



**המכון למדיניות העם היהודי (מיסודה של הסוכנות היהודית לא"י) בע"מ**  
**The Jewish People Policy Institute (Established by the Jewish Agency for Israel) Ltd.**

# **Annual Assessment 2015-2016**

## **Executive Report to the Government of Israel**

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## Introduction

2016 has posed new dilemmas for Israel and the Jewish people. Developments in the Middle East along with trends in the international arena are dividing analysts into two camps: the optimists, who at the moment see great opportunities and positive progress in the situation of Israel and the Jewish people; and the other camp which is greatly concerned by what may unfold once the regional explosions have settled down.

The Annual Assessment continues to be the flagship publication of the Jewish People Policy Institute. This 2015-2016 executive summary examines trends across five dimensions of Jewish well-being using a unique dashboard of indicators to show whether in each of area the dynamics, in the last year, have improved, deteriorated, or remain unchanged. In addition to the five gauges for Geopolitics, Bonds between Communities, Identity and Identification, Demography, and Material Resources, this year we initiate a sixth which refers to knowledge and innovation, based on the common perception that the Jewish people are the "people of the book."

The findings of the Annual Assessment are presented to the Israeli Cabinet each year, and have become essential to the budgeting and planning processes for Jewish leaders around the globe.

Like every year, the Assessment begins with the geopolitical situation. Rarely has the picture been so mixed. There are deeply troubling developments all around Israel, with threats to the state system from non-state actors like ISIS and other radical Islamists. These groups threaten stability in the region and Jewish and non-Jewish communities worldwide.

In its immediate neighborhood, Israel is threatened today by the danger of renewed warfare with Gaza, more than 100,000 Hezbollah rockets that now include capabilities of far greater range and accuracy, and Palestinian terror in Israeli cities. And, yet at the same time, some of the threats Israel faces have become less immediate. The war in Syria that has produced a humanitarian catastrophe also involves a war between radical Sunni and Shias. Iran and its Hezbollah proxy have suffered serious losses as they seek to preserve the Assad regime and their position in Syria and the conduit it provides to Lebanon. As such, Hezbollah has little interest in a conflict with Israel at this point.

But it is not just that those who are Israel's most determined enemies are preoccupied elsewhere. It is that the landscape of the region itself seems to have shifted more favorably. The leading Sunni Arab states and leaders see Israel as bulwark against their main threats: Iran and radical Islamists. Presently, Israel's cooperation with the leading Sunni states—both Egypt and Jordan and the Gulf Arabs—is unprecedented. Ironically, that cooperation is driven not only by common threat perceptions but also by shared concerns about America's perceived retrenchment in the region. Fairly or not, both Israel and its Arab neighbors believe that the nuclear deal that the US and the other members of the so-called 5+1 concluded with Iran is facilitating to Iran's pursuit of hegemony in the region—and that America is effectively acquiescing in Iran's growing reach. Still, the absence of any agreement or prospect of progress on the Palestinian question ensures that the cooperation between Israel and its Arab neighbors remains discreet and largely invisible.

While the conflict with the Palestinians may not be impeding Israel's growing, if private, cooperation with its Arab neighbors, it is increasingly isolating Israel outside the region. As the Palestinians seek to internationalize the conflict with Israel—and as Israel fails to make its case to the Europeans and others—the threat of delegitimizing the Jewish state is growing on the international stage. Movements like BDS exploit the international rejection of Israeli occupation of Palestinians to disguise their real purpose: the de-legitimization of Israel. BDS is about ending Israel's existence not its occupation of Palestinians. But because BDS focuses on occupation and Israeli settlement activity in the West Bank, it disguises its real objective. So long as Israel's settlement activity does not appear consistent with a two-state outcome, Israel will find it difficult to blunt the de-legitimization movement—and this is a factor in the new geopolitical reality.

It is also affecting at least part of the triangular relationship of Washington-Jerusalem-American Jewry. Younger and more progressive Jews, especially in the Democratic Party, are being influenced by what they define as objectionable Israeli policies. Palestinians are more successfully presenting themselves as victims. And, absent Israeli initiatives that demonstrate tangibly that Israel is seeking a two state for two peoples outcome—and it is Palestinians that are resisting any movement toward two states, the trends may continue to worsen.

In this context, we are concerned about the trends that suggest that Israel is becoming a partisan issue. Recent polls in the United States indicate that while over 80% of self-identified Republicans supportive of Israel compared to the Palestinians, among a similar group of Democrats, the figure is only about 50%.

Although at one level American Jewish engagement with Israel is at an all-time high, in terms of visits, Birthright/Taglit programs, support for pro-Israel groups, and their healthy growth in the American Orthodox community, we also detect an opposing trend: the more liberal, Reform, Reconstructionist, Conservative and secular parts of the American Jewish community may become more distant as Israel demographically becomes more Orthodox and nationalistic.

While JPPI did not change its gauge from last year of whether the bonds between the two great Jewish communities have strengthened or weakened, this is an issue to be closely watched.

There is another phenomenon that bears close attention. A generational transition of philanthropists in the United States is leading to a new approach to donations to Jewish causes, as the younger philanthropists tend more to support secular, rather than Jewish and Israeli causes. Many of America's major Jewish federations report that their giving has been flat for several years.

We are also concerned with the impact of the BDS movement on more than a dozen American college campuses. Jewish students and others who would be favorably inclined to Israel are largely uninformed about the basic facts on the history of Israel's creation as a Jewish state by the United Nations; the Palestinian rejection of substantial peace offers by Prime Ministers Barak and Olmert; the unilateral pull-out from Gaza by Prime Minister Sharon, for which Israel received Hamas rockets rather than roses.

There is no justification for the BDS campaign, which includes EU requirements to label products made in the West Bank; to hold-up Israel to special opprobrium in the UN Human Rights Council, compared to serial human rights violators from Zimbabwe to Iran. But it is incumbent on Israeli policy-makers to recognize that it is much harder for Israel's friends to fight BDS when policies on the ground are contributing to growing perceptions that a two-state solution may become unreachable. This would consign Israel to either lose its Jewish majority status, if it adopted a one-state solution with equal Palestinian voting rights, or permanent subjugation of the Palestinians in a

way that is inconsistent with what many Jews in the Diaspora believe are time-honored Jewish values.

While economically, Israel is a remarkable success story increasingly integrated into the world economy and the location for increased amounts of foreign direct investment from US firms to Chinese companies, diplomatically Israel is more isolated than at any time in recent memory.

It's understood that Israel cannot negotiate with itself, and that current Palestinian leadership is neither willing nor able to come to the table much less make the necessary compromises for any peace agreement. Nonetheless, it is in Israel's interest to take steps on the ground to provide more living space and more economic development for Palestinians. Instead, Israel should take actions that place the onus for inaction on the shoulders of the Palestinians.

Israel has a unique, historic opportunity to more closely align itself with the major moderate, Sunni states of Egypt, Jordan, Saudi Arabia and the Gulf states. Taking steps toward reconciliation, or at least mutual co-existence with the Palestinians can facilitate this re-alignment. In this regard, recent statements by the Prime Minister and Defense Minister regarding the Arab Peace Initiative are perceived in the Diaspora as positive, tangible steps.

Particularly concerning is growing anti-Semitism and Anti-Zionism in Europe, which has included acts of terror. Much of the violence is caused by young, unassimilated Muslim young people. There are only one million Jews in Europe, but 15 million Muslims, a figure likely to double in 30 years. Polls by the EU's own agency of European Jewish attitudes, indicate that some 50% say they or people they know have been subject to anti-Semitic harassment; similar percentages say anti-Semitism has grown in the last five years; and some one third are considering leaving.

The new dimension dealing with the condition of the Jewish people as the "People of the Book" will be examining what needs to be done in the fields of education and research to maintain this qualitative edge in an era of Information and Knowledge. There are concerns that Israel's support for its universities and for research and development is declining. This novel addition to our basic five gauges is yet another example of JPPI's effort think creatively to ensure a stronger Jewish State of Israel; a stronger Diaspora; and stronger ties between Israel and the United States.

As every year, JPPI's Annual Assessment, captures better than any other document the challenges and opportunities in front of the Jewish people and we believe it plays a unique role in strategic thinking and action-oriented planning for the future.

Dennis Ross and Stuart Eizenstat

# Integrated Assessment and Policy Directions

## Six Dimensions of Jewish Well Being

### 1. Geopolitics

Developments in recent months have highlighted the strategic question marks hovering over Israel. There is much uncertainty in the violent and turbulent Mideast regional arena, and the international arena is far from settling into a stable "world order." **As a result, we have kept the Geopolitical gauge unchanged from last year, it remains "problematic."**

Key challenges:

- The nuclear agreement with Iran was characterized by Israel's prime minister as “a mistake of historic proportions.” The deal grants legitimacy to Iran as a threshold state and does not prevent it from achieving nuclear weapons in the long-run.
- The nuclear deal raises the possibility that Iran will escalate its regional subversion, and gain greater political, economic, and military power.
- The danger of security deterioration – On the northern front (Hezbollah and Syria) and on the southern front ( Hamas and terror groups in Sinai).
- Palestinian terror – The "Lone-Wolf Intifada" –has dwindled in recent months; still, further violence could erupt at any time and take different and more virulent forms.
- Continued tensions with the U.S. threaten the triangular relationship: Jerusalem – Washington – U.S. Jewry, and Israel is increasingly a partisan issue in America.
- The erosion of U.S. interest in playing a central role in the Middle East, as others with whom Israel is less comfortable fill the void.
- Continued weakening of the Palestinian Authority until it ceases to function at all, harming security cooperation with Israel, and further complicating an already chaotic succession struggle as Abu Mazen exits the stage.
- The push to alter the diplomatic process between Israel and the Palestinians from bi-lateral negotiations to multi-lateral ones, or an enforced solution under UN auspices.
- Attempts to degrade Israel's international standing through BDS and de-legitimization campaigns.

Despite this, one cannot ignore some positive developments in the face of worrying security and political developments:

- Israel is not facing any conventional military threats, as in the past.
- Iran's march to nuclear weapons is blocked and has even been set back for the coming years.
- Hezbollah is exhausting itself in Syria in order to preserve the Assad regime, while Hamas is isolated and weak.
- Security cooperation with Jordan and Egypt is deepening and Egypt is diligently working to stop arms smuggling into Gaza.
- The upcoming change of U.S. administrations affords an opportunity to turn over a new page in relations between the two countries.
- Deepening relations with the Sunni world, which is increasingly open to Israel given the threats from Iran and radical terror groups.
- Increasing momentum in developing economic and strategic relations with Asia's rising powers, especially China and India.
- Leveraging gas reserves for regional relations and influence (Egypt, Jordan, Turkey, and the Palestinians) as well as with countries further away (Russia, China, and India).

## **2. Demography**

**2015-16 saw slight changes to the size and demographic trends of the Jewish people worldwide.** We especially note the growth of the Jewish population in Israel (including those of no religion covered by the Law of Return) by 130,000 individuals, the growth of immigrants to Israel (a continuation of the trend we observed in the previous two years), and the stability of the high fertility rates of over three children per Jewish woman in Israel. **Therefore, we decided to keep the Demography gauge unchanged from last year.**

## **3. Bonds between Jewish Communities**

The following table briefly describes developments in 2015-16 that contributed to strengthening/weakening of bonds between Jewish communities in the world – with an emphasis on Israel-Diaspora bonds.

	<b>Developments Strengthening Bonds</b>	<b>Developments Weakening Bonds</b>
1	Growing fears of anti-Semitism (anti-Israel and anti-Semitic trends appear to be converging) strengthen the sense of shared destiny, and dependability on global Jewish unity.	Anti-Semitic incidents on campuses and elsewhere make public identification with Israel\Jewish causes less appealing.
2	Continued Israeli initiatives to bolster Israel-Diaspora relations (Diaspora Affairs Ministry, GOI Kotel decision etc.)	Israeli policies on many issues still not in line with views of Diaspora communities (mainly in North America) – and vice versa: Diaspora political and cultural sentiments not in line with those of the Israeli public.
3	Growing instability in the Middle East somewhat reduces the level of criticism of Israel’s inability to advance a peace agreement to resolve the conflict with the Palestinians.	Continued criticism aimed at Israel, and clashes between the GOI and other countries’ governments, especially on Israel-Palestine, makes Israel less appealing to young liberal Jews.
4	Continued Israeli excellence in different fields (notably hi-tech) contributes to its positive image among Jews.	Demographic, political, and cultural trends in Israel (highlighted in the 2016 Pew report on Israel) seem alien to many Diaspora Jews.
5	Certain demographic trends in the American Jewish community, among them, the strengthening of the Orthodox community (which has strong ties to Israel), and increasing organization of the large Israeli expat community in America.	Israel as a political football in the upcoming U.S. presidential elections forces Jewish voters to “take sides” “for or against” things Israel represents. This on the heels of a fierce debate last year over the nuclear agreement with Iran, which made Israel a divisive issue within the U.S. Jewish community.

