of Israeli Jews Support Annexation or Status-Quo, 2025
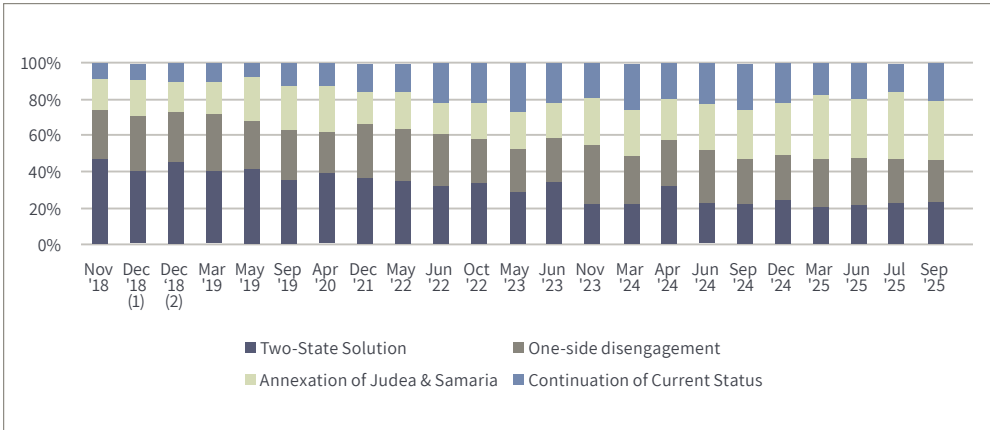
Figure 2.29 - Perceived Feasibility of a Two-State Solution Among Israeli Adults, 2013–2025
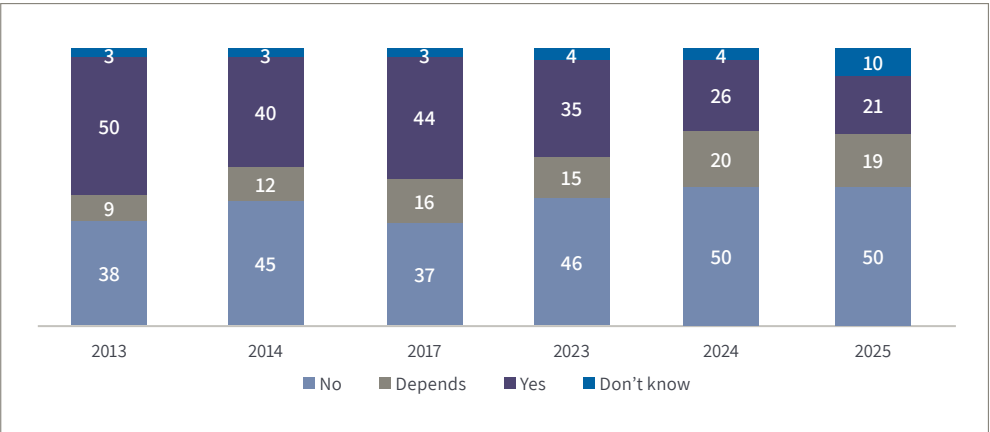
Source: Pew, 2013-2025

FE: Graphs 2.28–2.30 show that support for a two-state solution among Israeli Jews is at an all-time low. The decline began after Netanyahu's return to power in 2009 and has deepened steadily over time, reaching its lowest point in the aftermath of October 7th.

T: After the most severe security failure in Israel's history - under the most right-wing government, which promoted either conflict management (the "status quo") or annexation - more than half of Israeli Jews continue to support one of these same security frameworks. This persistence contrasts sharply with the collapse in support for the two-state solution, which has not been seriously pursued since the Annapolis process in 2007. Two conclusions follow. First, Israeli public attitudes toward the conflict are not fixed but highly responsive to political signals and major events. Second, Israeli politics is currently marked by a competition failure: even after a catastrophic breakdown, no credible alternative security vision has emerged. Yet this also points to an opportunity. If public opinion can shift so dramatically in one direction, it can shift again. Views on the conflict remain contingent and open to influence, but the liberal camp has failed to offer a compelling alternative for a long time.

Figure 2.30 - Beliefs on Settlements Contribution to Security, 2013-2025
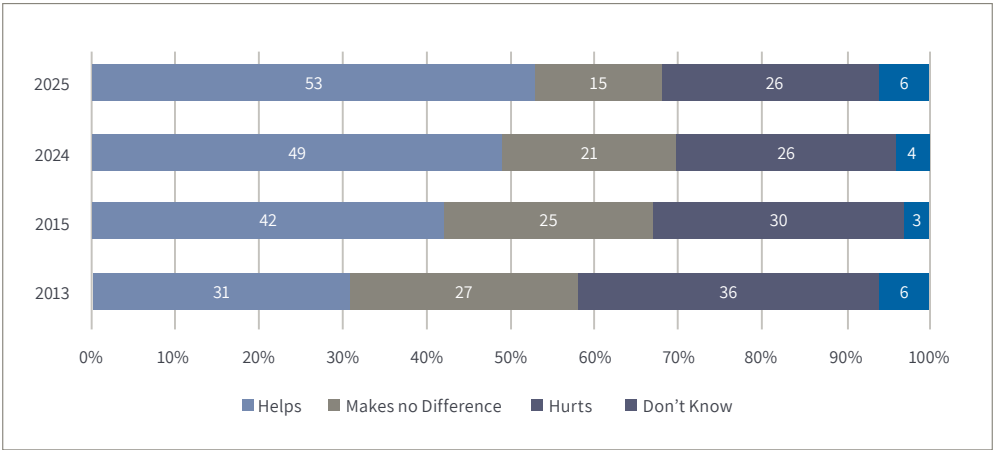
Source: Pew, 2013-2025

FE: A majority of Israeli Jewish adults believe that settlements contribute to Israel's security—an assessment that stands in stark contrast to the views of the overwhelming majority of Israel's former heads of the security establishment, who have consistently argued the opposite.

T: Support for the settlement project in Israel remains overwhelmingly grounded in security concerns. This reflects two important dynamics. First, the settlement movement has failed to persuade most Israelis of its core ideological claim—that expansion should be pursued for religious or messianic reasons tied to the sanctity of the land. Second, the movement has been highly effective in framing settlements as essential to Israel's security. Yet this also leaves room for optimism: security arguments can be challenged and reshaped, meaning public opinion is not fixed. For most Israelis, views on settlements are not fanatical, but contingent on how the security debate is framed.

Figure 2.31 - Settlers Attacks on Palestinians in the West Bank, 2006-2025

October 2025
264
(a daily average of 8
settler attacks per day)

2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021 2022 2023 2024 2025
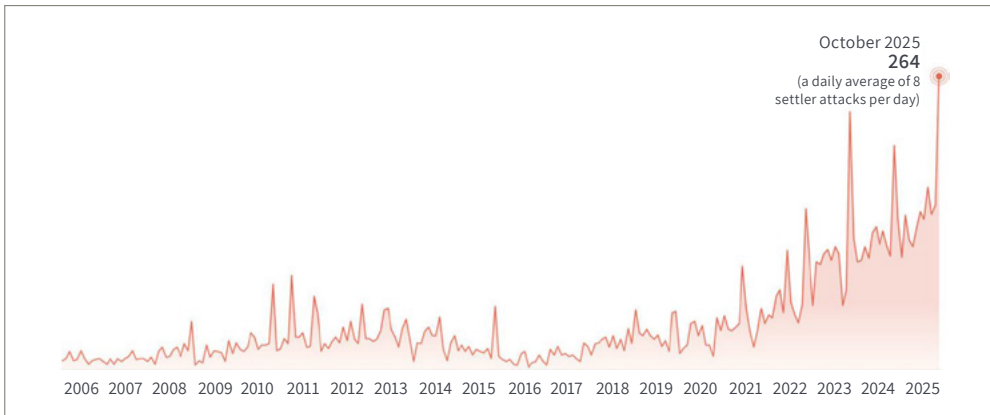
Source: OCHA, 2025

FE: Severely violent settler attacks on Palestinians have surged under the current government, indicating either explicit political backing or, at a minimum, a sustained and deliberate blind eye by state authorities.

T: Attacks peaked immediately after the collapse of Donald Trump's plan for the transfer of Palestinians from Gaza and the end of the war. One plausible interpretation is familiar from earlier moments in Israel's history: whenever prospects for de-escalation or political resolution emerge, radical fringes of the far Israeli right act to reignite violence and derail them. The sharp rise in attacks is difficult to explain other than as an attempt to inflame the West Bank, lock the system back into a cycle of violence, and push peace further out of reach—while pre-emptively eliminating the political threat of future settlement evacuation.

Figure 2.32 - Generational Support for a Palestinian State, 1981–2019
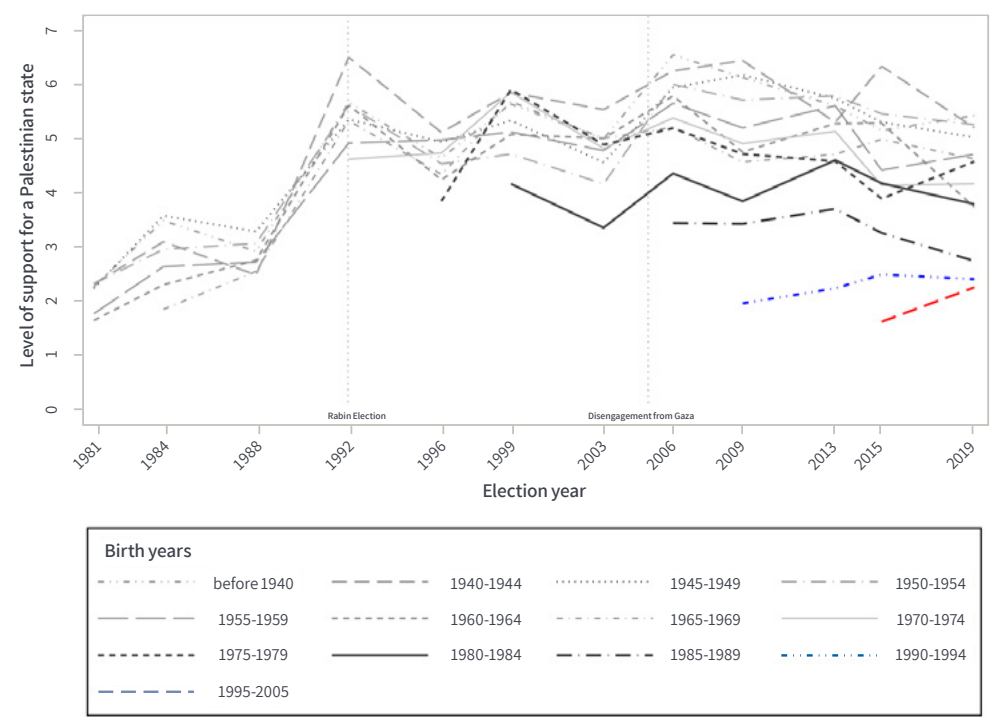
FE: Younger generations in Israel are less supportive of the creation of a Palestinian state. This 'hawkish' generation, born between 1995 and 2005, shows a marked shift in attitudes compared to older generations. Dr. Liran Harsegor's study indicates that while younger generations have historically been 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 2.33 - High School Students' Opinions About the 'Other' Group (Jewish and Arab), 2023
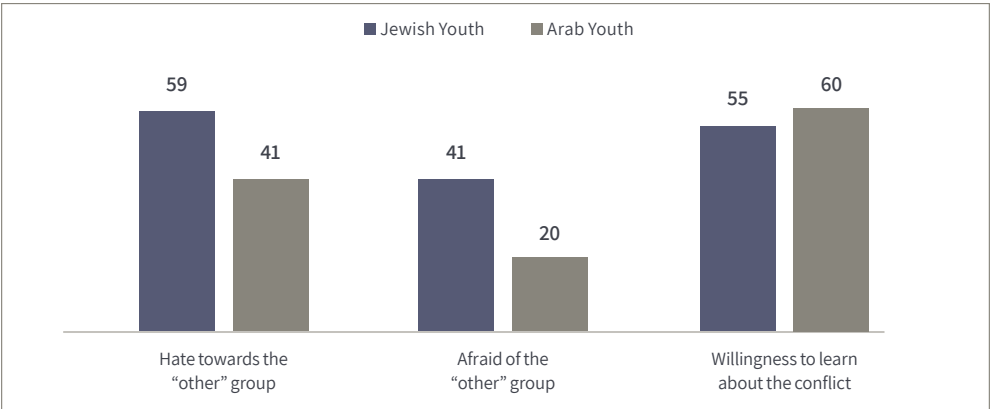
Source: Friedrich Ebert Foundation, 2023

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 2.34 - University Students' Views on the 'Other' Group in Israel, 2023-2025

To what extent do you feel each of the following feelings towards **Jews** in Israel?

1 = Not at all 6 = Very much - Arab Students

To what extent do you feel each of the following feelings towards **Arabs** in Israel?

1 = Not at all 6 = Very much - Jewish Students
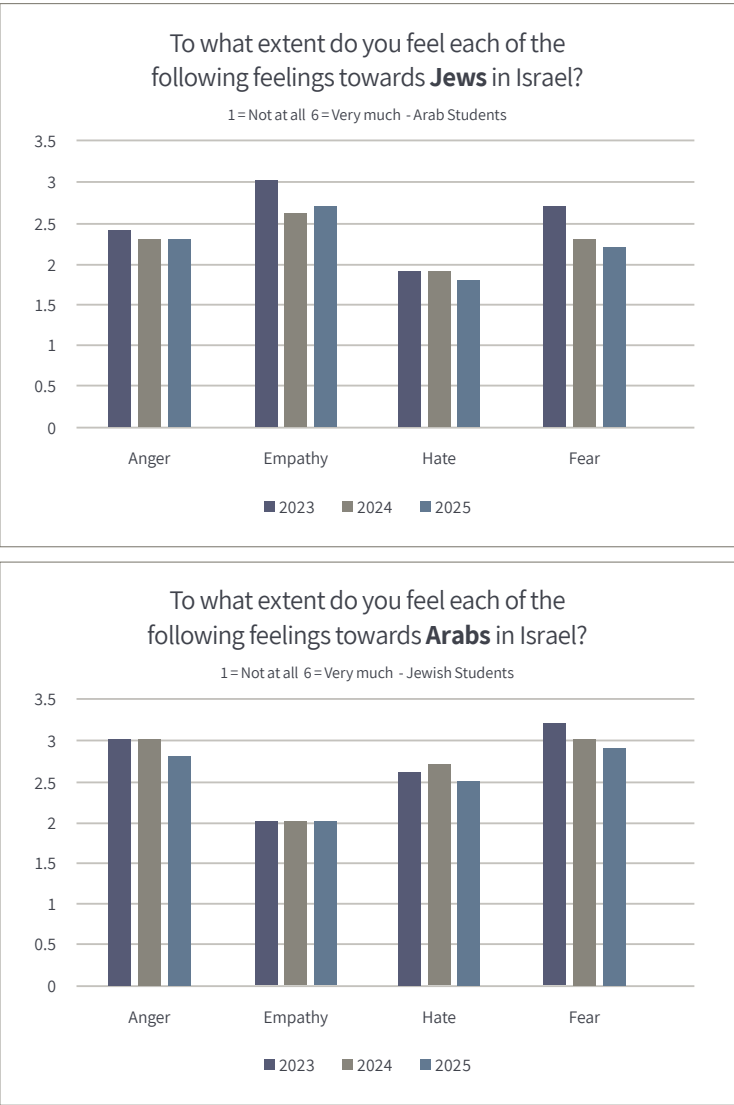
Source: aChord, 2023-2025

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. However, in 2025 data we can see a slight decline in the levels of anger, fear and hate.

Figure 2.35 - Changing Beliefs Towards Peace with Egypt, 1973-1978
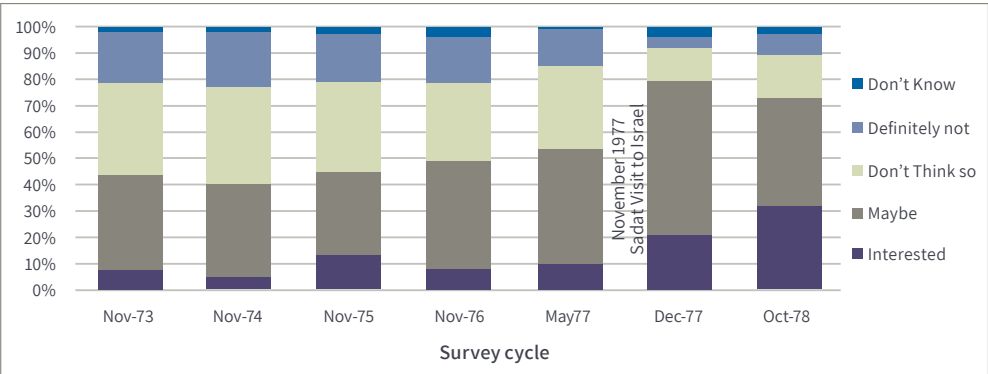
Source: IDI Data, 1973-1978

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.

