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THE JEWISH PEOPLE POLICY PLANNING INSTITUTE
(Established by the Jewish Agency for Israel) Ltd.

2030: ALTERNATIVE FUTURES FOR THE JEWISH PEOPLE

Project Directors
Avi Gil and Einat Wilf

About JPPPI

The Jewish People Policy Planning Institute (JPPPI) is an independent professional policy planning think tank incorporated as a private non-profit company in Israel. The mission of the Institute is to ensure the thriving of the Jewish People and the Jewish civilization by engaging in professional strategic thinking and planning on issues of primary concern to world Jewry. Located in Jerusalem, the concept of JPPPI regarding the Jewish People is global, and includes aspects of major Jewish communities with Israel as one of them, at the core.

JPPPI's activities are action-oriented, placing special emphasis on identifying critical options and analyzing their potential impact on the future. To this end, the Institute works towards developing professional strategic and long-term policy perspectives exploring key factors that may endanger or enhance the future of the Jewish People. JPPPI provides professionals, decision makers and global leaders with:

- Surveys and analyses of key situations and dynamics
- "Alerts" to emerging opportunities and threats
- Assessment of important current events and anticipated developments
- Strategic action options and innovative alternatives
- Policy option analysis
- Agenda setting, policy recommendations and work plan design

JPPPI is unique in dealing with the future of the Jewish People as a whole within a methodological framework of study and policy development. Its independence is assured by its company articles, with a board of directors chaired by Ambassador Stuart Eizenstat, and composed of persons with significant policy experience. The board of directors also serves as the Institute's professional guiding council.

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Project Directors: Avi Gil and Einat Wilf

Editors: Rami Tal • Barry Geltman

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The Jewish People Policy Planning Institute
Jerusalem

STRUCTURE OF PRESENTATION, PROJECT MISSION AND KEY CONCEPTS

STRUCTURE OF PRESENTATION

Preface by Avinoam Bar-Yosef

Foreword by Yehezkel Dror

Introduction by Avi Gil and Einat Wilf

Executive Summary

Section 1: Purposes of Project, Background and Methodology

Lays out the policy planning motivations for conducting an alternative futures exercise for the Jewish People as a whole and summarizes the methodology used by the JPPPI in mapping the dimensions, scenarios and alternative futures as well as analyzing existing trends.

Section 2: Jewish Civilization: Between Rise, Thriving and Decline

Reviews the historical literature regarding patterns of rise, thriving and decline in various civilizations with a view towards extracting insights for the Jewish civilization about the causes of rise, thriving, and decline and identifying policy instruments that may serve decision-makers in facilitating thriving and preventing decline.

Section 3: Dimensions and Trends

Lists the dimensions chosen as prisms for thinking about the future, and reviews broadly some of the observed trends in each dimension; this section sets the background for the alternative futures.

Section 4: Morphological Analysis and Alternative Futures

Presents four alternative futures for the Jewish People; these are backed by a morphological analysis that allows conceptualizing a wide range of alternative futures.

Section 5: Key Intervention Points and Potential Actions Directions

Analyzes some of the key drivers of the observed trends in the listed dimensions. It then highlights key intervention points where conscious choices can be made and concrete actions taken to influence trends so that the Jewish People develops towards a desired future and steers away from non-desired futures.

PROJECT MISSION

The goal of this exploratory project is to provide insights into possible futures of the Jewish People and into the variables shaping them, with identification of policy instruments that can be used by Jewish People decision-makers to increase the probability of a thriving future for the Jewish People and decrease the probability of negative futures. While this project indicates some strategic choices, which should be made, its main purpose is to serve as a basis for policy planning, with detailed alternative developments, policy analyses and strategy recommendations to be worked out by a variety of Jewish People and other JPPPI projects.

KEY CONCEPTS

In this work the following terms are employed as follows:

- **Alternative Future:** One possible realistic imagining of the Jewish People in 2030. An alternative future is not fully predictive. Rather, it explores a possibility that is assumed to have substantive probability, but without presuming to quantify its likelihood.
- **Scenario:** A set of sequential phases and events occurring in a particular time order that together chart the path by which the Jewish People may develop from the current point in time to one of the alternative futures; in this project detailed narrative scenarios are not provided, but potential developments are listed.

- **Dimension:** A prism through which the analysis of the Jewish People is conducted - a major facet of Jewish collective life. Taken together, the dimensions should provide a comprehensive view of key aspects of the Jewish People.
- **Driver:** A variable significantly shaping the Jewish future (for example: the number of children in out-marriage families who choose to identify with the Jewish People is a driver of the total number of the Jewish People). We use drivers on a middle level of analysis, recognizing that behind each driver operate deeper ones (for example, the soft power of the Jewish People influences the number of children in out-marriage families who choose to identify with the Jewish People). Also, there is much interaction and some unavoidable overlap between different drivers, which are analytical and operational concepts distilled from complex and interacting processes. A driver can change its operation in different directions (in the out-marriage children example the number can go either up or down). When a driver changes it leads to changed outcomes that affect the future of the Jewish People. The drivers in this work are analyzed according to the various dimensions they impact most, though many drivers exert effects across several dimensions.
- **Trend:** A direction of a driver's change over time. Trends reflect an understanding of dynamics likely at present to continue into the future and leading to significant changes in the dimensions of the Jewish People. The changes can either be gradual and incremental, or sudden and discontinuous. This project focuses on trends that are likely to have substantial impact on the future of the Jewish People. For example, the driver in the example above is the number of children in out-marriage families who choose to identify with the Jewish People, and the observed trend seems to be towards decreasing identification.
- **Meta-Trend:** A higher-level overall trend, produced by a number of trends. For example, in the dimension of Jewish demography, the meta-trend may be a decrease in the total number of Jews. One of the drivers of Jewish demography is affiliation of children in out-marriages. This in turn is the result of different trends that have to do with Jewish education and self-identity-shaping values. Given that this project analyzes complex phenomena that have multiple and sometimes diffuse causes that interact in a variety of linear and non-linear ways, the analysis imposes a partly pragmatic order on the drivers and trends, seeking a middle range of causes conducive to identifying operational policy instruments. However, it should be realized that trends and also mega-trends may shift in unpredictable ways, in which case the analysis should be revised to fit new, emerging realities.
- **Policy Instrument:** Some drivers are susceptible to deliberate influence, directly or indirectly, by collective action of the Jewish People. This provides opportunities

to make policies consisting of packages of policy instruments that influence the future direction of trends. However, some drivers and trends are not susceptible to deliberate influence by Jewish People action. The policy instruments available in these cases are mostly adaptive, for instance adjusting for possible reduction in the number of Jews by upgrading “quality.” The ability to make use of policy instruments depends on a number of factors, such as capacity to map them, policy-making abilities, and availability of decision-making bodies, policy implementation resources and more. These are not discussed in this paper, but are dealt with in other JPPPI projects.

- **Intervention Point:** A space in time and contexts in which policy choices are available that are likely to have substantial impact on the direction of trends.

PREFACE

The year 2030 is not exactly around the corner, but it is the time horizon we need to look at when it comes to strategic thinking and policy planning for the Jewish People and the thriving of the Jewish civilization. It is not accidental that this project was one of the first to be initiated when JPPPI was founded in 2003. Together with the Institute's Annual Assessments and other strategic papers, it may serve as a base for future planning --for us, the State of Israel and Jewish organizations.

Nations and large organizations in many places around the globe plan strategically decades ahead, but this is the first time that such a project focuses on a people and civilization. Projects in the US conducted by governmental and non-governmental organizations have chosen various time horizons for the world's only super-power at the beginning of the 21st century, and different methodologies have been employed.

JPPPI, under the professional guidance of Professor Yehezkel Dror, approached this enterprise using different drivers to address possible alternative futures. But, as the Jewish civilization is rooted in thousands of years of history, the project was also inspired by the challenge undertaken by the Rand Corporation in Santa Monica to explore the year 2100, in part from an historical perspective. In this context the work conducted by Ambassador Avi Gil and Dr. Einat Wilf took advantage of the research carried out in house by Dr. Shalom Salomon Wald on the rise and decline of civilizations and the embedded lessons for the Jewish People. We would also like to acknowledge the significant contributions of Professors Sergio DellaPergola, Zvi Eckstein and Chaim Waxman.

When looking back in time, it seems that some of the best futurists 100 years ago were writers of science-fiction. This perception was the basis for enrolling in this effort to promote the Jewish future some of the best creative minds of the Jewish People today in a series of brainstorming meetings that began at the Wye River Conference Center in 2005-2006 and continued in Jerusalem in 2007-2008. These brainstorming exercises never exceeded groups of more than 20 participants, and included academics, writers, professionals and lay leaders known for dedicating their time to thinking and planning for a better world.

The list of participants appears on the following page, and on behalf of JPPPI, I would like to express our deep gratitude and abiding respect to all of them, and especially Ambassador Dennis Ross, who at that time served as chairman of JPPPI's professional guiding council and made an invaluable contribution to the project.

Avinoam Bar-Yosef
Founding Director
Jewish People Policy Planning Institute

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FOREWORD

In the year 2009 two unexpected, un-expectable and counter-expected events happened, namely the global financial-economic crisis and the swearing in of Barack Obama as the 44th President of the United States. As to the first event, it may well be that the financial-economic crisis should in principle have been predicted in minds that had not been blinded by inadequate theories and linear views of history. As to the second, seasoned observers agree that only a few years ago the possibility that an African-American, born to a white woman and a black father would be elected by a vast majority as President of the United States of America would have been nearly inconceivable.

Taken together these two foundational events - sure to have significant impact on the future - demonstrate the nonlinear nature of historic processes, including trend-shifting events. Still, states, societies and civilizations, including the Jewish People, must plan ahead and make future-directed choices. This is possible, because not everything changes rapidly. Many important features of reality are stable for extended periods of time, permitting long-term outlook and policies. However, policy planning must take into account that it is dealing with a mix of rapidly changing and very stable factors and that the border between them is not fully knowable. Therefore, policy planning methods must be uncertainty-adjusted so as to fit the conditions of the 21st century which is likely to be one of profound changes combined with quite some invariance.

A main method for coping with mixtures of chaos and constancy is to construct alternative futures based on the understanding of historic processes and their drivers. By presenting alternative futures instead of focusing on one "reference scenario," uncertainty is taken into account. Furthermore, the learning curve is made steeper by permitting comparison of the alternative futures with emerging realities and thus basing action on the future which is increasingly realized and adding to it further alternative longer-range futures, while discarding those that do not fit developing realities.

However, even the best-designed alternative futures, based on thorough study of deep historic processes, are based on the past, as are all theories, extrapolations and "expert judgments." Therefore, they cannot foresee phase leaps, as almost sure

to characterize the 21st century and as illustrated in 2008. Imagination can help to broaden perspectives, but cannot be relied upon for making important choices. To cope with such irreducible uncertainties the time horizon of alternative futures, which serves as basis for important policies, must be kept relatively short - twenty to thirty years ahead. Longer-term perspectives need to be added when long-term processes are at stake and shorter-term time horizons are needed for current activity planning. But alternative futures for the year 2030 are a good tool for policy planning in the years 2010 through 2015, when the alternative futures should be revised if no shift-turning events require doing so earlier. This is the time horizon accordingly selected by the alternative futures for the Jewish People presented in this paper.

Alternative futures can be of three main types, with various combinations. They can present utopian or realistic visions. They can present expected futures if present policies continue without radical change, and they can be conditional, exploring futures resulting from various innovative policies. All these types and their mixtures have their uses and should be used in various combinations. But the most solid ones are alternative futures that explore expected futures as influenced by presently considered policies, supplemented by a list of possible surprise events designed to “open the minds” of the policy makers and encourage them to craft elastic policies with inbuilt learning processes. This is the method selected by JPPPI in designing the futures presented in this paper.

To help Jewish People decision-makers, JPPPI provides three types of inputs of broad applicability, in addition to in-depth studies of select policy issues: an annual survey of major developments; a study of rise and decline factors tentatively applied to the Jewish People, to be published soon; and a medium-range exploration of alternative futures, presented in this paper. Together, these provide a variety of frames for considering in greater depth and within broader perspectives main issues and for better designing policies facilitating the long-term thriving of the Jewish People. In this way JPPPI tries to fulfill its tasks as a Jewish People think tank.

Yehezkel Dror
Founding President
Jewish People Policy Planning Institute

INTRODUCTION BY PROJECT DIRECTORS

"הכל צפוי והרשות נתונה" מסכת אבות, פרק ג, משנה טו

"All is predestined and free choice is granted"

Thinking about the future is an irresistible temptation fraught with pitfalls. While no one can anticipate the future, in all its bewildering details, human fascination with the future is at the core of our human condition. We are future-facing animals, capable of planning and thinking about the future, and - whether consciously or implicitly - every step we take, every decision we make, every day and every moment are directed towards the future and are based on assumptions we make about what it holds in store.

As we think about the future, our innate instinct is extrapolation, in the well-worn tradition of Ecclesiastes - what has been will be again, what has been done will be done again; there is nothing new under the sun. And yet - as humans - we sometimes also raise our hands up in frustration, calling *Que Sera Sera - whatever will be will be* - giving up on any possibility of saying something meaningful about the future.

The future is unknown - and even more so as the pace of change of life accelerates ever more, but that is not to say that nothing of value can be said of it. While the absence of surprise would be a surprise, between the twin poles of extrapolation and absolute unknowability much can be inferred about the future relevant to our lifetimes if we make use of better and more sophisticated tools. While extrapolation is of value for the very immediate future, and complete darkness envelopes the very distant future - thinking about the next decade, two or three requires charting a middle course that makes use of a diversity of tools, such as scenario planning and alternative futures, which allow us to imagine a range of distinct possibilities.

As the Jewish People we possess a keen sense of history and a common destiny. We keep traditions and our common bonds in anticipation of a common future. And while all might be predestined, the possibility is given for humans to initiate and

shape their fate. As a people we are engaged in a multiplicity of activities - individual and collective that are designed to secure our future as a thriving people - and while having experienced failures, we have also proven our ability at critical junctures to take actions that have shaped our present in ways previously unimaginable.

Human agency matters. While the present constrains our possibilities, our actions matter for our ability to chart a more favorable course towards a better future and away from a nightmarish one. We are not powerless in the face of global changes. Even if we cannot have an impact on the course of the world, we can be better prepared for changes and adapt more quickly to them as they come, and in many matters that concern us directly as a people we have the ability to act and shape our future for the better.

"סוף מעשה במחשבה תחילה" מתוך פיוט "לכה דודי"

"Thought must precede action"

The purpose of this project is to provide a tool for thinking about the future in a way that assumes neither direct extrapolation nor complete chaos. It is an effort to provide an effective light through the fog of the future so as to help us overcome our innate failure to imagine a future very different from our present. But it is not only about thinking about and imagining the future, but also about planning for it. Jewish organizations, entrepreneurs, philanthropists and decision-makers in the Government of Israel allocate funds, support programs and make decisions that will shape the common future of the Jewish People. Taken as a collective these actions and decisions amount to a set of priorities for the Jewish People. But are these the right priorities? How are the actions that we are taking now contributing to either possibility? Are there unintended consequences to our actions that we are failing to foresee? Could we better calibrate our actions to steer us towards the future we want and away from that which we fear?

No one can answer these questions with certainty, but we can think through them methodically. This project seeks to offer a tool for thinking and imagining for all those who take actions and make decisions daily that are likely to have an impact on our future as a people. It also attempts to provide, as much as possible, an integrated view that explores key trends across various dimensions of Jewish life and their interrelations as they interact to shape a range of possible alternative futures.

While the project is intended mostly to serve as a first basis for thinking about

the future and imagining a range of possibilities, it also offers several preliminary policy suggestions that are designed, as much as possible, to bolster the possibility of actualizing a positive future for the Jewish People and preventing, to the extent possible, the unfolding of a nightmarish future.

Together with the Annual Assessments - the JPPPI's flagship annual publication - this project is intended to serve as a useful instrument in the toolbox of all those, who through their actions and decisions, shape our common future as the Jewish People. By its very nature this project integrates the work done throughout the history of JPPPI and includes major contributions from its fellows in their respective fields and we thank them for their valuable insights and expertise. We would like to extend a special note of thanks to Professor Yehezkel Dror, the Founding President of the JPPPI, without whose rigor, vision, expansive knowledge and careful attention to detail and most importantly - his deep concern for the future of the Jewish People - this project would not be what it is.

Avi Gil and Einat Wilf

EXECUTIVE SUMMARY

The Alternative Futures project identifies main trends and key drivers shaping the possible alternative futures of the Jewish People. The time horizon chosen is 2030, which is near enough to enable identification of main drivers and alternative futures, but far enough in the future to permit effective interventions. The underlying value position of this project is striving for a future in which the Jewish People thrives in terms of culture, quality of life and sense of cohesion, based on pluralistic Jewish values, with the State of Israel as the core state of the Jewish People. The operational goal of this project is to provide Jewish People decision-makers, thinkers, opinion shapers and communities at large with a professional framework for developing effective policies leading to a thriving future, as well as facilitating more systematic policy-oriented thinking. It serves as a basis for some of the policy planning work of JPPPI.

The project is based on established methods of constructing alternative futures. The first phase includes analysis of currently observable major trends likely to have the greatest impacts on the future of the Jewish People. The trends are analyzed through several prisms - dimensions - that taken together provide a sufficient overview of the condition of the Jewish People. The selected dimensions for analysis include both internal and external aspects. The internal dimensions of the Jewish People relate to demography, identity, hard and soft power and influence, Israel-Diaspora relations, economics and leadership. Together they form a composite image of the Jewish People called "Jewish Momentum." The external aspects relate to the external environment with which the Jewish People interact. It includes those dimensions expected to have the greatest impact on the trajectory of the Jewish People. These dimensions include geopolitics and especially the main global actors and their distribution of power, proliferation of weapons of mass killing, terrorism, energy, and the Palestinians and the Middle East. They also include global societal factors such as globalization, demography, economics, culture, religion, governance and anti-Semitism, as well as science, technology, cyberspace and environmental and public health issues. The internal and external dimensions overlap somewhat and interact intensely. Jewish People policies can be directed mainly at one axis or another, but usually at both. These policies are constrained by internal factors and the external environment, but in part independent ("free will") and, with time, influence both the momentum and some aspects of the external environment.

Following is a brief description of the observed trends in each dimension. The full report provides more detailed analysis, as well as discussion of possible changes in the observed trends.