**Jewish bonds in 2015-16 did not dramatically change from the previous year.**

Long-term trends recognized in previous years are still in place in the Jewish world

and in Israel. In the last year there was a growing worry about the future of Jewish communities because of the rise of anti-Semitic sentiments in several places – a double-edged sword when it comes to Jewish bonds. On one hand it causes some Jews to lower their “Jewish profile.” On the other hand, it evinces a sense of a shared Jewish destiny and the dependability of Jewish communities to come to each other’s aid. A similar double-edged sword can be found in the way Jews respond to the BDS movement. As the American Jewish community increasingly polarizes, not all developments can be analyzed in binary terms of increasing or decreasing solidarity. BDS fosters a degree of in-group solidarity for some Jews and alienation for others.

Another phenomenon worth noting is the confusing message that Israel sends to Diaspora communities: it pushes plans and funding aimed at strengthening Israel-Diaspora bonds, yet it doesn’t always execute these plans coherently and efficiently. A notable is the GOI Kotel expansion plan to include an area for non-Orthodox practice, which was approved by the cabinet but halted because of political handwringing.

**As a result, JPPI has kept the Bonds gauge unchanged from last year, slightly above “Maintaining.”**

#### **4. Identity and Identification**

This year, because of the publication of the *JPPI Pluralism Survey* of Israeli Jews and the Pew Center’s report on the attitudes and values of Israelis, *A Religiously Divided Society*, **the identity and identification gauge will focus on Jewish Identity in Israel.**

Our analysis begins with the components of Jewish identity. According to the JPPI survey, three out of four components are especially meaningful – culture, religion, and nationality. Over two thirds of the Israeli Jewish population find these components somewhat or very meaningful. (Less than half found ancestry somewhat or very meaningful.) Among these three leading components nationality stands out: **55 percent** of the total Jewish population found this component very meaningful, which is significantly more than those who found religion or culture very meaningful (42 and 45 percent).

This finding is also echoed in the Pew Survey. According to Pew, fully 88 percent of Israeli Jews find being Jewish to be a matter of nationality or culture, or religion and nationality or culture. This finding is also consistent with an international survey of 700 Jews connected to organized Jewish life conducted as part of the 2016 JPPI Global Dialogue Process. In that survey 69 percent gave a high score of 4 or 5 (on a 1 to 5 scale) to peoplehood/nationality as a primary component of Jewishness; 68 percent scored culture similarly.

The Pew Report also indicates the strength of Jewish identity among Israeli Jews:

88 percent said they had a strong sense of belonging to the Jewish People

93 percent said they are proud to be Jewish

90 percent said being Jewish is at least somewhat important to them.

**We believe that the strength of Jewish identity and Jewish identification in Israel (where over 40 percent of the world Jewish population reside, and which has the highest birthrates (among non-intermarried families) and a rapidly growing population) more than compensates for the reported decline in Jewish identification in the United States. As a result we are moving the needle slightly to the right in the direction of Prospering.**

## **5. Material Resources**

### Positive Factors

- Israel's economy continues to follow a moderate course of growth, lower than in the recent past but still avoiding the devastating troughs that appeared elsewhere in the developed economies.
- Indicators of Arab and Haredi participation in Israel's work force and in skill training are modestly increasing.
- Issues ranging from educational access, differentials in wealth, shares and pricing of mineral resources to regulation and protection in domestic markets have become topics of active policy discussion.

### Negative Factors

- In the U.S., indicators of generational change possibly leading to large changes in philanthropy toward Jewish causes and Israel.
- From data reported by the Bank of Israel, it emerges that the growth of the economy slowed in the past year, among other reasons, because of limits to the supply of trained personnel in the hi-tech sector. According to the report, it is quite possible that this limited supply was among the causes of the decline of Israeli exports.
- Israel's housing crunch puts a squeeze on the young and those in the lower and middle portions of the income distribution, with effects going beyond issues of housing alone.

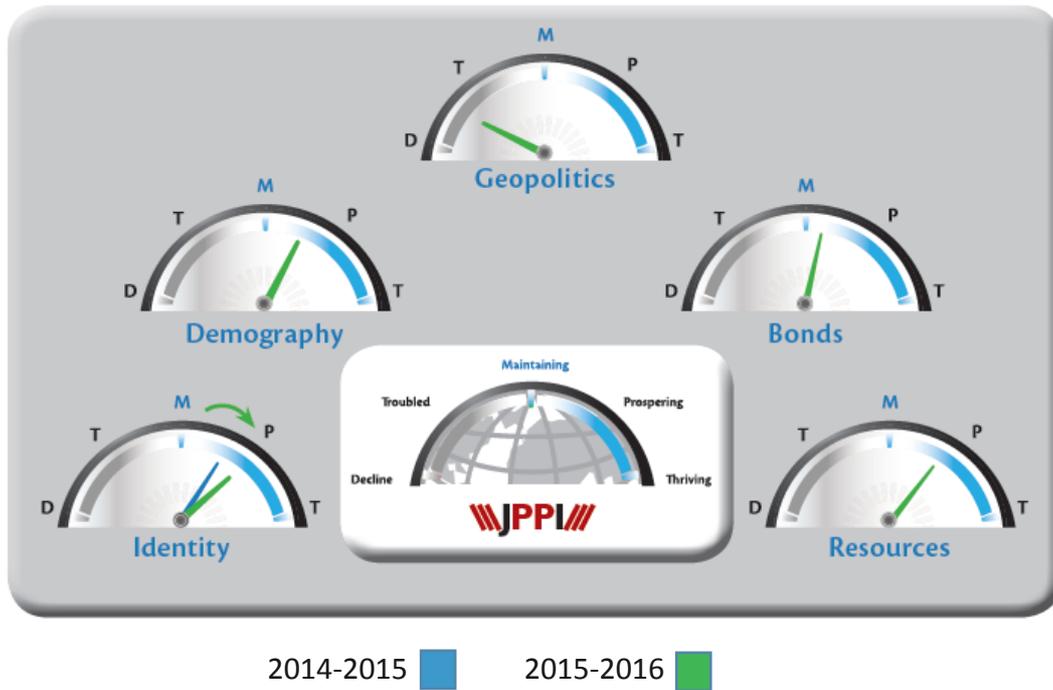
### **Setting the gauge for this year's Annual Assessment: Unchanged**

**Within Israel, the balance of sources of wealth and its uses for domestic and Jewish people purposes remains unchanged from last year.** Israel continues to be a source of innovation and punches well above its weight in educational attainments, albeit not evenly across the entire population. The Technion is opening a joint educational and research facility in China's Guangdong province, one of the most highly productive industrial regions in the world. The national economy, while having shifted to lower levels of growth has still managed to weather the storms of the past decade in a manner that would be envied by many in the developed world. The transition of Israel's economy to global importance was accompanied by rising inequality among economic sectors and social classes. Dealing with Israel's long-term problems with enhancing productivity overall may put pressure on employment in low productivity sectors, which could be problematic if not accompanied by sound policy to ease this transition.

In the Jewish world as a whole, the past year saw no major transitions or events. Over the longer term, the nature of Jewish philanthropy and the sources of its wealth may be affected by several factors. One is the generational change at the heads of some of its leading philanthropic families and foundations. There are indications that this generation may either be less attracted to Jewish people giving or more inclined to seek performance-based funding opportunities over more traditional giving patterns. It remains to be seen what effects may also attend emigration from settled Jewish communities to either Israel or the wider world due to the perception of increased anti-Semitism. Much depends on who is leaving, where they are going, and what they are

able to reconstruct of their former lives in their new locales. They may find themselves forced into a lower socioeconomic standing than they formerly enjoyed or possibly less affiliation with the Jewish community in their new locale. It is an issue that Israel and the wider Jewish world should recognize and address.

**Figure 1. Characterization of Key Drivers Affecting the Jewish People in the Year 2015-16**



## 6. People of the Book

Many regard education and knowledge as a key determinant of the future position and status of nations. This is even truer for the Jewish people, in Israel and throughout the world. An excursion into history shows that in every century and every country where Jews enjoyed a measure of religious, cultural, or economic success, they achieved it by superior knowledge, including apt governance. They learned languages, professions, trade routes, diplomacy, financial and other skills, and in some countries even military arts. Since the 19<sup>th</sup> century they have excelled in science, innovation, finance, and general culture, which irritated their enemies but impressed the rulers of the day and made some Jews indispensable. Israel's thriving high-tech sector and its excellence in science and technology are not a revolution in Jewish history, but a culmination of Jewish history.

Every country promotes education and culture, and all want to excel in science and technology. Can the “People of the Book” hold its place? Surely there are many reasons to worry, particularly in Israel. Notwithstanding the great difficulties of finding and evaluating the necessary data, it is important to add a sixth gauge to the currently five Annual Assessment gauges that attempt to measure the overall situation of the Jewish people from year to year: the “People of the Book gauge.”

The proposed assessment will use the “hard power – soft power” paradigm coined in the 20<sup>th</sup> century. It will evaluate the “knowledge base” of different types of Jewish competitive strength.

#### Hard Power I: Economic Strength

The analytical starting point is OECD’s 1996 *The Knowledge-Based Economy*, one of its most widely read and politically influential publications. Israel’s productivity rates are low and half of Israel’s exports are from its high-tech sector and generated by ten percent of its working population. These are reasons for concern that must be addressed. Jewish wealth in the Diaspora is also intimately connected with knowledge. Continued Jewish excellence in regard to educational, scientific, professional and cultural achievement will also form an important part of this assessment.

#### Hard Power II: Military Strength

Recently a senior military officer spoke of Israel’s education gap and warned that the IDF’s demand for engineer officers exceeds the supply. This could sap Israel’s long-term military strength.

#### Soft Power: Cultural Achievements

Defining and measuring cultural achievements objectively is problematic. Yet the importance of soft power cannot be overestimated because it shapes international public opinion and even politics. In May 2016, the historian Niall Ferguson wrote: “I am a philo-Semite. The disproportionate Jewish contribution to Western civilization – not least to science and arts – is one of the most astonishing achievements of modern history.” At the same time, a rising wave of global anti-Semitism denies the Jews and Israel any commendable achievements.

## 7. Selected Indicators of World Jewry

### SELECTED INDICATORS OF WORLD JEWRY – 2015-2016

Country	Jewish Population (Core Definition)		GDP per capita, PPP Intl \$	Index Of Human Development – World Rank	Recent Out- marriage Rate (%)	Aliyah	Number of Jewish Legislature Members / Seats In Legislature
	1970 <sup>a</sup>	2015 <sup>b</sup>					
<b>WORLD</b>	12,633,000	14,310,500	-	-	-	30,402	-
<b>ISRAEL</b>	2,582,000	6,217,400 <sup>g,h</sup>	33,658	18	5	-	103/120 <sup>i</sup>
<b>NORTH AMERICA</b>	5,686,000	6,086,000	-	-	-	3,133	-
United States	5,400,000	5,700,000 <sup>j</sup>	55,904	8	50<	2,748	29/535 <sup>k</sup>
Canada	286,000	386,000	45,488	9	15-24.9	385	13/443
<b>LATIN AMERICA</b>	514,000	382,200	-	-	-	-	-
Argentina	282,000	181,000	22,375	40	25-34.9	282	-
Brazil	90,000	94,500	15,690	75	25-34.9	461	-
Mexico	35,000	40,000	18,334	74	1-4.9	-	-
Other countries	107,000	66,700	-	-	15-95	-	-
<b>EUROPE NON-FSU</b>	1,331,000	1,123,800	-	-	-	-	-
France	530,000	467,500	41,221	22	25-34.9	7,030	-
United Kingdom	390,000	290,000	40,958	14	26	668	20/650
Germany	30,000	117,500	47,033	6	45-54.9	120	0/630
Romania	-	9,300	20,697	52	-	21	-
Bulgaria	-	2,000	18,501	59	-	13	-
Hungary	70,000	47,700	26,074	44	60	81	5<=
Other EU <sup>l</sup>	171,000	149,800	-	-	33-75	-	-
Other non-EU <sup>m</sup>	140,000	40,000	-	-	50-80	-	-
<b>FSU</b>	2,151,000	285,900	-	-	-	16,129	-