2c. Societal Fairness

This subsection presents data on the distribution of resources and opportunities in Israeli society, focusing on indicators of cohesion and fairness such as social mobility, cost of living, poverty rates, gender gaps, education, and violence in minority communities. The graphs show how, despite Israel's wealth and innovation, deep inequalities persist: poverty and food insecurity remain among the highest in the OECD, families face rising costs, and education standards are slipping. These pressures are compounded by sluggish growth, declining investment, and political instability linked to the judicial coup and regional conflict. We chose not to focus on short-term economic effects of the war, which are difficult to interpret. For now, the shekel remains strong, the stock market has stabilised, and some sectors—including defence and parts of high-tech, particularly cyber—have even benefited. Yet these signs of resilience mask troubling long-term trends: declining investment in civilian sectors, reputational "grey boycotts" and disinvestment, and the diversion of younger generations from education and production into prolonged military service. Taken together, the data suggest that while Israel's economy retains areas of strength, its post-war outlook is fragile and increasingly contingent on political stability and the quality of leadership in the coming years.

Figure 2.36 - Income Inequality, OECD Countries 2022-23
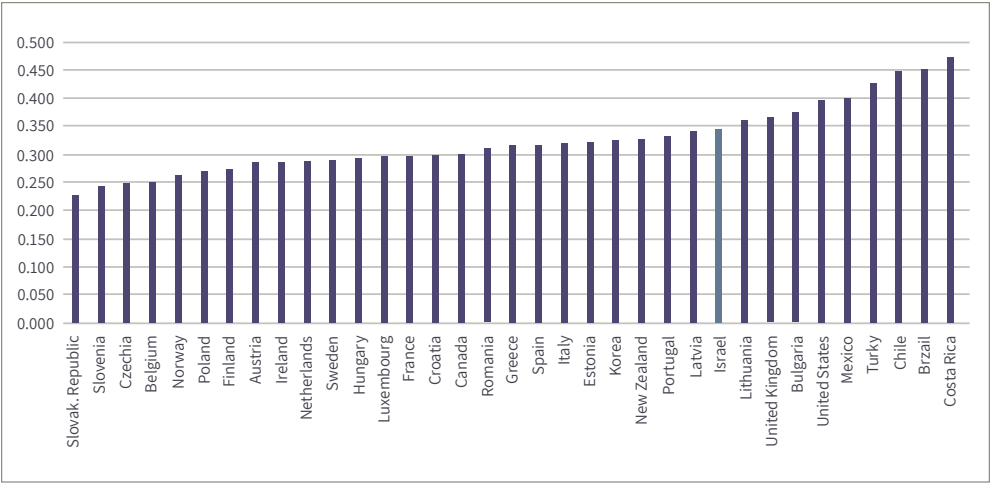
Source: OECD, 2024

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 2.37 - Social Expenditures in Israel, 2000-2024
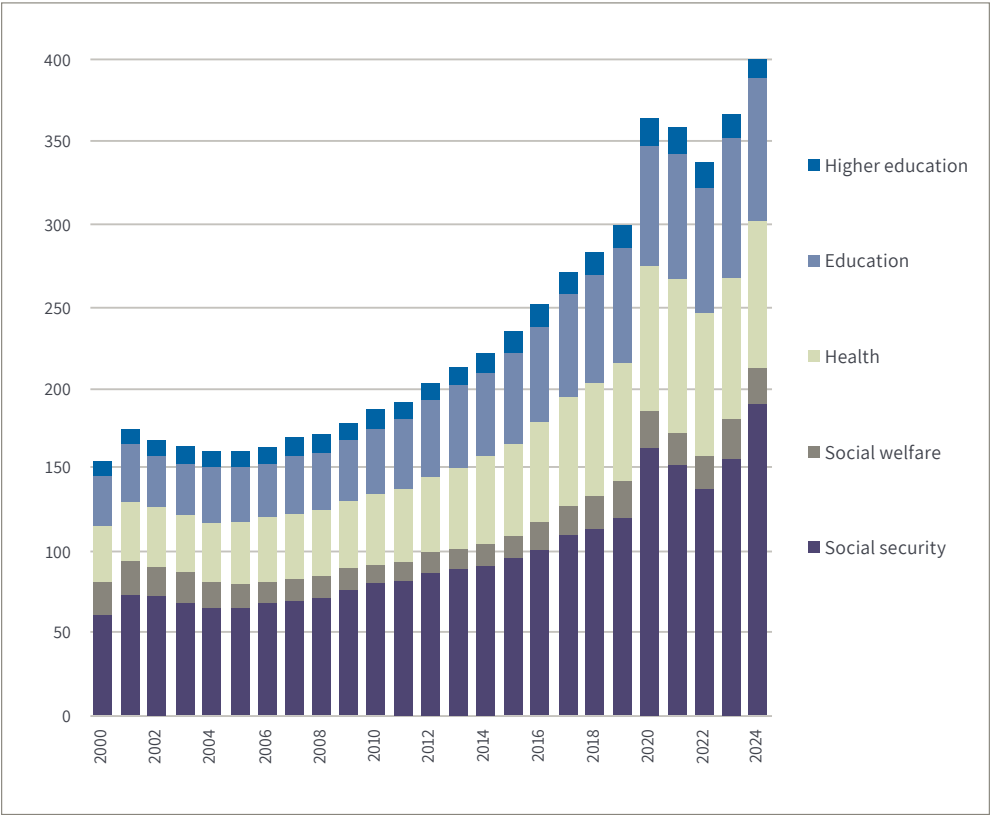
FE: Government expenditure on social welfare (net) has been dramatically reduced over the past twenty years.

T: While the fiscal burden of war will make new investments difficult, the scale of past neglect leaves substantial room for improvement. Strengthening welfare provision remains a critical opportunity to improve the lives of Israelis and rebuild social resilience.

Figure 2.38 - Percentage Below Poverty Rate – OECD Countries, 2022
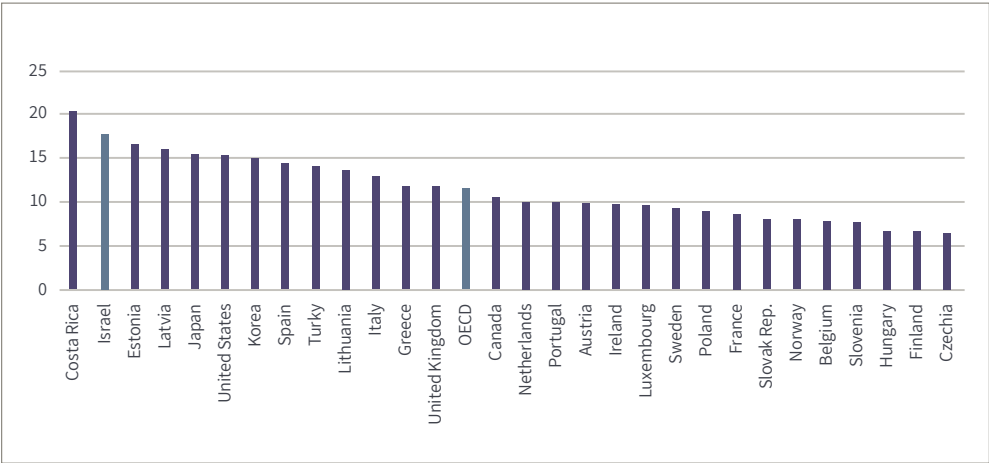
FE: One in six people in Israel lives in poverty, with the poverty rate being one of the highest among OECD countries. Data by age group reveals that nearly 30% of children are below the poverty line. This is especially concerning given that Israel is the youngest nation in the developed world.

Figure 2.39 - Percentage Below Poverty Threshold by Age Group, 2010-2023
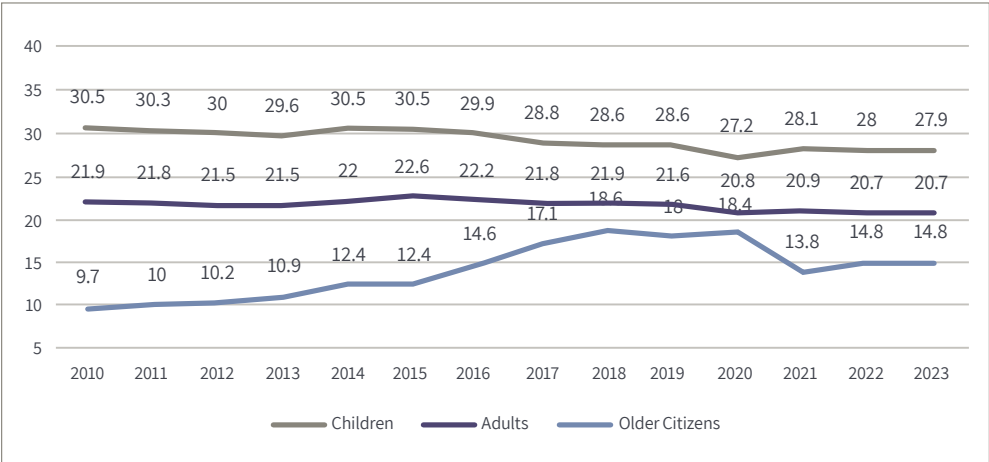
FE: In 2023, 27.9% of children, 20.7% of adults, and 14.8% of older citizens in Israel lived in poverty.

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 2.40 - Percentage Below Poverty Rate by Communities, 2022-2023
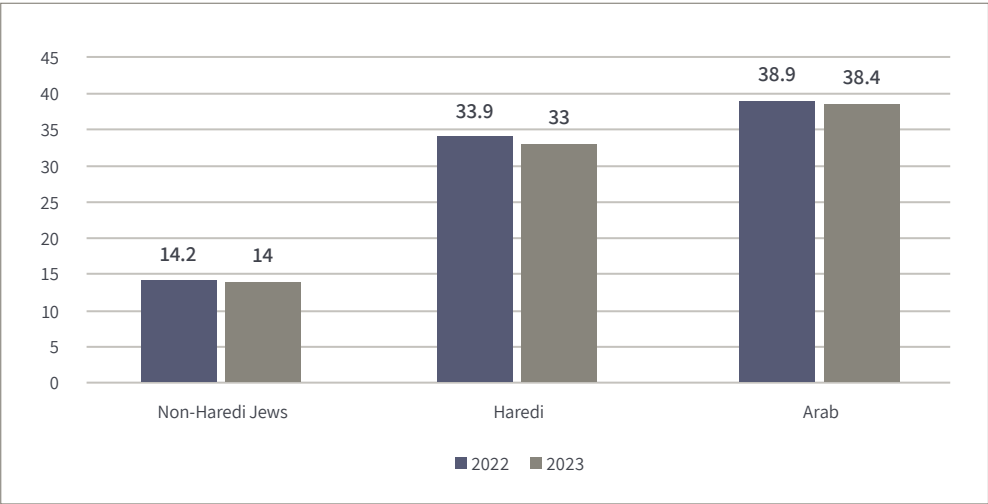
Source: BTL, 2024

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 2.41 - Price Level Relative to GDP Per Capita – OECD Countries, 2022

The chart plots Price Level (%) against GDP per capita, $. Labeled points include Israel, Switzerland, New Zealand, Finland, Austria, Belgium, Ireland, and Luxembourg. The fitted curve equation is:

$$y = -1E\text{-}08x^2 + 0.0023x + 28.276$$
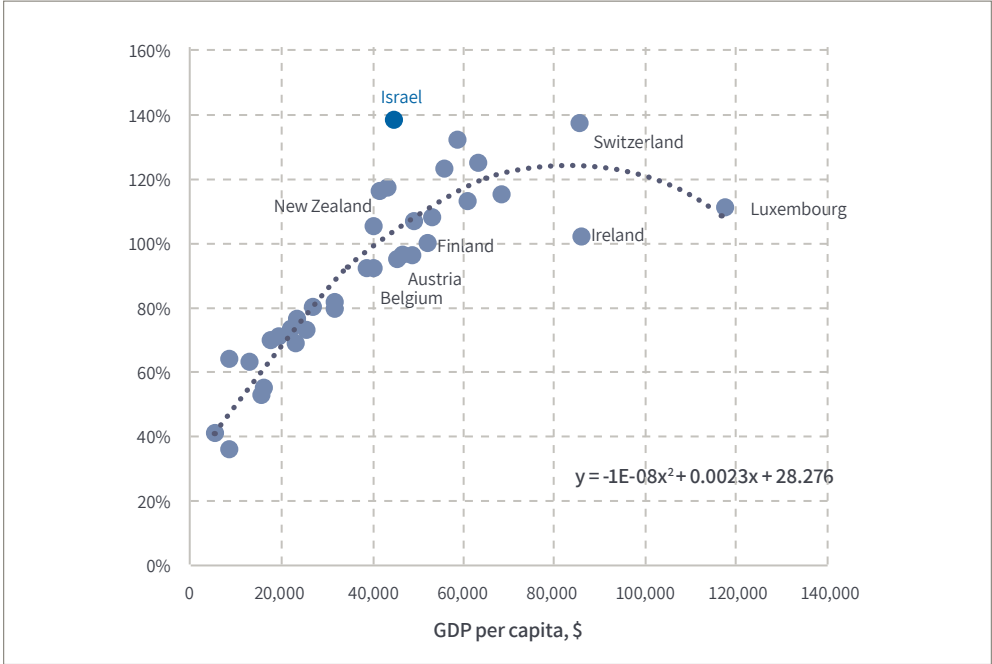
FE: Israel is among the most expensive countries to live in within the OECD, with rising costs of living exacerbating poverty, particularly for families with children.

Figure 2.42 - Moderate and Severe Food Insecurity, 2021-2023
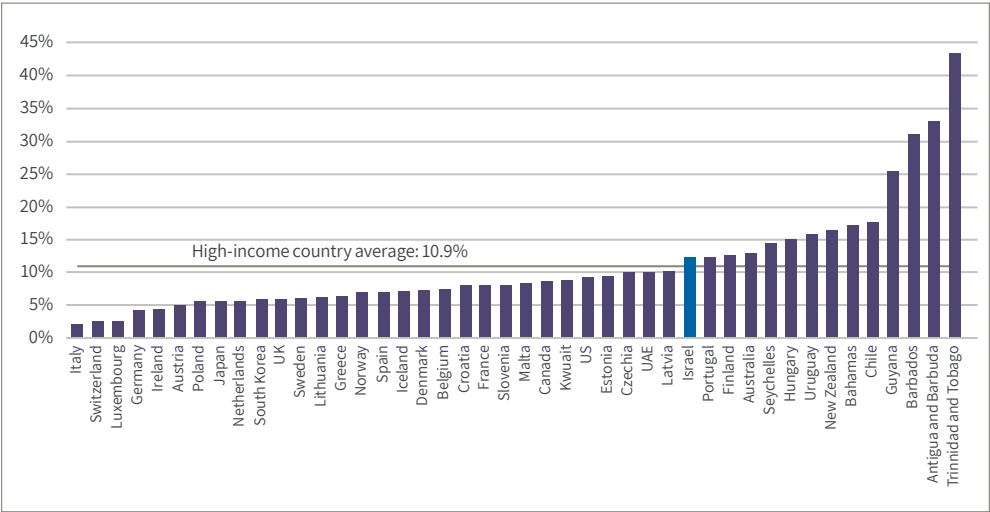
Source: Taub, 2025

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 2.43 - GDP's Deviation from the Pre-war Trend and Accounting Contribution of Its, 2024
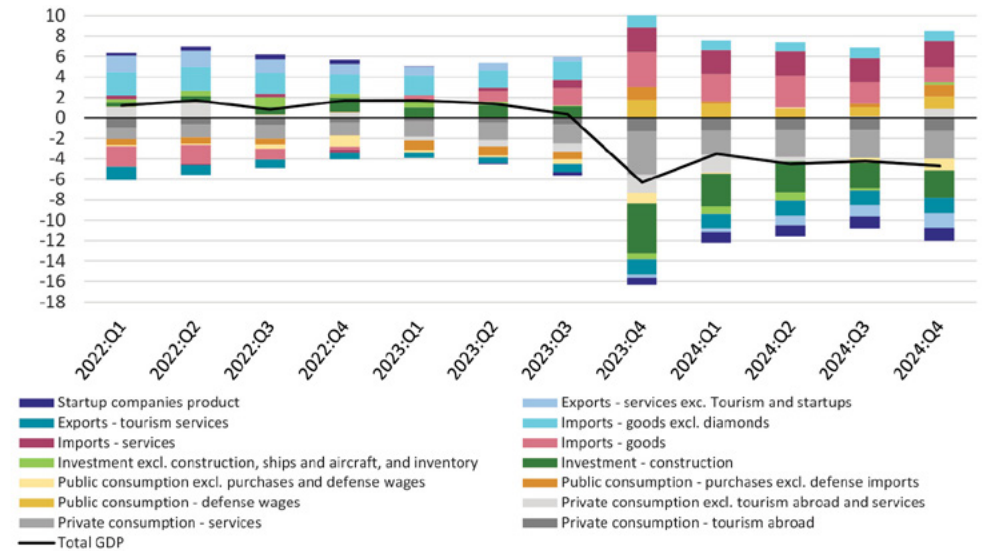
Source: Bank of Israel, 2025

FE: Israel faces mounting economic risks in the post-war period, including investor withdrawal and the cost of sustaining hundreds of thousands of people in reserve duty.