Jewish Momentum - Internal:

- **Jewish demography:** A negative balance of Jewish births and deaths now prevails in most Jewish communities worldwide with the prominent exception of Israel. Across the Jewish Diaspora, more frequent choosing of marriage partners from outside the Jewish community is associated with growing percentages of children not raised Jewishly. The consequent erosion of the younger generation has produced a steady process of Jewish population aging, leading in turn to higher death rates and population decrease. Further major consequences of ongoing familial and cultural changes include the blurring of Jewish identification boundaries and the growing complexities in defining the Jewish collective. In Israel, Jewish population grows naturally but the demographic balance between Jews and non-Jews produces a problematic equation critically linked to the Israeli-Palestinian conflict. The location of Jews on the world map largely reflects the ranking of countries by the Index of Human Development. Over 90% of world Jewry now lives in the top 20% of more developed countries - that is in North America, West Europe and Israel. The two major Jewish population centers in the United States and Israel now jointly comprise some 80% of world Jewry.
- **Jewish identity:** The overall trend in Jewish identification is towards more diverse and pluralistic forms of Jewish identification less focused on a common set of basic values. There is a shift in identification from religious to secular, from ethnic to cultural, from community-oriented to individualistic and universal. Global norms about identity, individual choice, communal expression and religious freedom are making it more acceptable to choose one's religious or non-religious and community identity. Jewish identity is increasingly about choice and the personal quest for meaning, especially among the younger generation. Outside Israel, within the overall growing diversity and plurality, the course of Jewish identification seems to be towards increased polarity between those clearly identified and those totally unidentified as Jews, with a large segment falling in between.
- **Jewish hard and soft power and influence:** The Jewish People has never been as powerful as now, including the military power and global standing of Israel, the soft power implied in the idea of "The Jewish Century" - however exaggerated - and the political and economic power and influence of the American Jewish community and, to a lesser degree, other Jewish communities. However, power has to be evaluated in terms of relative or "net" power, which means the power

of the Jewish People in comparison to the dangers, threats and challenges it faces. Outside of Israel the Jewish People faces almost no physical danger, while Israel is still subject to existential threats. Israel is still confronted by enemies determined to destroy it, and is subjected to the intense anti-Israelism of a variety of groups, including some in Western countries.

- **Israel-Diaspora relations:** The overall trend in the relations between Jews in Israel and the Diaspora is for the younger generation both in Israel and the Diaspora to be less and less interested in the fate of their fellow Jews overseas. Relations between Israel and the Jewish People in the Diaspora are strong at present, but are likely to face decline. The younger generation in the Diaspora is distanced from the dramatic historical events that accompanied the establishment of the State of Israel. The younger generation is more likely to be exposed to negative views of Israel and its policies, and has almost no experience of identification with Israel as a source of pride. It is less concerned about Israel and its future and has less of an emotional attachment to the country.
- **Jewish economics:** The Jewish People today is at a historical zenith of wealth creation. With the vast majority of Jews living in countries that are among the world's wealthiest, and with the majority of those Jews belonging to middle and upper socio-economic strata in those countries (excluding Israel) the Jewish People as a whole enjoys access to wealth as never before. There is more money per capita in Jewish hands, absolutely and perhaps even relatively, than anytime in history. Within Israel, the accumulation of wealth by Jews is much more dependent on the economic and social policies of the government (or lack thereof), within general global economic and local security contexts. The expected trend for Israel is a slightly better performance than the growth rates for most developed countries, mostly due to improved policy, especially with respect to encouraging higher rates of employment participation and fighting poverty through employment. With respect to the distribution of wealth and its allocation to Jewish causes, there is insufficient data and the evidence is mostly anecdotal. It appears that outside Israel philanthropic giving directed to Jewish causes is only a very small share of overall Jewish philanthropic giving, but the increase in wealth may mean that in absolute terms there are more funds available today for Jewish causes than there has been in the past. A critical juncture will come as the current older generation of committed, involved and wealthy Jews makes estate planning decisions about the disposition of their wealth. While the recent economic crisis has had immediate and specific impacts on Jewish wealth and philanthropic giving, it has appeared to not yet substantially transform the underlying conditions and long-term trends of Jewish economics.

- **Leadership:** The Jewish People is facing a serious paucity of high quality leadership - spiritual, political and organizational - with no clear trend of improvement. Current leadership, both in Israel and in Jewish institutions, with few individual exceptions, appears to lack the capacity to meet the challenges facing the Jewish People and a deep understanding of changing realities and new ideas for coping with them that are able to assure, as much as possible, the long-term sustainable thriving of Jewish communities around the world and the thriving of Israel as a Jewish and democratic state, which add up synergistically to the thriving of the Jewish People as a whole. Jewish leadership positions in Israel and in other Jewish communities do not attract the best and brightest - with some notable exceptions. Efforts to attract and prepare the best and the brightest for leadership are inadequate, and despite some beginnings, including on the Jewish civic society level, the entry of younger persons into leadership positions is very slow. There is also a very pronounced lack of spiritual leaders acceptable as such by major parts of the Jewish People.

EXTERNAL ENVIRONMENT:

The list of external developments likely to impact the long-term future of the Jewish People is infinite, mostly unknowable and even unthinkable. But given the 2030 time horizon a number of key drivers likely to be relevant to the external conditions under which the Jewish People is likely to live in the future can be identified, even though they may be subject to surprise trend shifts. In analyzing the external environment the emphasis is placed on drivers and trends that are most likely to have a direct impact on the future of the Jewish People. From the detailed analysis of observable trends in the dimensions listed above - as provided in the full report - emerges the insight that at the core of the current epoch-mutation are the quantum leaps in the power of humanity to shape its future by deliberate action and non-action. However, the ethical, cognitive and institutional capacities of humanity are increasing only incrementally at best, resulting in a rapidly widening abyss between the degree to which humanity could impact its future and the quality of those impacts. Shifts in technology and power are likely to continue to be accompanied by the basic features of human behavior in matters of security, such as radical disagreements, hostility and envy, widespread readiness to use violence and large disparities in thinking sophistication. Expectations that 'progress' would make the world more peaceful have no basis in fact as shown by the history of the 20th century. Increasing scientific

and technological knowledge, longer life expectancy and higher standards of living are unlikely to bring about consensual global tranquility in the foreseeable future, as distinct from the very long-term future.

Assessing the impacts of trends in the external environment requires utilizing the alternative futures method as external trends often lead to mixed situations. An increasing dependency on Middle Eastern oil is likely to trigger greater investment in alternative energy sources and delivery systems. The threat of exponential proliferation of weapons of mass killing might accelerate the consolidation of effective collective action mechanisms by forces of stability and freedom. The increasing virulence of Muslim anti-Semitism might be counteracted by a greater commitment in the US and Europe to stamping out anti-Semitism and preserving the memory of the Holocaust. The direction towards more global governance might help Israel and the Jewish People if it takes a constitutional, value-based form, but could be quite detrimental if it is based on simple majoritarian principles. It is therefore nearly impossible to determine whether these trends will yield an environment more or less favorable to Jews and Jewish communal expression. Just as modernity and nationalism provided Jews with some of their greatest opportunities it also culminated in their greatest harm and later in their renewed rebuilding. In a similar manner, globalization and the expansion of knowledge-based economies is bringing the Jewish People unprecedented freedom, wealth, mobility and power, while also intensifying and fomenting ideas of hate along with technologies that threaten its existence.

Based on this analysis the project presents four possible alternative prototypes of “pure” futures. The futures were created based on the intersection of two axes: the first includes the internal Jewish dimension, and the second includes external conditions. The alternative futures are described in the project in greater detail, including descriptions of developments and policies that could lead the Jewish People from the present to each of the alternative futures. The first axis is constructed according to the notion of Jewish Momentum presented earlier. The second axis is designed around the well-worn question of “good for the Jews or bad for the Jews?” Positive external conditions mean that Jews are able to survive and thrive both as individuals and as an open community in the world, whereas negative conditions mean that Jews are in danger as individuals and as a community. The four alternative futures that emerge from the intersection of these two axes - as shown in the chart - are:

- Jewish Momentum - high; External Conditions - positive: this is the ideal desired future - designated *Thriving*
- Jewish Momentum - low; External Conditions - positive: from a value perspective this is a problematic future - designated *Drifting*
- Jewish Momentum - high; External Conditions - negative: from a value perspective this is a problematic future - designated *Defending*
- Jewish Momentum - low; External Conditions - negative: this is clearly a non-desired future - designated *Nightmare*

These types of futures are also - in many ways - the “pasts” of the Jewish People, with Jewish history being essentially a narrative moving between the four phases with periods of Thriving, Drifting, Defending and Nightmare. The history of the Jewish People has also demonstrated that the transition from one phase to another can sometimes be very rapid with the Jewish People moving from Thriving to Nightmare in the space of a few years and vice versa.

THE JEWISH PEOPLE: FOUR ALTERNATIVE FUTURES

| Jewish Momentum high | | | |
|------------------------------|-----------|----------|------------------------------|
| External Conditions negative | DEFENDING | THRIVING | External Conditions positive |
| | NIGHTMARE | DRIFTING | |
| Jewish Momentum low | | | |

Section 1: Purposes of Project, Background and Methodology

The Alternative Futures project identifies main trends and key drivers that shape the alternative futures of the Jewish People. The time horizon chosen is 2030, which is near enough to enable identification of main drivers and alternative futures, but far enough in the future to permit effective interventions. Uncertainty is pervasive, all the more so in the 21st century, which is likely to be characterized by radical change leading up to a new epoch, for humanity as a whole and the Jewish People in particular. Also, surprise events are considered but not necessarily assumed. Therefore, the project results must be updated periodically. Still, within the given time horizon many processes are rather robust, providing a reliable basis for future-influencing policy planning.

The undergirding value position of this project is striving for a future in which the **Jewish People thrives in terms of culture, quality of life and sense of cohesion, based on pluralistic Jewish values, with the State of Israel constituting the core state of the Jewish People.**

The operational goal of this project is to provide Jewish People decision-makers, thinkers, opinion shapers and communities at large with a professional framework for developing effective policies leading to a thriving future, as well as facilitating more systematic policy-oriented thinking and serving as a basis for the policy planning work of JPPPI.

Project Methodology

In exploring alternative futures for the Jewish People in 2030, JPPPI took several steps:

- Mapping the key dimensions that shape the future of the Jewish People and the key drivers that influence those dimensions.
- Analyzing the trends in the various dimensions and describing a spectrum of their possible transformations.
- Amalgamating the dimensions, drivers and trends into four broad alternative futures along two main axes.
- Detailing the alternative futures and some of the scenarios leading to them, to form a comprehensive - though tentative - map of alternative trajectories into the future.
- Identifying policy instruments and likely intervention points that can be utilized by Jewish People decision-makers.

- Preliminarily indicating strategic choices leading to Jewish People thriving - which will serve as a basis for further examination and policy planning by JPPPI and which are suggested as a basis for policy planning by Jewish organizations and leaders worldwide.

JPPPI staff, assisted by consultations with decision-makers and experts, carried out the project. A Quasi-Expert Delphi-study was conducted in 2004 - 2005 among 129 experts and analyzed by the Tel Aviv University Interdisciplinary Center for Analysis and Technological Forecasting.

In 2005 and 2006 JPPPI hosted at Wye River three brainstorming events with prominent Jewish figures from diverse backgrounds, locations, and professions. In October 2006 JPPPI hosted a small gathering in New York City of heads of major Jewish organizations, as well leading thinkers such as Henry Kissinger to discuss the geopolitical environment and the trends likely to impact the future of Israel and the Jewish People.

In July 2007 and May 2008 the JPPPI hosted in Jerusalem two gatherings of 120 of the top policy shapers of the Jewish People for rigorous reflective discussions regarding the future of the Jewish People and the key trends likely to impact the Jewish People in the near and more distant future. The findings of these two rounds of discussions were published separately and provided valuable input into this project. In May 2008 JPPPI took part in planning and shaping the content of the inaugural Israel President's Conference where world leaders - past, present and future - gathered in Jerusalem for three days of thought provoking sessions discussing three interweaving 'tomorrows' and how to shape them - the global tomorrow, the Jewish tomorrow and the Israeli tomorrow. The President's Conference findings were summarized by JPPPI and served in the thinking in this paper.

Section 2: Jewish Civilization: Between Rise, Thriving and Decline

To serve as a deep grounding for the alternative futures project, JPPPI initiated a project by Senior JPPPI Fellow Dr. Shalom (Salomon) Wald on rise and decline histories and theories, and their possible applications to the Jewish People. A summary of this study is provided below, the complete version will be published separately in 2010.

Historians, philosophers and political scientists have been intrigued by questions of civilizational rise and decline for millennia and have developed a variety of theories on the subject. The criteria for rise, thriving and decline are not fixed, because they reflect value judgments that vary between civilizations and also because they can change over time within each civilization. Thinkers about rise and decline propose a great number of theories and observations with respect to their causation.

Studying 22 historians and social scientists writing over the past 2400 years (In chronological order: Thucydides, Sima Qian, Ibn Khaldun, Edward Gibbon, Jacob Burckhardt, Max Weber, Oswald Spengler, Johan Huizinga, Arnold Toynbee, Pitrim Sorokin, Fernand Braudel, Marshall G.H. Hodgson, Bernard Lewis, Jonathan I. Israel, Paul Kennedy, Jared Diamond, Bryan Wald-Perkins, Mancur Olson, Peter Turchin, Christopher Chase-Dunn/Thomas D. Hall, Joseph A. Tainter, Arthur Herman), Dr. Wald has extracted several key insights regarding the drivers of the rise, thriving and decline of civilizations, as well as their potential implications for the Jewish People.

Drivers of Rise, Thriving and Decline of Civilizations

Global Futures and Threats: Challenges to Humanity as a Whole

| Cause | Insight | Jewish Aspect | Potential Policy Conjectures |
|--|---|--|---|
| Religion and Identity Safeguards | Religion is inseparable from ancient civilizations. Religion could boost or even create a civilization, or conversely, paralyze it by inhibiting change. | Religion has preserved the Jewish People's identity via a mix of norms and beliefs: by rituals that set boundary safeguards and instill a feeling of "otherness," by commemorating and re-enacting history, by the message that Jews have been chosen for a mission in the world, by hope in a better future expressed in the messianic idea, and also by the bond to the land of Israel. | The question of how to define and preserve identity and tradition is, and will for a long time continue to be, the most important Jewish policy challenge. Preserving Jewish identity in Israel - where it is not automatically guaranteed - and in the Diaspora calls for various policy initiatives. Strengthening the links between Israel and the Jewish world will help safeguard the identity of both. Issues of conversion to Judaism will become increasingly critical. |
| Extra-Rational Bonds: "Magic Consensus" or "The Particular Secret of Every Civilization" | Civilizations depend on many unexplained and extra-rational factors. | Oswald Spengler called the cohesion that had maintained the Jews in the past in the absence of a common land or language a "magic consensus". Freud spoke of a "spiritual essence" ("der Fortschritt in der geistigkeit") apparently common to Jews. | Strengthening emotional or extra-rational bonds would go a long way towards ensuring and supporting Jewish identity, but we do not yet know how to do this or even how to explain such bonds. Policy makers must remain open and alert to new scientific discoveries in this field. |
| Education, Science and Technology | Ibn Khaldun (14 th century) was perhaps the first great historian to grasp the critical importance of education, scholarship and science to the fate of civilizations. He attributed the rapid decline of the Arab civilization of his time to the loss of Arab scholarship in all fields, particularly the sciences. The level of education is a key indicator of a society's values and competitiveness. In modern times, science and technology have become the cutting edge of knowledge. The countries in command of these disciplines will largely determine our future. | Jews were among the first to become a literate people. Although their reasons were religious, education gave them early occupational and economic advantages. Jews had a pioneering role in the advancement of science and technology in the 20 th century, widely beyond their small numbers. This enhanced their position in the world and helped Israel to survive against overwhelming odds. Weaknesses in the domains of education, science and technology are now emerging that could affect the future position of the Jewish People and Israel. | It is essential to maintain a high degree of Jewish involvement in the advancing frontiers of science and technology. Improving the level of general education in all branches of the Jewish People, particularly in Israel, and maintaining a leadership role in science and technology should be a major policy priority. Israeli science policy measures should increase the attractiveness of science and technology for the young. |

| Cause | Insight | Jewish Aspect | Potential Policy Conjectures |
|----------|---|--|---|
| Language | <p>"The high point of every culture is the miracle of language," said Jacob Burckhardt.</p> | <p>Ancient Hebrew was one of several, very similar Canaanite languages. What distinguished ancient Israel most from its surrounding environment was not its language but the message the language expressed. During the Babylonian exile, Jews began to speak Aramaic, and in the Eastern Mediterranean, Greek. Rabbinic tradition then understood the dangers inherent in the loss of Hebrew. Indeed, the rich Greek Jewish culture of Alexandria could not preserve its Jews who were alienated from Hebrew: they disappeared. In modern times, Hebrew became indispensable for the national re-birth of the Jewish People in its ancient land. This historically unique language renaissance occurred together with an equally extraordinary language regression: while many Jews had easily spoken several languages two generations earlier, now many Jews speak only one language, particularly English. Today, many Jews across the world cannot easily communicate with each other in a common language. Could this lead to a new "Alexandria syndrome?"</p> | <p>Encourage the spread and study of Hebrew among Jews.</p> |

| Cause | Insight | Jewish Aspect | Potential Policy Conjectures |
|--|--|--|---|
| Creative Leadership and Political Elites | All classical and many modern historians assert that history is made by great, incompetent or evil leaders whose decisions can determine their people's rise or decline. Against this view stands a philosophy that sees history driven by deep, irresistible socio-economic forces if not "iron laws." Leaders are emblematic of these forces, they do not create them. | A critical condition for the long-term survival of Jewish civilization was and is creative spiritual and political leadership. Jews had good and bad leaders like every other people, but could less afford the bad ones because their external conditions were often so tenuous. There is no comprehensive history of the leaders who provided Jews across the ages with the political and material space for their spiritual achievements or physical survival. But when one compares great leaders from different epochs - say e.g. Nehemiah, Don Isaac Abarbanel, Josel of Rosheim, Manasseh Ben Israel and some early Zionist leaders, a few common traits emerge. They all intervened strongly in history, had great courage and charisma, were financially incorruptible, sometimes ascetic and often ready to risk their life, health and money for their cause, all were learned, polyglot and knew Hebrew (except for Herzl), and all were attuned to the complex geopolitical and religious situation of their times. | It would be a mistake to believe that the Jewish People is today less in need of leaders of the caliber of those of the past. The current Jewish and Israeli leadership situation is a source of concern. There is an urgent need to improve the political selection mechanism as well as the general quality of governance, policy making and policy implementation, particularly with regard to the long-term. More critical than the availability of 'great people' is probably the willingness and ability of competent and dedicated leaders to reach and hold positions of power. |