Russia	808,000	183,000	23,744	50	80		-
Ukraine	777,000	60,000	7,989	81	80	15,448	-
Rest FSU Europe	312,000	24,300	-	-	65-75		-
FSU Asia	254,000	18,600	-	-	50-75	681	-
<b>ASIA (REST)</b>	104,000	20,100	-	-	-	250	-
<b>AFRICA</b>	195,000	74,700	-	-	-	420	-
Ethiopia	-	100	1,773	174	-	91	-
South Africa	118,000	69,800	13,197	116	15-24.9	207	2/400
Morocco	-	2,400	8,194	126	-	121	-
Other countries	-	2,400	-	-	-		-
<b>OCEANIA</b>	70,000	120,400	-	-	-	119	-
Australia	65,000	112,800	47,317	2	15-24.9	-	-
New Zealand and other countries	5,000	7,600	35,966	9	15-24.9	-	1/121

- a. Source: Division of Jewish Demography and Statistics, The A. Harman Institute of Contemporary Jewry, The Hebrew University of Jerusalem.
- b. Source: DellaPergola, Sergio, World Jewish Population, 2014. In: Arnold Dashefsky and Ira Sheskin (eds.), American Jewish Year Book 2014 (Appendix)
- c. Source: Website for the International Monetary Fund (IMF), World Economic Outlook for 2014. Gross Domestic Product (GDP) based on Purchasing Power Parity (PPP), per capita (world currency).
- d. A measure of a country's development based on public health, educational level and real income level. Source. Human Development Report 2014, Work for Human Development, United Nations Development Programme (UNDP).
- e. Source: Israel Central Bureau of Statistics, Monthly Bulletin of Statistics in Israel, January 2015.
- f. Based on previous year's statistics, unless otherwise specified.
- g. Does not include "without religion", includes East Jerusalem, Golan Heights and West Bank.
- h. According to population predictions from the Israel Central Bureau of Statistics (medium alternative), by the year 2025, Israel's Jewish population will grow to 7.3 million (Statistical Abstract of Israel, 2014, Table 2.10, p. 111).
- i. Source: Knesset website.
- j. Aside from this measure of 5.7 million Jews, the Pew Jewish People Survey from 2013 found another one million people (600,000 adults and 400,000 children) who are partial Jews.
- k. Source: Blumberg, Antonia. Jan. 5, 2015. "A Look At The Religious Make-Up Of The 114th Congress". The Huffington Post. [http://www.huffingtonpost.com/2015/01/05/congress-religious-affiliation\\_n\\_6417074.html](http://www.huffingtonpost.com/2015/01/05/congress-religious-affiliation_n_6417074.html).
- l. Excluding Baltic countries.
- m. Including Turkey, Bosnia, Macedonia and Serbia.

## 8. Policy Recommendations

The upcoming presidential elections in the United States and subsequent change of administrations affords an opportunity to turn over a new page in relations between Israel and the United States. President Obama's tenure signaled some worrying trends for the future of U.S. - Israel relations – both the depth of U.S. support for Israel (gradually becoming a partisan issue), and a foreign policy doctrine that doesn't align with Israeli interests. Rising tensions between Washington and Jerusalem, should they continue, threaten Israel's strategic stature and would put pressure on the American Jewish community, placing it between "a rock and a hard place". This could erode the resilience of the "triangular relationship": Jerusalem – Washington – U.S. Jewry, a bedrock of Israel's and the Jewish people's strength. **As the U.S. is Israel's and the Jewish People's only significant ally, improving this relationship should be Israel's utmost priority. A main catalyst to achieve this could be an Israeli initiative, coordinated with the new American administration, to advance towards a negotiated solution to the Israeli-Palestinian conflict, on the basis of two states, and within a regional framework.**

## Articles

### 1. Israel: In the Midst of Strategic Uncertainty

The developments of recent months highlighted the strategic question marks hovering over Israel. There is much uncertainty in the violent and turbulent Mideast regional arena, and the international arena is far from settling into a stable "world order." One expression of Israel being in the midst of strategic uncertainty is the harsh polarization among analysts and commentators as to the effects of recent developments to Israel's strategic stature. Just as one can find theses explaining why Israel's strategic situation is tough and worrying, one can find similarly rational and learned arguments that Israel's strategic situation has never been better.

#### Israel's immediate strategic challenges

- The danger that Iran will not abide by the commitments it made under the nuclear agreement, will escalate its regional subversion, and will achieve greater political, economic, and military power.
- The danger of security deterioration – on both the northern front (Hezbollah and Syria), and the southern front ( Hamas and Sinai terror groups).
- Palestinian terror – The "Lone-Wolf Intifada" – although it has dwindled in recent months, further violence could erupt at any time and take different and more virulent forms.
- Continued tensions with the United States -- the threatened resilience of the triangular relationship: Jerusalem – Washington – American Jewry, and Israel increasingly becoming a partisan issue in America.
- Erosion of U.S. interest in playing a central role in the Middle East, while others with whom Israel is less comfortable fill the void.
- Continued weakening of the Palestinian Authority until it ceases to function at all, harming security cooperation with Israel, and further complicating an already chaotic succession struggle as Abu Mazen exits the stage.
- The push to alter the diplomatic process between Israel and the Palestinians from bi-lateral negotiations to multi-lateral ones, or an enforced solution under UN auspices.
- Attempts to degrade Israel's international standing through BDS and de-legitimization campaigns.

- Threats to Egypt and Jordan's stability – two neighbors with whom Israel has peace treaties and relationships of the highest strategic importance.
- Changes affecting Europe, Israel's largest trade partner: the rise of radical elements on both the right and left; increased overt anti-Semitism and racism; and growing power of Europe's Muslims.

Alongside the challenges, opportunities to improve Israel's situation include:

- The upcoming change of U.S. administrations affords an opportunity to turn over a new page in relations between the countries.
- Deepening relations with the Sunni world, which is increasingly open to Israel, given the threats from Iran and radical terror groups.
- Increasing momentum in developing economic and strategic relations with Asia's rising powers, especially China and India.
- Leveraging gas reserves for regional relations and influence (Egypt, Jordan, Turkey, and the Palestinians) as well as with countries further away (Russia, China, and India).

Israel faces strategic challenges in three main arenas: 1) the regional arena, characterized by harsh violence and instability; 2) the international arena, of which U.S.-Israel relations are central; 3) the Israeli-Palestinian arena, which raises the issue of Israel's Jewish nature.

#### The regional context – the Middle Eastern storm

Israel cannot anticipate a quick change in the violent and unstable character of the region. Thirty percent of today's Middle East population is 29 and under; 30 percent are unemployed. The economy is crumbling and central governance is failing. Tribal or kinship connections are more dominant than civic and national ones. The Sunni-Shia divide continues to feed enmity and bloodshed, 1384 years after the death of the Prophet Mohammed. The hope attached to the Arab Spring has led to a harsh disappointment. All this coalesces to form a vacuum that allows the rise of local militias, terror groups, and radical Islamists. Although Daesh (ISIS) has lost ground in recent months, it continues to attract and inspire young Muslims. The "caliphate" has significant regional influence, continues to control wide swaths of Iraq and Syria, and controls strong

proxies like in Libya and the Sinai Peninsula. The nation-state system continues to unravel in the region, deepening the trend of "failed states" in which sovereign control over territory is only nominal (Iraq, Syria, Lebanon, Libya and Yemen). The tragedy in Syria continues, and the number of dead is approaching 500,000. Four million refugees have fled the country, while another seven million Syrians are internally displaced refugees. Syria's average life expectancy has plummeted from 70 to a mere 56.

While the Middle East is raging, Israel does not face a coalition of hostile Arab armies as in the past. Moreover, Israel's connections with the Sunni Arab world are deepening, as these countries, in light of the threat from Iran and radical Jihadi groups, see a convergence of interests with Israel. Today's military threats mainly originate from terror organizations working out of unclearly defined territories ( Hamas) or failed states (Lebanon or Syria). The most significant threat is Hezbollah, which is armed with 100,000 rockets aimed at targets throughout Israel, and who have gained considerable combat experience in the complex fighting in Syria. For the time being, Hezbollah is busy with the civil war in Syria, where they have lost a considerable number of fighters. However, one cannot ignore the fact that Arab countries are arming themselves with the most advanced weaponry purchased with massive sums of money. This could threaten Israel's qualitative military edge (QME) in the future – in case there are regime changes or policy shifts in these countries.

#### The international context – the relationship with the United States

President Obama's tenure signaled some worrying trends for the future of U.S.-Israel relations -- both the depth of U.S. support for Israel, and a foreign policy doctrine that doesn't align with Israeli government policies. Opinions are split as to what extent these trends will continue to characterize America's approach to Israel and American foreign policy generally in the future. Israel is affected significantly not just by the qualitative change of its relationship with Washington, but also by America's changing global standing. The perception that America – Israel's closest ally – is a declining power, which is deserting the Middle East, diminishes Israeli deterrence. U.S. Jewish leaders warn that support for Israel is losing its bi-partisan status. They are expressing concerns that the core values traditionally shared by both countries, and at the heart of their relationship, are no longer in alignment. They admonish that they increasingly hear from friends of Israel in the U.S., and even from the Jewish community itself: "This is not the

Israel we knew...." This trend has led many to feel distanced from Israel, especially among young liberals. This disconnect is expressed by some of them in the de-legitimization of Israel and support for boycotts (BDS).

**The U.S. - Israel agenda remains packed with significant issues, even in the remaining months of the Obama administration, including:**

- The possibility that President Obama will initiate or support a UNSC resolution that will define the parameters for a permanent solution to the Israeli-Palestinian conflict, in a manner that would harm Israel's interests and that sits in contradiction to U.S. policy until now: that a solution should result from direct negotiations between the two sides.
- Completing the negotiations for the Memorandum of Understanding (MOU) laying out U.S. security support for Israel in the coming decade (2018 - 2027). Key figures in the American Jewish community warn that continued stubbornness over the amount of aid could lead to accusations that Israel is squeezing the American coffers. According to them, given the state of the U.S. budget, it is doubtful that the next administration will be as generous as the current one. (However, there are those who warn that finalizing the MOU during Obama's tenure will allow him to claim he proved his commitment to Israel's security, which will grant him additional legitimacy and motivation to pursue UNSC intervention.)

**President Obama is leaving his successor a series of decisions regarding Israel's interests. Positive outcomes depend on a deepened Washington-Jerusalem strategic dialogue and closer political cooperation:**

- Will the U.S. continue to view the Middle East with less importance?
- How can we ensure Iran fulfills its obligations under the nuclear agreement, and what measures should be taken in the event of violations?
- How will Washington respond to Iran's defiant behavior in areas not included in the nuclear agreement (subversion, support of terror, development of ballistic missiles, and more)?
- Will the U.S. be a dominant factor in defining Syria's future so that it doesn't become a forward operating base for Iran and anti-Israel Jihadist elements?

- Will the U.S. deepen its involvement in bringing about a decisive victory over Daesh (ISIS)?
- How will the next administration choose to manage the balance of power between Iran and Saudi Arabia? Will it continue to grant legitimacy to Iran's demands to be a regional power at the expense of Saudi Arabia and the Sunni camp?
- How will the next administration deal with Egypt? Will it continue to assist and advance cooperation with Cairo or will it cool the relationship over discomfort with a regime insufficiently committed to democratic values and human rights?
- Will the next administration continue to adequately support Jordan to ensure its stability?
- Will the next administration generate momentum in the relationship forming between Israel and the moderate Sunni camp? Will it try to maximize the potential for strategic cooperation between: Israel – Egypt – Jordan – the Gulf States?
- How will the next administration prepare for the Palestinian Authority's coming succession leadership, and how will it chose to relate to the Israeli-Palestinian conflict?

**Jerusalem's ability to manage a strategic dialogue on these issues in a way that produces positive results from Israel's perspective is at least partly dependent on Israel's readiness to fulfill some of Washington's expectations.** Despite Prime Minister Netanyahu's clarifications, the Obama administration doubts Israel's commitment to a two-state vision. In this spirit, Secretary of State John Kerry warned of a deterioration into a one-state reality that will not have a Jewish majority, and called on Netanyahu to prove his support for a two-state solution is "not just a slogan." One must note that this assessment of American expectations of Israel might not be relevant should Trump win the election. It is also unknown whether the joint endorsement by Prime Minister Netanyahu and the newly installed Defense Minister Lieberman (May 30, 2016) of the two-state solution paradigm, and their willingness to discuss the Arab Peace Plan, thaws the current political freeze and leads to a renewal of negotiations with the Palestinians and the Arab world.