T: Despite an apparent rise in public consumption, much of it is government-fuelled. Market indicators suggest Israel is heading into a period of economic instability, underscoring the urgency of preparing for a potential crisis.

Figure 2.44 - Israel's Credit Rating History by Agency – 1988-2025
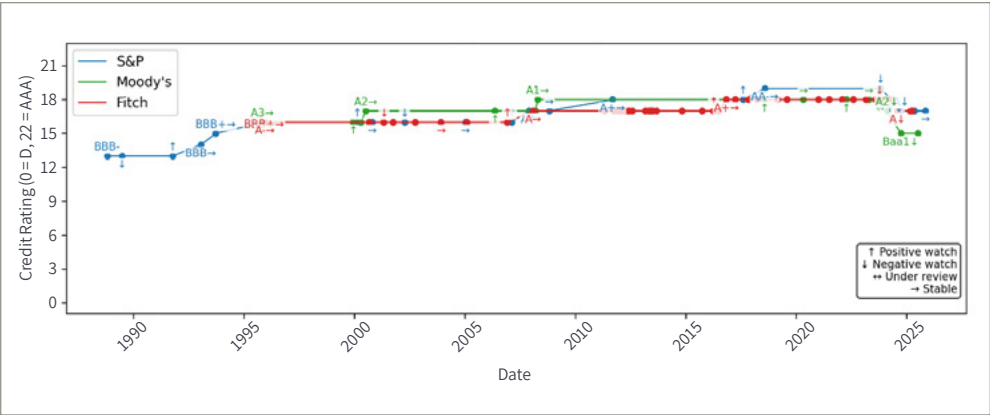
Source: TradingEconomic, Israel credit rating History. Rating standardized to common scale for display.

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 2.45 - Capital Raised by Israeli Tech Sector, 2018-2025
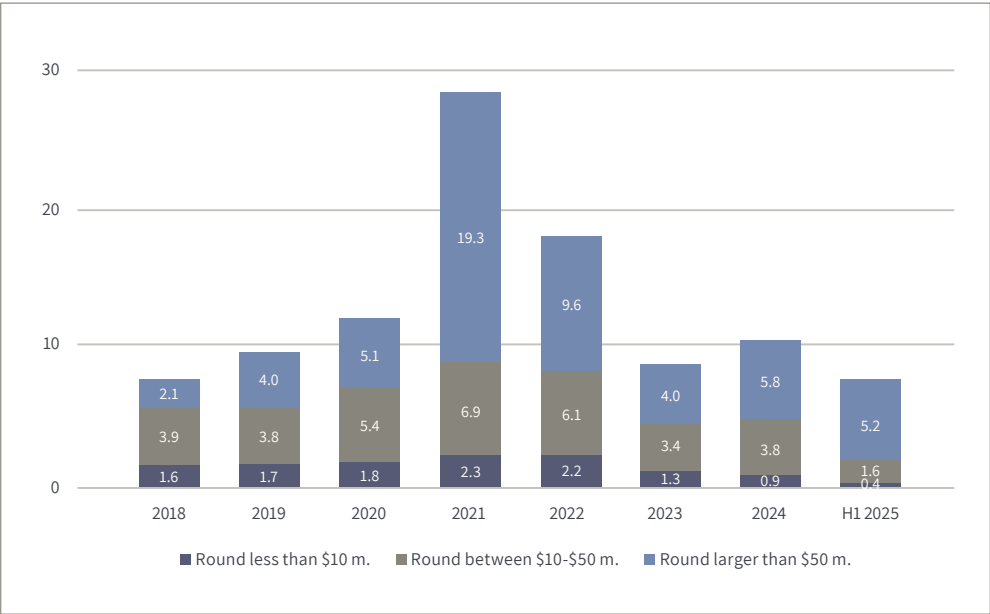
FE: High-tech investments in Israel have declined sharply, falling from record highs in 2021 to levels last seen a decade ago. This trend mirrors global patterns and, according to the Taub Center, has not been significantly affected by either the war or the judicial coup.

Figure 2.46 - The Family Index - How Easy Is It to Raise a Family? 2024

Country	Score
Denmark	7.0
Luxembourg	7.0
Norway	7.0
Finland	6.9
Sweden	6.4
Iceland	6.4
Estonia	6.2
Germany	6.2
Slovenia	5.9
Austria	5.8
Slovak Republic	5.4
Poland	5.4
Netherlands	5.3
Belgium	5.2
Hungary	5.2
Japan	5.1
Czechia	4.9
Latvia	4.7
Korea	4.7
France	4.7
Lithuania	4.6
Switzerland	4.6
Ireland	4.5
Portugal	4.1
New Zealand	4.0
United Kingdom	3.9
Spain	3.9
Greece	3.5
Italy	3.4
Australia	2.6
Israel	2.6
United States	2.0
Chile	1.2

Legend: ■ Education and Daycare ■ Shared Time ■ Economical Relief

Source: Schecner & Mann, 2024

FE: An 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 2.47 - Gender wage gap in hourly earnings (%), 2025
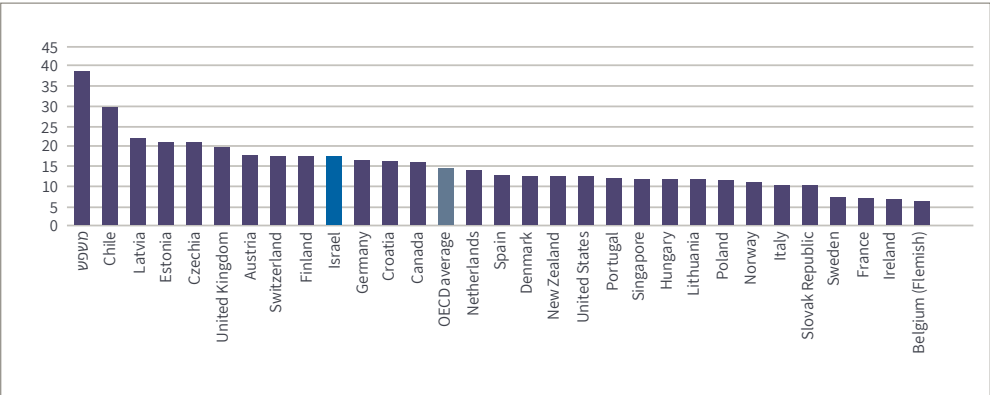
FE: Israel has a significant gender wage gap of nearly 18 percent, ranking tenth highest among OECD countries. At the same time, Israel has improved by six places since the last measurement, indicating some progress despite the remaining gap.

Figure 2.48 - Social Mobility in Israel: Probability of a Child Reaching the Top 25% if Parents Are in the Bottom 25%, by Ethnicity, Community, and Religion
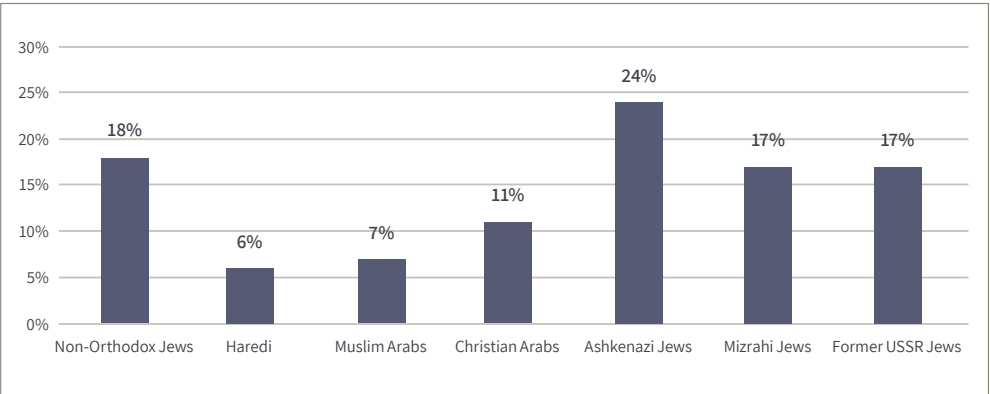
FE: Social mobility in Israel is highest among Ashkenazi Jews, with 24% of children from the bottom 25% reaching the top 25%. Former USSR Jews and Mizrahi Jews follow at 17%, while Haredi Jews and Arabs rank significantly lower.

T: The FSU Jewish community, despite being a more recent migrant group, has integrated relatively successfully and rapidly narrowed socio-economic gaps with Mizrahi Jews. At the same time, the data highlights the persistence of **ethnic-based structural inequalities** in access to ethnic-based structural inequalities.

Figure 2.49 - Annual Expenditure per Pupil (1st to 12th Grade) in Israel - Jewish and Arab Education Systems, 2014-2024

Source: Ministry of Education, 2025

FE: Israel continues to subsidise the religious Jewish education system more heavily than other education systems, despite some recent reductions in the funding gap. Overall, the gap remains at around 16 percent in favour of religious education, and preferential funding i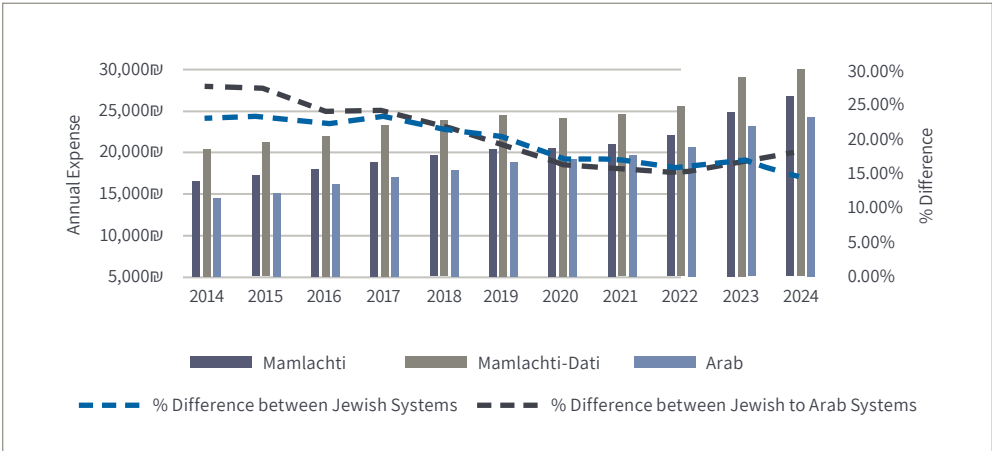s also evident when religious Jewish education is compared with the Arab education system. Moreover, after several years of narrowing, the gap between Jewish and Arab education funding widened again in 2023–2024.

T: Initiatives that promote liberal and democratic education are necessary but insufficient in the face of sustained and unequal public investment in education streams that are often anti-liberal or exclusionary. Meaningful change will require government-level action or a broad national campaign, and in the longer term structural reforms—such as dismantling the rigid four-stream system or, at minimum, softening it through shared teacher training, joint curricula, and cross-stream learning and teaching opportunities.

Figure 2.50 - TIMSS Educational Test Score in Israel – 8th Grade, by Education System, 2019-2023
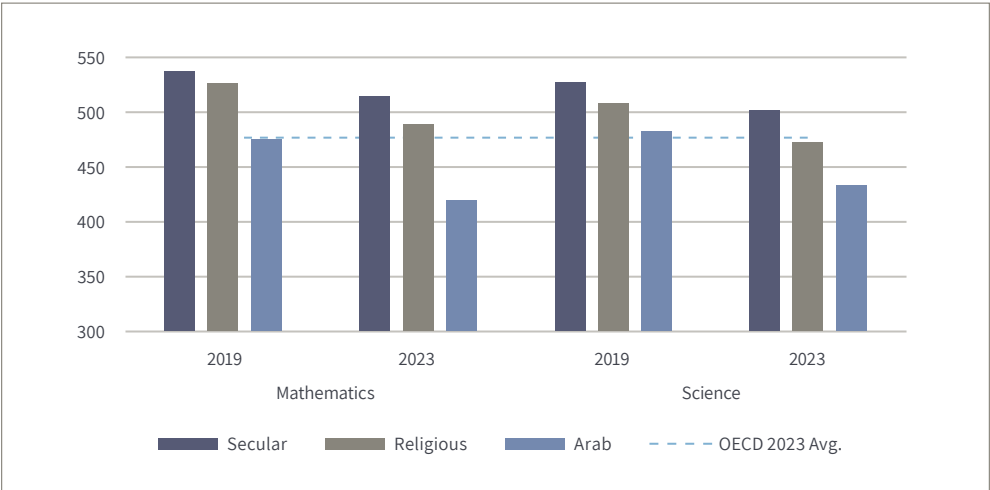
Source: OECD, 2025

Figure 2.51 - PISA Educational Test Score in Israel – 9th Grade, by Primary Language, 2022
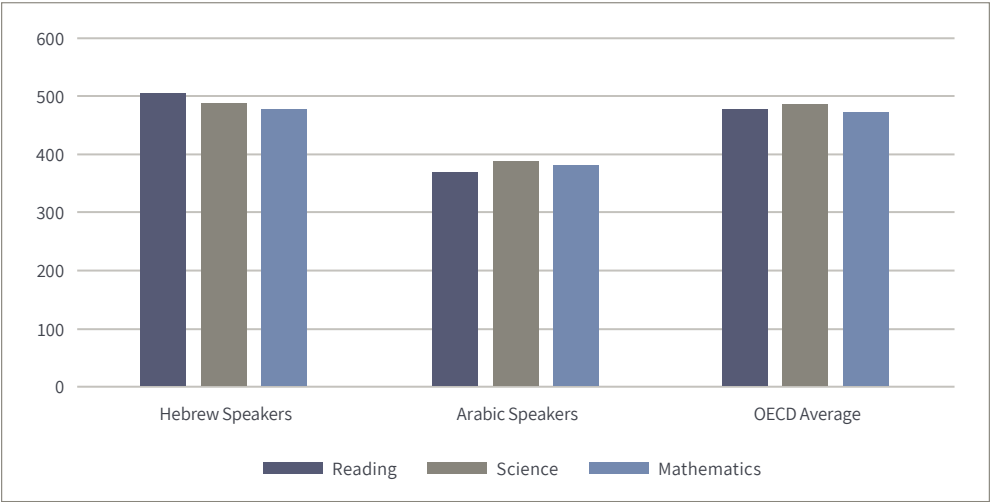
Source: OECD, 2024

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 2.52 - Within-Countries Gaps in PISA Educational Test Score – 9th Grade Pupils, OECD Countries, 2022
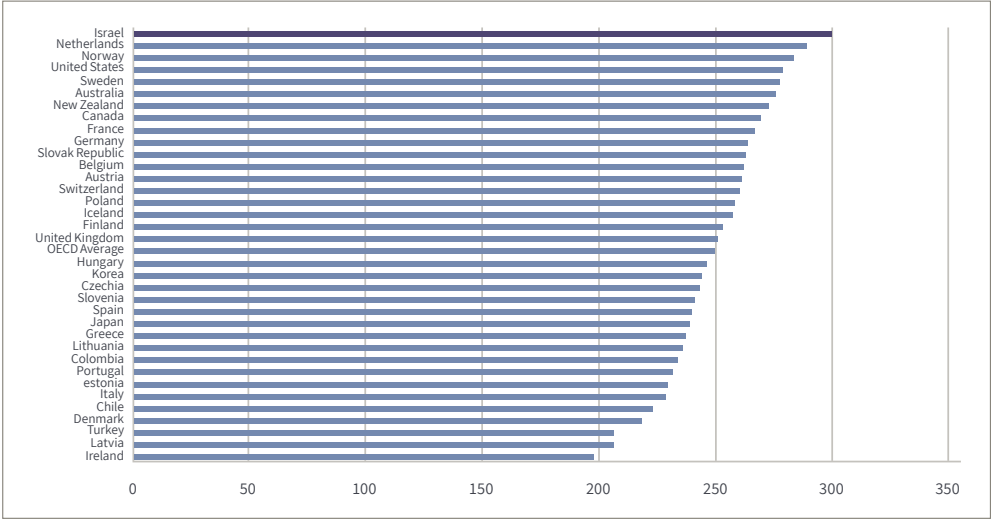
Source: OECD, 2024