| Cause | Insight | Jewish Aspect | Potential Policy Conjectures |
|---------------------------|--|---|---|
| Numbers and Critical Mass | Is there a critical population slope below which a civilization is doomed to decline? Everything depends on the ambitions and external conditions of a civilization. | In Judaism, concern about the small number of Jews is ancient and already begins in the Bible. The Jews needed critical mass for different goals: defense, maintaining a numerical majority in the homeland, cultural-religious creativity and political influence. Critical mass was essential for all four goals when Israel was sovereign in the past and it is essential again today, not least for maintaining the Jewish nature of Israel and its ability to defend itself. In the Diaspora numbers were not required for defense, and Jewish religious and cultural creativity and even economic success were often ensured by numerically very small but well-connected communities. However, in some places there could be a minimum level below which a community might not remain viable. Demographic challenges are now different from those before the Enlightenment. Demography is no longer limited to numbers of people but must also include qualitative criteria such as identity and cultural-religious content. In Israel, the demographic challenge is to preserve the Jewish identity and majority; in the Diaspora, to preserve sustainable communities with spiritual significance. | Jewish population numbers are growing slowly in Israel and shrinking in the Diaspora. The net result is stagnation. Jews need more critical mass, in Israel for defense and maintaining a majority, and everywhere for cultural creativity and political influence. Population stagnation is a critical weakness that can and must be addressed. Israel should create a top-level government position in order to signal the urgency of this problem. Demography is today not limited to numbers of people but includes also qualitative criteria, such as identity (see 1) and spiritual significance. |

| Cause | Insight | Jewish Aspect | Potential Policy Conjectures |
|--|---|---|--|
| Economic Foundations of Long - Lasting Civilizations | The recognition that economics is a dominant factor of history, a driver of rise and decline, belongs to modern times. Until the 19 th century, mainstream historians paid almost no attention to it. The Industrial Revolution brought profound change not only to economics, but to historiography too which discovered the power of socio-economic drivers. Economic prosperity is an essential basis of many drivers, such as demography, military supremacy and science and technology. | There were enormous differences between periods and countries where Jews were prosperous and other ones where they lived in great poverty. Periods of prosperity tended to sustain population expansion and cultural creativity and influence. Some of the challenges were similar in all cases: Jews were minorities, had no land or natural resources, were discriminated against, dispersed and dependent on changing rulers. Their responses were also similar: a high level of education ("human capital"), intensive networking across the Jewish world ("social capital") and an exceptional gift for entrepreneurship, risk-taking and innovation. Jews created "knowledge-based economies" long before the term existed. Today, the Jewish competitive advantage in human and social capital is probably shrinking because many others are trying to catch up. | If history can be taken as a guide, Israel's long-term economic growth and prosperity cannot be assured without massive educational reforms that must begin soon. |
| War: A Double Edged Sword | Virtually all historians regard war as a key driver of rise and decline, and many consider military virtuosity essential to the long-term survival of civilizations. War was seen as part of the normal business of government. Among the classics, only Sima Qian, father of Chinese historiography, disagreed: peace is the business of government, not war. | War has repeatedly determined the rise and decline of the Jewish People. Victories over Philistines and Canaanites permitted ancient Israel to flourish, and defeat at the hand of Assyrians, Babylonians and Romans, though catastrophic for the defeated, has triggered the radical transformations that created Judaism as we know it. Modern Israel owes its creation and survival to its readiness to fight wars of defense. This readiness had its roots in the early Zionist ideal of the "New Jew" but also had many links to old traditions and collective memories. | Ensuring Israel's future will call for great strategic, tactical and technological innovativeness and fast adaptation to new and/or fluid conditions, e.g. those of asymmetric high-intensity warfare. It is unlikely that Israel will be allowed to forget its martial qualities anytime soon. Struggling for peace while preparing for war has been the fate of many nations. Israel and the Jewish People will have to live with the tension between the two. It will need technological, tactical and strategic innovation to respond to changing defense challenges. Innovative thinking must tackle not only battlefield problems but also international laws that favor non-state actors in asymmetric warfare, as well as global security frameworks inadequate to stop the spread of weapons of mass destruction. |

| Cause | Insight | Jewish Aspect | Potential Policy Conjectures |
|---|---|---|--|
| Geopolitics and Civilizational Affinities | <p>Thucydides identified the will to power as the strongest motive of men and nations. Later historians described the strategies that nations used to increase their power over that of others. Geopolitics is one of the oldest instruments of statecraft. Samuel Huntington recently predicted that civilizational affinities will become the most important dimension of future geopolitical power alignments: nations with civilizational affinities will move closer and act together.</p> | <p>Israel, ancient and modern, is small, geographically exposed and surrounded by many larger powers, while Diaspora Jewry is so widely spread that any major event in the world will affect it somewhere. Both reasons should have encouraged Jews to keep their eyes open to the wide world and search for allies and affinities. Some affinities did play a role at critical junctures of Jewish history. Bernard Lewis suggests that religious affinity may have motivated the friendliness of Persia's King Cyrus towards the exiled Jews, and it certainly motivated England's Christian Zionists and contributed to the genesis of the Balfour Declaration. Today, affinity is again one of several reasons for the United States' support for Israel.</p> | <p>The Jewish People and Israel are today playing a global role while Jewish perspectives, at least those of much of the public, often remain short-term if not parochial. The current situation of the Jews and Israel makes the shaping of long-term geopolitical vision imperative. As the global balance of power is shifting, the Jews and Israel must keep looking for new friends and allies in addition to the traditional ones - notably the emerging powers of Asia. Cultural assets could be useful for this purpose.</p> |
| Internal Dissent | <p>Many historians see internal dissent as the main cause of the decline and fall of civilizations.</p> | <p>Jewish history is different. It has known three types of dissent, but survived them all: a.) Ideological conflict: Judaism is a religion of argumentation. Ideological rivals did not exclude each other from the Jewish People b.) Civil war: led to loss of independence during the Second Temple but not an end to Jewish civilization. c.) Geographic partition and dispersion. Judaism will remain a civilization of argumentation and spiritual conflict. Intellectual argumentation can be creative as long as it does not prevent joint action in times of crisis.</p> | <p>Civil war is not a real danger today, but conflicts between religious and non-religious, severe differences of opinion about the peace process in Israel and a new form of "geographic partition," with a growing separation between Israel and large parts of the Diaspora, could become serious problems.</p> |

| Cause | Insight | Jewish Aspect | Potential Policy Conjectures |
|--|---|--|--|
| Chance Events or "Luck" | Ancient civilizations were convinced that "fortune," luck or chance events intervened in the fate of nations and individuals. Historians who did not believe in "iron laws" of history made the same observation: the appearance, unexplained madness or sudden death of an important ruler, a mishap in war or an epidemic could change the course of history. | Rabbinic Judaism has no place for "fortune" besides the Almighty's unlimited power and it opposes reliance on magic and miracles to influence "fortune." However, a neutral historian could easily regard many events that influenced Jewish history, for better or worse, as chance events. A lucky event in 701 BCE was the unexpected end of the siege of Jerusalem by the Assyrian Sennacherib, perhaps due to an epidemic that struck his army. Another one was the sudden death of Stalin in 1953 a few weeks after he had fabricated the infamous Jewish "doctors' plot" and apparently ordered the deportation of Soviet Jewry to Siberia. There also have been many unlucky chance events, for example some of the events that led to the destruction of the Temple in 70 CE. | A people in a tenuous situation - the Jews - must reduce their exposure to chance events and upgrade their capacity to cope with the unpredictable. This requires, in line with Machiavelli's advice, excellent science, long-term anticipation, and a good decision making capability in crisis situations. |
| Decline of the West or the "End of Civilization" | Current prophecies of the decline and end of the West, of capitalism or of all civilization go back to 19 th Century Europe and regularly re-emerge in the West. Global decline and collapse could begin as a worldwide economic depression, a new world war or accelerating global warming followed by famines, wars and mass migrations. | The Jewish People will be drawn into any global crisis but has no way to significantly impact the mega-trends. Whether Jews will be more or less affected by these trends than other peoples depends on their internal strength, that is their willingness to make the best use of the internal drivers mentioned thus far. | While Jews can do little to affect the main trajectories of the West, they could, at least, increase their links with Asia, particularly China and India. |

| Cause | Insight | Jewish Aspect | Potential Policy Conjectures |
|------------------------------|---|--|--|
| Natural and Health Disasters | <p>Natural and health disasters are recognized today as potential major causes of decline and fall. Jared Diamond's <i>Collapse</i> (2005) describes how ancient civilizations destroyed themselves by ravaging their natural environment. Man-made global warming and pandemics could become growing dangers to civilization. Earthquakes, tsunamis and other natural disasters are likely to cause increasing loss of life because population numbers are increasing.</p> | <p>No natural event seems to have harmed the Jews in the past, but they may have to cope with such dangers in the future. Rising sea levels are more than likely. Such rises may come to affect, in time, the eastern shores of the Mediterranean and will also threaten the wider regions of New York and South Florida where together approximately two million Jews are living. Global warming will increase water shortages in Israel and the Middle East. Israel is in a geologically unstable region where major earthquakes are more than likely while a large number of buildings are still not earthquake safe.</p> | <p>Jewish civilization, like all others, has been and will continue to be affected by global problems and dangers that it cannot influence directly. The emergence of global dangers does not mean that measures to strengthen individual civilizations will be ineffective and thus less urgent. On the contrary, in conditions of global crisis and turmoil, policies to enhance identity, solidarity, military supremacy, education, science and technology etc. will become even more important.</p> |

Section 3: Dimensions and Trends

The analysis of theories of rise and decline has guided JPPPI in selecting the key dimensions through which the rise, thriving and decline of the Jewish People is explored. A series of dimensions was selected in order to respond to the need for a holistic view of the multiple reasons for rise and decline. The dimensions are both internal and external, allowing for analysis of remote factors as well as more proximate ones. The dimensions of analysis are arranged according to two axes: the internal and the external.

The internal Y-axis is a composite called “Jewish Momentum” which includes the internal features of the Jewish People that shape its movement into the future in interaction with external factors. Momentum is a composite function of various factors classified as: quantity, quality, power, structures and leadership. Quantity includes demography in a broad sense. Quality includes individual and societal qualities, such as social capital, identity and identification, culture, knowledge and will. Power includes hard and soft power and influence. Structures include macro-structures: Israel, the Diaspora and their relations; organizations; networks; grass-root groups; philanthropists and more. Leadership includes spiritual, political, intellectual and organizational leaders.

However, no attempt is made to rate dimensions and drivers in terms of importance. This is a value-judgment issue as well as being dependent on unstable dynamics that are context-shaped. However, as the project focuses on aspects and variables that have been evaluated as important, the qualitative analysis meets the main needs of policy planning, which in any case should adopt multiple directions so as to be robust in the face of irreducible uncertainty, and should adjust the analysis to particular contexts, including, as far as feasible, qualitative and quasi-quantitative cost-benefit-thinking, also on the level of guesstimates.

The Momentum of the Jewish People operates within the external environment, which can influence the trajectory towards alternative futures, mostly independent from the Momentum and in part in interaction with it. This is the X-axis. The X-axis dimensions have to do with the External Environment: geopolitical and other dimensions, such as science and technology and global culture that affect the Jewish People.

Axis-Y Dimensions: Internal - Jewish Momentum

- Jewish Demography
- Jewish Identity
- Jewish Hard and Soft Power and Influence
- Israel-Diaspora Relations
- Jewish Economics
- Leadership

Following is a list of drivers of external developments that are likely to have substantial impact on the future of the Jewish People. The list is not exhaustive but seeks to encompass the key external dimensions as far as foreseeable at present.

Axis-X Dimensions: External Environment

- **Geopolitics - includes:**
 - Global Main Actors and Distribution of Power
 - Proliferation of Weapons of Mass Killing
 - Terrorism
 - Energy
 - The Israeli-Palestinian Conflict and the Middle East
- **Global (and especially Western) Society - includes:**
 - Globalization
 - Global Demography
 - Global Economy
 - Global Cultures
 - Religion
 - Global Governance
 - Anti-Semitism
 - Science, Technology, Cyberspace, Environmental and Health Issues

The internal and external dimensions overlap somewhat and interact intensively. Jewish People policies can be directed mainly at one axis or the other, but are usually directed at both. These policies are constrained by internal factors and the external environment, but are in part independent ("free will") and, with time, influence both the momentum and some components of the external environment.

Jewish Demography (numbers and composition)

Background

The study of Jewish demography emerges from the historical insight that numbers count for thriving and decline of civilizations, and that beyond a certain but unknown threshold numbers are critical to enable a variety of critical functions, from the ability to sustain an army, to the fostering of in-marriage, and excellence in education. The demography dimension charts the number of Jews living in the world today as well as their age and geographical composition. The total number of Jews is related to their geographical composition in that certain geographies, such as Israel, foster more in-marriage and greater fertility. That is, the same Jew with the same social background and economic standing in moving from the UK to Israel is more likely to marry a Jewish spouse and have more children.

According to accepted methods, the number of Jews referenced in this project reflects the concept of a core Jewish population. This includes people who in censuses or surveys say they are Jewish, or do not express a definite identification preference but are of Jewish parentage and do not have another religious identification. It should be noted that this is not a Halakhic definition, though it broadly overlaps it. This is a rather loose definition and does not imply any specific Jewish knowledge, belief, behavior or affiliation. Being enumerated in the core Jewish population only requires a readiness not to deny one's own Jewish origin or belonging, no matter how expressed.

The Jewish population defined through such criteria stands at the core of a more complex and extended configuration. The 13 million Jews estimated worldwide at the dawn of the 21st century are intimately connected to several more millions of people. Some of them have Jewish origins or family connections but are not currently Jewish, because they changed their own identification, or are the non-Jewish children of intermarried parents, or are non-Jewish partners in intermarried households. Jewish and non-Jewish mates in these households share and mutually affect each other's daily life experience, social and economic concerns and cultural environment. The gap between the number of individuals covered by the enlarged and core definitions tends to increase together with growing rates of out-marriage. Often, an increase in the enlarged population can coexist with a reduction of the respective core population. An estimate of the total number of people eligible for the Law of Return would be even higher, as it would also incorporate non-Jewish children and grandchildren of Jews and their spouses. Indeed, recent immigration to Israel has significantly drawn from the non-Jewish fringes of the eligible constituency in the Diaspora.

Numbers - Overall Trends

A negative balance of Jewish births and deaths now prevails in most Jewish communities worldwide with the prominent exception of Israel. Across the Jewish Diaspora, more frequent choice of marriage partners from outside the Jewish community is associated with growing percentages of children not raised Jewishly. The consequent erosion of the younger generation has produced a steady process of Jewish population aging, leading in turn to higher death rates and population decrease. Further major consequences of ongoing family and cultural changes are the blurring of Jewish identification boundaries and growing complexities in defining the Jewish collective. In Israel, Jewish population grows naturally but the demographic balance of Jews and non-Jews produces a problematic equation critically related to the Israeli-Palestinian conflict.

There may be fewer Jews in the world than commonly thought, and if the current trends continue unchanged, there may be even fewer in the future. At the beginning of 2008, world Jewry was estimated at just about 13 million; it was 11 million in 1945. It took 13 years to add one million Jews between 1945 and 1958, but it took 50 more years to add another million. Since 1970 world Jewish population has practically stood still at zero population growth compared to an increase of over 73% of the world's total population.

Low Jewish birth rates and population aging are exacerbated by high and continually increasing frequencies of out-marriage. On average, around the year 2000, out-marriages involved about 31% of all Jews marrying worldwide, and 48% of all Jews marrying in the Diaspora. A further factor of Jewish population erosion likely to emerge from recent demographic trends is the disenchantment and disaffiliation of large sections of the younger adult Jewish population - comparatively more frequent among the out-married and possibly also associated with the desire to have fewer children.

The decrease in the number of core Jews is accompanied by an increase in the number of Jews at the periphery who have some Jewish ancestry, and a growing number of non-Jews who share households with core Jews.

| Country | Jewish Population Core Definition | | | GDP per capita, PPP US \$ | GDP per capita, PPP US \$ | Jewish Day- school Attendance Rate (%) | Recent Out- marriage Rate (%) | Ever Visited Israel, % of Jew. Pop. | Aliyah |
|-----------------------|--------------------------------------|-------------------|-------------------|---------------------------------|---------------------------------|---|-------------------------------------|--|---------------|
| | 1970 | 2009 | Projected 2020 | 2006 | 2008 | Most recent | Most recent | Most recent | 2008 |
| World | 12,633,000 | 13,309,000 | 13,827,000 | 60,228-667 | 268- 86,008 | | | | 13,681 |
| Israel | 2,582,000 | 5,569,000 | 6,453,000 | 25,864 | 28,474 | 97 | 5 | 100 | - |
| North America | 5,686,000 | 5,650,000 | 5,581,000 | 41,890-33,375 | 47,440 - 39,098 | | | | 2,281 |
| United States | 5,400,000 | 5,275,000 | 5,200,000 | 41,890 | 47,440 | 25h | 54 | >35 | 2,019 |
| Canada | 286,000 | 375,000 | 381,000 | 33,375 | 39,098 | 55 | 35 | >65 | 262 |
| Latin America | 514,000 | 391,000 | 364,000 | 17,297-1,663 | | | | | 955 |
| Argentina | 282,000 | 183,000 | 162,000 | 14,280 | 14,408 | 50-55 | 45 | >50 | 188 |
| Brazil | 90,000 | 96,000 | 90,000 | 8,402 | 10,446 | 71 | 45 | >50 | 208 |
| Mexico | 35,000 | 40,000 | 42,000 | 10,751 | 14,534 | 85 | 10 | >70 | 83 |
| Other countries | 107,000 | 72,000 | 70,000 | 17,297-1,663 | | 75 | 15-95 | >50 | 476 |
| Europe non-FSU | 1,331,000 | 1,149,000 | 1,070,000 | 60,228-5,316 | | | | | 2,598 |
| France | 530,000 | 485,000 | 482,000 | 30,386 | 34,205 | 40 | 40-45 | >70 | 1,562 |
| United Kingdom | 390,000 | 293,000 | 278,000 | 33,238 | 36,358 | 60 | 40-45 | >75 | 505 |
| Germany | 30,000 | 120,000 | 108,000 | 29,481 | 35,539 | <20 | >60 | >50 | 86 |
| Hungary | 70,000 | 49,000 | 34,000 | 17,887 | 19,533 | <15 | 60 | .. | 54 |
| Other EU | 171,000 | 149,000 | 134,000 | 60,228-15,871 | | 10-25 | 33-75 | >50 | 262 |
| Other non-EU | 140,000 | 53,000 | 34,000 | 41,420-5,316 | | 5-20 | 50-80 | .. | 227 |
| FSU | 2,151,000 | 339,000 | 173,000 | 15,478-1,356 | | | | | 5,603 |
| Russia | 808,000 | 210,000 | 130,000 | 10,845 | 15,948 | <15 | 80 | .. | 2,600 |
| Ukraine | 777,000 | 74,000 | 25,000 | 6,848 | 7,342 | <15 | 80 | .. | 1,310 |
| Rest FSU Europe | 312,000 | 36,000 | 15,000 | 15,478-2,100 | | <15 | 65-75 | .. | 590 |
| FSU Asia | 254,000 | 19,000 | 3,000 | 7,857-1,356 | | <15 | 50-75 | .. | 1,103 |
| Asia (rest) | 104,000 | 19,000 | 21,000 | 31,267-930 | | | | | 134 |
| Africa | 195,000 | 77,000 | 60,000 | 16,106-667 | | | | | 1,892 |
| South Africa | 118,000 | 71,000 | 57,000 | 11,110 | 10,136 | 85 | 20 | >75 | 257 |
| Oceania | 70,000 | 115,000 | 105,000 | 31,794-2,563 | | | | | 119 |
| Australia | 65,000 | 107,000 | 97,000 | 31,794 | 36,918 | 65 | 22 | >65 | 109 |

This Table was prepared by Professor Sergio DellaPergola for the Jewish People Policy Planning Institute's 2009 Annual Assessment and documentation and sources may be found there.