Continued rising tensions between Washington and Jerusalem threatens Israel's strategic stature and could put pressure on the American Jewish community, placing it between a rock and a hard place. This could erode the resilience of the "triangular relationship":

Jerusalem – Washington – U.S. Jewry, a bedrock of Israel's and the Jewish people's strength. **As the U.S. is Israel's most important ally, improving this relationship should be Israel's utmost priority.**

In this regard, one cannot ignore the fact that settlement construction draws the harshest criticism of Israel, and is viewed by the U.S. (and the international community) as proof that Israel does not really intend to comply with a two-state solution. (Again, the American position on this issue may change if Trump is elected.) Even though the Palestinian issue itself has become significantly lower on the agendas of relevant actors in the regional and international arena, the European Union has adopted guidelines labeling goods produced in the settlements and sold in retail stores within the EU. Secretary Kerry claims: "Continuing settlement growth raises honest questions about Israel's long-term intentions."<sup>1</sup> UN Secretary General Ban Ki Moon has called on Israel to refrain from additional construction in the settlements, saying that it is "human nature" to resist occupation. He has deemed settlement construction an "affront to the Palestinian people and the international community."<sup>2</sup> British Prime Minister David Cameron said, "Construction in the settlements and East Jerusalem is shocking."<sup>3</sup> According to the German weekly *Der Spiegel*, German Chancellor Angela Merkel is highly concerned by the Israeli government's settlement policy, which is making a two-state solution impossible, saying that she "understands why Abbas wants to turn to the UN Security Council."<sup>4</sup> Even Dan Shapiro, the U.S. Ambassador to Israel, didn't mince words when addressing the issue, noting that the U.S. was "concerned and perplexed" by the Israeli government's policy on the settlements, "which raise questions about Israeli intentions."<sup>5</sup>

### Is Israel's strategic situation improving or deteriorating?

Assessing Israel's strategic stature cannot be reduced to a momentary situational account. This year, Israel celebrated 68 years of independence after the Jewish people had experienced 2000 years of exile. The 600,000 Jews that made up the state at its founding has grown to 7 million today.

Israel is currently ranked number 11 on the Global Happiness Index; its birthrate is the highest among developed countries; and its average life expectancy is very high (ranked fifth in the world for men, and ninth for women). GDP per capita (USD 37,000)

surpassed Japan, Italy, and Spain. Israeli hi-tech is world-class and many major technology corporations have R&D divisions in Israel. Gas fields discovered off Israel's coast promise an energy supply for years to come, and will turn Israel into a gas exporter.

Exports to Asia have tripled over the past decade. Chinese investments in Israel grew from 70 million dollars in 2010 to 2.7 billion dollars this past year. Israel's arms industry is the second most important supplier to India. The peace treaties with Jordan and Egypt are stable despite regional instability (the agreement with Egypt was maintained even under the Muslim Brotherhood's rule). Following the internal collapse of Syria and Iraq, Israel no longer faces conventional military threats, at least in the coming years, and Iran's ability to achieve a nuclear weapon has been pushed back for the time being. In light of Iran's regional subversion, jihadist terror, and the emergence of Daesh (ISIS), the confluence of interests between Israel and the Sunni Arab states has grown. Security cooperation with Egypt and Jordan is broader than ever. Israel's economic and military power translates into improved relations with Moscow, which allows Israel to conduct vital coordination in light of Russia's military activity there. Even Turkish President Erdogan admitted that his country "needs a country like Israel."<sup>6</sup>

The positive developments regarding Israel's strategic standing are encouraging, but they do not provide a full picture. When the Middle Eastern system stabilizes, the regional map could be less comfortable for Israel. Significant actors that could play a greater role in the future balance of forces – Iran and Turkey – have already proven their potential for being hostile to Israel. Confronting terror groups that operate out of failed states and find cover in populated areas will continue to pose a serious security challenge, especially if additional states break down or if Israel's neighbors become less stable (Jordan and Egypt).

Relations with China and India, great as they may become, cannot replace the strategic relationship with the U.S. They do not hold the same foundational core values and are missing an essential element – the existence and influence of the U.S. Jewish community. The free world's opinion of Israel could deteriorate further, strengthening the de-legitimization movement, as Israel is increasingly perceived to have abandoned liberal values and refuses to a two state solution.

### Maintaining Israel's Jewish identity as a strategic aim

Assessing a country's resilience cannot be reduced to a metric of its relative strength in the international arena; domestic and economic issues, scientific achievement, education, and social solidarity are integrally important. In Israel's case, maintaining its "Jewish character" is an essential component, which could dissipate if Israel finds itself in a bi-national reality. The security implications of this prospect were recently expressed by IDF Chief of Staff, Lt. Gen. Gadi Eizenkot: "There are 161 settlements in Judea and Samaria. There are 400,000 settlers among 2 million Palestinians. The populations are mixed, and that causes a great operational challenge."<sup>7</sup>

As time goes by without defining Israel's eastern border, the number of Jews living in the area beyond the settlement blocs increases, which could foreclose a territorial division between the river and the sea. This population (about 85,000 people) is ten times greater than the number of Israelis evacuated from the Gaza Strip in 2005, a traumatic event in its own right. Over the past five years, the number of Jews in settlements beyond the blocs grew at a rate of between 2500 and 3000 per year.

As time goes on, the possibility of an Israeli leader taking responsibility for relocating such a large number of settlers dwindles, especially as the religious and ideological connection to that land is much stronger than it was in the Gaza Strip. The critical mass of Jews living beyond the blocs is growing, and will at some point no longer permit the implementation of an agreement based on a defined border between two peoples, in a way that will ensure the Jewish character of the state through maintaining a clear Jewish majority. This may push the Palestinians to switch their demand for an independent state alongside Israel to a demand for equal rights – including the vote – within a single bi-national state. Such a claim could very well win international support..

Considering the above-mentioned developments and the possibility, that American foreign policy will continue to be shaped by trends unfavorable to Israel, Israel should ask itself if delaying the drawing of a recognized final eastern border is prudent, and whether it is missing out on the optimal timing to gain the maximum American assistance in achieving the best possible border.

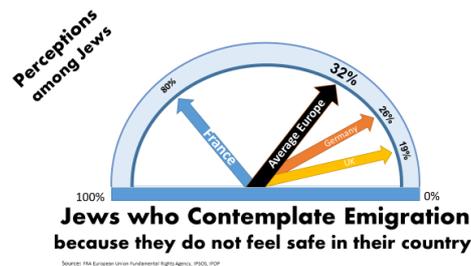
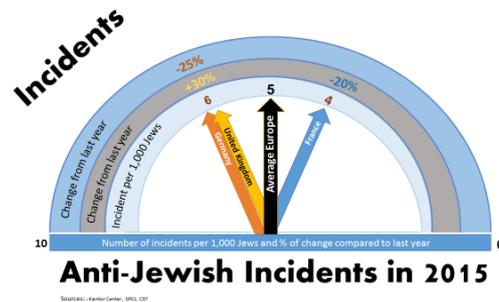
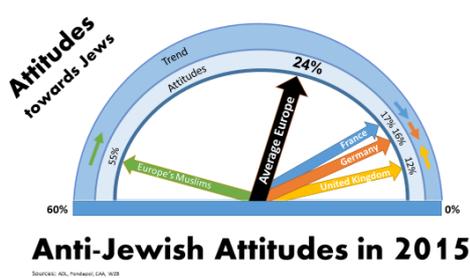
The current strategic interval, with all its uncertainty, grants a grace period with no existential danger to Israel. **It would be wise to take advantage of this time to craft a policy that will effectively deal with the strategic threat to Israel's Jewish identity.**

## 2. Comprehensive Three-Dimensional Index on Anti-Semitism in Europe

### The need for an integrated indicator

In the shadow of a resurgence of Anti-Semitism in Europe, and in the light of EU governments' efforts to eradicate the phenomenon, there is a need for an integrative anti-Semitism Index that will provide Israeli policy-makers and world Jewry leaders with a policy tool to monitor developments, ease decision-making and assess efficacy of implemented interventions.

Existing measurement tools only provide partial perspectives, a single piece of anti-Semitism jigsaw puzzle. Some only examine public opinion. Others only check the number of incidents of violence or harassment against Jews. Occasionally, field studies examine how Jews themselves perceive



anti-Semitism.

### A three-dimensional indicator

JPPI's anti-Semitism Index, presented here for the second year. This year we focus on Europe – aiming to measure the discomfort and threat levels of European Jewry. This integrated indicator, meant to be a tool for policy makers, relates to three complementary dimensions of anti-Semitism affecting individual Jews and communal Jewish life. Our integrative index utilizes the existing **Attitudes Toward Jews** Index compiled from data collected by the Anti-Defamation League (ADL) in cooperation with various research

institutes, **anti-Semitic harassment** figures collected by local Jewish organizations entrusted with security (such as CST in UK, and SPCJ in France) <sup>8</sup>, and findings regarding **perceptions among Jews** of anti-Semitism.

Table 1. Anti-Semitism in Western Europe 2015-2016	Trend	Europe average	France	UK	Germany
<b>PUBLIC OPINION TOWARDS JEWS</b>					
Harbor anti-Semitic attitudes (%) <sup>9</sup>	▼	24 (26)	17 (37)	12 (8)	16 (27)
-- as above, among Muslims (%) <sup>10</sup>	▼	62 (55)	49 (83)	54	54 (62)
<b>ANTI-SEMITIC BEHAVIOR (number of incidents; only as reported to official agencies)<sup>11</sup></b>					
Extreme violence (including terrorism)	▼ ▲		32 (2)	4 (41)	3 (4)
Assault	▼		66 (108)	82 (80)	18 (25)
Damage to property	▼		109 (131)	65 (81)	N/A
Total incidents (extreme violence, assaults, damages, desecrations and threats)	▼		1,015 (1,092)	912 (1,189)	740 (864)
Number of physical attacks per 1,000 Jews	▼		4 (5)	6 (8)	6 (7)
Per cent of attacks that are not reported <sup>12</sup>		77	72	73	72
<b>ANTI-SEMITISM AS PERCEIVED BY JEWS<sup>13</sup></b>					
Have been personally assaulted (%)			11	5	
Anti-Semitism is a very or fairly big problem (%)		(67)	(86)	(48)	(25)
Have considered emigration because they do not feel safe in their country (%)		(32)	80 (49)	(19)	(26)
Avoid places in their neighborhood because they would not feel safe there as a Jew (%)		(27)	(20)	(35)	(28)

Note: Most recent data available. Numbers in parenthesis are 2014 scores

#### A. European Jewish communities are at risk of further terror attacks

Thousands of Europe-born jihadists have fought in the Syrian civil war, and hundreds of them have returned to Europe. Moreover, among the million migrants who have arrived in Europe recently, it is suspected that there are several hundreds of trained jihadists who are setting up sleeping terror cells. On June 4, 2016, the U.S. State Department warned Americans of the risk of potential terrorist attacks throughout Europe.<sup>14</sup> It is clear that in recent terror attacks throughout Europe, Jews have been specifically targeted by jihadists. Security services put in place in several European Jewish communities were not designed to safeguard the many thousands of Jewish residences against terror, and do not have the capacity to do so.

#### B. Strong condemnations of anti-Semitism by top-level political leaders matter

We observe an increase of anti-Jewish sentiment in United Kingdom, while anti-Jewish attitudes and harassment dropped significantly in France and Germany.

There is no doubt that high-profile violence against Jews has fostered a sense of solidarity with the Jewish community. Strong condemnations of anti-Semitism by French PM Manuel Valls and German Chancellor Angela Merkel have been highly effective in their respective countries.

Israeli diplomats and political figures should encourage European political and top-level civic leaders to take a clear stand against anti-Semitism and demonstrate their commitment to the security of Jews. Declarations backed by visible acts are useful with respect to the three components of the index: (1) Anti-Semites get the message that expressing anti-Semitism is not acceptable; (2) Commitment to stand by the Jews and to vigorously pursue perpetrators deters anti-Semitic acts; (3) Jews regain trust in their country's commitment to their security and feel comfortable as full citizens.

**C. Despite the fact that there was no armed conflict in 2015, the level of anti-Jewish incidents remained similar to those of 2014**

If until recently, anti-Semitic harassments were seen to spike mainly during Middle East armed conflicts with a subsequent sharp decline, today anti-Jewishness in Europe remains high even during years (such as 2015) without any armed conflict involving Israel and Palestinians. Beyond the fluctuations linked to external triggers, the trend line of anti-Semitic incidents, as illustrated in Figure 1, shows an overall ascent during the last 15 years. This is due to the fact that anti-Jewish violence, coming mainly from Europe-born Muslims, is now home-grown and endogenous.