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

Figure 2.53 - High-School Diploma Eligibility Rates Among 12th Graders by Communities, 2019-2024
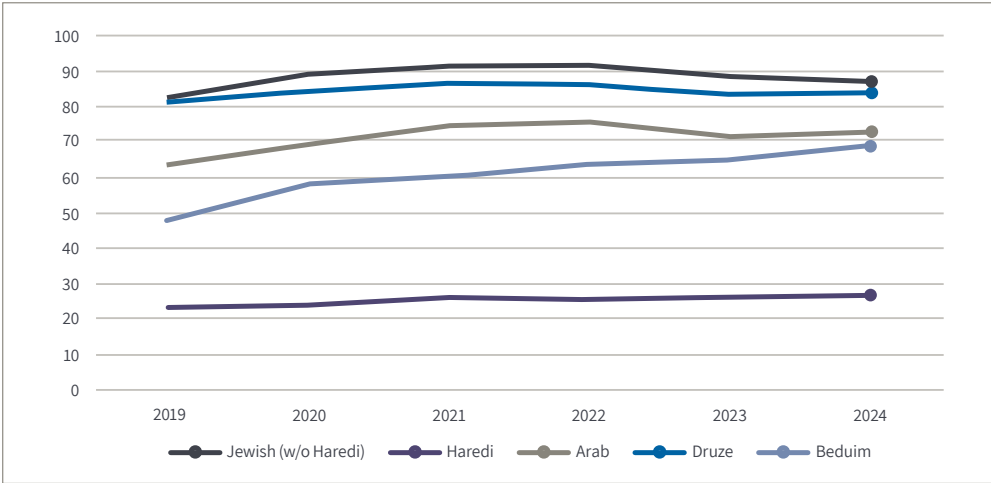
Source: Ministry of Education, 2025

Figure 2.54 - Share of Haredi Sitting and Entitled to High School Diploma, 2011-2023
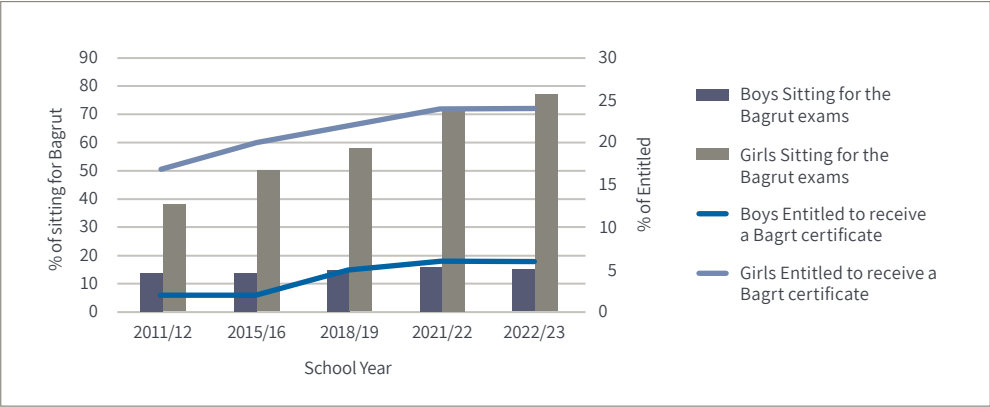
Source: Cahaner & Malach, IDI, 2025

FE: Diploma eligibility rates remain high and stable among Druze and non-Haredi Jewish students. Rates in Arab and Bedouin communities have improved in recent years but continue to lag behind. By contrast, the Haredi community remains largely outside the diploma system, with eligibility rates of below 30 percent, despite a growing share of girls obtaining diplomas; outcomes for boys remain substantially worse.

T: In the context of declining performance on international assessments, stable or rising diploma eligibility rates in some communities may mask a broader erosion in educational quality, rather than genuine improvement in learning outcomes across Israel's education system.

Figure 2.55 - Dropout Rates from High School, 2013-2023
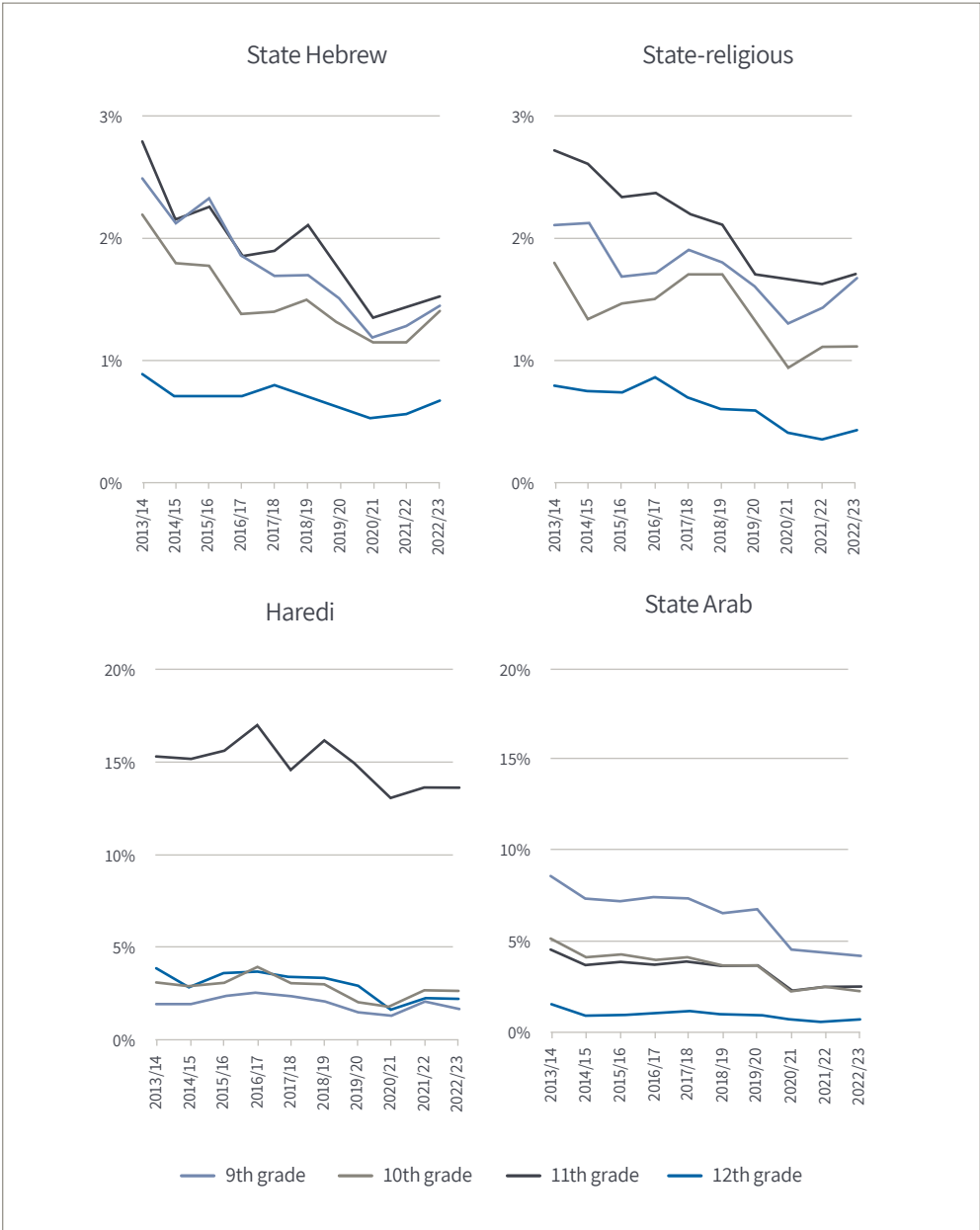
FE: Dropout rates are highest in the Haredi sector and remain relatively high among Arab students, although there has been significant improvement in recent years, likely reflecting increased government investment. In addition, dropout

rates are rising in both state (Hebrew) and state-religious education. The effects of the war are not yet reflected in this data.

Figure 2.56 - Israel's Adults' Skills in Comparison to OECD Average, 2024
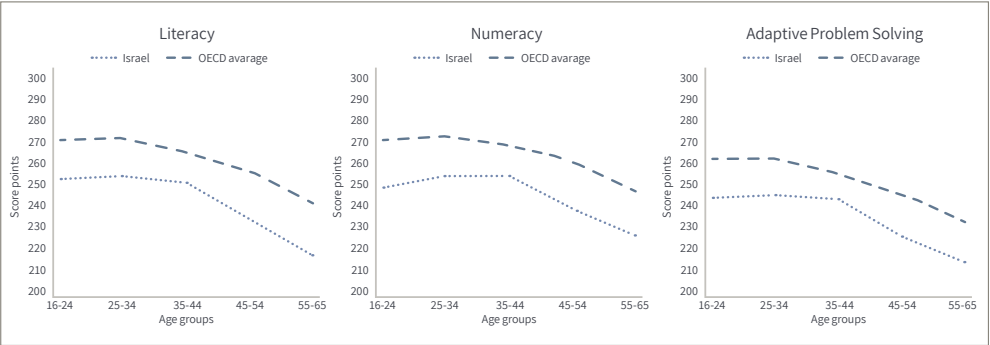
Source: OECD, 2025

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

Figure 2.57 - Life Expectancy in Israel 2012-2024
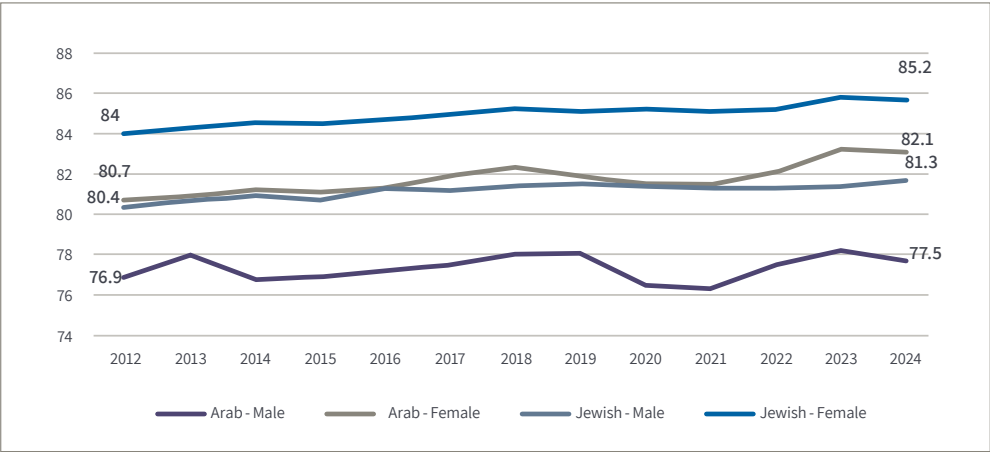
Source: CBS, 2025

FE: Arab male life expectancy in Israel is four 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 2.58 - Homicide Rates Per 100,000: Comparison Between Jewish and Arab Communities in Israel, 2000-2025
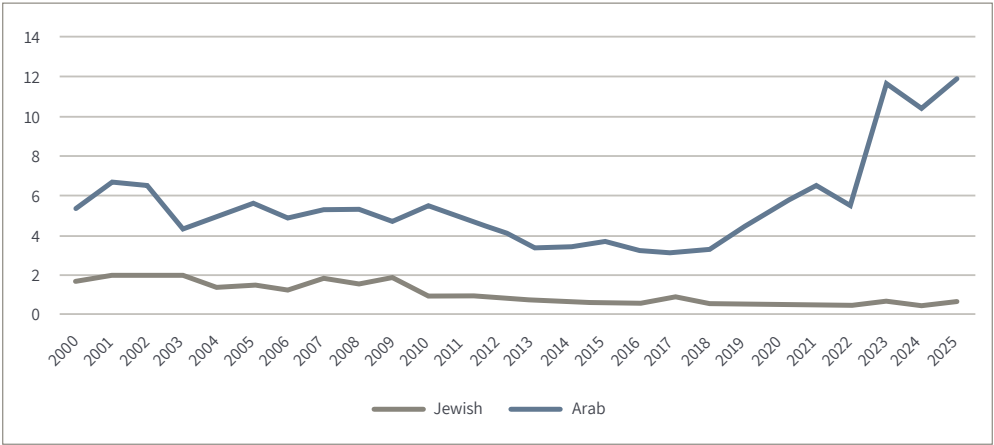
Source: Abrahm Initiative, 2023; Kan broadcast, 2024-2025

FE: In 2022, an Arab citizen of Israel was 11 times more likely to be murdered than a Jewish citizen. By 2024, that disparity had widened dramatically, with an Arab citizen 21 times more likely to be murdered. These sharp increases coincided with the tenure of Itamar Ben-Gvir as Minister of National Security, during which overall murder rates—particularly within Arab communities—rose steeply. In 2025, the ratio declined to 17.47, but this change did not reflect an improvement in safety for Arab communities. Rather, it resulted from an increase in murders among Jewish citizens. In absolute terms, the situation remains indefensible and unacceptable: one in every 8,414 Arab citizens of Israel was murdered in 2025.

Figure 2.59 - Most Arabs in Israel have no Sense of Personal Safety, 2025
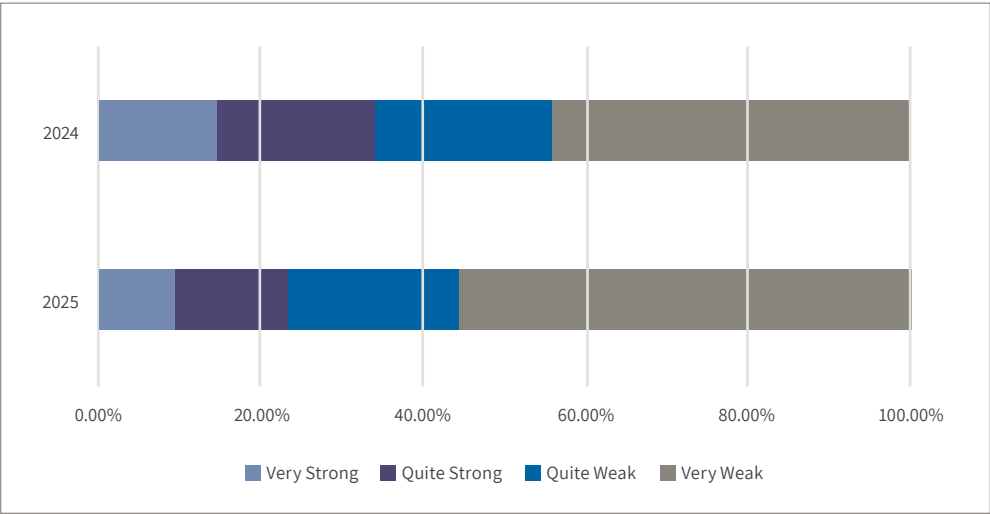
Source: Konrad Adenauer Foundation, 2025

FE: Personal safety among Arab citizens of Israel has been declining year after year, reflecting weak governance and the spread of uncontrolled violence driven by organised criminal networks.

T: Compared to the period before the current government, the rise in violence points to policy failure rather than inevitability. This trend undermines racialised and politically motivated claims that depict violence as "cultural" or inherent. Instead, the data show that public safety outcomes in Arab communities are shaped by state capacity, political priorities, and enforcement practices—all of which are open to change.