Israel offers the only real exception to recessive demographic trends in the Diaspora. Jewish community identity is an important intervening factor in Jewish fertility levels in Israel, resulting in larger families than among Jews who live in other countries. The phenomenon of assimilation and the consequent identificational loss of Jewish children are far less statistically significant in Israel than elsewhere. As a consequence, in recent years the Jewish population increase in Israel has more or less compensated for Jewish population decline in the Diaspora. At the beginning of 2008 Israel's Jewish population (5.5 million) constituted more than 40% of the world's total Jewish population, rendering it the largest single Jewish community in the world.

Composition - Overall Trends

The location of Jews on the world map largely reflects the ranking of countries by the Index of Human Development, an international measure of the quality of life, published annually by the United Nations Development Program, which goes beyond simple GDP measures to incorporate additional factors such as life expectancy, health and literacy. Over 90% of world Jewry now lives in the top 20% of more developed countries - that is in North America, West Europe and Israel. Even when, as is the case in Israel, not all Jews belong to the middle and upper classes, they still partake in the health, literacy and economic benefits of a developed country. The two major Jewish population centers in the United States and Israel now jointly comprise some 80% of world Jewry. Well above 50% of world Jewry now lives in six major metropolitan areas, in and around New York, Los Angeles, South Florida, Tel-Aviv, Jerusalem and Haifa.

Projections of Trends into the Future

The direction of Jewish demographic developments is towards numerical stagnation, greater concentration in Israel and the US, especially in a few urban centers, with an increasing share of total Jews, especially young Jews, residing in Israel.

World Jewish population size is expected to remain relatively stable if the main current features of international migration and family formation continue unchanged. A total Jewish population increase of about half a million may be expected by 2020 to a world total of 13.8 million. This would reflect an increase of about one million in Israel and a decrease of about half a million in the aggregate of Diaspora communities. Under higher fertility assumptions this number may be as high as 14.4 million, and under lower fertility assumptions it may be closer to 12.7 million.

The expected share of Israel's Jewish population out of total World Jewry is expected to increase, mostly because of its younger age composition and significantly higher fertility levels. Israel already holds one half of all Jewish children worldwide below the age of 15, and will substantially increase its share of global Jewish youth in the future. Jewish communities in the Diaspora comprise a disproportionate share of the Jewish elderly. By 2020, more than half of all Jews aged 65 and over will be located in North America, whereas only about one third of all Jewish children will be located there. With the total number of Jews projected to grow only marginally, the share of Jewish People in the total world population will continue to decline from approximately 0.20% to 0.18% (based on UN estimates for a world population of 7.6 billion in 2020).

Within Israel, Israeli Arabs are likely to comprise by 2025 about a quarter of Israel's expected population of nearly 9 million with the ultra-Orthodox nearly doubling, becoming more than 10% of the population. The Arab populations of the West Bank and Gaza are expected to reach 6 million by 2025.

Possible Changes in Trend Projections

Within the timeframe of this study, substantial changes to the demographic outlook beyond the 12.7 - 14.4 million spread mentioned above are highly unlikely and may result, on the downside, mostly from catastrophic events, though possible impacts of a lasting economic depression may also reduce Jewish birth rates. The key issue that may impact numbers beyond this spread on the upside is changes in definitions of Jewish belonging. New definitions may expand the numbers of Jews that are counted in, although without corresponding changes on the ground, the mere changing of definitions may lead to increasing numbers without actually changing the reality of Jewish life (e.g. if a person born to a Jewish father who converted to Catholicism is considered a Jew, it doesn't mean that he actually does something about it).

Evaluation of Future Projections

The evaluation of future projections depends on one's assessment of the importance of population numbers to the thriving of the Jewish People. One of the key discussions of Jewish demography is whether - in the Jewish context, and given Jewish history - there is a point at which quantity becomes quality. That is, given that Jews constitute a fraction of world population, does it matter if there are 12 million Jews or 16 million

Jews? Is there a critical mass number of Jews below which Jewish assimilation into the general population accelerates? Perhaps within a certain range of numbers it may be as important to discuss and address the questions of who are these Jews, how strong are their ties to the Jewish People and to Israel and what is their contribution to human advancement. Assuming also that a substantial increase in number would not come from high-income secular families suddenly deciding to have seven children each, how far should the Jewish People go in opening up to new Jews, or phrased differently, should the Jewish People “dilute itself” - however doubtful and value-sensitive this is. This question is also relevant in Israel where a sizeable minority argues that Jews should not be immediately concerned by the “demographic balance” with the Palestinians, since throughout the 20th century Jews between the Jordan and the Mediterranean were rarely a majority and certainly never a sizeable one. According to this view, Israel’s thriving does not depend on getting this balance “right,” but on ensuring that its Jewish population is highly committed and motivated to Israel’s defense and prosperity. The question then shifts to whether it is possible to keep the Jewish population committed and motivated in a state of permanent conflict.

Another judgment has to do with Jewish geographical composition. Is the thriving of the Jewish People better served by the concentration of Jews in Israel, or is it better served by their dispersion around the world? Is there a certain balance that provides the best chance of future survival and thriving? Is it substantially different from the current balance?

However, within a broadly accepted value-judgment, the evaluation of demographic trends is fairly straightforward from a Jewish People perspective: more Jews is better and fewer Jews is not; as much as possible the Jewish People should open up to more Jews while seeking to deepen the connections of those who are already in; having 1 million more Jews in Israel is beneficial; and finally - reaching some kind of a two-state solution or another form of “separation” is critical to enabling Israel to democratically sustain a Jewish majority.

Identity

Background

The concept of identity is complex. There appears to be a basic difference between the way it is conceived by psychologists and sociologists. To complicate matters, identity is not something “out there;” it is something that individuals in some measure create for themselves and reflects how they think and feel emotionally about a particular aspect of themselves.

Identification is also a complex notion because there are various aspects of the collectivity with which one may identify and there are varying ways one can manifest that identification. On the most basic level, there are significant differences between ethnic-national identification and religious identification, but there are overlaps between them. These entail issues of who determines the criteria for identification and how one measures those criteria, which are made even more complex by virtue of a group’s heterogeneity.

The focus of this project is on the collectivity, the Jewish People, and how individuals connect with that collectivity. We are interested in the ways in which they manifest their Jewish identity, which is actually Jewish identification. We posit the widest spread and look at ways which are seen as manifesting a sense of group belonging in a way or ways that are deemed appropriate by an acknowledged segment of that group. For some, it may be via observance of religious rituals; for others it may be in joining Jewish organizations; and for others, it may be in participating in a study group. It is of course possible for Jews to view themselves as Jews without engaging in any overt activity or behavior that identifies them as such. While this makes it difficult to discuss Jewish identity in the context of the Jewish People collective it does introduce the possibility of future active identification.

The Jewish People is a civilizational entity characterized by sets of beliefs, values and behavior. Until the Enlightenment in the 18th century, rigorous religious Jewish practice, often referred to in shorthand as “religion,” constituted the main element and the spirit of Judaism. However, since the Enlightenment and the opening of the West to Jews, Jewish religious practice as the main component of Judaism has undergone a transformation, resulting in the question as to what is the core of Jewish identity and how to define it when the majority of Jews is not religious in the traditional or any other sense. The development of various streams of Judaism and the growing literature on secular Judaism demonstrate the quest for new meanings.

Tradition, ritual, and a number of customs as practiced by many Jews are part of the answer, as are memory, participation in Jewish community activities, the sense of identification with Israel and a feeling of Jewish solidarity. But these are not durable conceptions of Jewish identity and neither are the Halakhic definitions since many children of Jewish mothers are increasingly distancing themselves from the Jewish People. An alternative approach may be to define identity in subjective terms, such as the desire to be Jewish, the feeling that one is Jewish, and/or the active desire for one's children and grandchildren to be Jews. However, this approach might lead to extreme forms of Jewish subjectivism and "inner Jewishness" which undermine the nature of the Jewish People as a communal entity.

Also to be taken into account are the impacts of new communication technologies and virtual communities. This is likely to change some forms of Jewish identification and identity. However, the attributes of new forms of Jewish identity and identification cannot as yet be clearly mapped, leaving an open question with respect to the alternative futures - with actual developments to be shaped both by external examples and by Jewish People policies.

In terms of macro-history, as corroborated by the history of Jewish culture throughout the ages, the issue of Jewish identity is shaped partly by external determinants such as cultural globalization and changes in the significance of religion in various countries where many Jews reside, as well as internal determinants, such as community structures and spiritual leaders that shape Jewish values and meaning. In this context communication technologies and virtual communities may have unprecedented impacts.

Overall Trends

The overall trend in Jewish identification is towards more diverse and pluralistic forms of Jewish identification less focused on a common set of basic values. There is a shift in identification from religious to secular, from ethnic to cultural, from community-oriented to individualistic and universal. Global norms about identity, individual choice, communal expression and religious freedom are making it more acceptable to choose one's religious or non-religious and community identity. Jewish identity is increasingly about choice and the personal search for meaning, especially in the younger generation. Younger people choose how they want to express their identity, and this less and less involves membership in classical Jewish organizations. Younger

people avoid labels - opting for 'just Jewish' or even 'of Jewish background' - and given their notion that identity is a matter of choice, reject the view that assimilation is tragic.

Jewish identity, excluding deeply Orthodox and Haredi Jews, is decreasingly about an agreed set of concepts and symbols and more about personal fulfillment, no matter how discordant it is with the standards of the past. What one person may recognize as Jewish is not necessarily what someone else recognizes as such. The spectrum of Jewish identity is becoming broader with increasing distance between the polar extremes. While the number of people who may feel Jewish might not be decreasing, the possibility and likelihood of a conversation among them and a sense of shared belonging is diminishing.

These trends, although in different forms, appear both in Israel and outside it. Outside Israel, within the overall growing diversity and pluralism, the course of Jewish identification seems to be towards increased polarity between those clearly identified and those totally unidentified, with a large segment falling in between. The non-identifying (sometimes called unaffiliated) are becoming increasingly so, demonstrating the following patterns:

- Declining rates of communal affiliation - this relates to membership in both secular and religious Jewish organizations;
- Declining rates of marriage within the Jewish collective;
- Declining rates of Jewish neighborhood concentration - increasingly Jews reside in ethnically and religiously heterogeneous neighborhoods and express less value in living among Jews;
- Declining significance of Jewish friendships - an increasing number of Jews state that their best friends are not Jewish;
- Declining rates of philanthropic giving and voluntarism to specifically Jewish causes, and
- Declining degrees of emotional attachment to Israel.

These patterns relate to non-identifying Jews but as a phenomenon are not unique to Jews. Rather, they are fairly characteristic of general patterns, especially among the relatively affluent sectors of contemporary Western, "post-modern" societies. In these societies, Jews can effectively cease being Jews without converting to another religion - secular national identities and patchwork identities composed of pieces of various religions, nations and sects are making it possible for Jews to leave the community without having to go through the high barrier of conversion to another religion.

In contrast, for the identified and affiliated segment of the population, there is a mirror image of these patterns with an increase and intensification in almost all of the above areas. The identifying group increasingly sends its children to Jewish day schools. Its college students are enrolling in large numbers of college courses with Jewish subjects that are taught by an ever-growing number of professors of Jewish studies at major colleges and universities across the US. This polarity is sharpened by the high interconnectedness and correlation between these various patterns. In general, there is a consistency running throughout - that is, those who are high on one factor are high on most or all other factors, and those who are low on one are low on most or all. This means, for example, that it is very rare to find Jews who are alienated from Jewish life and society but express a strong emotional attachment to Israel.

One outcome of this increasing polarity is that the patterns of decline are taking place concurrently with the increased number of strongly Jewish US senators and members of the House of Representatives, Jewish studies at colleges and universities around the US are numerous and highly visible, and in some places it has become quite "in" to be Jewish in the US, even a status symbol.

Within Israel, studies have shown that the vast majority of Jews living there regard themselves as Jews and keep selected elements of the tradition. While approximately half of Jewish Israelis regard themselves as not religious and view themselves primarily as Israeli rather than Jewish, almost all Israeli Jews consider themselves part of world Jewry and view it as an important part of their Jewish identity. Even when they feel that as Israeli Jews they lead different lives from those of Jews in the Diaspora they still have a strong sense that they share a common fate and belong to a common people. Compared to previous generations young Israeli Jews attach lesser importance to living in Israel as part of their Jewish identity and often feel that living as Jews outside of Israel is a legitimate choice, even if it is not of their own making. Surprisingly, the younger generation in Israel seems to place higher value on the attachment to the Jewish People rather than the land as a key element of their Jewish identity.

While research on young Israeli Jews has shown no significant difference from previous generations in terms of the strength of their Jewish identity, like their counterparts outside Israel they tend to reject labels and categories and define their Jewishness in a variety of ways (examples from one study include: "free / secular Jew," "Jewish," "Jewish without additions," "Israeli," "religious in my religion," "formerly religious," "conscious-traditional," "traditional in my way," "seculartraditional," "secular plus," "secular believer," "secular atheist," "a bit traditional," "free believer," "spiritual-secular,"

“free, “unique,” “with an affinity to heritage rather than to religion,” “multi-religious,” “wondering and questioning secular,” “secularreligious,” “enigmatic,” “spiritual-traditional,” “it’s really complicated...,” “God seeking,” “dedicated to doing good,” “Zionist believer,” “traditional-spiritual,” and “non-defined.”)

Within Israel, the polarity between affiliated and unaffiliated identities takes a different path. The constant conflict between state and religion in Israel, between secular and religious, flattens the Jewish discourse to polar positions and does not allow for the pluralism with which the typical Diaspora Jew lives. In addition, the political condition and the ongoing conflict are often perceived as a collision between the desire to preserve a Jewish identity for the state and the values of democracy and equality. Also in terms of its Jewishness, Israel is no longer perceived by the younger generation as an impressive achievement of the Jewish People, and as an exemplary society, as its prophets and founders hoped it would be. However, in response to this polarity there are several signs suggesting that among certain circles in Israeli society there is an interest in changing the situation and retrieving the feeling of “ownership” of Jewish culture and tradition. During the last decade many initiatives have been started and developed in various places and among various sectors, which share the desire to create a Jewish revival in Israel.

Possible Changes in Trend Projections

Changes in trend projections towards greater plurality and polarity are dependent in large part on the emergence of new ideas, from outside of the Jewish People or from within, that would provide a new basis for collective identification. A sense of external threat could also lead to a renewed sense of cohesion, while a prolonged period of peace and security, in Israel as well, could lead to erosion of collective identity towards a more universal one.

Evaluation of Future Projections

If the Jewish People and Judaism are to persist and thrive, prudence requires not leaving the future of Jewish identity to historic processes shaped by factors outside the Jewish People, which, unless interfered with and unless they are supportive of the resurgence of Jewish identification, may ultimately lead to dissolution. In assessing the future of Jewish identification it matters greatly if the emphasis is on the individual Jew or the

Jewish collective. It is very possible to imagine a future where an increasing number of Jews define themselves as Jewish, but engage in no form of collective identification and no activity that reflects solidarity or group cohesion or even membership. There are definite indicators that in the West, the collective sense of an increasing number of Jews is on the decline, even in places where the individual sense of Jewish identity remains in tact. In that situation, while Jews continue to feel Jewish individually, the Jewish People as a collective is being weakened. It matters greatly to policy makers if individual or collective forms of Jewish identity are promoted. While there are ways to advance both, it is important to be skeptical of policies that enhance individual identification at the expense of the collective.

Jewish Hard and Soft Power and Influence

Background

The Jewish People has never been as powerful as now, including the military power and global standing of Israel, the soft power implied in the idea of “The Jewish Century” - however exaggerated - and the political and economic power and influence of the American Jewish community and, to a lesser degree, other Jewish communities. However, power has to be evaluated in terms of relative or “net” power, which means the power of the Jewish People in comparison to the dangers, threats and challenges it faces. Outside of Israel the Jewish People faces almost no physical threat, while Israel is still subject to existential ones. Israel is still confronted by enemies determined to destroy it and is subjected to intense anti-Israelism by a variety of groups, including in Western countries.

It is beyond the scope of this project to engage in a detailed discussion of Israel's security situation and its net power balances. However, given the crucial importance of the security of Israel for the future of the Jewish People as a whole, the following are a required minimum:

- Within a historical perspective, more than 60 years of existence of the State of Israel is a heroic achievement radically changing the narrative of the Jewish People. But it is too short a span of time to overcome deep Islamic resistance to having a Jewish State on “the territory of Islam,” all the more so a thriving state that has defeated Muslim armies.
- The Jewish People as a whole is mainly a Western civilization and Israel is very closely associated with the United States; therefore, anti-Western sentiment and

a possible relative decline of the West may have profound implications for the Jewish People.