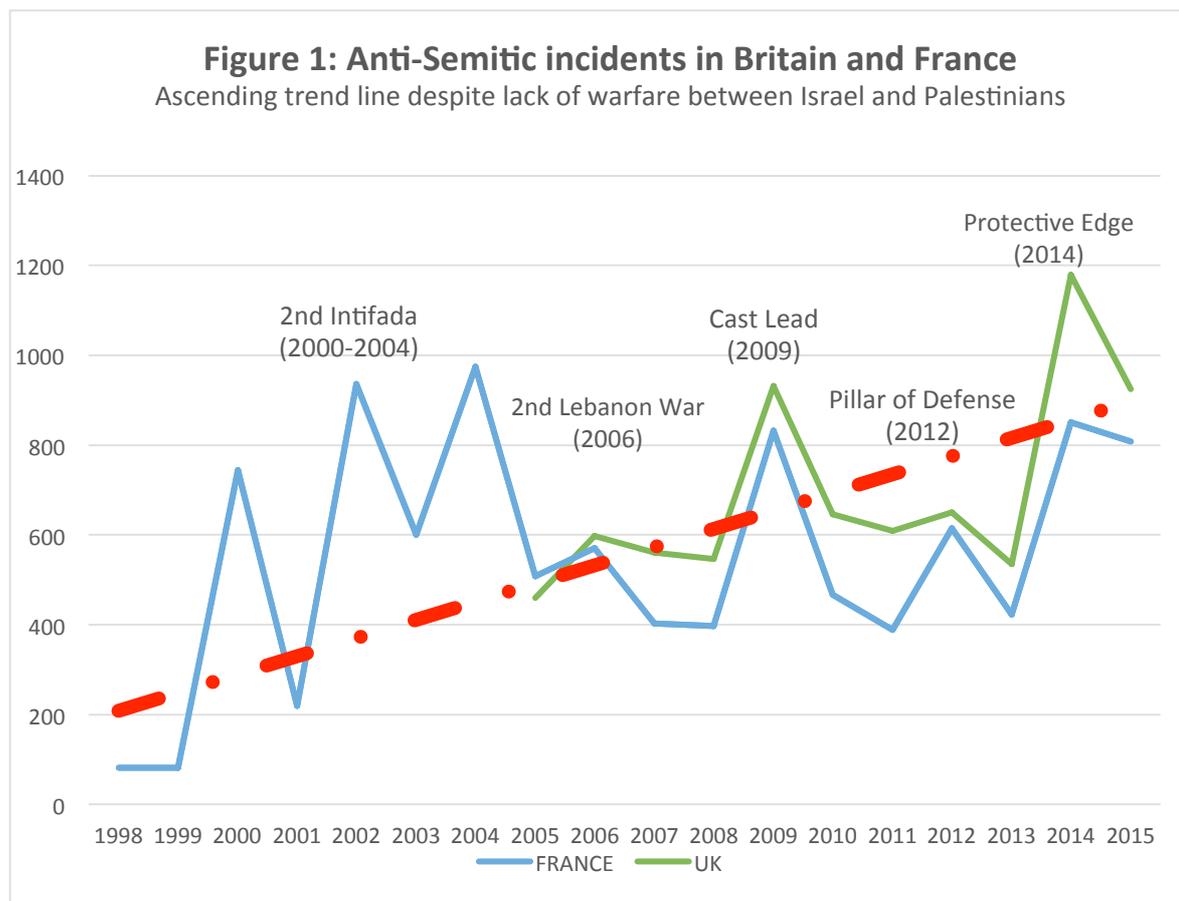
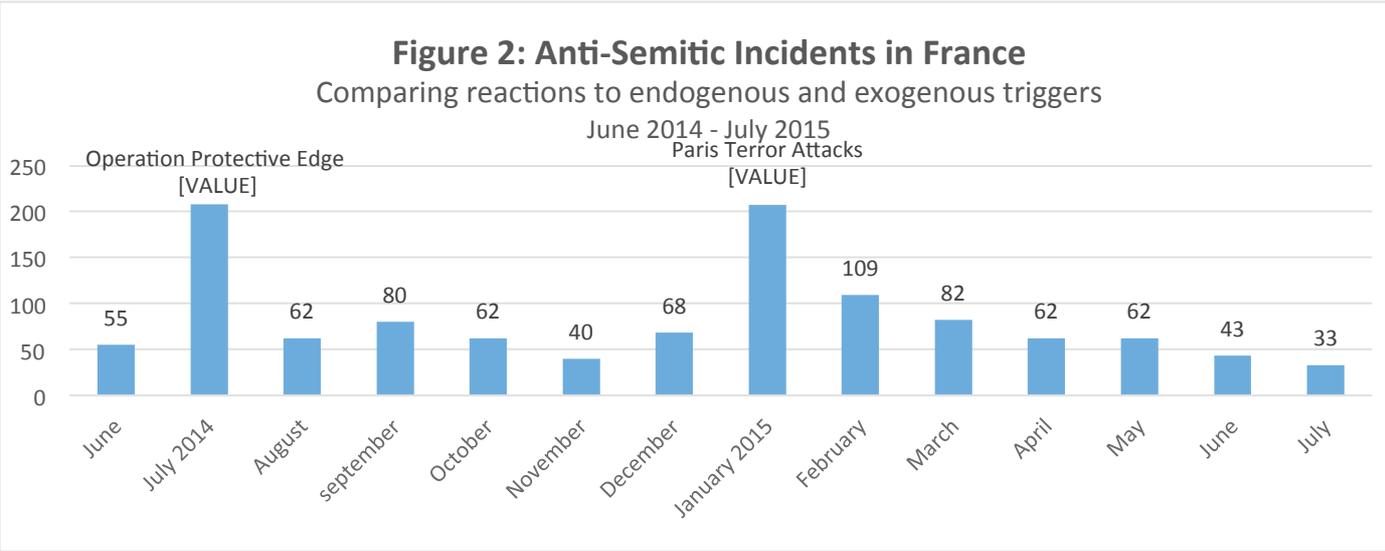


Figure 2 provides further insight into the emerging endogenous nature of anti-Jewish violence, in this case in France. After the end of the 2014 Israel-Gaza conflict in 2014 and its spike in incidents, the level sloped steeply away from that high level. When compared to the level of incidents at the time of the Paris terror attacks in January 2015, a moderately high level of incidents continued for the two following months. This may be a harbinger of a growing difference not only between the number but also the nature and impacts of endogenous and exogenous triggers. The decline was slower in returning to a baseline level after the January 2015 terror attack in a Parisian kosher supermarket than after Operation Protective Edge. The Paris massacre was perpetrated by French-born Jihadists and their action – especially after being celebrated as a glorious victory by global Jihadists – inspired local radicals. Without the French government’s steadfast reaction this wave of anti-Jewish harassments may have been prolonged even more.

### Implications – comparing French Jewry’s discomfort with British Jewry’s confidence

As we integrate the data of the three dimensions, an aggregating picture emerges. Despite a larger number of annual incidents per 1000 Jews in UK than in France, French Jews feel more anxiety than British Jews. Unlike British Jews, French Jews feel that anti-Semitic discourse has spread into the national mainstream public sphere and have lost confidence in the ability of the national government to control the Muslim minority. However to some extent, following Manuel Valls’ unambiguous statements and concrete actions, French Jews started regaining confidence in the French government’s



commitment to protect them. Nevertheless, they are worried about the persistence of anti-Semitic violence and are still cautious about the capability of the police and security to contain social and violent manifestations of anti-Semitism.<sup>15</sup> This discomfort fits with additional field survey findings. Following the 2015 terror attacks in Paris and Brussels, national surveys confirmed the spread of feelings of deep discomfort among French Jews and their heightened motivation to leave the country: 61 percent feel they “they would be more secure in Israel than in France” (for 40 percent of the general French population expressed that “Jews are not safe in France”), while 80 percent of them “contemplate leaving the country” and half of them “consider Israel as their preferred destination.”<sup>16</sup>

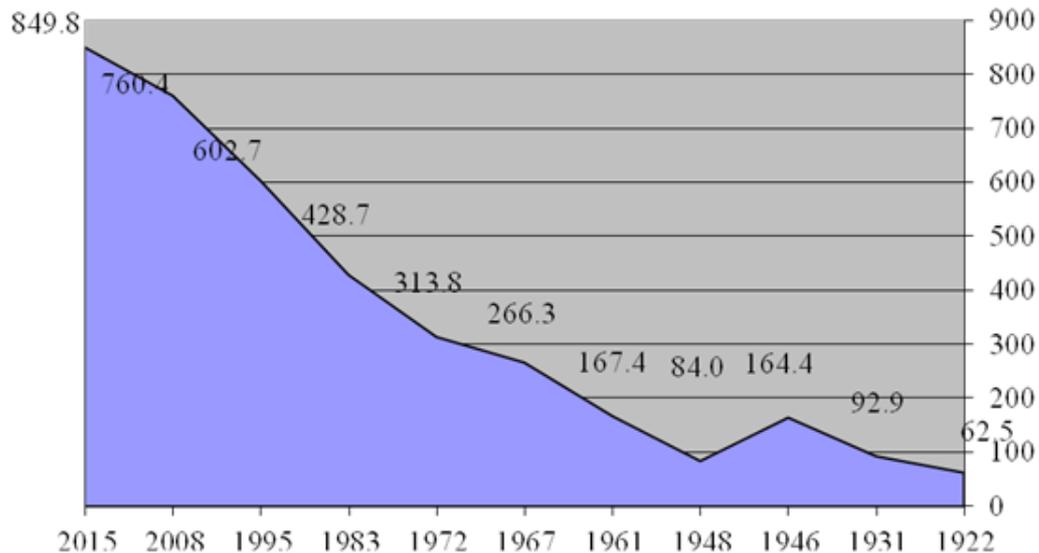
### **3. The Demographics of Jerusalem**

Jerusalem's special status as a capital city, its religious importance to Judaism, Islam and Christianity, and its being one of the more sensitive focal points of the Arab-Israeli conflict, led us to examine Jerusalem's population in detail. Add to this the events of the summer of 2015 – the rise in tensions between Jews and Arabs that characterized the past few months of stabbing, car ramming and even shooting attacks of individual residents of the city. The recent wave of attacks called the “Lone-Wolf Intifada,” although it spread to other parts of the country, was focused disproportionately on Jerusalem. It has awakened a debate on the status of the Arab neighborhoods of Jerusalem, both those within the security barrier and those on the other side. Although a political deal between Israel and the Palestinian Authority doesn't seem close at this time, there is no doubt that any eventual deal will include Jerusalem. Religious, security, economic, and also demographic considerations will need to be taken into account.

In the past seven decades, Jerusalem's borders or the placement of physical barriers within the city have changed a number of times. According to the UNSCOP Partition Plan (UN Resolution 181, November 29, 1947), Jerusalem was to be a neutral status territory (*corpus separatum*) under UN supervision. After the War of Independence, the city was divided: its western sector under Israeli control, its eastern part controlled by Jordan. Following the Six Day War, the two parts were united, and a number of villages not previously part of Jordanian East Jerusalem were added. However, when the separation barrier was constructed in the previous decade, a number of Arab villages were left to its east.

On the eve of the state's founding, in 1946, Jerusalem was home to 164,000 residents (see graph 1). Following the city's division in 1948 roughly half remained on the western side (84,000). The Israeli census of 1961 recorded a doubling of residents to 167,000. Following the 1967 reunification of Jerusalem, the number of citizens stood at slightly more than a quarter million. It continued to grow as a result of internal demographic trends and the settlement of new immigrants: it reached 428,000 in 1983, and 750,000 in 2008. Jerusalem's population today is 850,000, Israel's largest city.