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
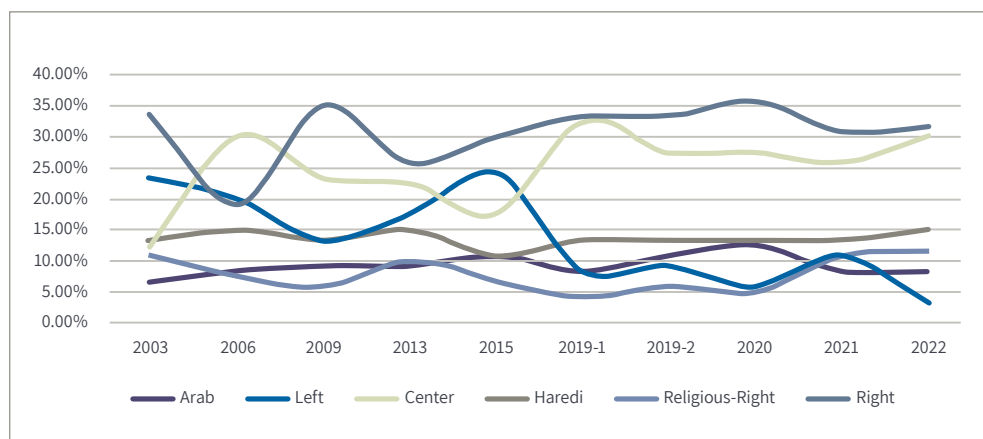
Source: Election Results. Right-Left Analysis by Molad

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
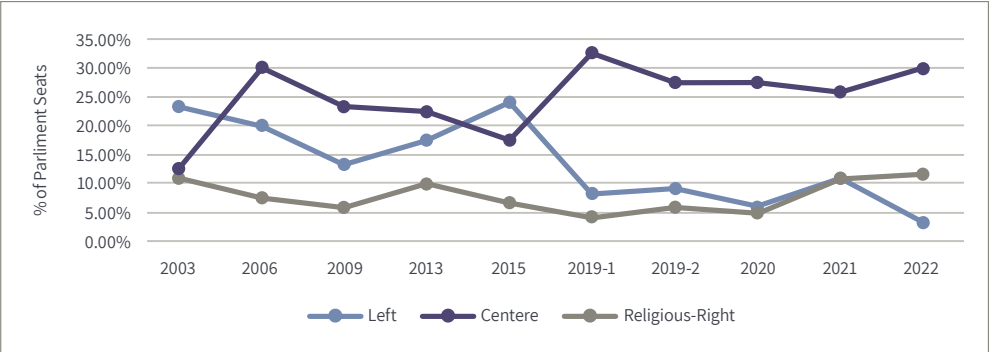
Source: Election Results. Right-Left Analysis by Molad

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
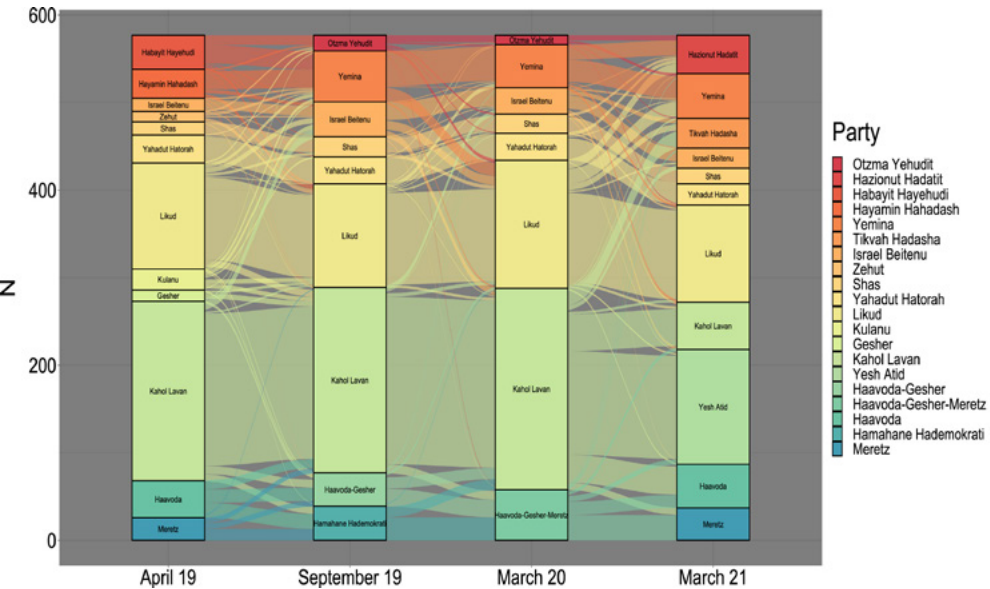
Source: Gidron, Sheffer and Mor, 2022

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 - Voter Self-Identified Political Position in Israel, 2003–2025
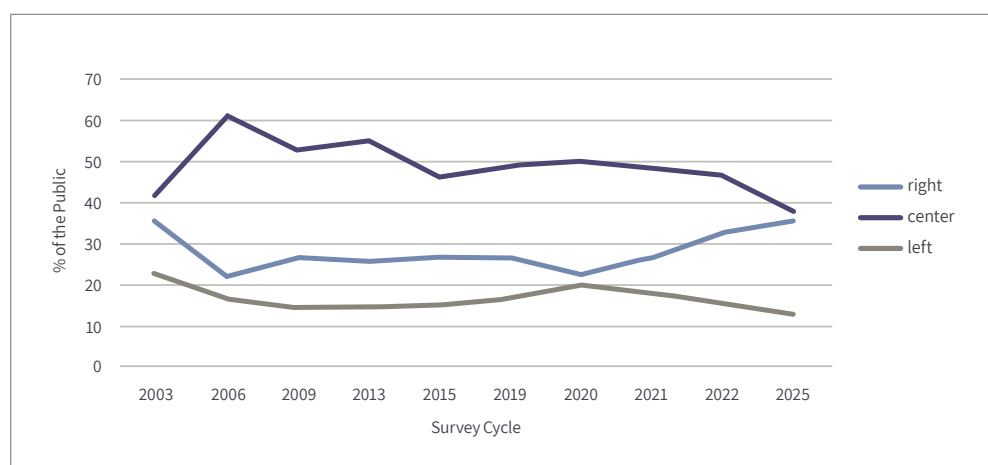
Source: INES, 2003-2025

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 delegitimization 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 3.5 - Median Political Self-Identity Leaning Score, 2002–2025
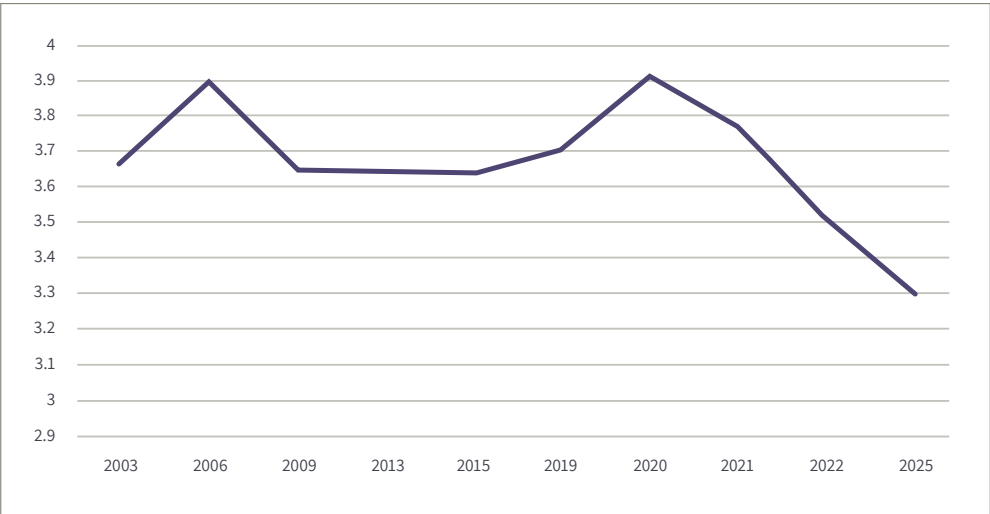
FE: In 2006 and 2019, the Israeli public positioned itself significantly more to the left, contrasting with a notable shift toward the right in the 2021 and 2022 election polling.

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

Figure 3.6 - Polling Average 2023-2026 (January)
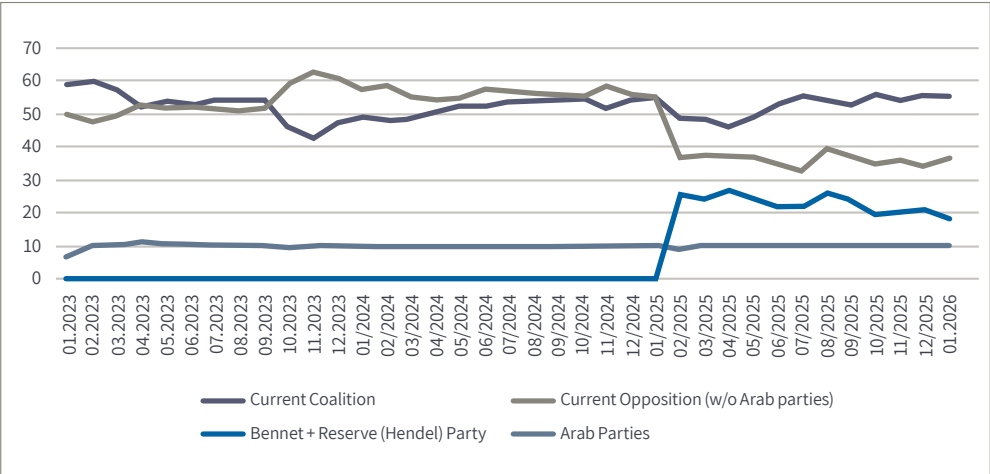
FE: As a general election appears increasingly likely, this graph presents polling trends since October 7th. Overall, the opposition has retained a majority throughout the period, although Benjamin Netanyahu has gradually recovered some support. A major shift followed Naftali Bennett's announcement that he would return to politics: many centrist voters—and some who had already moved to the opposition after October 7th—shifted their support from Benny Gantz and Yair Lapid to Bennett. During 2025, the coalition improved its polling results from a low of 46 seats in April 2025 to around 55 seats by December 2025–January 2026.

T1: The decisive change in voter blocs occurred immediately after October 7th, when large numbers moved from the right to the opposition. Unlike previous election cycles, the central task of the liberal opposition is therefore not to convert "soft" right-wing voters, but to identify, retain, and mobilise those who already shifted in response to the catastrophe.

T2: That Bennett is now regarded by some as a leading candidate for the centre-left—despite his longstanding right-wing record and unchanged positions on security and peace after October 7th—illustrates how the political spectrum continues to shift rightward, with the centre-left following its lead.

Figure 3.7 - Socioeconomic Status of Left-Wing Voters in Israel, 1969–2019
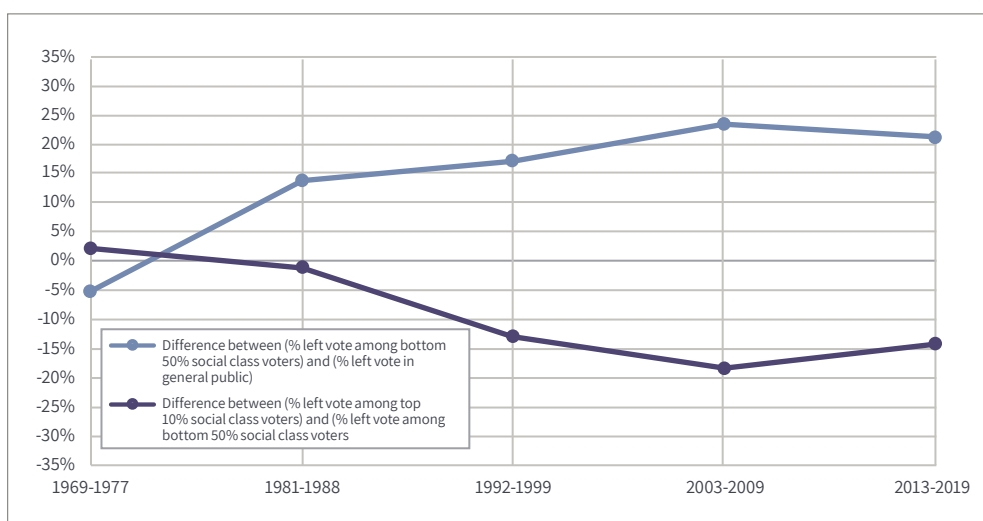
Source: Berman, 2022

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 3.8-3.11) 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 3.8 - Voting Distribution in Israel's Central District Wealthy Cities (% of All Votes), 2021–2022
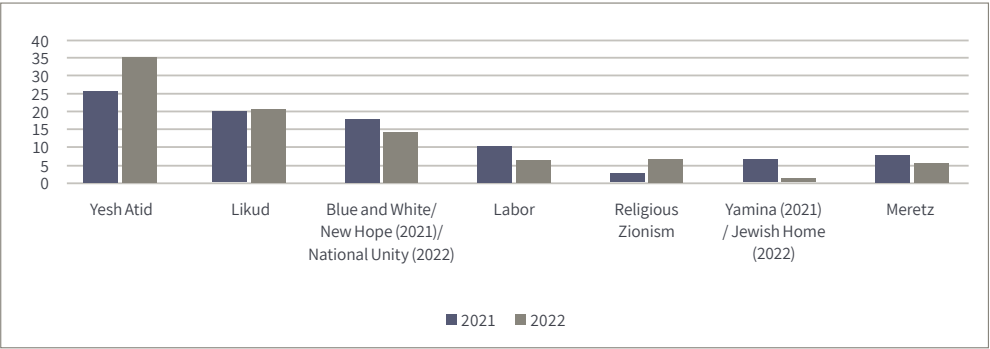
Source: Kenig, 2022

Figure 3.9 - Voting Distribution in Israel's Development Towns (% of All Votes), 2021–2022
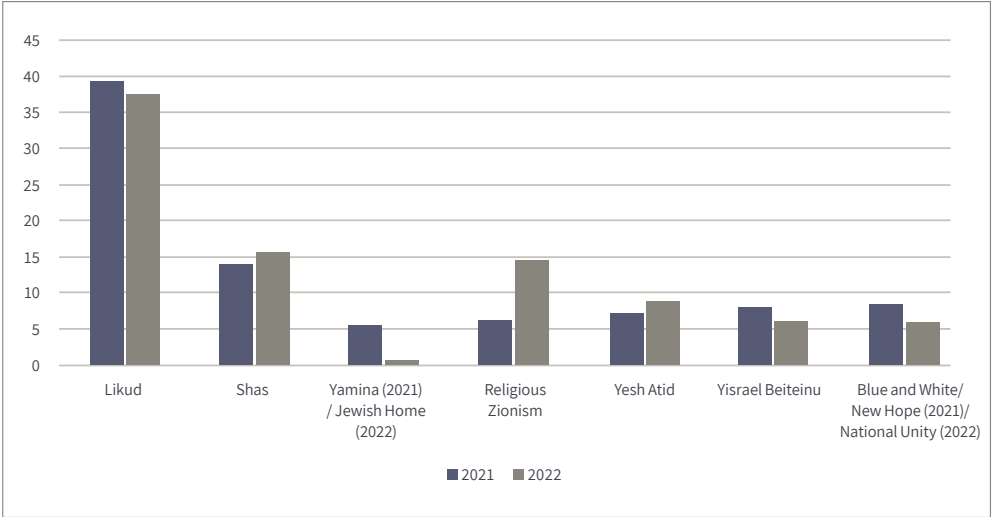
Source: Kenig, 2022

Figure 3.10 - Voting Distribution in Southern Cities of Israel (% of All Votes), 2021-2022
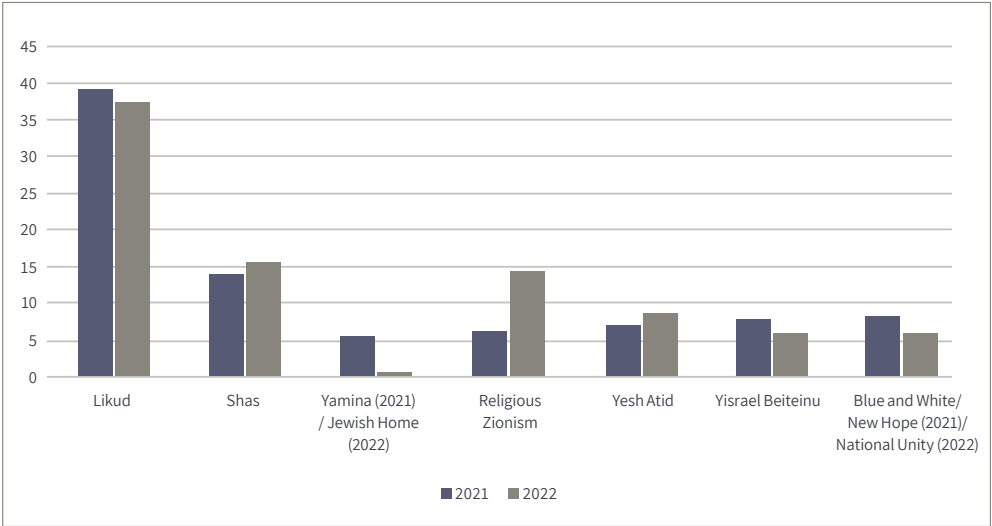
Source: Kenig, 2022