- While Israel is militarily strong, the prospect of a nuclear Iran followed by the proliferation of additional nuclear and other mass-killing weapons to hostile and potentially hostile countries, poses a serious and perhaps existential security threat.
- While there are prospects for peace with the Palestinians and Syrians, and with the important Arab regional peace initiative on the table, all progress towards peace requires very significant sacrifices in terms of territories of much Jewish significance and security importance.
- Needless to say, should the security of Israel be seriously endangered, putting its very existence at stake, the implications for the Jewish People are momentous, even if extreme scenarios are not taken into consideration.

Therefore, upgrading and increasing the power of the Jewish People, including the net power of Israel, is an existential necessity.

Overall Trends

The global and Middle Eastern geostrategic situations are unstable, as is the global standing of the US, where the largest and most powerful Jewish community, outside Israel, is located. Still, within the time horizon of 2030 the following three alternative trends can be identified, with various mixtures being likely:

- **Neutral:** The situation remains more or less the same, with ups and downs in conflict management between Israel and its enemies and in its relations with moderate Arab countries, without any breakdown into large-scale violence or breakthrough towards a stable and comprehensive peace, and without any major shifts in the power and security of Jewish communities worldwide.
- **Negative:** There is a real decline in power and security: the United States is losing its superpower monopoly, Jewish communities outside North America are subjected to more aggressive anti-Semitism and to an increasing number of terror attacks, including mega-terror. At the same time, the power and influence of the Jewish People outside Israel is declining, due to demographic shifts in its countries of citizenship and some economic decline. Israel is confronted with existential threats by weapons of mass killing in the hands of fanatic states and non-state actors. Deterrence seems to work, but cannot fully be relied upon.

- **Positive:** There is real progress towards a new world order, including an overall Middle East peace agreement supported by the majority of Arab and Islamic states and the major powers as well as the UN. Iran's nuclear plans are abandoned. Israel maintains overall military superiority, but there are no major security threats. Anti-Semitism and anti-Israelism are on the decline, and the overall standing of the Jewish People - its soft power - is increasing.

Possible Changes in Trend Projections

The neutral trend is the expected trend given currently known factors and policies. A major war in the Middle East with limited use of weapons of mass killing could change the situation radically and so could nuclear proliferation in the Middle East, or, more positively, a rapid breakthrough towards a comprehensive and stable peace. Much more radical in nature is the hypothetical but not impossible scenario of a nuclear war in the Middle East, with devastating consequences.

Evaluation of Future Projections

Because of the multiplicity of diverse drivers and their instability, no reliable probabilities can be assigned to the more pessimistic or the more optimistic trend projections, but the more extreme ones, both optimistic and pessimistic, may well have a lower probability though much more critical impacts. Still, one clear statement leading to a critical policy recommendation is well supported: Catastrophic possibilities cannot be excluded. Making them nearly impossible is, therefore, the most critical task facing the Jewish People including Israel, requiring expansion of all forms of power and their focused use.

Israel-Diaspora Relations

Background

The establishment of the State of Israel radically ruptured the continuity of Jewish history. It will take at least two or three more generations to resolve the primary issues resulting from this radical event. Since the establishment of the State of Israel, the relationship with Diaspora Jewry has mostly been based on Diaspora communities giving aid to Israel and serving as a source for new immigrants. Israel has perceived its primary tasks as defending its existence and absorbing new immigrants. Fundamentally, since its inception, the State of Israel has - as its founding ideology - viewed itself as the sole solution to the Jewish problem and as the only hub for the ingathering of exiles. But in practice and also in its changing ideology, Israel has come to terms with the existence of Jewish life in the Diaspora and regards it increasingly positively and also as important for the future of the Jewish People as a whole.

Overall Trends

The overall trend in the relations between Jews in Israel and the Diaspora is for the younger generation in both Israel and the Diaspora to be less and less interested in the fate of their fellow Jews overseas. Relations between Israel and the Jewish People in the Diaspora are strong, but are likely to face decline. The younger generation in the Diaspora is removed from the dramatic historical events that accompanied the establishment of the State of Israel. The younger generation is more likely to be exposed to negative views of Israel and its policies and has almost no experience of identification with Israel as a source of pride. It is less concerned about Israel and its future and has less of an emotional attachment to the country.

Another factor is the radical and growing difference between living as a Jew in Israel and a Jew in the Diaspora in terms of Jewish individual life experience, socio-economic structures and public agendas in so far as Jewish issues are concerned. However, in other matters, the lifestyles, ambitions, and hopes of Jews living in Israel and the Diaspora are converging as part of broader trends of cultural globalization and Westernization. This means that while the experience of being Jewish in Israel and the Diaspora may be different, the experience of being a teenager, for example, in Israel and outside Israel is increasingly similar. This may mean that while the younger generation of Jews is less connected through familial and institutional bonds, it is

likely to have more opportunities for real and virtual connections based on shared interests. These kinds of connections are less well understood and studied and it is not clear to what extent they translate into a sense of collective belonging. They are less understood and studied also because the major institutions mediating Israel-Diaspora relations have shown themselves to date unable to respond to these opportunities and translate the emergent personal and Internet networks into a sense of collective belonging and action.

Possible Changes in Trend Projections

For Israeli-Diaspora relations to become even worse than projected several factors could come into play. These are: decline in number of children receiving Jewish education; apathy in the young generation towards Israel and Jewish community; decline in national unity, collective identity and ability for coordinated activity; and significant decline in Jewish knowledge and education; dilution of the Jewish attributes of Israel in favor of normalization and regional integration; no significant Jewish creativity in Israel; and deepening corruption and lack of effectiveness of the national leadership in Israel.

On the other hand, Israel-Diaspora relations would be strengthened if Israel is a Jewish state, whose Jewishness is manifested in various ways, both public and individual; Israel's security position is stable; Israeli society is economically and qualitatively attractive to Jews; Jewish creativity is blossoming in Israel and in the Diaspora; cultural and economic growth of large communities; Jewish children, even in out-marriages, receive Jewish education; many learn and speak Hebrew; Jewish People enjoying unity with diversity with expanded ability for collective activity; Israel and the Diaspora more closely woven through networks and Internet. This would be especially aided by an integrated educational system that brings together the Jewish and the general elements of a collective modern Jewish identity into one agreed basis for national solidarity.

Evaluation of Future Projections

The current trends appear to be leading towards decline in the institutional relationship between Israel and the Diaspora. However, the institutional relationship may be replaced by new forms of relationships that take advantage of new technologies and new types of communities. The quality and strength of these relationships are currently difficult to assess.

Jewish Economics

Background

The Jewish economics dimension examines both the aspect of the accumulation of wealth in Jewish hands as well as its distribution for specifically Jewish causes. These aspects are treated separately as it is quite possible for Jews to accumulate greater wealth individually while distributing a smaller share, relatively and absolutely, to Jewish causes.

Overall Trends

World Jewry today is at a historical zenith of absolute wealth creation. With the vast majority of Jews living in countries that are among the world's wealthiest, and with the majority of those Jews belonging to the middle and upper socio-economic strata of those countries (excluding Israel) the Jewish People as a whole enjoys access to wealth as never before. On average, the social and economic status of Jews in most Diaspora communities is better than that of the general population: Jews earn more, are better educated, have superior professional training, and are attracted to the more profitable sectors of the market. Jews continue to be at the forefront of the technological revolution and economic know-how, and take senior positions in the global economic and business system. There is more money per capita in Jewish hands –absolutely and perhaps, even relatively– than anytime in history. There are no data comparing Jewish and non-Jewish levels of accumulated wealth. One can base the predictions only on non-scientific analysis such as the prominence of Jews among: Nobel laureates, lists of rich people and the “Russian oligarchs,” leaders of financial institutions, entertainment, hi-tech industries, and political representatives. Based on these observations, one can say that Jewish wealth is higher than almost any other ethnic group worldwide. Barring a financial catastrophe that would impoverish large numbers of Jews, given Jewish professional selection, levels of education and global mobility these trends are likely to continue in the next 20 years.

The urban skilled occupations remain the distinctive mark of the Jewish People, as it has been for most of their history: in the countries that hosted the largest Jewish communities in the early 20th century (countries in East Europe, Russia, North Africa, the United States, the Middle East and Canada), almost all Jews were engaged in non-agricultural occupations even though they were not always prohibited from

being farmers. In the United States, more than half of adult Jewish men are engaged in professions such as law, medicine, and academia, whereas the percentage for white non-Jewish men is about 20 %. In contrast, only 6 % of adult Jewish men are employed in the construction, transportation, and production sectors compared to about 40 % of adult non-Jewish men. This distinctive mark of the Jews in the US is most likely the same for all Jews outside of Israel (although data are unavailable today for European and other Jewish Diaspora communities besides the US).

Within Israel, the Zionist task of reversing the “up-side-down pyramid” of Jewish occupations has been relatively successful. While in the Diaspora the Jewish occupational structure remains the same as it has been for centuries, in Israel the structure is similar to that of most other developed economies. Today, in the Israeli labor market, only 14 % of Jewish workers are employed in occupations that require an advanced academic degree such as physicians, accountants, lawyers, professors and others. In the US 52 % of Jews are employed in these same occupations. In Israel about 32 % of Jewish men work in industry, construction, agriculture and equivalent professions. In the US only 7 % of Jewish men work in these same occupations. Among the adult Jewish population in Israel 37 % have completed college while in the US 80 % have a college degree. In addition, in Israel only 3 % of Jewish workers earn (gross income) more than US\$75,000 while in the US, 34 % of Jews fall within this range with much lower taxes. These numbers indicate that while the Israeli GDP per capita is about 55-60 % (depending on the measurement method) of the US GDP per capita, the ratio of per capita Jewish income between Israel and US is even lower.

Within Israel, the accumulation of wealth by Jews is much more dependent on the economic and social policies of the government or lack thereof, within general global economic and local security contexts. The expected trend for Israel is a performance slightly above the growth rates for most developed countries, mostly due to improved policy, especially with respect to encouraging higher rates of employment participation and fighting poverty through employment. In general, Israel's budget and the size of its public sector are within advanced global norms. GDP per capita in Israel compared to that of the US could reach 65% by 2030. Education will continue to be a key policy issue with primary and secondary education likely to be somewhat improved, but not dramatically, with higher education declining towards mediocrity. In the next twenty years Israel as a whole should continue to rank among the world's wealthiest countries. Israel will continue to be an isolated Western style democracy with a high GDP per capita relative to undeveloped Muslim countries that run under

highly centralized societies in Egypt, Jordan, Syria and the other Arab nations. Should current trends continue, the gap between the Israeli and Arab economies is likely to widen.

In the Diaspora, the global spread of education and full literacy among all people in all advanced countries will reduce the comparative advantage the Jews have had in literacy, social attitudes and basic knowledge. Nowadays all people in China, India, Japan and the entire Western world realize the great importance of education and knowledge. The comparative advantage that Jews have had in the new knowledge-based economies might erode as all nations compete for the “tickets” to the top academic and highly skilled executive structures of the leading global economies.

At the micro-level, the question of the cost of living Jewishly is gaining importance. Living Jewish in the Diaspora is increasingly expensive. The costs of synagogue membership, Jewish community centers, day-school tuition, and even Jewish burial can be burdensome. The cost of entry into the Jewish community poses a barrier to many Jews who would like to belong but cannot afford to do so. Those involved in the Jewish community are weighted down by the associated financial pressure.

With respect to the distribution of wealth and its flow to Jewish causes, there are insufficient data and the evidence is mostly anecdotal. It appears that outside Israel philanthropic giving directed to Jewish causes constitutes only a very small share of overall Jewish philanthropic giving, but the increase in wealth may mean that in absolute terms there are more funds available to Jewish causes today than there has been in the past. A critical juncture will come as the current older generation of committed, involved and wealthy Jews makes estate planning decisions about the distribution of their wealth upon death. In addition, influenced by general philanthropic trends, it appears that more and more funds are provided outside the traditional Jewish giving structures, and are managed according to a model in which the givers themselves have considerable voice in initiating the programs, managing them and monitoring their outcomes. One of these structures that might lead to major changes in giving patterns is Internet-based philanthropy designed for small donations. A move in that direction might bring back the role of smaller donations in the Jewish community, while enabling donors to have a direct say in the projects they wish to support.

Possible Changes in Trend Projections

For Israel to experience a massive leap in its relative global standing, the key required factor is peace, and especially the resulting shift in domestic priorities. While Israel could still make economic progress in the absence of peace, a massive leap is likely to require the kind of shift in domestic priorities that peace is likely to bring. Given that Israel is an open economy with strong institutions, the peace dividend is likely to benefit the Israeli economy greatly. Assuming full peace is achieved, Israel could experience at least 1% additional growth a year, reaching 80% of US GDP per capita within the 2030 timeframe, depending on the timing of peace. The shift of resources is likely to lead to political focus on economic policy, investments in education, quality of life, society, culture and the environment along with further urbanization and the required urban planning. Israel is likely to enter a much closer association with the EU. The Arab sector is also likely to become more urbanized and developed. In the US and West Europe, the big jump took place throughout the 20th century and the benefits of growth and education have been largely utilized.

The positive picture provided above is subject to radical revision should there be a prolonged economic depression, to which the Jews are especially sensitive, because of their professional status and capital accumulation. Combined with a long-term relative decline of the Western economy, significant parts of the Jewish People may become substantially worse off, with the elderly at particularly high risk of impoverishment. The economy of Israel too could go into a steep and lengthy decline. A negative future for Israel's economy might look like the 1980s with economic populism and a lack of sound economic policy, and due to security concerns - an increased defense budget. A global economic recession might push Israel into decline even with sound policies. In Diaspora communities, the economic situation of Jews is closely correlated with that of the countries in which they live. The global economic crisis or economic decline of the West will directly result in the economic decline of Jews and Jewish communities. Economic failure and domestic unrest produced by it will hit Jewish communities and could produce greater anti-Semitism.

Exploring future distribution of wealth to Jewish causes depends on the hands in which wealth is accumulated and the degree to which philanthropic Jews feel a sense of obligation to the community. This question emerges from the fact that much of the new Jewish wealth has been created in the hi-tech sectors and hi-tech entrepreneurs are more likely to look at the whole world rather than confining perspectives to

their countries of origin. In the United States, some of the most successful hi-tech entrepreneurs of Jewish or half-Jewish origin have no link with Jewish communities or Jewish issues. In Israel the problems are different again, and related to the potential long-term fragility of a part of the hi-tech sector in the competitive global marketplace. IT experts have estimated that up to half of Israel's hi-tech jobs could one day be lost to competitors such as India and China. Only continuous renewal and the search for new technology niches can answer the challenge of competition. Otherwise, Israel might lose some of its highly skilled workforce through emigration (*brain-drain*).

However, given the realities of the financial-economic crisis, more pessimistic trend changes are likely, both in Israel and Jewish communities around the world. There is a realistic possibility of a steep decline in philanthropic activities and mobilization of resources for Jewish causes. A major Jewish People economic crisis cannot be ruled out, with harmful consequences for which Jewish leaders and institutions are ill prepared.

Evaluation of Future Projections

The future of Jewish economics is highly dependent on the global economic environment above all. Within given economic conditions much depends on the economic policies of the Government of Israel and the individual actions and education of Jews everywhere. The question of giving to Jewish causes might experience independent behavior - that is, a worsening in economic conditions need not necessarily result in major loss to Jewish giving as a sense of danger and a desire for solidarity could lead Jews to give a greater share of wealth - even if from a smaller pot - to Jewish causes.

Leadership

Background

The dimension of leadership reflects the historical understanding that creative leadership and elites are critical to the thriving of civilizations and that their absence is a key cause of decline. Moreover, the historical assessment is that Jews and the Jewish state are much more dependent on the quality of their leadership than other groups and states. The Jews and Israel - given the sometimes existential challenges they face - cannot afford leaders of mediocre and lower quality. The idea of leadership is widely studied but less well defined and understood. It is even less clear how a collective is able to produce excellent leaders and whether this process is entirely random or whether it is possible to improve the quality of a collective's leadership in a systematic manner over a long period of time.

Overall Trends

The Jewish People is facing a serious problem of high quality leadership - spiritual, political and organizational - with no clear trend of improvement. Current leadership, both in Israel and in Jewish institutions, with few individual exceptions, appears to lack the capacity to meet the challenges facing the Jewish People. It also lacks the deep understanding of changing realities and new ideas for coping with them that are able to assure, as much as possible, the long-term sustainable thriving of Jewish communities around the world and the thriving of Israel as a Jewish and democratic state, adding up synergistically to the thriving of the Jewish People as a whole. Jewish leadership positions in Israel and in other Jewish communities do not attract the best and brightest - with some important exceptions. Efforts to attract and prepare the best and brightest for leadership roles are inadequate and, despite some beginnings, including on the Jewish civic society level, the entry of younger persons into leadership positions is very slow. Also very pronounced is the lack of spiritual leaders accepted as such by major parts of the Jewish People.

Another disturbing feature is inappropriate linkages between money and leadership as well as other misuses of power by leaders. These find an extreme and in part criminal expression in legal proceedings against some top-level politicians in Israel, as well as in some plutocratic tendencies in leadership selection within Jewish communities, including the US. No less disturbing are obsolete institutional arrangements making

and preventing even outstanding leaders from making critical choices and innovating future-shaping policies. These structures are making it even harder for the best leaders to cope well with difficult and controversial issues, resulting in much dithering when determined choice is essential. The appointment processes of leaders of main Jewish organizations do not necessarily bring forward the best, while preventing even very good leaders from doing what is necessary. There is also a concern that as the Jewish community ages and the older generation enjoys better health and longevity, older leaders crowd out leadership opportunities for younger people. The ideals, values and commitments of the older generation may inhibit the ability of the organized community to react to the changing environment as expressed by younger people. The concentration of financial assets in the hands of the older leadership may lead to a less dynamic response to the challenges facing the Jewish People.

Possible Changes in Trend Projections

In light of global problems with leadership, no change in trend projection is envisaged unless intense efforts are made to improve Jewish People leadership, and salient institutional reforms are successfully undertaken.

Evaluation of Future Projections

The quality of the Jewish People's spiritual, political and professional leadership is one of the few unambiguous elements of this project. Better leadership is clearly beneficial to the thriving of the Jewish People, and its absence puts the Jewish People in danger of decline.

External Environment

Background

The list of external developments likely to impact the long-term future of the Jewish People is infinite, mostly unknowable and even unthinkable. But given the 2030 time horizon, a number of key drivers that are likely to be relevant to the external conditions under which the Jewish People is likely to live in the future can be identified, subject to surprise trend shifts. In analyzing the external environment the emphasis is placed on drivers and trends that are likely to have a more direct impact on the future of the Jewish People.