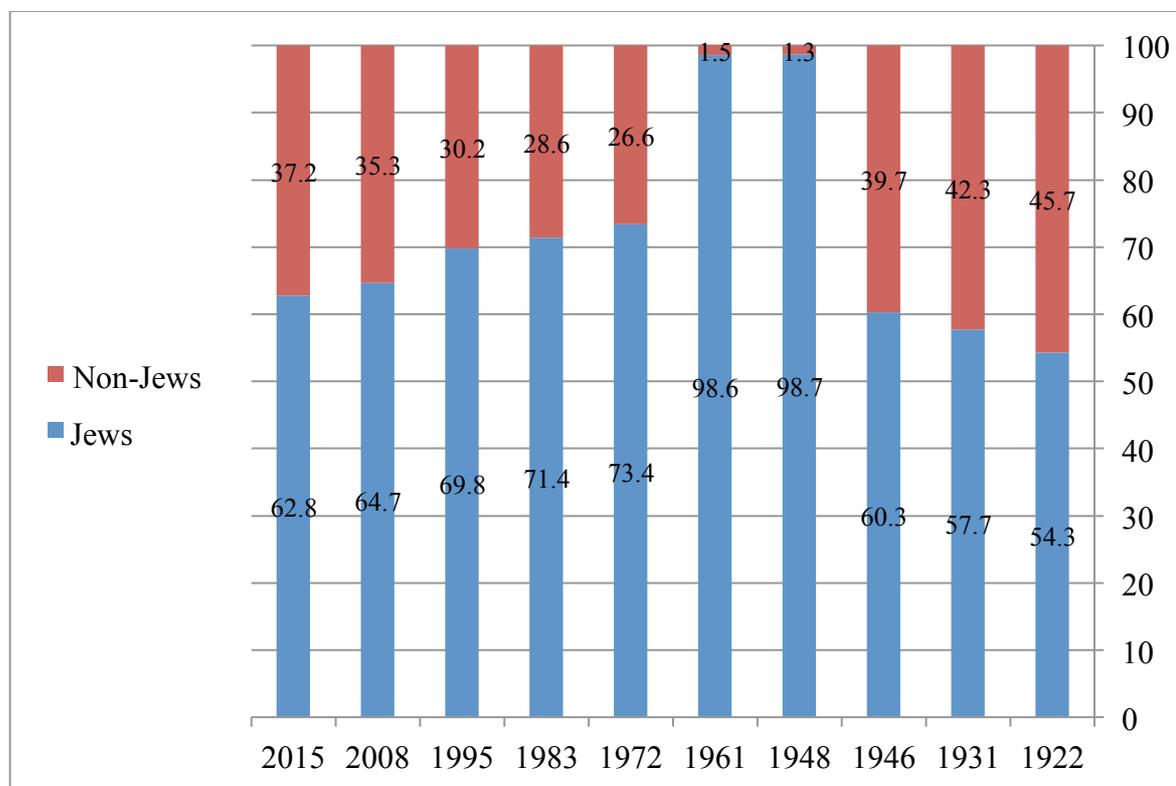
**Graph 1. Population of Jerusalem, 1922 - 2015 (in thousands)**



Until 1946: during the British mandate borders; establishment of the state and until the Six-Day's War: 1948 borders; following the Six Day War: the borders of a united Jerusalem.  
 Source: *The Jerusalem Center for Israel Studies, Statistical Yearbook, 2014;*  
*Jerusalem Center statistics yet to be published.*

As the number of residents have shifted, so too has the balance between Jews and non-Jews (see graph 2). In the latter part of the British Mandate, Jews constituted 60 percent of the city's population. After the city was divided, the western part remained primarily Jewish. The Jewish majority of Jerusalem (western, of course) was more substantial than in the rest of the country – 99 percent of Jerusalem versus 85 percent of the entire country. With the reunification of Jerusalem, the non-Jewish residents of the eastern sector were added, and all at once the proportion of Jews was reduced to three-quarters. Since then, the growth of the non-Jewish population has been quicker than that of the Jewish population. At the beginning of 2015, Jerusalem's Jews constituted 62.8 percent of the city's population, a proportion lower than that of Jews in all of Israel.

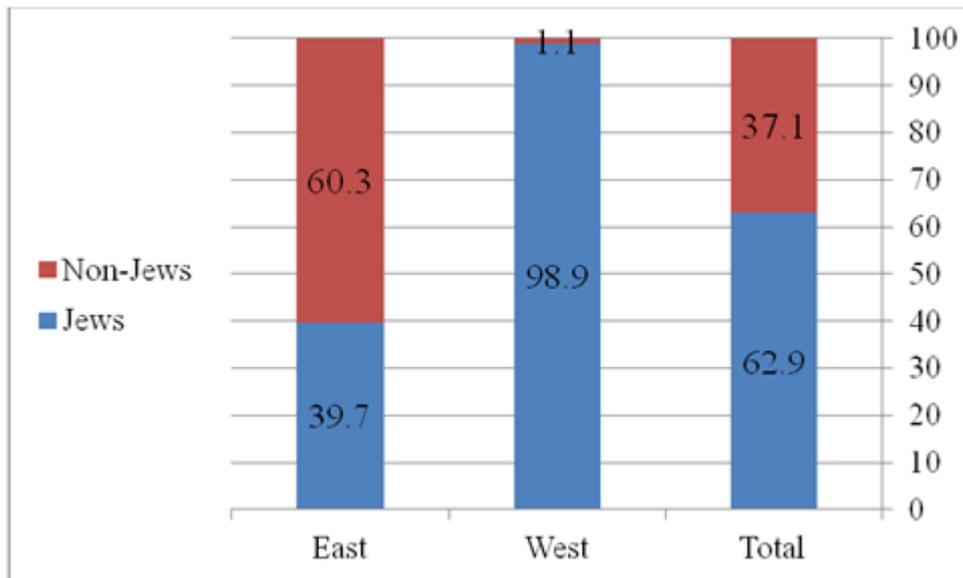
**Graph 2. Jerusalem's population according to population groups, 1922 – 2015 (percent)**



Source: *Statistical Yearbook of Jerusalem*, The Jerusalem Institute for Israel Studies, various years.

The balance between Jews and non-Jews differs in each part of the city (graph 3). While in the western part, almost all the residents are Jewish, in the eastern part, Jews comprise 40%. However, in absolute terms, in the Jewish neighborhoods in the eastern part of the city and the old city, there are altogether 200,000 Jews.

**Graph 3. Jerusalem’s population according to area of residence and population groups, 2013**



*Source: Statistical Yearbook of Jerusalem, The Jerusalem Institute for Israel Studies, various years.*

Analysis of the five-year period between 2009 and 2013 shows that much of the growth of Jerusalem’s Jewish population was due to natural growth, the settling of new immigrants, an internal immigration balance with other cities and towns, and a balance between expat Israelis and those who returned (table 1). Although the natural birth rates and settling of immigrants increased the number of Jews in the city, the internal balance of emigration was negative, by a scope of 37,000 people. (Some moved to secular Jewish cities near Jerusalem, such as Mevaseret Zion or to further away places, such as Tel Aviv. Others left Jerusalem for Haredi settlements or the ultra-Orthodox neighborhoods of Beit Shemesh, Modi’in Ilit, and Beitar Ilit, and some went to non-Haredi West Bank settlements.) The loss of residents to internal migration canceled out half the increase of the Jewish population from natural growth and Aliyah. The balance between new immigrants and the number of Jerusalem residents leaving Israel is also negative. Among non-Jews, natural growth and family unification account for a population rise, while internal migration brings it down slightly. All told, 31,000 were added to the Jewish population in the past five years, and 40,000 to the non-Jewish population, which means Jerusalem’s Jewish population grew at a slower pace than its non-Jewish population.

**Table 1. Components of Jewish and non-Jewish population growth in Jerusalem, 2009-2013**

Population Groups	Natural Growth	Immigrants	Internal migration	International Balance of Israeli immigration/ Family Unification	Total Growth
Jews	57.6	15.3	-37.2	-4.7	31.0
Non-Jews	36.7	0	-1.3	4.5	39.9

In each of the years between 2009 and 2013, non-Jewish population growth outstripped Jewish growth by a percentage point or two. Despite this, new data published on Jerusalem Day by the Jerusalem Institute for Israel Studies show that in 2014, the growth rate of the Jewish population increased considerably and was close to that of the non-Jewish population. In other words, as opposed to previous years when the non-Jewish population grew at a much higher rate than the Jewish one, in 2014 the two demographics grew at a more similar rate. Each of the three factors mentioned had an effect on this: a rise in natural growth rates of the Jewish population (mostly among its Haredi population), a reduction in the negative internal migration balance of the Jewish population, and an increased number of new immigrants choosing to live in Jerusalem.

However, the proportion of Jews in Jerusalem is taking a constant downward trajectory. At this time, it is difficult to determine if the new data showing a narrowing growth rate gap between Jews and non-Jews signals a long-term development that will stabilize the balance between the two groups at the current level, or whether it represents a temporary change only, and, in the coming years, the non-Jewish growth rate will once again be greater than the Jewish one. In the second instance, it is even possible that the Jewish population will cease to be a majority in the city, perhaps by mid-century. In the public debate, some claim geography is more important than demography, and that one should not interfere in processes happening within the city's population, even at the price of losing a Jewish majority. Related to this, one should keep in mind that East Jerusalem's Arabs can vote and run for city council seats as well as the mayorship. Until now, most have not chosen to exercise this right, but a change in approach, or a decision by the

Palestinian leadership to participate in municipal elections, could bring a change to the face of the city council or even who serves as mayor.

Others, who wish to ensure and strengthen the Jewish majority of Jerusalem, can examine two policy measures in different but complementary directions. The first is to implement measures that will reinforce or accelerate the trend narrowing the balance of internal emigration, such as job creation and the availability of affordable housing – especially for younger graduates of the city’s academic institutions. To a large extent, this in the spirit of the recent June 2, 2016 government decision on the occasion of Jerusalem Day. Related to this, the government should take any possible steps to raise and ensure the quality of life for non-Jewish citizens, especially in East Jerusalem. Non-Jewish Jerusalemites must be better integrated into the city’s social, economic, and cultural fabric. Measures must be taken to prevent tensions around holy sites in order to ensure peace and quiet. Conditions such as these will retain more residents in the city and raise the appeal of Jerusalem to new populations.

In recent years, we have witnessed positive changes in the cultural and leisure life of the city. The public spaces of Jerusalem have become more accessible and fitting for a young population and for families with children from all segments of the population, including the secular. To ensure that these changes help reduce the rate of out-migration from Jerusalem and increase the number of new residents, we recommend lowering tensions and strengthening the image of Jerusalem as a safe, developing, pleasant and special place to live.

A different policy measure could be changing the municipal borders of Jerusalem either westward or eastward, without altering Israel’s sovereign status over these areas. Shifting the border westward by annexing existing Jewish towns; or shrinking the current municipal boundaries, for example along the current route of the security barrier, perhaps even moving it in order to shift a number of Arab neighborhoods and villages to its eastern side.

Of course any unilateral step that would remove tens of thousands of Arab residents from the municipal boundaries of Jerusalem would need to be well thought out and implemented in a cautious manner, such that it would maintain employment status, welfare benefits that have accrued, and the ability to maintain connections with relatives

who will continue to reside within Jerusalem proper. Moreover, moves such as these must be cognizant of relevant political and security considerations.

It is also important to take into account the viewpoint of Diaspora Jewry, much of which supports a united Jerusalem and would likely favor a Jewish-majority Jerusalem. While Diaspora Jewry holds little connection to the neighborhoods on the eastern side of the security fence, they see this physical barrier and its implications on the daily life and living conditions of the Arab residents, as something that does not sit well with their often-liberal world view. A policy that would strengthen the Jewish majority of Jerusalem while improving the life of the non-Jewish population could receive greater support from the Jewish Diaspora, and could even help strengthen its identification with Israel.

#### **4. Pluralism and Dialogue**

A vast majority of Israeli Jews feel comfortable being “who they are” in Israel, but the more rightwing and religious they are, the more comfortable they tend to be.

There are many indications that support the claim that Jewish groups in Israel accept as natural that Jews (in Israel and abroad) have a multiplicity of views, ways of life, and identity components. The Jews of Israel do not want this variety to erode the sense of Jewish unity.

However, understanding the reality of multiplicity does not always translate to practical acceptance of different practices and beliefs. Debates between groups over Israel’s Jewish identity are many and fierce.