Figure 3.11 - Voting Distribution in Israel's Central District Middle-Class Cities (% of All Votes), 2021-2022
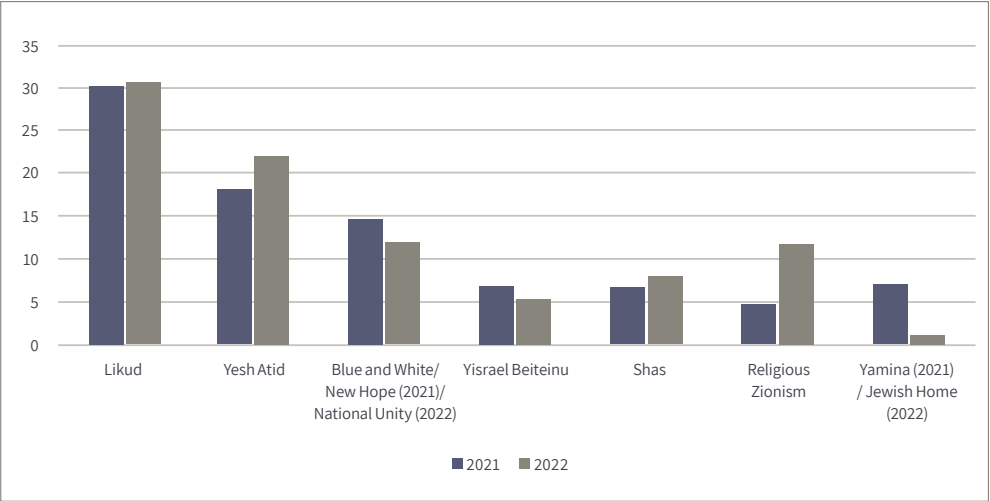
Figure 3.12 - Comparison of Right-Wing Populism: Likud and European Parties
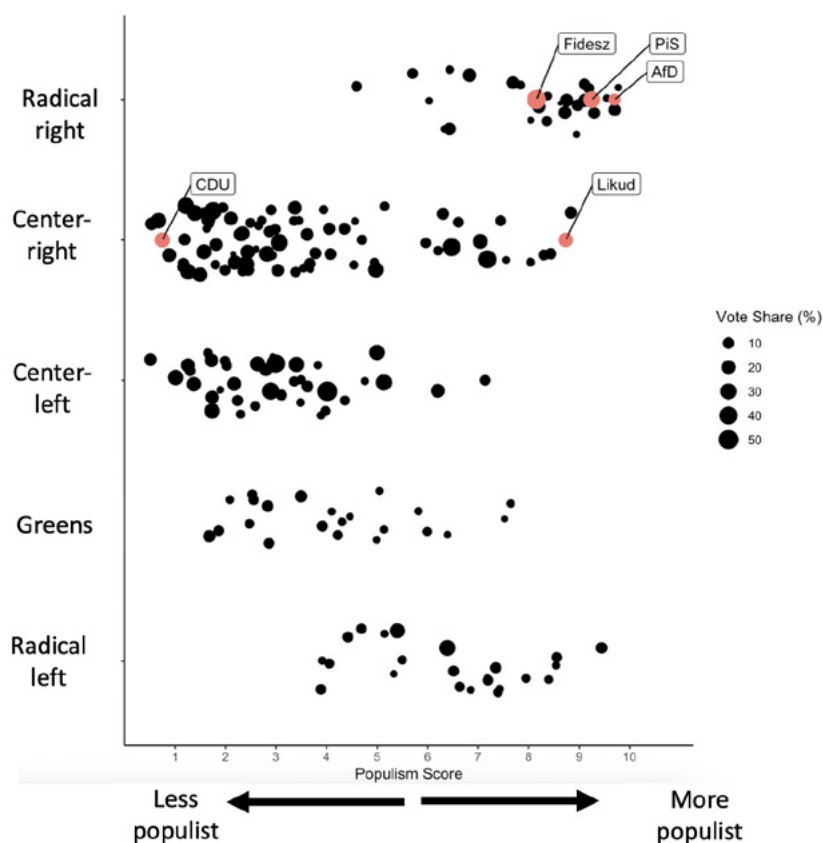
Source: Gidron, 2023

FE: The Likud has become 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 3.13 - Majority of Arabs in Israel Wish to See an Arab Party in the Coalition, 2025
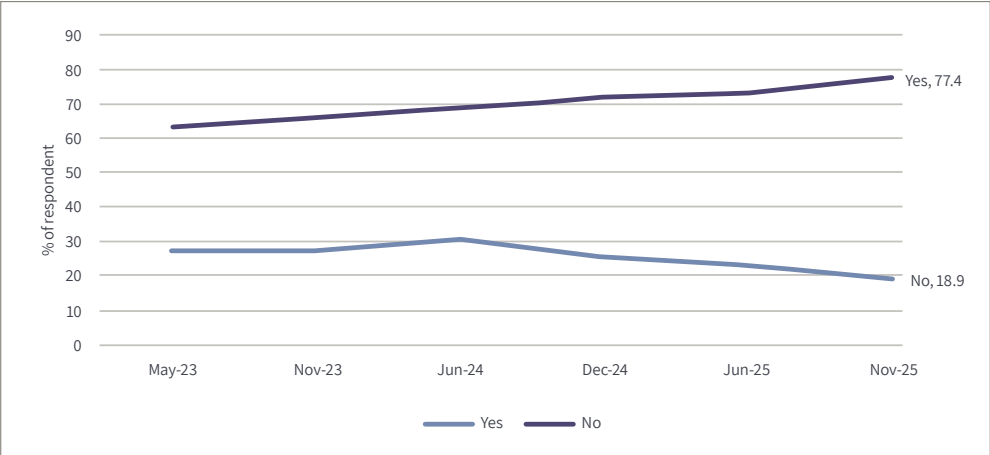
Source: Konrad Adenauer Foundation, 2025

Figure 3.14 - Shifts in Voter-Party Sentiment Toward Arab Parties: Ra'am vs. Joint List (Pre-/Post-Election, 2021), 2025
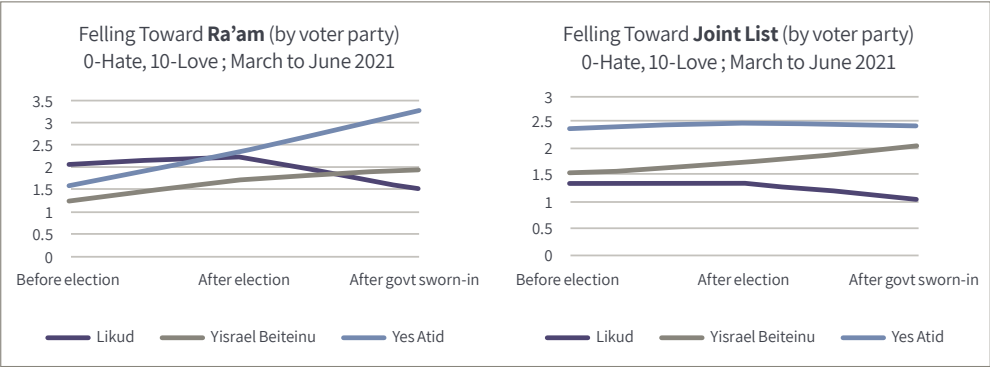
Source: Sheffer & Gidron, 2025

FE 1: While the general Overton Window has shifted to the right, shifts on specific issues are no less important. During the "change government," Israel experienced a historic break: for the first time, an Arab party joined a governing coalition. While some attribute the normalisation of this move to Netanyahu's prior rhetoric, a decisive factor was elite signalling by leaders of the liberal camp who actually formed a government with Ra'am. As Figure 3.14 shows, following the election and coalition formation, favourability toward Ra'am rose sharply among voters

of governing parties: +57 percent among Yisrael Beiteinu voters and +207 percent among Yesh Atid voters. Favourability toward the Joint List, which did not join the coalition, also increased (+32 percent among Yisrael Beiteinu voters and +25 percent among Yesh Atid voters).

FE 2: A further shift is now occurring within the Arab community itself. Since May 2023, support among Arab citizens for an Arab party joining the next governing coalition has increased by nearly 20 percentage points.

T: In preparation for the coming elections, liberal parties have largely ruled out cooperation with Arab parties in advance, whether out of fear of right-wing smear campaigns or short-term polling concerns. Beyond being both an electoral and a moral mistake, this reflects a poor reading of political history. The data show that elite signalling can rapidly reshape the Overton Window, even on issues long considered politically immovable, such as Arab participation in governing coalitions. Once a precedent has been set—and given the demonstrated willingness within the Arab community to re-enter such partnerships—changing liberal voters' attitudes is not only possible, but plausible. These trends point to a concrete opportunity: the formation of a durable liberal bloc, built through political courage, clear leadership signals, and sustained persuasion.

Figure 3.15 - Perception of Support for the Two-State Solution: All Israelis vs. Family and Friends, 2021

Regardless of how you personally feel about a two-state solution, do you think that **the majority of Israelis** supports a two-state solution or that the majority opposes a two-state solution?

- Supports
- Opposes

38 / 62

Would you say that most of your **family and friends** support a two-state solution or that most of your family and friends oppose a two-state solution?

- Supports
- Opposes

48 / 52

Source: Molad, 2021

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 3.16 - Political Positions of Jewish Youth in Israel, 2016–2022
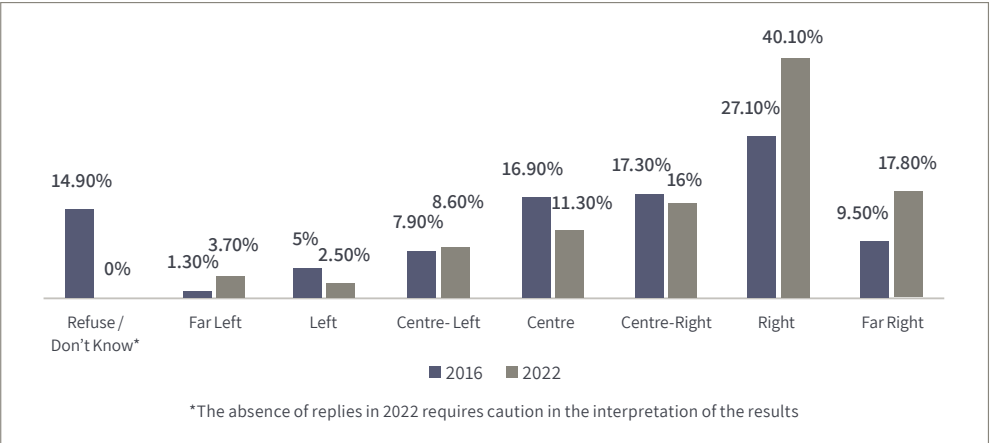
Source: Friedrich Ebert Foundation, 2024

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

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 have 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 - Israeli's Attachment to World Jewry, 2023

To what extent do you feel part of the Jewish people living outside of Israel?

Don't know — 7%
Not at all — 11%
Not so much — 12%
To a large extent — 44%
To some extent — 26%
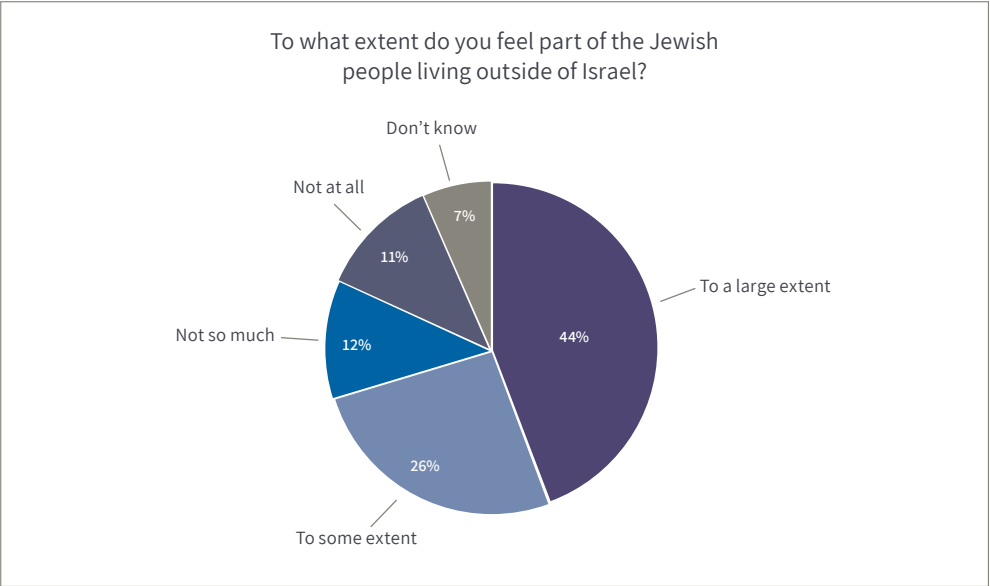
Source: CBS, 2024

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, 2022–2025
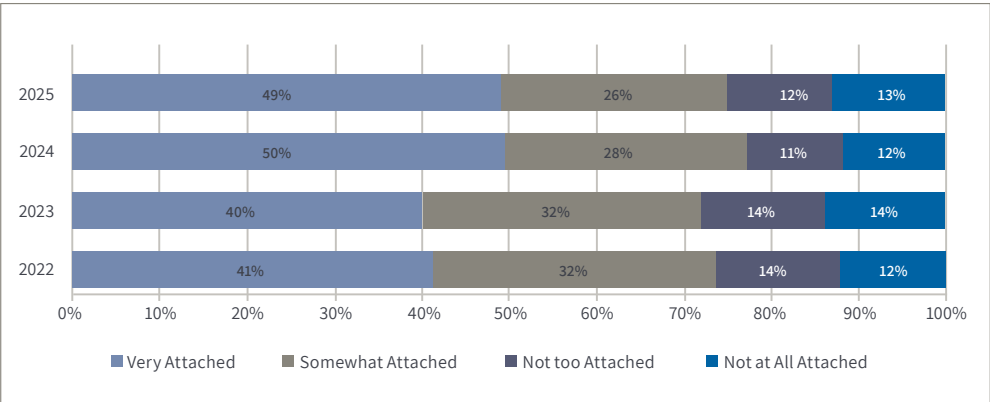
Source: Boyd, 2025

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, 2020-2025
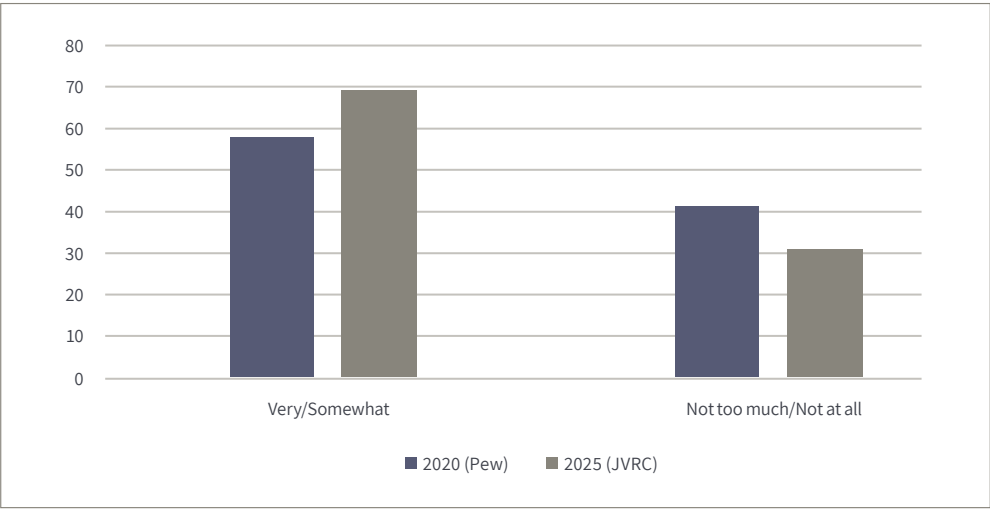
Source: Pew, 2020; JVRC, 2025

Figure 4.4 - Younger US Jews are less attached to Israel, 2025
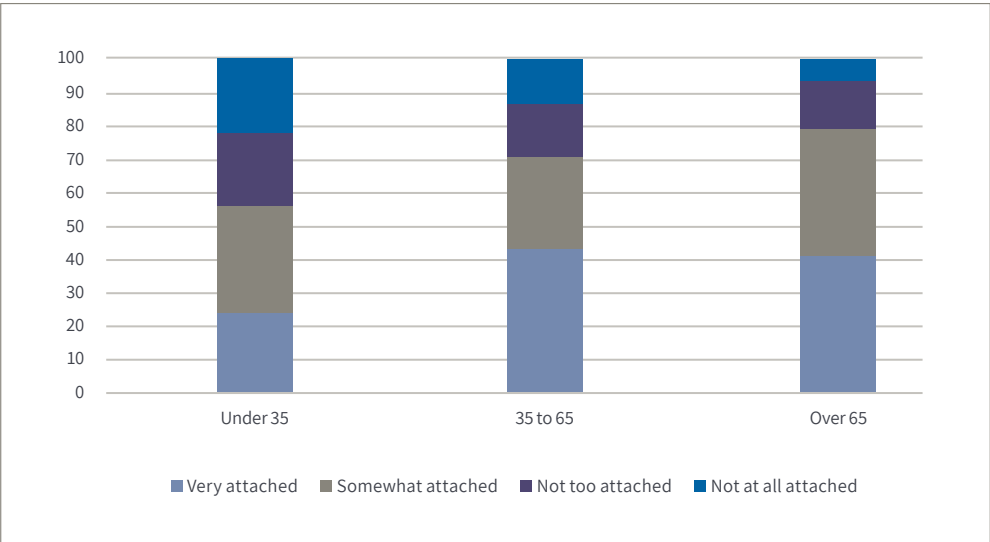
Source: JVRC, 2025

FE: This figure, based on 2020 data, shows weaker attachment to Israel among Jews aged 18–29. While "attachment" is not identical to "favourability," more recent evidence suggests that a majority of U.S. Jews continue to hold positive views of the Israeli people, even as views of the Israeli government are more divided.