External Environment:

Geopolitics - includes:

- Global Main Actors and Distribution of Power
- Proliferation of Weapons of Mass Destruction
- Terrorism
- Energy
- The Israeli-Palestinian Conflict and the Middle East

Global (and especially Western) Society - includes:

- Globalization
- Global Demography
- Global Economy
- Global Cultures
- Religion
- Global Governance
- Anti-Semitism
- Science, Technology, Cyberspace, Natural and Health Disasters

Overall Trends

At the core of the current epoch-mutation are the quantum leaps in the power of humanity to shape its future by deliberate action and non-action. However, the ethical, cognitive and institutional capacities of humanity are increasing only incrementally at best, resulting in a rapidly growing abyss between the degree to which humanity could impact its future and the quality of those impacts. The shifts in technology and power are likely to continue to be accompanied by the basic features of human behavior in matters of security, such as radical disagreements, hostility and envy, widespread readiness to use violence and large disparities in thinking sophistication. 19th century expectations that technological and scientific progress would inevitably lead to a more peaceful world were shattered in the 20th century. Increasing scientific and technological knowledge, longer life expectancy and higher standards of living are in no way directly determined to bring about consensual global tranquility in the foreseeable future, as distinct from the very long-term future.

Geopolitics

Global Main Actors and Distribution of Power: The global power map will continue to shift towards a global multi-polar and multi-level system. The United States will likely continue to be the most powerful state for at least the first part of the 21st century but its relative power will diminish. The US will find itself as one of a number of actors among a few important ones. Additional poles of power will include China - which is likely to achieve near superpower status, India, the European Union and Russia, with some Islamic states likely to play an increasingly important role, partly equipped with nuclear weapons and perhaps engaging in their proliferation. Russia is likely to continue asserting its international standing--sometimes even with aggression. Increasingly important actors in geopolitical affairs are likely to be non-state actors, spanning the gamut from global movements and NGO's, to diasporas and religious organizations, to terrorist and criminal networks. The world will appear to be a much messier place with numerous actors vying for power, and traditional nation-states only one type of actor among them. Disputes over resources - water, energy and food - as well as over new water-ways created by melting ice-caps, could create new sources of global rivalries, tensions and conflicts.

Proliferation of Weapons of Mass Destruction and Terrorism: A radically new development of this age is the growing ability of fewer and fewer persons to kill more and more human beings with increasing ease, including the specter of doomsday devices in the hands of suicidal/homicidal fanatics. Related is the approaching turning point in nuclear proliferation and, in the foreseeable future, diffusion of other weapons of mass destruction (WMD). Either - and this option seems more likely - nuclear proliferation will take place in Iran followed by other countries that feel endangered, or a strict non-proliferation regime will be imposed. Episodes of low-intensity conflict and terrorism taking place under a nuclear umbrella could lead to unintended escalation and broader conflict. New forms of aggression, such as information attacks, many of them with potentially paralyzing effects and a global reach, are possible, including attacks 'out of the blue' that leave no trace of their perpetrators.

Energy: Energy will continue to be a major driving force in the distribution of power with high oil prices supporting autocratic regimes with aggressive policies, and lower oil prices potentially contributing to a weakening of these regimes. Oil reserves will continue to concentrate in the Middle East, as most other oil producing countries approach capacity. Only six countries - Saudi Arabia, Iran, Kuwait, the UAE, Iraq and Russia will account for nearly half of world oil production in 2030. Investments in

renewable and alternative energies will become increasingly a matter of geopolitics as the West makes a more concerted effort to reduce its dependence on Middle East oil. The world will experience an energy transition away from oil and gas - supported by improved efficiency, clean coal and renewable energy, but it is unclear how far this transition could progress within the 2030 timeframe. A technological breakthrough providing alternative energy might be made by 2030 but implementation of a major shift will lag behind. A shift away from oil will have a destabilizing effect mostly on Saudi Arabia, Iran and perhaps Russia and Venezuela. The transition - to the extent that it uses major resources such as land and water and is based on bio-fuels might also yield competing and conflicting demands between energy and food security.

The Israeli-Palestinian Conflict and the Middle East: The conflict between Israel and the Palestinians, as well as the Arab world at large is the key geopolitical issue where the Jewish People, through the State and Government of Israel, has the possibility to directly influence outcomes. While it is sheer exaggeration to argue that a resolution of the Israel-Palestinian conflict would alter the global geopolitical environment, it would take a key element that contributes to heightened global tensions - even if only through its abuse - off the table. However, while the Israeli leadership has an important role to play in steering the conflict closer to either resolution or deterioration, one should not overplay that role. Just as it has in the past, the conflict between Israel and the Palestinians will continue to take on the flavor of the global geopolitical environment, and the realm of possibilities open to the Israeli and Palestinian leadership will be determined by broader global trends. A more peaceful external environment, and one in which global radical forces are at bay - as it was in the 1990's - is likely to create opportunities for resolving the conflict, while a more radicalized environment - characteristic of the first decade of the 21st century - is likely to render resolution of the conflict more difficult, if not impossible.

The question of the democratization of Iraq could have far-reaching consequences for the region, opening the possibility of a wave of democratization in the Middle East - that could lead to substantial instability in the 2030 timeframe with beneficial effects in a longer timeframe. The future of most Middle Eastern countries will depend on their ability to handle the combination of demographic and political pressures. Wisely managed economic growth could lead to a productive path for the region's new population bulge of working age citizens and a moderation of radical forces. Alternatively, leaders could continue to resist pressure for change with regimes becoming more repressive and non-working populations becoming more restive.

Globalization: The question of the irreversibility of globalization is likely to be the most important question determining the face of global society, economics and geopolitics in the future. Should globalization continue, it is likely to force greater global cooperation as the mismatch between global markets and national decision-making structures becomes more apparent and less tenable. The face of globalization will continue to become less Westernized with pressure on international arrangements and institutions reflecting this shift. While a global crisis could lead to the reversal of globalization, the implications of such a development could be catastrophic, on a scale no less than the two world wars that followed the breakdown of the first wave of globalization.

Global Demography: The world is projected to include an additional 1.5 billion people by 2030, almost none of whom will be Westerners. Populations in the West, especially in the EU and Japan will continue to age rapidly as life expectancies continue to rise and fertility levels remain low. Some non-Western countries such as Russia and China are expected to experience this trend as well, with Russian and Japanese populations even shrinking. In the meantime, the former third world and the Muslim world in particular, will continue to experience rapid population growth. These trends are already leading to large-scale migration of non-Westerners to the West, changing the demography of Europe and North America. First, second and third generation immigrants are changing the face of politics in Europe and the North America with opposing effects towards some integration, but also greater extremism and xenophobia. Improved health services, and greater investment in the education of females are expected to increase levels of productivity even in traditional societies in which the number of countries with youthful populations, especially in the Middle East, is expected to decrease. By 2030, the number of 15-29 year olds is expected to drop below 40% in almost all Middle-Eastern countries. However, the populations of several countries with substantial 'youth bulges' such as Afghanistan, Congo, Nigeria, Pakistan and Yemen, will continue to increase rapidly, contributing to discontent and unrest.

Global Economy: The transfer of global wealth and economic power from West to East is likely to continue. There will be a large convergence of economic growth in Asia, Central and East European countries towards the economic wealth (GDP per-capita) and social structures of the US and Europe. The Muslim world, Africa and South America will lag behind, with some potential exceptions. Among the exceptions one can see a few North African Muslim countries like Algeria and Morocco, as well as

Turkey, Chile, Brazil and Indonesia as potentially growing nations that may also adopt Western social structures. The US will continue to be a leading nation economically, working together with the European Union on integrated global economic structures based on free trade, common economic structures and social values. One can expect greater economic coordination between the US, the EU, Canada, Australia, Japan, Russia, China and India. The EU will expand with many more Central and East European countries joining the EU and related frameworks.

This process is leading to an unprecedented lifting out of poverty of millions of people and the emergence of a new and massive middle class in the East, mostly in China and India. The rise of a new global middle class is happening just as the extremes between the poorest individuals and nations and the wealthiest individuals and nations continue to diverge ever further.

The global economic crisis is pulling the world in two opposing directions that could determine the future contours of the global economy. Should the crisis lead to a thorough restructuring of global economic governance structures, reducing the mismatch between global markets and national regulators, the global economy could emerge from the crisis strengthened, more efficient and even better able to unlock the growth opportunities of globalization. Should governments yield to the temptation of protectionism, the world might experience economic depression, and would require decades to renew its growth. In a less extreme form, the world might experience a protracted period in which more and more of the world's wealth and key financial systems come under some form of state control and ownership.

Global Cultures: The process of global cultural integration is likely to continue, even if through phases of progress and backlash. The continued decline in the costs of travel and communications are likely to continue to connect more of the world's population to each other and expose more of the world's people to different cultures. However, this exposure might contribute both to greater integration and to greater radicalization, as responses to direct and immediate contact with the other is shown to produce contradictory effects. The global elite is likely to expand, with the growth of the middle class in China and India having a potentially revolutionary impact on global cultures. The question of universal values versus particularism of cultures and traditions is likely to command the attention of all societies with a possible bifurcation between radical fundamentalism and universal modernization. The increasing complexity of the international system is likely to lead to a proliferation

of political identities and group loyalties, with national identity being only one of several. Feminism is likely to continue to be the most radical force for cultural change around the world, making particular headway in more traditional societies that have escaped or resisted its impact in the past.

Religion: Religion-based identities and networks are likely to increase in relevance and power as other structures and identities recede. Islam will continue to be a potent force in global affairs with intra-civilizational developments such as ethnic splits and conflicts between tradition and modernity increasingly played out globally. Radical Islam is likely to become more global and more sophisticated with aggressive propensities and capacities, but countertrends in Islam are also likely as moderate forces acquire greater confidence. Women are likely to play a critical role in determining the future path of Islam. Christianity is likely to have an increasingly southern hemisphere face with Protestants such as evangelicals, Pentecostals and fundamentalists gaining in power. Global turbulence is likely to increase the power of religion, as people crave certainty in an uncertain world. However, greater fundamentalism in religion could also result in a strong backlash towards more militant atheism.

Global Governance: The growing mismatch between the global nature of the challenges and opportunities in economics, environment and security will place greater strain on the governance structures designed for a post WWII world. Global governance bodies and arrangements will increase in importance, with new frameworks likely to emerge beyond that of the United Nations in an effort to respond effectively and rapidly to emerging threats and opportunities. The existing frameworks are likely to undergo substantial restructuring - especially towards greater inclusiveness - if they are to remain centrally relevant. A proliferation of various frameworks and systems for global, regional and issue-based cooperation is likely with an emerging world of overlapping and rival networks of cooperation. New technologies also support a greater possibility of transnational networks of civic cooperation with the possible emergence of a new type of global 'public opinion' states, which are likely to continue to be dominant actors in international affairs, will seek to strike a new balance between national political pressures and incentive mechanisms along with global pressure for cooperation.

Anti-Semitism will continue to be a potent ideological tool for societies in distress searching for a ready, easy and proven method of rallying and distracting public opinion. Anti-Semitism, especially in the guise of blanket ideological opposition

to Israel, will continue to serve the needs of leaders in the Arab and Muslim world seeking to deflect the attention mostly of restless youth. It is likely to continue to be useful to Muslims in Europe expressing frustration, delusion and hate, as well as a cause célèbre of the new left, stripped of its old ideological base. De-legitimatization of Israel under the guise of post-nationalist ideologies is likely to persist. The economic crisis, especially as it centers on the dubious actions and fraud schemes of New York bankers, might lead to the spread of traditional forms of anti-Semitism in the West and perhaps even globally in all injured economies.

Science, Technology and Cyberspace, Natural and Health Disasters: Science and technology are increasingly the drivers of the future and the main long-term source of intellectual, economic and military power. It is more likely that during the next thirty years, science based technologies will keep expanding throughout the world economy, with China and India gaining ground in developing scientific and human capital and encouraging innovation. The scientific push generated by new discoveries will be enormous, and demand will not slacken either, particularly in the defense and human healthcare markets. Concerned scientists argue that in the next one or two generations, science will begin to affect our mentality and beliefs more deeply than before. The life sciences will open possibilities and raise deep questions about the nature of humanity, the right to shape our own lives and that of our children, the nature of love, family, and human autonomy.

Potential transformative technologies likely to develop and expand by 2030 include ubiquitous computing, which enables networking of an increasing range of products and devices, clean water technologies that enable increased availability of and access to fresh water, a wide variety of energy related technologies from storage to clean coal and bio-fuels, technologies that increase life expectancy as well as improve the quality of life in old age, human augmentation technologies that improve the physical and mental capacities of humans with potential military applications, and advances in and expansion of service robotics, which could also change the face of future battlefields. The information revolution will continue to work its way through global society expanding its reach and deepening its penetration into human life.

Climate change might become a greater force in geopolitics, contributing to an increase in the frequency and scale of natural disasters and perhaps even creating or exacerbating food and water scarcities. The melting of the ice caps might renew 19th-century-style colonial conflicts between major powers over newly available waterways and water rights.

The emergence of a novel, highly infectious, and virulent human respiratory illness for which there is no adequate countermeasure could initiate a global pandemic. If a pandemic disease emerges by 2030, internal and cross-border tension and conflict may become more likely as nations struggle - with degraded capabilities - to control the movement of populations seeking to avoid infection or maintain access to resources.

Possible Changes in Trend Projections: Several alternative futures with respect to the external environment have been offered in recent years:

The historian Niall Ferguson argues that the chief lesson of the 20th century is that countries can provide their citizens with wealth, longevity, literacy, and even democracy and still descend into lethal conflict. He points out three factors that explain the timing and the location of the extreme violence of the 20th century: ethnic disintegration, economic volatility, and empires in decline. Analyzing the two world wars and other conflicts in this context, he argues that today, the Middle East displays in abundance all the characteristics of the worst conflict zones of the 20th century. First, economic volatility has remained pronounced there even as it has diminished in the rest of the world. Second, the American empire (albeit one that dares not speak its name) is losing its grip over the region, and third and worst of all, ethnic disintegration is already well under way. His conclusion is that a new “war of the world” may already be brewing in a region that has yet to sate its appetite for violence. He points out that as in previous world wars - where the Balkans and Central Europe played this role - ramifications of such a Middle Eastern conflagration would be global. Economically, the world would have to contend with oil at above \$350 a barrel. Politically, countries in West Europe with substantial Muslim populations might also find themselves affected as sectarian tensions radiate outward. He concludes that although such an outcome may seem to be a low probability, nightmare scenario, it is already more likely than the scenario of enduring peace in the region. (*The War of the World: Twentieth-Century Conflict and the Descent of the West*, Penguin Press 2006).

In a similar vein, with even a greater sweep of history, historian Bernard Lewis argues that we may be entering the era of the third counterattack of Islam against Christianity, a counterattack that is based on demographic spread and terrorism. Lewis argues that Christianity and Islam are the only religions to claim not only that they hold the universal truth, but which also have an exclusive view, under which it is the duty of the believers to bring the truth “to the rest of humanity, removing whatever obstacles there may be on the way.” In this “cosmic struggle for world

domination between the two faiths," Lewis identifies in the past two millennia five eras of three Christian attacks/spreads and two Islamic counterattacks/spreads, with the third one in its early stages. The first era includes the spread of Christianity from the 1st to the 7th century CE. The first Islamic counterattack swept through the Middle East and parts of Europe from the 7th century to the 11th century CE bringing the Muslims to Spain, Portugal, southern Italy and parts of France. The Christian world responded in a series of counterattacks from the 11th to the 15th century, including most famously the Crusades and the reconquests, achieving partial success. The Islamic world, under the leadership of the Turks, launched a second counterattack in the 15th through 17th centuries, reaching the gates of Vienna. This time, the Christian world was more successful in its counterattack, inaugurating the imperial and colonial period up to the present era. Lewis argues that, "the era that was inaugurated by Napoleon and Nelson was terminated by Reagan and Gorbachev," and he asks, "is the third time lucky for the Islamic world?" and says that "it is not impossible, not least because much of the Christian world has lost its fervor for this cosmic struggle, while it is still very much alive in the Islamic world." (Published Lecture by Bernard Lewis titled "Europe and Islam" at the American Enterprise Institute, March 2007).

Paul Kennedy (LA Times, February 18, 2007) counters the current nostalgia for the so-called stability of the Cold War that is implicit in such apocalyptic accounts. He argues that however tricky America's relations with Putin's Russia and President Hu Jintao's China are nowadays, the prospect of its entering a massive and mutually cataclysmic conflict with either nation are vastly reduced. He reminds readers that the Cold War was a really scary time, and much more dangerous than present circumstance because the potential damage that could be inflicted during an East-West confrontation was far, far greater than anything that Al Qaeda can do now. He reviews the years from 1945 to 1990 and demonstrates that these were horrible years in that they included China's Mao Tse-Tung's *Great Leap Forward* leading to as many as 30 million deaths, the greatest loss of life since the Black Death; the incarceration of tens of thousands of the Soviet Union's and the Warsaw Pact's citizens in the gulags, the Indo-Pakistan wars, and the repeated conflicts between Israel and its neighbors, as well as the millions slaughtered in Angola, Nigeria, the Congo, Vietnam and Cambodia. He points out that at the time most of the nations of the world were "un-free" and that such "delightful" countries as Greece, Spain, Portugal, Chile, Brazil, South Africa, Poland and Czechoslovakia were run in those days by fascist generals, avowed racists or one-party totalitarian regimes. Kennedy summarized that humankind, as a whole, is a lot more

prosperous, a great deal more free and democratic, and a considerable way further from nuclear obliteration than during the Cold War.

The National Intelligence Council report on 2025 argues that “the international system - as constructed following the Second World War - will be almost unrecognizable by 2025 owing to the rise of emerging powers, a globalizing economy, an historic transfer of relative wealth and economic power from West to East, and the growing influence of non-state actors. By 2025, the international system will be a global multi-polar one with gaps in national power continuing to narrow between developed and developing countries. Concurrent with the shift in power among nation-states, the relative power of various non-state actors - including businesses, tribes, religious organizations, and criminal networks - is increasing. The players are changing, but so too are the scope and breadth of transnational issues important for continued global prosperity. Aging populations in the developed world; growing energy, food, and water constraints; and worries about climate change will limit and diminish what will still be an historically unprecedented age of prosperity. The next 20 years of transition to a new system are fraught with risks. Strategic rivalries are most likely to revolve around trade, investments, and technological innovation and acquisition, but we cannot rule out a 19th century-like scenario of arms races, territorial expansion, and military rivalries.” (National Intelligence Council, 2025 Global Trends Report, 2008)

Speaking of a story with ‘no clear outcome,’ the 2008 report offers four alternative futures for 2025:

- In *A World Without the West*, the new powers supplant the West as leaders on the world stage.
- *October Surprise* illustrates the impact of inattention to global climate change as unexpected major impacts narrow the world’s range of options.
- In *BRICs’ (Brazil, Russia, India, China) Bust-Up*, disputes over vital resources emerge as a source of conflict between major powers—in this case two emerging heavyweights—India and China.
- In *Politics is Not Always Local*, non-state networks emerge to set the international agenda on the environment, eclipsing governments.