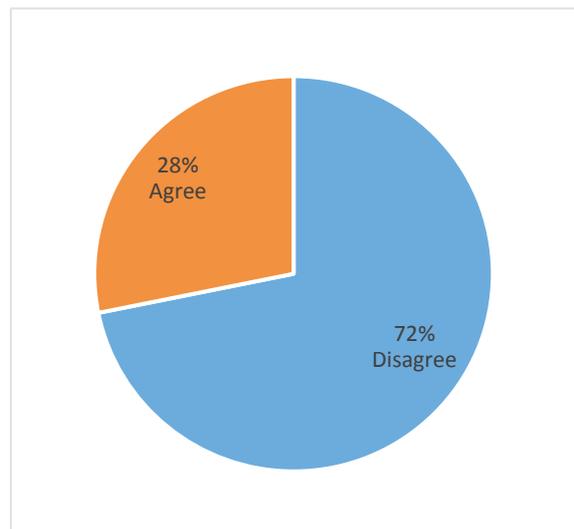
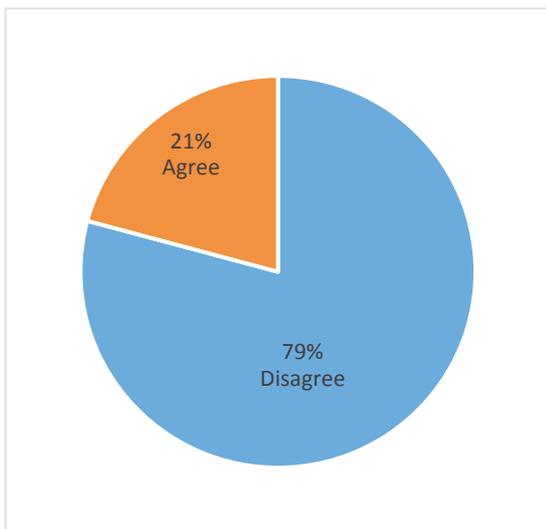
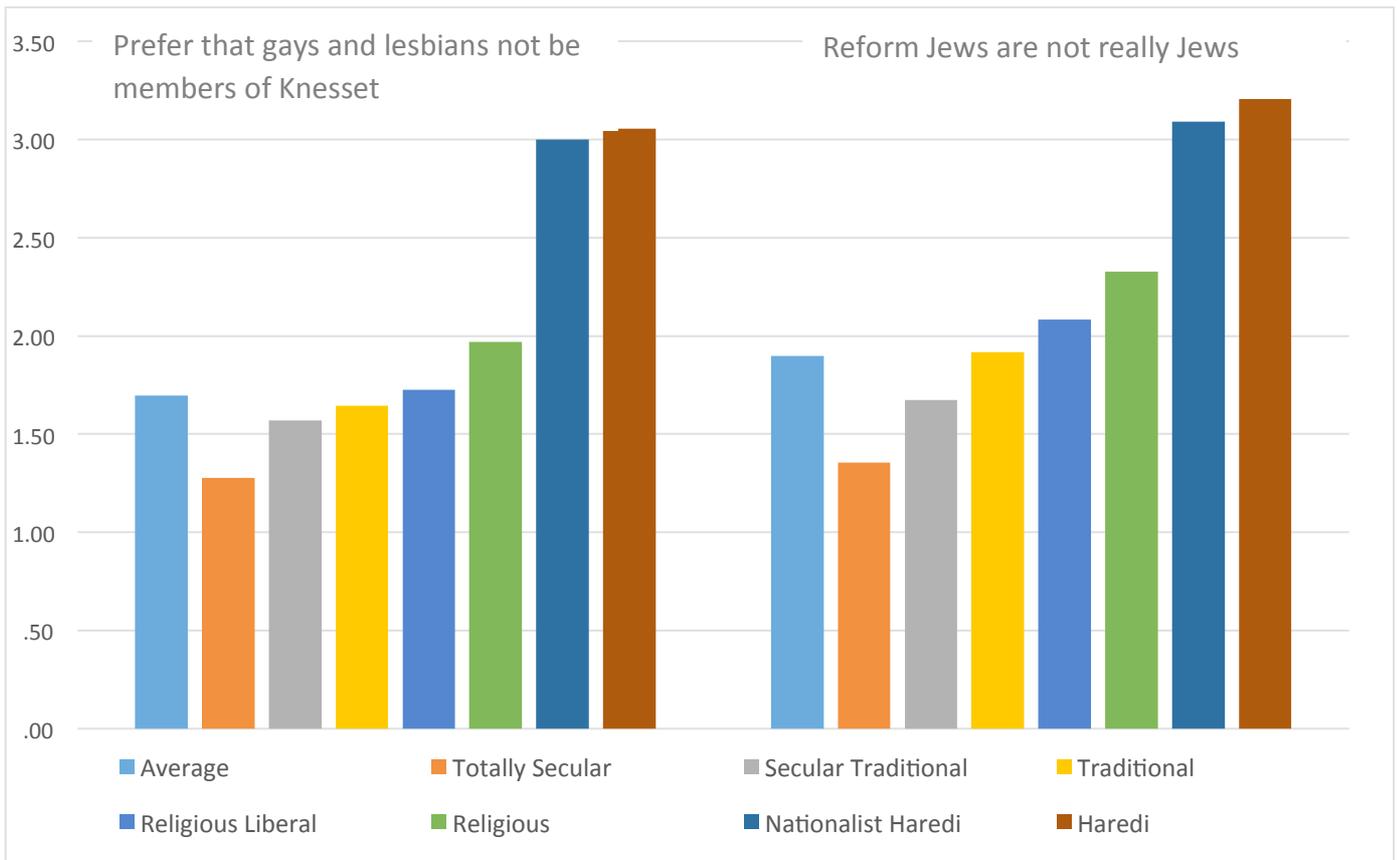
The general wish for acceptance, harmony, and unity together with the difficulties translating it into social accords that facilitate acceptance, harmony, and unity is the basic unresolved tension that must be dealt with as we strive to make Israel a place where “every Jew feels at home.”

Similar tensions were apparent in JPPI’s third annual world Jewish dialogue, which dealt with the thorny question of Jewishness in the era of fluid identity. Again, among engaged Jews around the world, we found the wish for a general understanding of the meaning of what Jewishness entails, coupled with a practical inability to agree on parameters that would make such an understanding possible.

Assisting these Jews – Israelis and non-Israelis – in finding a balance that allows multiple groups of Jews to thrive according to their standards, while also keeping them part of a single vibrant entity, is a mission the Israeli government could play a constructive role in fulfilling. Accepting the settlement framework of the Western Wall dispute was a step in the right direction. Making sure that the framework becomes a reality is no less important.

### Negative Opinion Statements

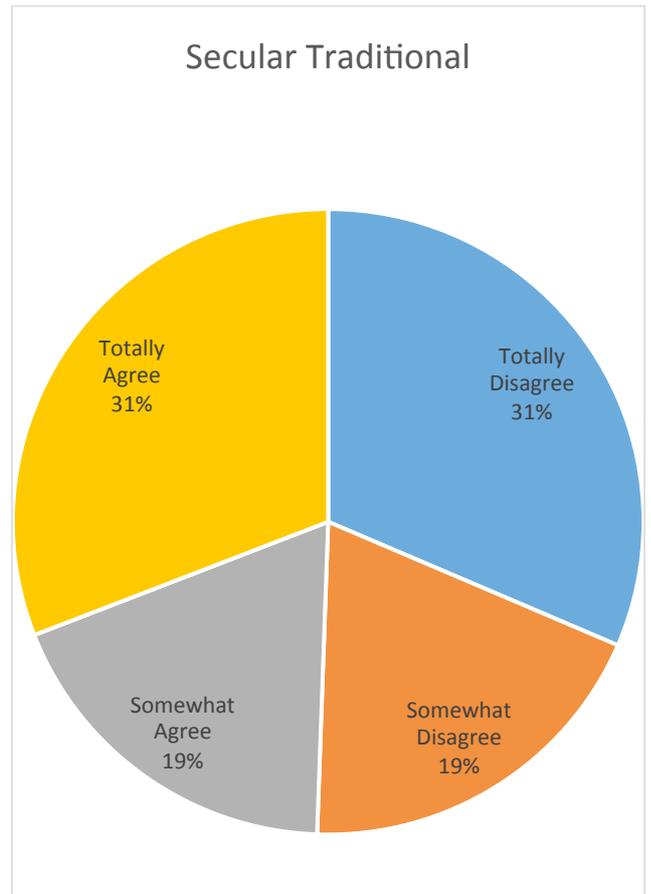
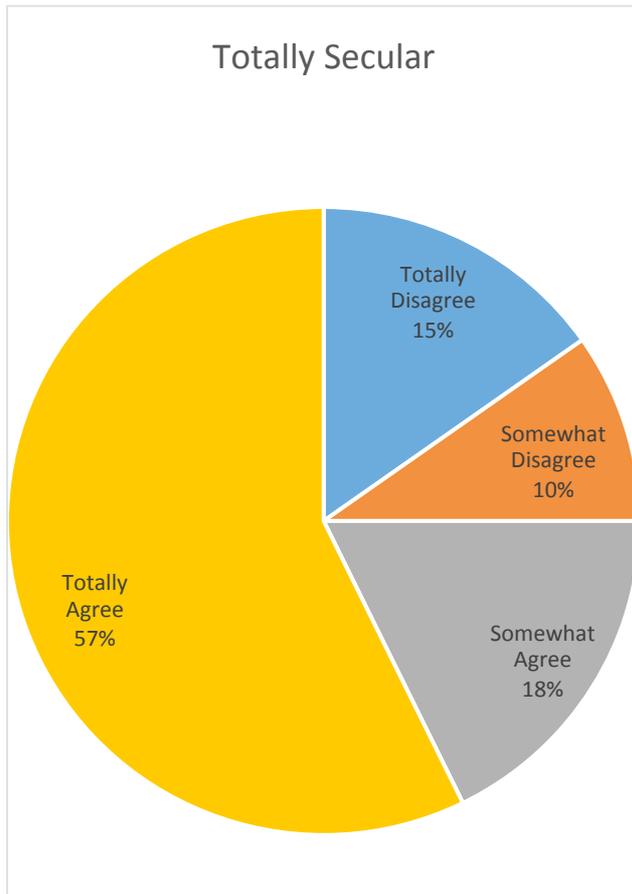
(On a Scale of 1-4: 1 = "Totally Disagree"; 4 = "Totally Agree")



Prefer that gays and lesbians not be members of Knesset

Reform Jews are not really Jews

### Women should be allowed to put on T'filin at the Western Wall (Kotel)



## **5. Aliyah From France – Policy and Practice**

French Aliyah, after a few years of growth, has declined significantly in 2016 – down 30 percent from the previous year. Despite this, 40 percent of French Jews report they have considered or are considering making Aliyah.

The main obstacles dissuading potential immigrants from France relate to employment, education for their children, and housing. This policy paper reviews the Israeli government's efforts, which have successfully overcome deficiencies in Aliyah processing, but have only had a minor effect on social and professional integration, and suggests ways to overcome these obstacles, and to ease the absorption process for new immigrants from France.

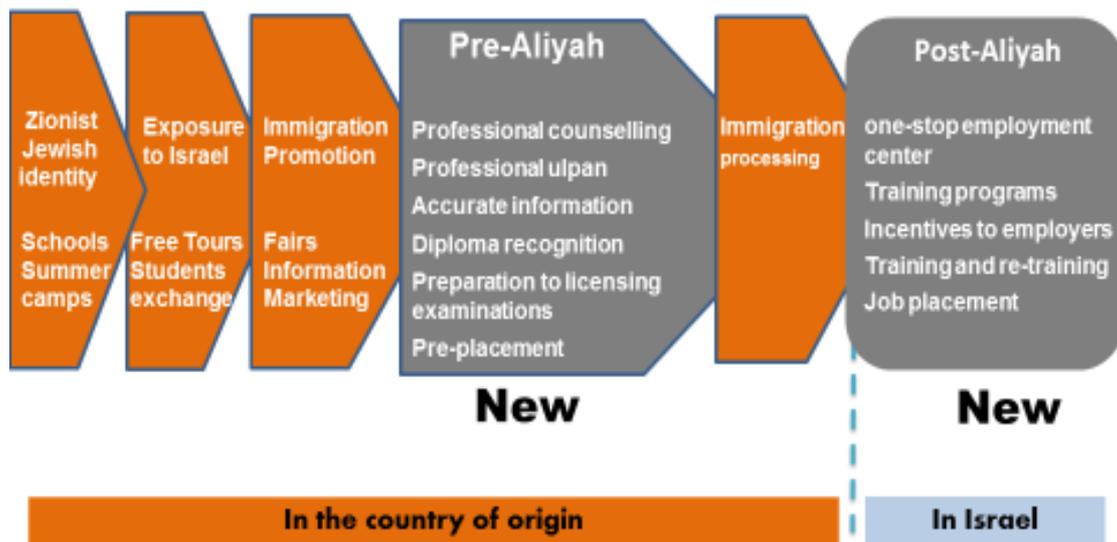
The employment obstacle can be mitigated through a focused effort on employment counseling and academic degree recognition prior to arrival in Israel. In parallel, a job training and placement program that focuses on French immigrants once they arrive in Israel should be established. Since we are speaking of high-potential immigrants (43% of French immigrants have college degrees; half are under the age of 34). There is no doubt that such an investment is worthwhile and would benefit the Israeli economy.

In previous years, the government successfully focused on improving the administrative process for immigration, which led to the arrival of 20,000 individuals over the past three years. It seems that fulfilling the desire to make Aliyah for many more additional Jews will demand initiatives and efforts focused on employment, in France and Israel.

If Israel would provide such services, it would be possible to advance, for the first time in the history of Zionism, a large wave of immigrants from an advanced country. This would be an historic breakthrough, which would create an opportunity to try out

mechanisms that might be of use one day in bringing other strong immigrant populations from western countries. The government's effort should match the scope of the challenge.