Figure 4.5 - Worldwide Jewish Students' Perspectives on Israel, 2024
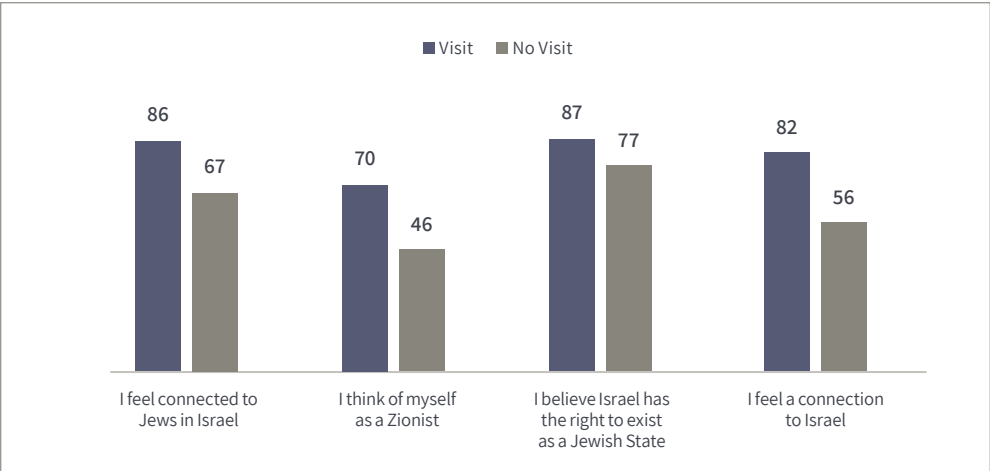
Source: Mosaic United, 2024

FE: Research consistently shows that students who have visited Israel report stronger connections to both Israeli Jews and the State of Israel. It should be noted, however, that this relationship may partly reflect self-selection: students who choose to visit Israel are often already more positively inclined.

Figure 4.6 - Experiences of Antisemitism in the Last 12 Months Among World Jewry, 2024
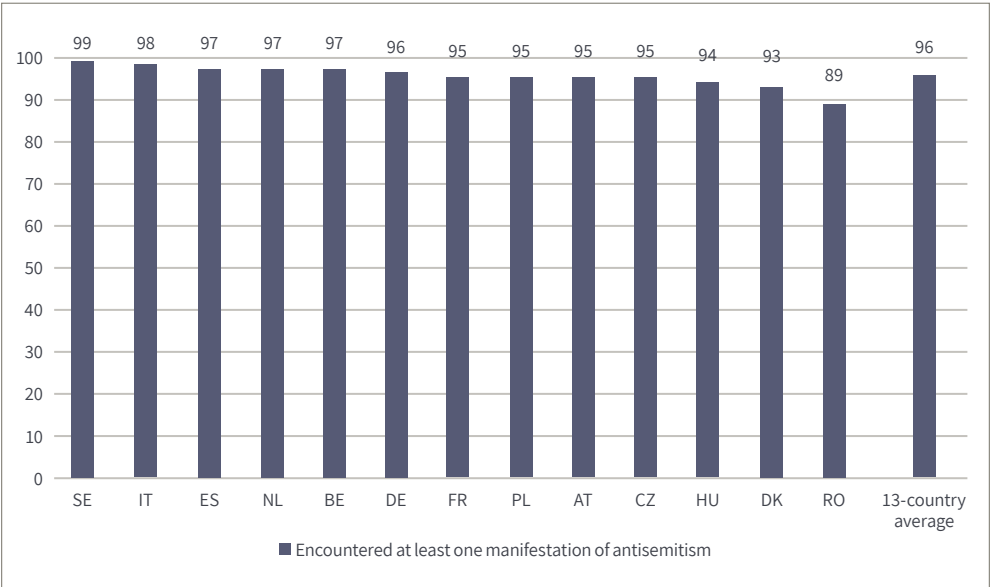
Source: FRA, 2024

FE: As this graph—and those that follow—show, the October 7th massacre and the ensuing war led to a sharp rise in reported antisemitic incidents worldwide. A survey by the EU Antisemitism Task Force found that 96 percent of respondents across 13 EU countries had personally encountered an act of antisemitism. These figures do not include the horrific antisemitic attacks that took place in Sydney and Manchester in 2025. We stand in solidarity with the victims and the affected communities.

T: The surge in antisemitism is likely to reshape the relationship between world Jewry and Israel, placing Israel more prominently in Jewish life worldwide. This shift could drive increased immigration to Israel and greater recognition of its centrality, but it may also deepen feelings of alienation. The direction is not predetermined—it will be shaped by political struggle and will. This moment

presents an opportunity to mobilise liberal Jewish communities globally, as their commitment to liberal democracy, societal fairness, and secure peace aligns with Israel's most urgent needs.

Figure 4.7 – Officially Reported Antisemitic Incidents in the U.K., U.S., and France, 2012–2024
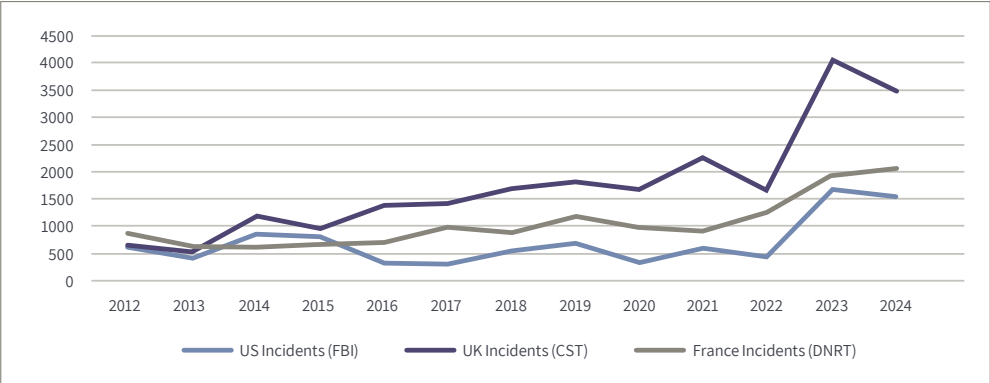
Source: FBI(USA), CST(UK), DNRT(France) – 2012-2024

Figure 4.8 - Australian Jewish Community Reported Incidents 2013-2025
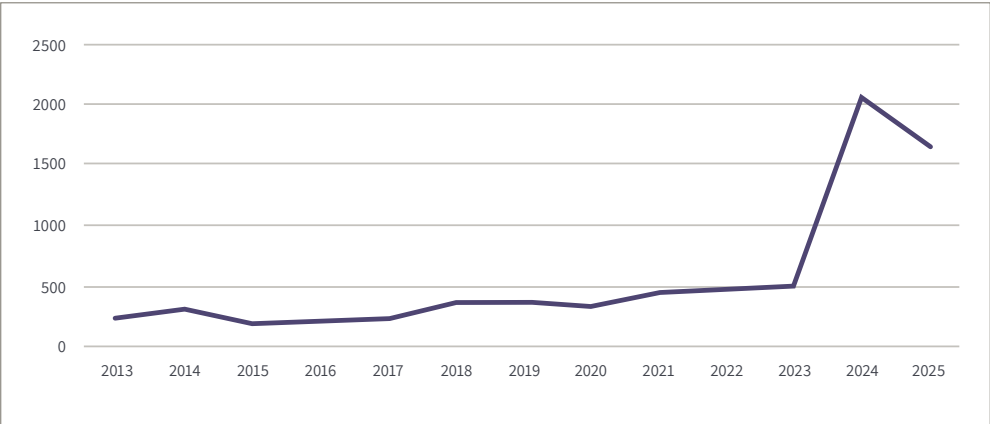
Source: ECAJ, 2025

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

Figure 4.9 - Impact of October 7th and the Gaza War on British Jews' Friendships with Jews and Non-Jews, 2025
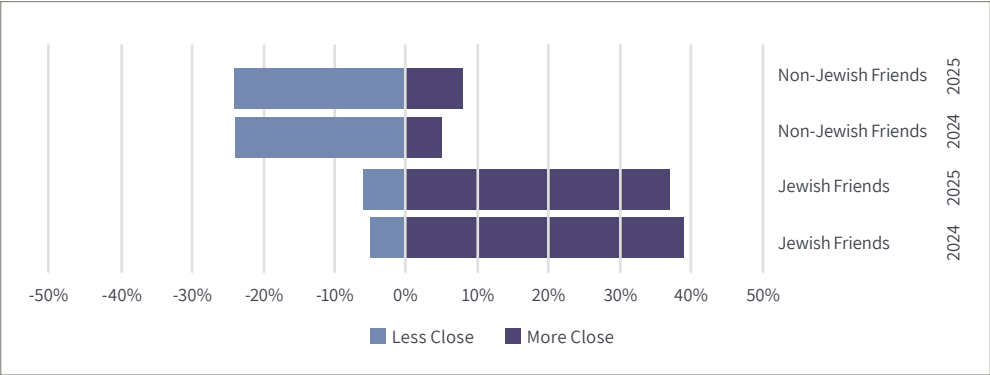
FE: The effects of the October 7th war extend beyond the rise in antisemitic incidents, shaping both relationships within the Jewish community and between Jews and non-Jews. In the UK, many Jews report feeling closer to their Jewish friends while becoming more distant from non-Jews in their daily lives.

Figure 4.10 - Global Jewry's Perception of Being Blamed for Israeli Government Actions, 2024
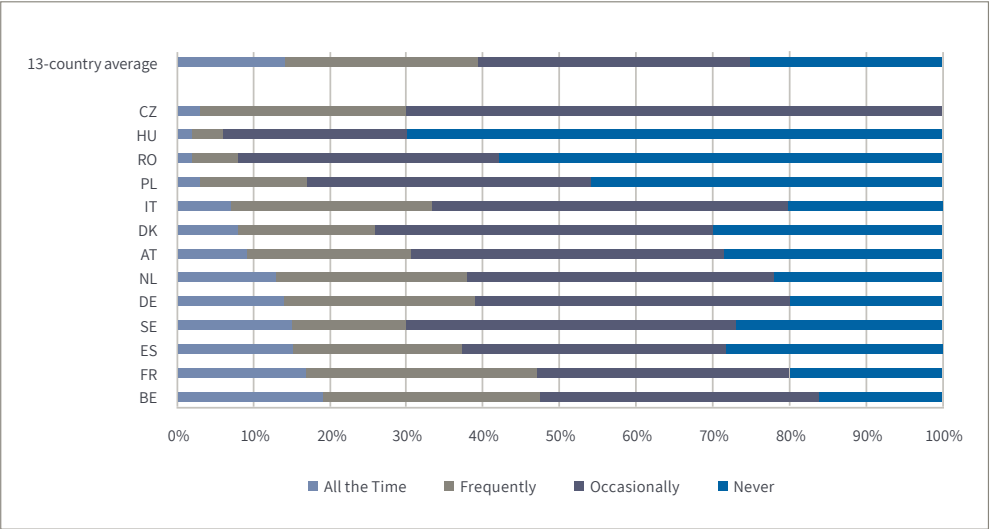
FE: 39% of European Jews report being constantly accused of actions taken by the Israeli government, while only 25% say they are never accused.

Figure 4.11 - U.K. Jewish Community's Approval Ratings of Netanyahu, 2024
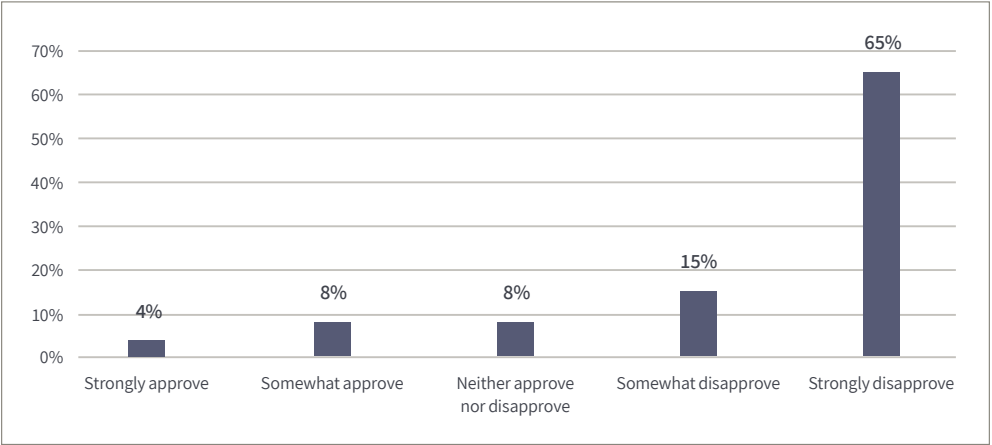
FE: Most Jews in the US and UK maintain a strong attachment to Israel but do not support its government. As of February 2024, 89% of American Jews expressed support for the Israeli people, but only 54% supported the Israeli government. In the UK, 80% disapproved of Netanyahu's leadership. A similar trend 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 4.12 - U.S. Jewry's Opinions on the Israeli People and Government, 2024
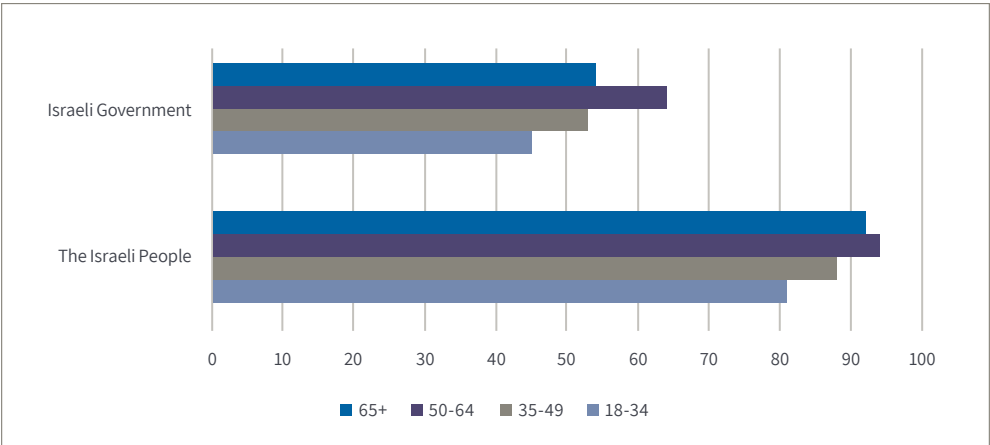
FE: While approximately only half of Jewish Americans support the Israeli government, over 80% across all age groups have a favourable opinion of the Israeli people.

Figure 4.13 - French Public Opinion on Israel (% of Positive Views), 2017-2024
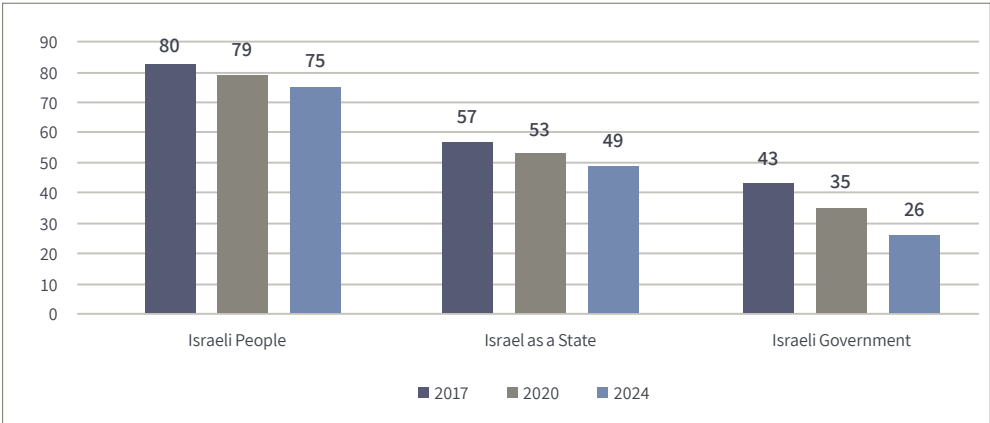
FE: Fewer than half of French Jews express support for the Israeli government. By contrast, more than 80 percent across all age groups report a favourable view of the Israeli people.