Evaluation of Future Projections (in the Jewish People Context)

External trends often lead to mixed situations. A rise in dependency on Middle Eastern oil is likely to trigger greater investment in alternative energy. The threat of exponential proliferation of weapons of mass killing might accelerate the consolidation of effective collective action mechanisms by forces of stability and freedom. The increasing virulence of Muslim anti-Semitism might be counteracted by a greater commitment in the US and Europe to stamping out anti-Semitism and preserving the memory of the Holocaust. The direction towards more global governance might help Israel and the Jewish People if it takes a more constitutional, value-based form, but could be quite detrimental if it is based on simple majoritarian principles. It is therefore nearly impossible to determine whether these trends will yield an environment more or less favorable to Jews and Jewish communal expression. Just as modernity and nationalism provided Jews with some of their greatest opportunities, it also culminated in their greatest destruction and later in their renewed rebuilding. In a similar manner globalization and the expansion of knowledge based economies is bringing the Jewish People unprecedented freedom, wealth, mobility and power, while also intensifying and spreading ideas of hate by technological means that threaten their existence.

Geopolitics:

The rise of Asian states, particularly China and India, may be very significant from a Jewish perspective since Asian countries do not share the Biblical religions and traditions, and therefore, have a radically different view of Judaism and the Jewish People than Christian and Islamic countries. Also, they do not have significant Jewish communities. This provides unprecedented opportunities for a Jewish global grand-strategy, as proposed in a JPPPI paper on upgrading relations between the Jewish People and China.

If technological breakthroughs fail and energy becomes increasingly scarce and more costly, there will be increased dependence on Middle Eastern oil and competition for other energy sources, such as natural gas. Crises in the global economy may result, but more ominous scenarios must also be taken into consideration, especially if main oil-supplying countries in the Middle East destabilize. This has overall implications for the economic situation of the Jewish People and for the security of Israel.

Evaluating geopolitical trends with respect to Israel yields several assessments. Israel is culturally, politically and security-wise a frontier zone. Not only is it located in the

Arab Middle East while being culturally part of the West, but also its security depends on Western and especially US support. Also, the vast majority of Jewish Diaspora communities, for which Israel serves as the core state, are situated in the West. At the same time, Israel's ability to thrive in the long term and perhaps also its very survival, depend on reaching a *modus vivendi* with Islam and Islamic actors. Achieving a viable long-term relationship with Islam and Islamic actors is a very difficult endeavor, all the more so as the latter will remain divided and unstable in the foreseeable future. In Islam, Jews are traditionally regarded as inferior, so Israel's successes are hard to accept. Israel's territory as a whole is regarded as part of the 'Land of Islam' and Israeli control over holy Muslim sites in Jerusalem is anathema to Islam. Israel is seen as being closely associated with the US and the West as a whole, and thus a target for anti-Western feelings and actions, which are likely to continue and may very well escalate.

A settlement of the conflict with the Palestinians would ease this problem but not eliminate it, while further 'Islamization' of the conflict may have grave consequences. However, the Israeli confrontation with Islam has much deeper roots than the Palestinian issue and is quite likely to persist, in changing forms and intensities, for at least most of the 21st century. Related to this is the inherent instability of Arab and also other Islamic countries. Various mixtures of Islamic orthodoxy and modernity are to be expected, accompanied by both deep cleavages in the world of Islam and waves of intense anti-Western and anti-Israel sentiment and policies. The implications for Israel are grave. A peace treaty is in itself desirable, however, given the geopolitical situation in the Middle East, it cannot be seen as guarantee of a long-term stable peace. At the same time, instability may provide Israel with opportunities to improve its strategic position, such as building alliances with Arab states that need Israeli support, or helping the West to maintain access to critical oil resources. Possible changes in Western policies add to the challenges. Thus, US involvement in the Middle East and overall support of Israel may diminish, together with changes in America's global standing. Despite basically positive attitudes towards the Jewish People including Israel, China and India may adopt anti-Israel postures because of their dependence on Middle Eastern oil.

Such instabilities are all the more critical to Israel because of its vulnerabilities. However strong militarily, Israel is a small country and most of its population is concentrated in parts of the coastal area. It has a large minority that may in part become actively anti-Israel. And its economic base, however successful, is limited. Support from the Jewish People worldwide improves its political-security situation, but if Western backing

should diminish while Arab countries modernize technologically, weapons of mass destruction proliferate and global terror groups upgrade their capabilities while focusing on Israel, then the very existence of Israel may be endangered. All these, and additional fundamental political-security challenges, take on a radically novel form because of the increase of fanatical non-state actors combined in various loose global networks, together with the proliferation of weapons of mass destruction, including nuclear and, in the foreseeable future, biological ones. As a result, Israel may face fanatical states and non-state actors willing and capable of causing the country grievous harm and possibly jeopardizing its viability. Even if the probability of catastrophic attacks is low, the very possibility poses the single most important existential political-security challenge to Israel. While it is true that the Jewish People has never been as powerful as it is now, taking into consideration both Israel's hard power and the political, economic and cultural influence of the American Jewish community, in comparison to the multitude and scale of dangers, threats and challenges, there is no place for complacency.

Global Society:

Global cultures are of profound importance for the Jewish People. If the world becomes culturally increasingly "flat," to use Tom Friedman's problematic term, or new cultural values emerge, then Jewish identity will be subjected to increasing competition, resulting in growing assimilation in the Diaspora and greater "normalcy" of Israel. However, if there is movement towards post-post modernity, Judaism will be strengthened and assimilation will decrease. In any case, Jewish creativity has significant chances to impact global culture, if it reaches peak quality.

Becoming a much smaller part of the global population with diminishing Western populations, raises serious issues concerning long-term viability and significance, for example if belonging to the Jewish People is regarded by an increasing number of Jews as not really significant. The situation of Jewish communities is closely tied to that of their countries, with all forms of political destabilization and radical change posing dangers. A number of possible futures of domestic politics can also diminish support for Israel and increase pressures on it. Anti-Semitism may also increase as a result of changes of direction in domestic politics.

In principle, a stronger global regime preventing wars and containing terror meets the moral standards of Judaism and realpolitical needs of the Jewish People, but if biased by an anti-Israel majority, strengthening of the United Nations may pose serious problems because of enforcement possibilities of measures that harm Israel's security and its nature as a Jewish state.

Science and Technology:

Science and technology play essential roles in Jewish thriving and perhaps even survival, even as they increase the possible threats and challenges to the Jewish People. Science and technology are effective tools of both hard and soft power. It includes the prestige attached to great intellectual achievements and thus, the ability to influence the long-term course of history. Many Jews want Judaism and Israel to be seen as contributors to Tikkun Olam - the repair and betterment of the world. The international standing that Jews may achieve through their contributions to science and technology can help them in many endeavors beyond science, including political ones, and thus can have a positive impact on future Jewish history. With regard to hard and economic power, the Jewish People might find it difficult to thrive, and in the case of Israel - survive, if the Jews lose their edge in science and technology. If the interest of Jews in science and technology does not decline further, and if the financial opportunities of the hi-tech sector remain attractive, there is no reason to assume that the future role played by Jews in these sectors will be smaller than their current role. The knowledge-based economy will continue to provide Jews with major opportunities for professional advancement and wealth creation.

Cyberspace:

New information and telecommunication technologies have in the last 30 years invaded every sector of the economy and society. This is the greatest revolution in communication since the invention of modern printing by the German Johannes Gutenberg in 1455. The information revolution is continuing unabated and will bring enormous and still unpredictable transformations to our lives. For many Jews, information technologies have become indispensable in conducting their personal lives and performing their professional and social functions. These technologies are widely believed to have enhanced communication within and between Jewish organizations and branches of the Jewish People (e.g. between Israel and the Diaspora). They allow friends, families and business associates to stay in contact across continents on a daily basis, which was unthinkable before. They have also stimulated the creation of a great number of new organizations (a Google search yields more than 500,000 "Jewish organizations" across the world). Cyberspace has radically changed the meaning of distance and the pursuit of knowledge by introducing remote search and remote learning. If the pursuit of knowledge is considered to be a Jewish characteristic, there is another one that is even more Jewish: individualism. There is no doubt that the computer enhances and rewards individualism, both in personal and professional

life, as no other technology has. It allows many - whose numbers are constantly on the increase - to work and communicate in the time and place of his or her own choosing. At the same time, the computer can also enhance social cohesion. In fact, cyberspace has the potential to address the most obvious disadvantage of the Jews in the modern world: their small numbers and lack of critical mass. Cyberspace could help many isolated Jews and small or remote communities connect with, and become part of the wider Jewish world. Cyberspace creates the possibility of instantaneous communication and quick joint action among dispersed components of the Jewish People. To anticipate long-term developments in information technology and their impact on Jews is even more difficult than speculating about demographic, geopolitical, military or economic mega-trends. For one, they are ubiquitous and keep transforming every human activity. Second, they advance so fast and in so many directions that it is impossible to foresee how cyberspace will look in twenty years, and third, we know much too little even about the current Jewish use of cyberspace. It is difficult to assess whether cyberspace is stimulating more unity or disunity among Jews, as compared to in the past or to non-Jews, and whether cyberspace has multiplied substantial communication and effective interaction between Israeli and Diaspora Jews than was possible half a century ago when contact was based on travel, written letters and phone calls. That the quantity of communication has increased by several orders of magnitude is obvious. The **qualitative** effect is not. Three caveats are necessary:

- (1) Jews will maintain a competitive advantage in the acquisition and transfer of information in the next 30 years only if their education and know-how is more advanced than that of others and if they keep improving all the time. Currently, Jews are still far from using the full potential of cyberspace.
- (2) In principle, the invention of new technologies will not by itself facilitate more cohesion among Jews or closer links between Israel and the Diaspora if Jews don't want them. If the will exists, cyberspace will show the way. A dynamic relationship between cyberspace potential and the will to interact is conceivable - probably they do stimulate each other to some extent, but again, we do not know enough about this relationship.
- (3) Future IT breakthroughs could make a radical difference for Jews who need or want to use cyberspace. For example, if computers could effectively translate from one language to another, a big obstacle to computer communication between Jews of different countries would disappear. Some Jews, e.g. those of France, Russia and the US, do not easily communicate in other than their national languages.

Section 4: Morphological Analysis, Alternative Futures

Morphological analysis provides a relatively simple tool to review thousands of possible alternative futures in compact form. It operates with the help of a matrix in which the rows reflect the dimensions and the columns reflect a range of possible states in each dimension. Each alternative future is created by charting a path from top to bottom. The number of alternative futures is a combinatorial formula based on the number of chosen dimensions and possible states in each dimension. The benefit of this analysis compared with the construction of a small number of alternative futures is that it enables exploration of a wide range of combinations. It leaves the combinations open so that revisions can easily be made in light of ongoing developments.

Following are two morphological matrices. The first is pared down, basic and allows for broad analysis at a glance. The second is highly detailed and includes a wider range of ideas and possibilities emerging during the project and/or listed in salient literature. In both matrices the columns for each dimension include a neutral possibility (typically, same as now), a negative one, a positive one, and two “wild card” possibilities of highly negative or highly positive potential states, included mostly to provoke thinking and push the envelope so as to minimize the possibility of “failures of imagination.”

Compact Morphological Analysis*

| Dimension | Neutral | Negative | Positive | (+) Wild | (-) Wild |
|---------------------------|--------------------------------|----------------------------------|---------------------------------|---|-----------------------------|
| Demography: numbers | 14 Million | 12 Million | 15 Million | 20 Million | 6 Million |
| Demography: composition | 50% in Israel | 80% in Israel | 2/3 in Israel | New centers | Israel's destruction |
| Identity | Mixed | Weak | Strong | New attractive idea | Massive rejection |
| Hard and Soft Power | Same as now | Decline in power | Increase in power | A new Jewish century | Nuclear war |
| Israel-Diaspora | Same as now | Drifting apart | Strong, deep, equal | New governing idea | Hostility and rejection |
| Jewish Economics | Slight improvement | Economic stagnation | Israeli high growth | Israeli jump along the lines of East-Asian markets | Global economic crisis |
| Science and Technology | Same as now | Decline in achievement | Major breakthroughs | | |
| Leadership | Some good leaders but not all | Mediocre leadership | Innovative leadership | A new charismatic figure emerges combining political ability with a strong Jewish spiritual basis | |
| Global Main Actors | Rising Asia, no instability | Rising radical Islam | Strong America | Sustained world peace | Global security breakdown |
| Proliferation of WMD | | To terrorist groups | Under control | Roll back of proliferation | Global nuclear war |
| Terrorism | Occasional, not transforming | Increasing impact | Minor nuisance | Eliminated | Global disruption |
| Energy | Oil a factor, not overwhelming | Oil supports terrorism | Oil less important | Oil out of equation | Petro-power |
| Palestinians and the ME | Manageable conflict | Escalating conflict | Peaceful relations | Israel/Pal towards EU | Mutual destruction |
| Global Demography | Ethnic enclaves | Islam changes Europe | Immigrant integration | Demographic reversal | Global ethnic conflagration |
| Global Economy | Mixed trends | Volatility and inequality | Rising wealth; equality | Eradication of poverty | Global economic breakdown |
| Global Cultures | Western-Asian confluence | Cultural tensions | Cultural exchange | New sect of peace | Global cultural clashes |
| Religion | Mixed trends | Deepens conflicts | Personal, not geopolitical | Source of peace | Global clash of religions |
| Global Governance | Strong states; global networks | Unstable, majoritarian | Stable, protects minorities | Peaceful world order | Breakdown of world order |
| Anti-Semitism | Mixed trends | Hostility to Jews and Israel | Fringe phenomena | Philo-Semitism | Jews and Israel pariahs |
| Cyberspace | | Instrument of hate and terrorism | Instrument of cultural exchange | | |
| Natural/ Health Disasters | Manageable | Disrupt Jewish centers | Minor, under control | | |

*Expanded analysis and additional examples are provided in the Appendix

Alternative Futures - Introduction

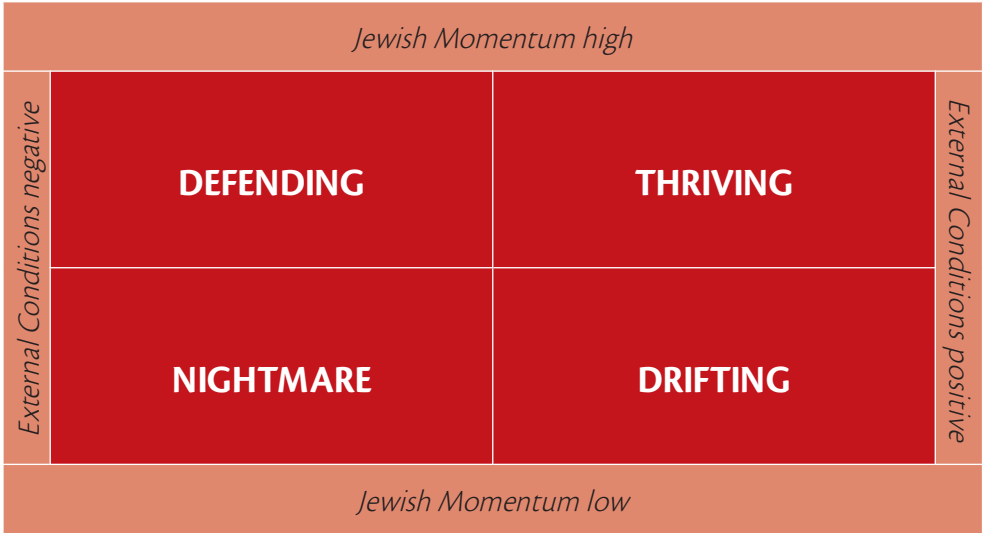
Following is a presentation of four possible alternative prototypes of “pure” futures. The futures were created based on the intersection of two axes: the first, which includes the internal Jewish dimension, and the second, which includes the external conditions. The alternative futures are described later in greater detail.

The first axis is constructed on the basis of the notion of Jewish Momentum, which was presented earlier. The second axis is designed according to the well-worn notion of “good for the Jews or bad for the Jews.” Positive external conditions mean that Jews are able to survive and thrive both as individuals and as an open community in the world, whereas negative conditions mean that Jews are in danger as individuals and as a community. The four alternative futures that emerge from the intersection of these two axes are:

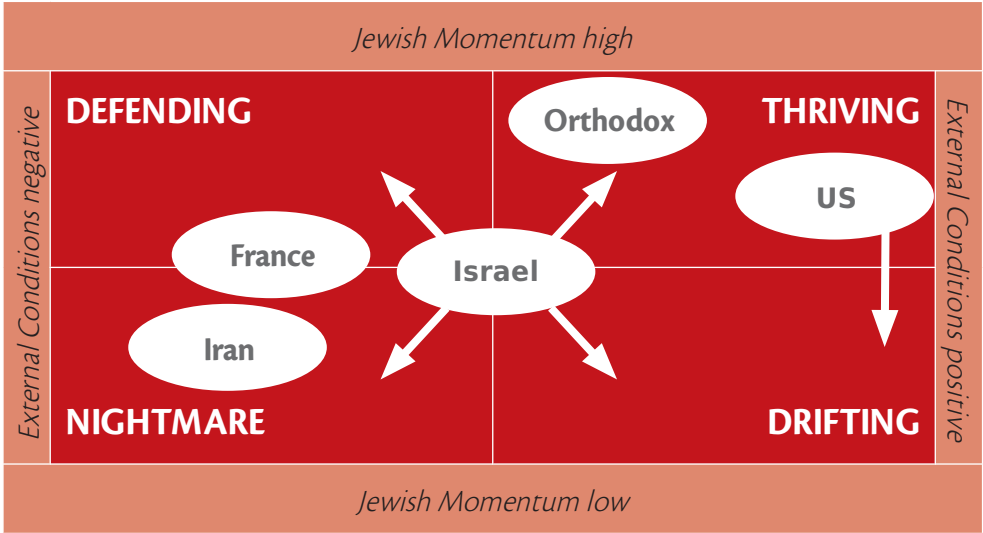
- Jewish Momentum - high; External Conditions - positive: This is the ideal desired future - designated *Thriving*
- Jewish Momentum - low; External Conditions - positive: From a value perspective this is a controversial future - designated *Drifting*
- Jewish Momentum - high; External Conditions - negative: From a value perspective this is a controversial future - designated *Defending*
- Jewish Momentum - low; External Conditions - negative: This is clearly a non-desired future - designated *Nightmare*

These types of futures are also - in many ways - the “pasts” of the Jewish People, with Jewish history being essentially a narrative moving through these four phases with periods of *Thriving*, *Drifting*, *Defending* and *Nightmare*. The history of the Jewish People has also demonstrated that the transition from one phase to another can sometimes be very rapid with the Jewish People moving from Thriving to Nightmare in the space of a few years or vice versa. These futures may also be applied to sub-groups within the Jewish People, such as the American Jewish community, or the Orthodox one and examples for using the matrix for communities are presented. The communities-matrix is presented for demonstration purposes, but this project will not focus on specific communities.