## Aliyah process for developed countries -Employment oriented-



## Summaries

### 1. Religious Zionism in Israel Today

This chapter relates to recent developments in the Religious Zionist or National Religious community. As commonly defined, this community constitutes about 10-12 percent of the population (CBS 2009, 2010), however, according to a recent survey about one fifth of the Jewish population considers themselves part of this community (Herman et. al. 2014). Despite their small size, the Religious Zionists have an outsized impact on Israeli public life. They have spearheaded the movement to settle Judea and Samaria (that is, the occupied territories of the West Bank) and today they make up a very sizable portion of the officer corps of the IDF (in the combat units they make up over a third of the officers). Moreover, in the current government they control three Ministries, two of which have an important impact on general Israeli public life – the Ministry of Education and the Ministry of Justice. Just as important, for the first time in the history of the State, three of the most senior positions in the security and defense establishment – Head of the Mossad, Head of General Security Service (Shin Bet), and Chief of Police are held by people who have grown up in the Religious Zionist community.

Religious Zionism arose and developed as an attempt to integrate Orthodox Judaism and modern nationalism. Within this framework Religious Zionists view the flourishing of the Jewish People, the State of Israel and the control and settlement of the Land of Israel as essential parts of the religious way of life they are committed to.

The first development is the increased crystallization of the drive to have an impact upon and even lead the political, cultural, and moral life of Israel. Religious Zionism constitutes an alternative, integral formulation of Jewish nationalism, which is different from, and even opposed to, liberal formulations insofar as it tends to give priority to collective belonging and collective goals over individual goals, needs and ambitions. Religious Zionist moral and political leadership would aim to strengthen the Jewish nationalist character of the State of Israel and its attachment to the Greater Land of Israel. Its leadership ambitions crystallized in the current government in which

representatives of the Religious Zionist community became the heads of the Justice and Education Ministries, that is, two ministries whose task is to define reality and set correct norms and values. Currently, it aims to exercise this leadership through its prominence in the military (Levy 2015), through its control of the Education and Justice Ministries and the policies and legislation that they initiate and implement, and through grass roots efforts at education and local communal leadership.

A second development we will describe and analyze is that there has been a reduction in religiosity among part of the Religious Zionist public. While this development has only fully affected part of the community, it has had a good deal of public visibility and discussion. Since many members of the community remain committed to strict religious practice, it has also resulted in a wide spectrum of religious practice and strictness/laxity among the Religious Zionist public (Moses 2009, Herman 2014.). This development is noteworthy because it partially reverses the trend that has characterized Religious Zionism for the past generation or so – the increased strictness with which the Jewish religious law had been observed and the increased religious atmosphere with the Religious Zionist community as a whole and individual Religious Zionist communities.

We will dovetail this description with that of another long-term trend within Religious Zionism – the importance of self-expression and, in recent decades, that of individual self-expression (which rests upon notions of national and metaphysical divine- self-expression. We will briefly describe this trend, which expresses itself in theology (among other things, in a new interest in Hassidic texts and practices), in new methods of Bible study, in a greater emphasis on creative arts and writing, and more religious attention being paid to the intimate spheres, including the body and sex. A very important manifestation of this trend is the Hilltop Youth and "price tag" attacks as well as the murderously violent fringe (The Revolt group). As will be seen, Religious Zionist individualism is not conceived of as in tension with collective, national commitments. Rather, individual and personal authenticity and self-expression is conceived as being connected to ethno-national belonging and commitments. In this, it resembles European Romantic and Lutheran individualism.

It would seem that the decrease in religious tension and religious sectarianism that affects part of the community plays a role in advancing Religious Zionist cultural and moral leadership for the general Israeli public. As Religious Zionism presents a public

image that is less sectarian and stringently religious, its integral nationalist agenda and nationalist leadership can become more generally acceptable. This trend also finds expression in the attempt to appoint non-observant representatives of the Jewish Home Party to the Knesset and the Government.

## 2. Israel's Arab-Christians: Challenges and Opportunities

Israel's Arab Christians, a minority within a minority, are currently at a crossroads of identity. With a high potential for integration, Christians could play a more influential and beneficial role within Israeli society, and serve as a bridge to the broader Christian and Arab worlds. Christian Arabs in Israel face a unique set of challenges, separate from the larger Muslim Arab minority, many of these solvable through Israeli policy measures.

This report is the first in a series of policy papers that seeks to better integrate the different minority groups in Israeli society.

Presently, Israel home to 166,000 Christian citizens, about 130,000 are Christian Arabs.<sup>1</sup> Nazareth, Haifa, Jerusalem, and Shfaram have the largest communities. Israel's Christians are mostly Greek Orthodox (and the Monophysite churches in general) or Catholic, with a small number of Protestants.

Arab-Christians are generally considered a successful minority group with: the highest secondary school graduation rates, high rates of university attendance, the lowest unemployment rate, and average household incomes second only to non-Haredi Jews (well above Muslims). They hold more government jobs than their proportion of the population would predict, and have the lowest birthrate of any group in the country.

Christian Arabs have traditionally been among the leaders and shapers of Arab nationalism, seeing it as a way to achieve social equality without forgoing their separate ethnic and religious identity. However, in recent years, the model of Arab nationalism has crumbled and the region has reverted to traditional tribal and religious lines. The region's Arabs have become increasingly "Muslim," no less so here in Israel,

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<sup>1</sup> Israel is also home to some 30,000 non-Arab Christians, mostly from the former Soviet Union and Ethiopia, relatives of those who made Aliyah, as well as over 100,000 Christian guest workers, mostly

and so Israel's Christian Arabs once again find themselves alienated, and under increasing pressure from Muslim Arabs.

Having noticed the fate of Christian communities across the region, Israel's Christians seek to integrate more into Israeli society realizing this is the only place where they can thrive. At one end of the spectrum, some have aggressively pursued this goal, publically distancing themselves from Israeli Arab society, and encouraging their youth to serve in the IDF in small but growing numbers. Led by Greek Orthodox Priest Gabriel Naddaf,<sup>2</sup> some have begun identifying as Aramean rather than Arab. While by no means mainstream, this signals key changes happening in Christian society. The majority, however, seek to integrate but cannot express this too publically, at the risk of upsetting the delicate balance with Muslim-Arabs. At the other end of the spectrum, some have embraced secular Arab nationalism more strongly, including those in the current Knesset. Ironically, this might be the last place where secular Arab nationalism still exists.

Additionally, the larger Christian world is highly sensitive to the status of Israeli and Palestinian Christians – its representatives in the "Holy Land." This has been the source of considerable criticism and pressure on Israel over the years.

There is a unique window of opportunity for the Israeli government to bring this segment of the population closer into the national fabric. In this manner, their contribution to Israeli society will only grow.

The government approach to date has either ignored, or enthusiastically embraced the Christian sector represented by Naddaf. JPPI recommends the government adopt a generally positive and pro-active, but sensitive approach to this sector, including the following policy directions:

- Appoint a cabinet-level coordinator for Christian Affairs who will formulate and implement a comprehensive Christian strategy, including engaging with Christian world.
- Increase security for church property and personnel against vandalism and spitting attacks.

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<sup>2</sup> Naddaf is currently facing charges of sexual harassment. We are not specifically discussing the person rather the trend of which he is the most public figure.

- Adopt a more lenient approach to family unification due to the difficulties Christians experience in finding suitable spouses.
- Adopt a more lenient approach to issuing visas for religious leaders.

### **3. Israel and Judaism in the Era of Super Intelligence**

Developments in contemporary science and technology will almost certainly reshape human reality, including that of the Jewish people. This has led JPPI to initiate a new project. Communication and information sharing methods, societal structures, and how we understand our environment are all influenced by scientific and technological advances. As such, having a firm grasp on the currents and trends in science and technology is crucial for long-term policy planning.

Looking at contemporary science today, substantial evidence suggests, and many prominent individuals believe, that the world is on the cusp of a technological revolution that will profoundly affect humanity. The confluence of advances in the fields of computational design, nanotechnology, additive manufacturing, materials engineering, artificial intelligence, and biotechnology could potentially change societies as much as the agricultural or industrial revolutions in previous eras.

The rapid progress in genetic engineering over the past several years and the potential of what lies ahead will make it possible that in the next several decades mankind will take control of the evolutionary process and will be far less constrained by the laws of nature. Concurrently, there is much talk in the tech community of the possibility of an approaching 'technological singularity', when artificial intelligence will surpass that of man. Some even go so far as to predict that many alive today will witness a “post-human” era in which man and machine will eventually merge into a single perfected unit.

Although we cannot predict the full implications of scientific and technological breakthroughs and the issues that will arise in their wake, we think these developments are of sufficient importance that decision makers should start to consider how

developments could impact the Jewish people on the individual, community, national, and global level.

Today, the government of China is already funding research to determine the genetic codes that cause genius. They hope that within a decade they will be able to boost the IQ of unborn babies by as much as 20 points. If such genetic engineering becomes commonplace and human intelligence and behavior is modified and enhanced by computers, countries will likely enter into a biotechnological arms race in which some countries may be at a relative disadvantage if they don't find a way to improve the knowledge and abilities of their population.

What seems clear is that no matter how far or fast new technologies advance, there will be profound moral, ethical, legal, religious, and economic considerations that will need to be examined deeply by government and community leaders.

JPPI has started a consultation process to bring together scientists at the cutting edge of their fields along with social scientists, philosophers, ethicists, and rabbis to discuss how new advances may impact and shape the Jewish people and the society around us.

JPPI plans to: 1) Identify new technologies on the horizon and their possible relevance for the Jewish people; 2) Lay out some of the moral and ethical considerations of developments taking place in the field of genetic engineering; 3) Examine how Israel and Jewish people's resources are organized and deployed in the pursuit of scientific and technological progress; and 4) Identify possible ways the Jewish people could utilize technological advances for purposes of Tikkun Olam.

## End Notes

<sup>1</sup> *Washington Post*, December 5, 2015.

<sup>2</sup> *Haaretz*, January 26, 2016.

<sup>3</sup> *Haaretz*, February 24, 2016.

<sup>4</sup> *Spiegel Online*, April 29, 2016.

<sup>5</sup> *Haaretz*, January 18, 2016.

<sup>6</sup> *Hürriyet Daily News*, December 14, 2015.

<sup>7</sup> Remarks at the Institute for National Security Studies 9th International Conference, 18 January 2016

<sup>8</sup> France: <http://www.antisemitisme.fr/dl/2015-EN.pdf>; UK : <https://cst.org.uk/news/blog/2016/02/04/cst-antisemitic-incidents-report-2015-published-today>; Germany :

<http://kantorcenter.tau.ac.il/sites/default/files/Report2015-080516.pdf>; harassments in internet and literature not included.

<sup>9</sup> ADL Global 100 (2014) and update about 19 countries (2015), Anti-Defamation League, An Index of Anti-Semitism, Executive Summary. <http://global100.adl.org/>

<sup>10</sup> Figures for 2015 taken from ADL, Op. cit.; figures for 2014 taken from Koopmans (Germany and France) and Raynié (France). Reynié, Dominique. *L'antisémitisme dans l'opinion publique française. Nouveaux éclairages*, Fondapol, November 2014. <http://www.fondapol.org/wp-content/uploads/2014/11/CONF2press-Antisemitisme-DOC-6-web11h51.pdf>, Koopmans, Ruud. "Fundamentalism and out-group hostility Muslim immigrants and Christian natives in Western Europe." WZB Berlin Social Science Center, *WZB Mitteilungen*, December 2013. [http://www.wzb.eu/sites/default/files/u6/koopmans\\_englisch\\_ed.pdf](http://www.wzb.eu/sites/default/files/u6/koopmans_englisch_ed.pdf). See also

"Türkische Migranten hoffen auf muslimische Mehrheit," *Die Welt*, August 2012, <http://www.welt.de/politik/deutschland/article108659406/Tuerkische-Migranten-hoffen-auf-muslimische-Mehrheit.html>

<sup>11</sup> France: <http://www.antisemitisme.fr/dl/2015-EN.pdf>; UK : <https://cst.org.uk/news/blog/2016/02/04/cst-antisemitic-incidents-report-2015-published-today>; Germany : <http://kantorcenter.tau.ac.il/sites/default/files/Report2015-080516.pdf>; harassments in internet and literature not included.

<sup>12</sup> FRA: "Discrimination and hate crime against Jews in EU: experiences and perceptions of antisemitism", Fundamental Rights Agency, November 2013, European Union. <http://fra.europa.eu/en/publications-and-resources/data-and-maps/survey-data-explorer-discrimination-and-hate-crime-against>

<sup>13</sup> FRA, op. cit.

<sup>14</sup> CNN, "[State Department warns Americans about European travel](#)," June 1, 2016.

<sup>15</sup> IFOP : "83% of French Jews trust the French government and French security forces." [http://www.ifop.fr/media/pressdocument/883-1-document\\_file.pdf](http://www.ifop.fr/media/pressdocument/883-1-document_file.pdf)

<sup>16</sup> IPSOS : <http://www.fondationjudaisme.org/wp-content/uploads/PRESENTATION-GLOBALE-ENQUETE.pdf>