Figure 4.14 - Unfavourable Attitude Towards Israel – 24 Countries, 2025
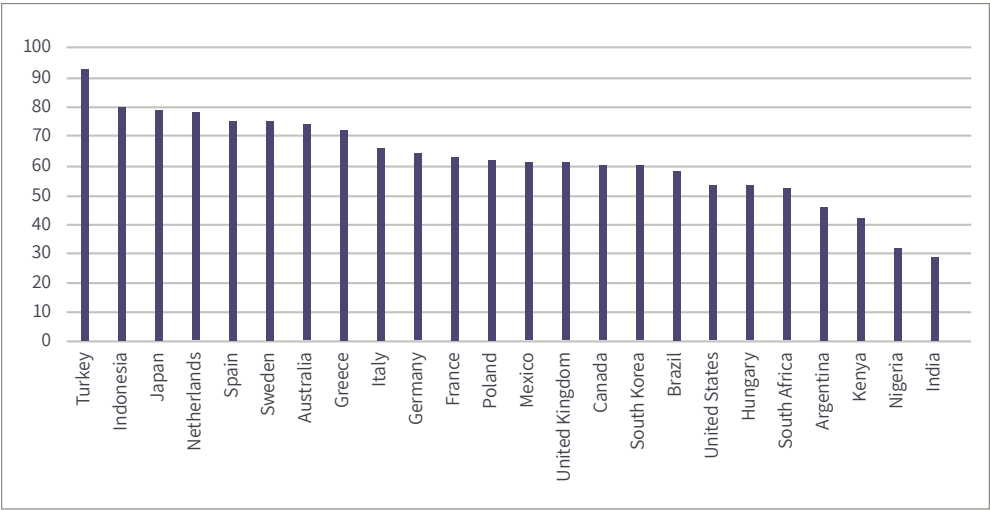
Figure 4.15 - Sympathy for Israeli vs. Palestinian Sides in Western Europe, 2023–2025
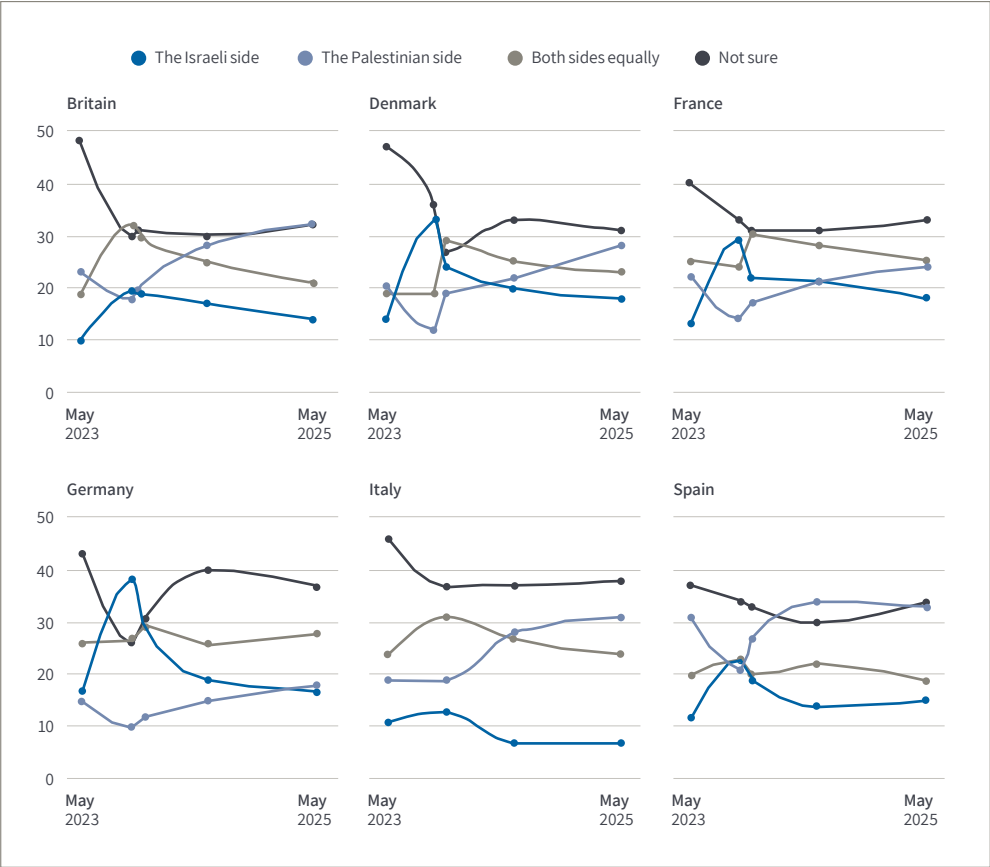
Source: YouGov, 2025

FE: Israel is facing an unprecedented international image crisis, particularly among its Western allies, where unfavourability rates now exceed 60%.

T: After October 7th, global opinion was initially sympathetic to Israel, with support far outweighing fringe identification with Hamas or anti-Israel protests. As the war has continued, however, favourability has declined across the political spectrum in many Western societies, including among centrists and right-leaning groups. Israelis often underestimate this shift, attributing it to the notion that "the world is always against us," yet recognising these changing perceptions is essential to understanding the scale of the current crisis.

Figure 4.16 - Most US Citizens have Unfavourable Opinion Towards Israel, 2025
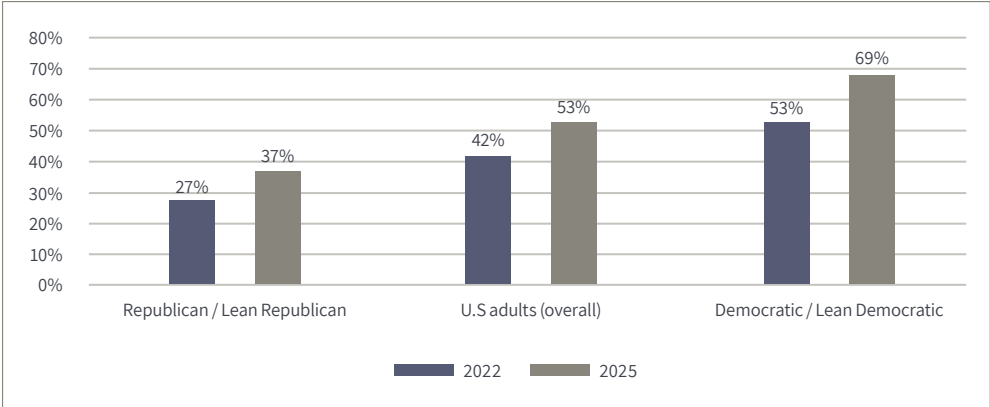
Figure 4.17 - UK public sympathy lies more with the Palestinians, 2019-2025
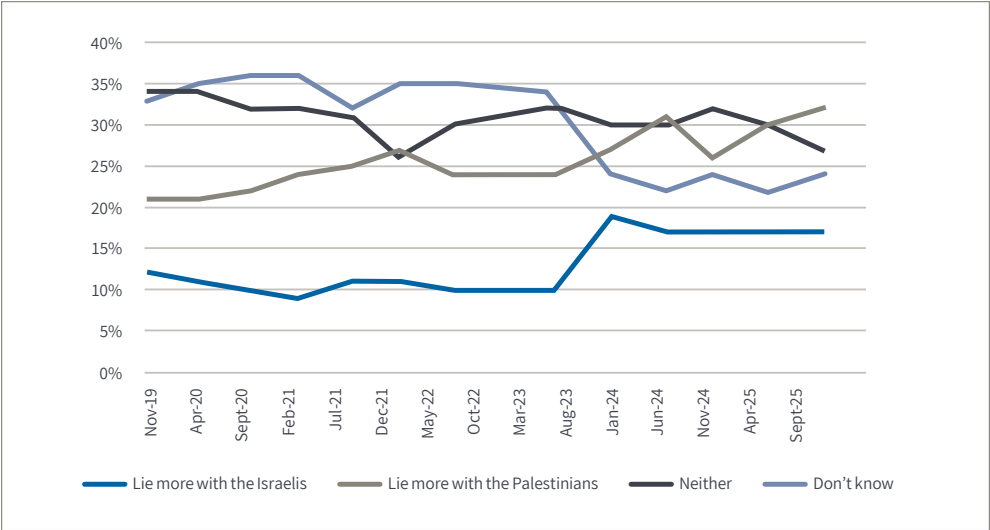
Figure 4.18 - Australian Public Sympathy towards Israeli Palestinian Conflict, 2025
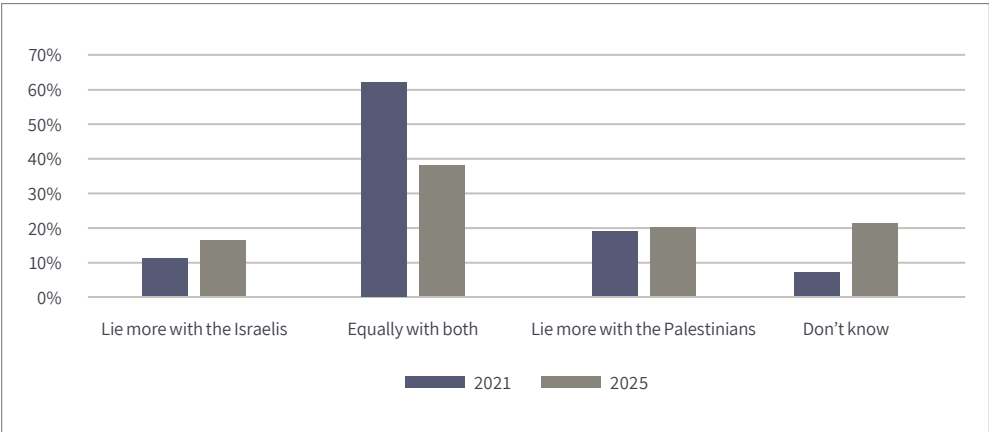
Source: YouGov for TJI, 2025

Figure 4.19 – Changes in Israeli public views of Israel Allies, 2014-2025
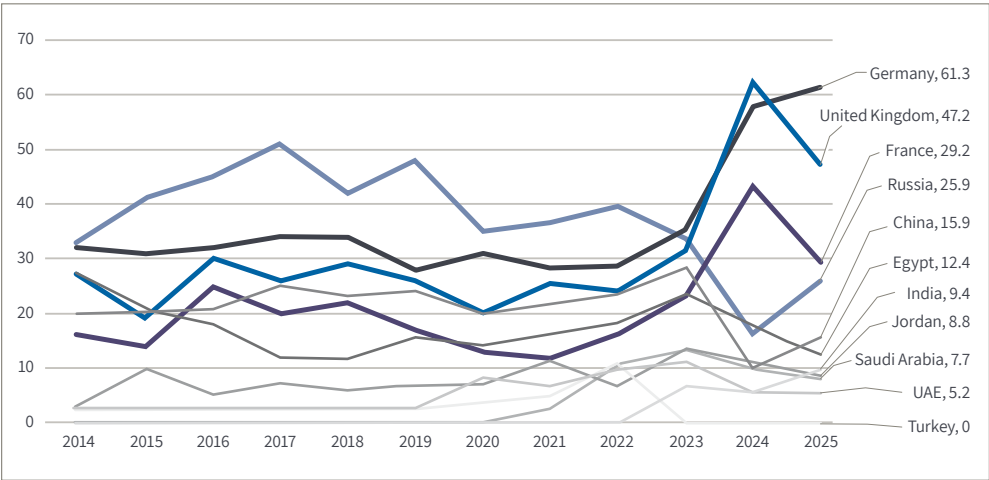
Source: Mitvim, 2025

FE 1: After October 7, there was a sharp rise in favourable attitudes among Israeli citizens toward what many perceive as the country's most important relationship: ties with its Western allies. Both before and after October 7, the Israeli right promoted a dominant narrative claiming that Israel could distance itself from the West, that Western liberal values undermined Jewish identity, and that viable strategic alternatives existed through closer alignment with actors such as China,

Russia, India, and Hungary. The events of October 7 collapsed this alternative vision. In its aftermath, Israelis turned decisively toward their Western allies for support and reassurance - not only for security and strategic reasons, but also because of shared values and identity.

FE 2: The relative decline in favourability toward the United Kingdom and France reflects, in part, their recent recognition of Palestine.

T: Foreign policy narratives are inseparable from domestic political identity. Israelis understand their alliance with the West not merely as instrumental, but as normative: liberal democracy at home, alignment with Western democracies abroad, and Israel's self-conception as a free society are mutually reinforcing. When crisis struck, alternative illiberal alignments lost credibility, while the connection between security, liberal values, and Western partnerships reasserted itself as both politically and morally compelling - and as a potential foundation for future mobilisation and identity-building within the liberal camp.

Figure 4.20 - UK Jews Charity Patterns, 2022-2025
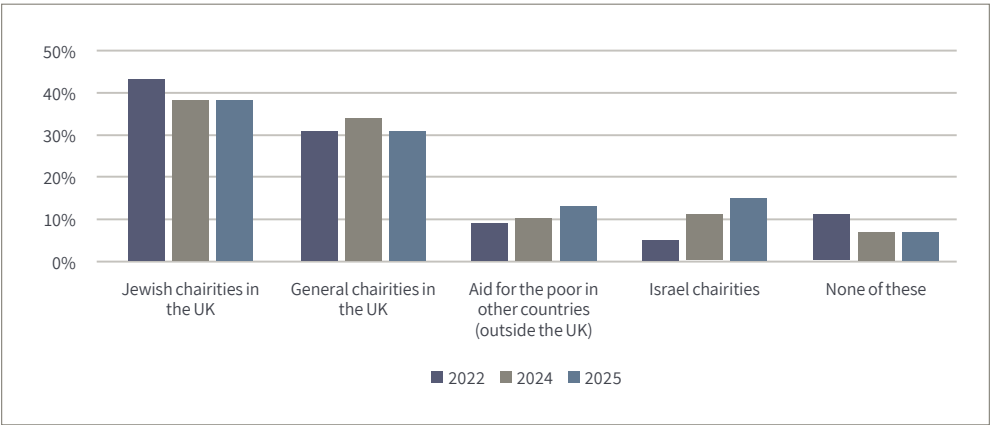
Source: Boyd, 2025

FE: Donations from British Jews to Israeli charities have tripled from 2022 to 2025, 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 4.21 - The 39th Zionist Congress Seat Allocation, by Ideological Spectrum
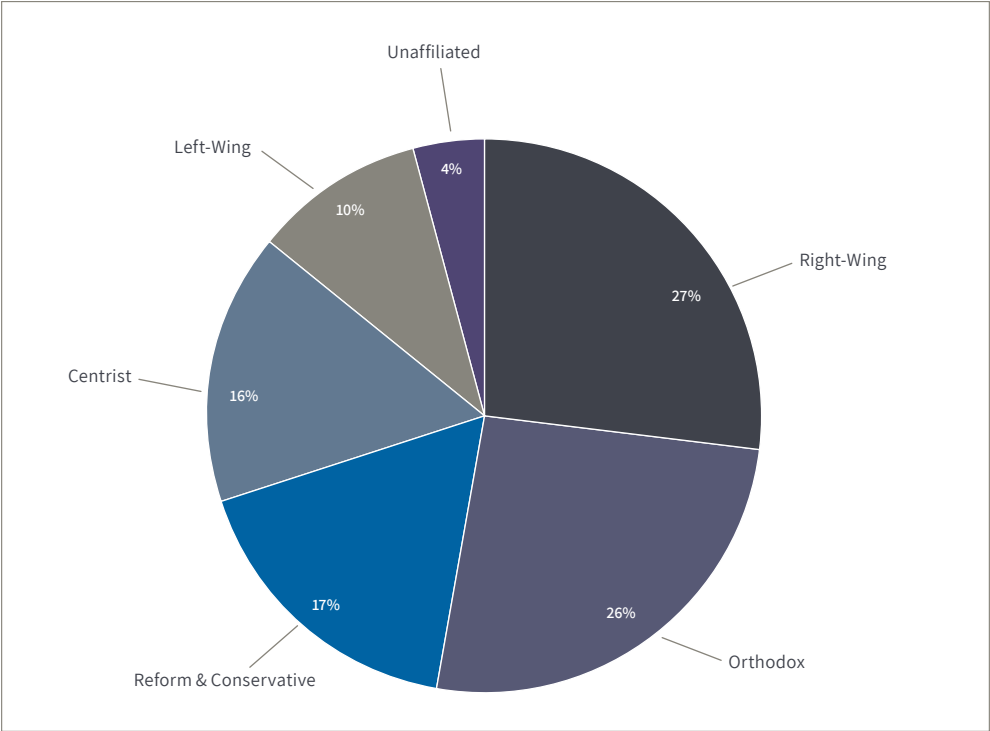
Source: Molad Analysis to WZO Results, 2025

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This Data Pack relies on an ecosystem of scholars, NGOs and communities alongside commercial polling companies. Taken together they all enable us to present a rich and vast data coverage of Israel and the Jewish Diaspora, and we thank them for that. Below is a list of sources and data repositories used for this 2026 February Data Pack.

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