THE JEWISH PEOPLE: FOUR ALTERNATIVE FUTURES



FOUR ALTERNATIVE FUTURES: COMMUNITIES



DESCRIPTIONS of ALTERNATIVE FUTURES

Each of the four alternative futures presented in the two-by-two chart above is described in greater detail as follows. The details are intended to provide a stimulus for imagination by giving a sense of what such a future might look like. In addition to the descriptions, each alternative future includes examples of certain policies, decisions and external developments that might lead from the present to the alternative future described.

Alternative Future I: *Thriving*

Jewish Demography:

- 14 Million Jews; 60% live in Israel and form a 90% majority there; significant decrease in out-marriage; increase in identification; children of out-marriages choose to identify Jewishly.

Jewish Identity:

- Jewish creativity in culture, religion and faith provides new and relevant meanings to being Jewish; Jews are particularly active in Tikkun Olam efforts and make new contributions to humanity.

Jewish Hard and Soft Power:

- There is real progress towards a new world order, including an overall Middle East peace agreement supported by the majority of Arab and Islamic states and the major powers as well as the UN. Iran's nuclear plans are abandoned. Israel maintains overall military superiority, but there are no major security threats.
- Anti-Semitism and anti-Israelism are on the decline. The overall standing of the Jewish People - its soft power - increases.

Israel-Diaspora:

- Israel is a Jewish state, whose Jewishness is manifested in various ways, both public and individual; Israel's security position is stable; Israeli society is economically and qualitatively attractive to Jews; Jewish creativity blossoms in Israel and in Diaspora.
- Cultural and economic growth of large communities; Jewish children, even in out-marriages receive Jewish education; many learn and speak Hebrew.
- The Jewish People enjoys unity with diversity with expanded ability for collective activity; Israel and the Diaspora more closely woven through networks and the Internet.

Jewish Economics and Science:

- Israeli economy is booming - reaching 80% of the US GDP per capita; increase in financial resources available for Jewish causes and considerable investments are made in the Jewish future.
- Israel jumps to the head of world indices of GDP per capita and quality of life through investments in infrastructure, education, environment and culture.
- Focused investments in science and technology by Jews bring achievements that increase Jewish security, wealth and international respect.
- Jewish energy project takes oil out of the global equation; Jewish scientists are prominent members of teams that find solutions to AIDS, malaria and other diseases.

Leadership:

- Jewish leadership at a very high personal and professional level.

External Environment:

- The world is enjoying a power balance where competition is conducted mostly through economics and development; America continues to enjoy dominance but is woven into an international community.
- The rise of alternative sources of energy starts a slow process towards marginalizing oil as a factor in the Middle East and leads to a relative decline of Arab countries.
- Solid economic development in Muslim and African countries moderates demographic growth rates and decreases migration to the West.
- Islam is moderated by globalization and adopts values of pluralism, tolerance and restraint from violence.
- There is a flowering of Jewish-Christian relations with positive global interest in Israel and Judaism; Jerusalem becomes a center for religious creativity and inter-faith dialogue including Jewish-Muslim dialogue.
- A stable peace between Israel, a Palestinian state and Syria, most Middle Eastern countries maintain fairly normal relations with Israel. Palestine and Israel develop close economic relations and together with Jordan develop deeper ties with the EU. Iraq stabilizes as a democracy and democracy makes headway throughout the region without destabilizing it. Iran undergoes a regime change and gives up nuclear weapons development.
- Considerable decline in hostility towards Jews as a result of attainment of regional peace and elimination of global terror - increase in influence of China and India spread ideas of multi-ethnicity and religious pluralism.

- Main Jewish organizations, the Government of Israel and a large number of Islamic leaders and organizations agree to cooperate in fighting against anti-Semitism and anti-Islamism and set up a joint Anti-Religious and Cultural Hate League, which becomes a major and effective global actor.
- Determined Western and global action stops proliferation of nuclear weapons, freezing Iranian nuclear programs and slowing down dissemination of dangerous knowledge.
- Islamic terrorism declines significantly thanks to a combination of stern Western countermeasures and an anti-terror reaction by leaders of Islam and the Islamic states.

Examples of policy directions and developments likely to lead to a *Thriving Alternative Future*:

Policy Directions:

Demography:

- Clear policies to encourage larger families as well as a new fashion for large families leads to larger families among highly educated couples.
- Change in definitions and thinking lead to new approaches welcoming peripheral Jews into the Jewish People.

Identity:

- Injection of funds to a wide variety of programs and institutions leads to the emergence of numerous attractive paths to identifying Jewishly so that parents in out-marriages decide to engage their families with a vibrant and interesting Jewish community.

Jewish Hard and Soft Power:

- A peace agreement and changes in the geopolitical environment take the main physical threats to Israel's existence further out of the equation.
- The US Jewish community is able to mobilize critical new groups in the US to enhance political support for Israel.
- Israel launches three national efforts in partnership with the Jewish People: the first seeks to find uniquely Jewish answers to questions of social justice in the information age; the second seeks to contribute to alternative energy development and the third towards a green revolution in Africa. The Jewish tradition is viewed globally as a source of moral guidance; Israel becomes a global center of excellence and innovation in alternative energy and agricultural development.

Israel-Diaspora:

- Israeli educational reforms lead to a turn-around in education in Israel (climbing up international comparative charts), and to an increasing number of Jews who choose to immigrate to Israel or send their children for limited periods of study in Israel.
- Development of new programs for multi-local Aliyah and life-long engagement with Israel increase the number of Jews who actively contribute their talents to Israel's success.
- Soft power projects enable Jews in Israel and around the world to discover new ways of working together. The projects improve Israel's global image and excite young Jews around the world about Tikkun Olam.
- The World Jewish Forum is launched and becomes a new center of discourse and innovative and influential ideas about the place of Judaism in Israel's public sphere, including the place of religious denominations in Israel. The success of this forum creates a renewed sense of global 'peoplehood,' and offers Jewish leaders a structured opportunity to discuss and formulate policies.

Economics:

- Israel makes wise use of the economic crisis to shift its domestic priorities and implement a new wave of reforms and investments that allow Israel to unleash its growth potential by the end of the crisis.
- Israel upgrades its status vis-à-vis the European Union becoming effectively "a Norway" in its relation to the EU and enjoys the benefits of further growth and better social policies.
- Israelis find opportunities in India and China's growth.
- The Energy Independence 2030 project turns Israel into a global center of scientific and technological innovation in the field.
- The rise of Internet-based small donations renews the communal Jewish tradition of making meaningful small donations by unbridling a powerful and sustainable new source of financial resources for Jewish communal cohesion.

Leadership:

- Following a major leadership crisis, young Jews in Israel and around the world rally to join political parties and Jewish organizations, engaging at times in "takeovers" of fossilized institutions. The Jewish Agency, WJC and UJC undergo thorough reform becoming the preeminent institutions of a strong global Jewish community; the new leaders and organizations create joint global forums to engage in constructive discourse about the future of the Jewish People.

- A development program for politicians is launched, creating a highest-quality cadre of young leaders in Israel and abroad with a commitment to the Jewish People.

External Developments:

- Following a steady process of broad-based economic development, moderation becomes the overarching trend in the Arab world. Many European Muslims return to North Africa leading to a more acceptable model of cooperation between Europe and Islam.
- The rise of moderate Muslim forces opens a new opportunity for peace making in the Middle East. With parameters for peace already in place, a comprehensive final peace agreement is signed in Mecca.

Alternative Future II: *Drifting*

Jewish Demography:

- 12 Million Jews; growth in number of out-marriages; children of out-marriages opt not to identify Jewishly.
- 50% or more of Jews living in Israel.

Jewish Identity:

- End of certain ideologies along with cultural globalization erodes Jewish identity.
- Decline in number of children receiving Jewish education.
- The Jewish People is not fulfilling any important role in finding solutions to humanity's problems.
- Jewish attributes of Israel are diluted in favor of normalization and regional cooperation - no significant Jewish creativity in Israel, even though Israel is experiencing success in general areas.
- Significant decline in Jewish knowledge and education.

Jewish Hard and Soft Power:

- Israel's military power goes into relative decline.
- The American Jewish community experiences relative decline in its political influence.
- Israel is a normal country with no special attributes.

Israel-Diaspora:

- Apathy in the young generation in the Diaspora towards Israel and the Jewish community and vice versa.
- Decline in national unity and capacities for coordinated activity.

Jewish Economics and Science:

- Individual Jews doing remarkably well, but most Jewish wealth is found in the hands of Jews who do not care for Jewish causes.
- Israelis are integrated into the global economy and experience an erosion in the ties that bind them to Israel and the Jewish People.
- Decline in interest in science and technology by Jews and reduced investments by Israel deprive Jews of a key source of security, wealth and international respect.

Leadership:

- Jewish leadership is mediocre.

External Environment:

- The world is enjoying a power balance where competition is conducted mostly through economics and development. America continues to enjoy dominance but is woven into an international community.
- The rise of alternative sources of energy starts a slow process towards marginalizing oil as a factor in the Middle East and leads to a relative decline of Arab countries.
- Solid economic development in Muslim and African countries moderates demographic growth rates and decreases migration to the West.
- Islam is moderated by globalization and adopts values of pluralism, tolerance and restraint from violence.
- A stable peace between Israel, a Palestinian state and Syria. Most Middle Eastern countries maintain fairly normal relations with Israel. Palestine and Israel develop close economic relations and together with Jordan develop deeper ties with the EU. Iraq stabilizes as a proto-democracy. Democracy makes headway in the region without destabilizing it. Iran undergoes a regime change and gives up nuclear weapons development.
- Considerable decline in hostility towards Jews as a result of the attainment of regional peace and the elimination of global terror - increase in influence of China and India spread multi-ethnicity and religious pluralism.
- Determined Western and global action stops proliferation of nuclear weapons, freezing Iran's nuclear program and slowing down dissemination of dangerous

knowledge; however, within determined efforts to stop proliferation, there is growing pressure on Israel to join a reinvigorated global treatise requiring it to reveal alleged nuclear, biological and chemical weapons capacities and to give them up.

- Islamic terrorism declines significantly thanks to a combination of stern Western countermeasures and an anti-terror reaction by leaders of Islam and Islamic states.
- Global cooperation deepens creating a greater sense of a single world facing common challenges.
- Demographic shifts including accelerated assimilation of the Jewish community in the US, and its decline relative to other groups in the US leads to decline in its political power.

Examples of policy directions and developments likely to lead to a *Drifting* alternative future:

Policy Directions:

In general, the Drifting alternative future is characterized by a lack of policies and “giving up” or by wrong policies - the Drifting alternative future emerges as the outcome of the combination of positive external conditions that are not met by policies designed to secure the attractiveness and pull of Jewish life at a time of openness and acceptance; or worse - accompanied by policies that push Jews further away precisely in an era when they have the greatest amount of choice.

Identity/Demography:

- Jewish content is increasingly diluted leading to a general drifting away from any Jewish commitment - especially to the collective.
- Due to internal political pressures Israel adopts a strict Orthodox interpretation of “who is a Jew?” leading non-Orthodox Jews outside Israel to feel rejected and alienated.

Jewish Hard and Soft Power:

- A desire for normality following improvement in geopolitical conditions as well as the signing of a peace agreement leads to decreased investment in Israel's military power.
- Normality leads also to a reduced sense of Jewish solidarity and decline in contributions towards Jewish communal matters.

Developments:

Identity:

- Ideas of individual choice and personal fulfillment continue to erode Jewish affiliation, with mixed marriages increasing and fewer people getting married at all.
- Failure of Jews to create new, attractive and diverse forms of identification leads to Jews choosing other identities over a Jewish one.

Jewish Hard and Soft Power:

- Following a peace agreement, Israel falls behind in military investment and experiences a deterioration of its hard power edge.
- With Israel no longer facing an existential threat, Jewish communities lose their ability to mobilize political support and experience a decline in influence.
- With conflict no longer dominating the agenda, Israelis crave normality and Israel becomes 'just another country' with nothing particular or special to recommend it.

Israel-Diaspora:

- Continued globalization and mobility of Jews undermines the idea of a nation-state and reduces support for Israel.
- A strong movement emerges among US Jews to disengage from a 'not sufficiently Jewish' Israel.
- Two decades of economic growth in Israel and a growing sense of security leads to Israeli Jews viewing Diaspora Jews as not critical to Israel's future.

Jewish Economics:

- A rise in the gap between large givers and small contributors leads to the concentration of Jewish giving to a small number of major donors; most donors drift away from giving to Israel and the Jewish community.

Alternative Future III: *Defending*

Jewish Demography:

- 14 Million Jews; 55% live in Israel and form an 80% majority there; significant decrease in out-marriage; increase in identification; children of out-marriages choose to identify Jewishly; Aliyah from Western countries to Israel reaches 50,000 a year due to worsening external conditions.

Jewish Identity:

- Jewish creativity in culture, religion and faith provides new and relevant meaning to being Jewish.

Jewish Hard and Soft Power:

- Israel's military strength is expanded in line with increased threats, and the IDF's qualitative edge improves substantially.
- The American Jewish community and other Jewish communities organize in a superior manner and are able to secure political support for Israel at critical junctures.
- Israel's strong stance against existential threats gains it grudging respect from leading nations.

Israel-Diaspora:

- Israel is a Jewish state, whose Jewishness is manifested in various ways, both public and individual. Israeli society is economically and qualitatively attractive to Jews. Jewish creativity blossoms in Israel and in the Diaspora.
- Cultural and economic growth of large communities; Jewish children, even in out-marriages receive Jewish education.
- The Jewish People enjoys unity with diversity with expanded capabilities for collective activity; Israel and Diaspora are more closely woven together through networks and the Internet.

Jewish Economics and Science:

- Israel's economy is booming, fueled mostly by hi-tech research and development.
- Motivated by a sense of concern for the future, Jewish communities experience an increase in financial resources available for Jewish causes and considerable investments are made in the Jewish future, especially in Jewish education.
- Focused investments in science and technology by Jews brings achievements that increase Jewish security and wealth.

Leadership:

- Jewish leadership is at a very high personal and professional level.
- Jewish leaders are able to make critical choices for the future of the Jewish People.
- Israel's leaders are able to implement key policies critical to Israel's future survival.

External Environment:

- Growing cooperation between Islamic states that are becoming both more

Islamic and more advanced technologically. Three Muslim countries have nuclear weapons. Turkey, out of the EU, becomes more radical. The West is less inclined to engage in wars.

- Large scale migration from Islamic countries to Europe and from Latin America to the US changes the demographic nature of countries including voting populations; efforts to stop it fail.
- A global economic crisis leads to a backlash against globalization and domestic unrest.
- Islam and Christianity are on a collision course, leading to confrontations with Jews caught in between; Moslem violence against Jews and Israel is on the rise.
- Increasing demand for energy from Asian countries drives oil prices up to around \$350 per barrel, accompanied by increasing competition for oil and resulting in a slow down of the global economy.
- Constant conflict between Israel and Palestinians; many ME countries unstable; region is economically stagnant.
- Widespread hostility towards Jews, particularly towards Israel.
- A global increase in terrorism including a number of mega-attacks on population centers; an increase in attacks on Israeli and Jewish targets. Demands are made that Israel give up the idea of being a state of the Jewish People.
- There is an increasing clash of cultures, not yet violent in form but with increasingly deep repercussions on global discourse.
- Misuses of cyberspace for the diffusion of hate and mass terrorism and massive disruption of the World Wide Web by hackers, lead to strict global control over cyberspace; some countries use cyberspace for brainwashing with strict control over access and content with the help of new cyberspace-controlling technologies.

Examples of policy directions and developments likely to lead to a Defending alternative future.

Policy Directions:

Identity:

- Jewish entrepreneurs develop a new, original and economically affordable model of distance learning that allows more Jews access to high-quality, attractive and affordable Jewish education.

Israel-Diaspora:

- Pressured by existential threats, Israel invests heavily in military development and especially in breakthrough technologies, allowing the IDF to open a massive lead over its rivals.
- Israel engages in several innovative and successful military operations that generate a sense of pride among Jews and grudging respect among leading nations.

Economics:

- Reforms in Israel's economy lead to a sustained period of growth despite a global economic crisis and continued geopolitical instability.
- Jewish donors and institutions respond to an increasing sense of threat by investing heavily in Jewish security, Jewish education and Jewish institutions; donor money is especially effective in supporting a new generation of leaders and social entrepreneurs who create new and compelling ways of identifying Jewishly.

Israel-Diaspora:

- A sense of common danger brings Jews in Israel and around the world together; an increasing number of Jews migrate to Israel and many others spend time in Israel contributing their skills to Israeli society.

Leadership:

- Establishment of a Global Jewish Leadership Academy creates a cadre of high-quality leaders, well-equipped to lead the Jewish world at times of crisis.
- Jewish organizations adopt the formula that 35% of their leadership and staff should be under 35 years of age, and implement it systematically leading to an institutional renewal and the development of a new generation of committed leaders.

External Environment:

- Israeli leaders carefully upgrade security, economic and strategic relations with the US generating a strong defensive shield for Israel and Jews, with Israel invited to join NATO.

Developments:

Leadership:

- A new generation of leaders of high moral stature convinces Jews in Israel and the Diaspora that their future thriving depends on their ability to act collectively and in solidarity.

Alternative Future IV: *Nightmare*

Jewish Demography:

- 6 Million Jews; Mega-terrorist/catastrophic event wipes out Jewish population concentrations in Israel.

Jewish Identity:

- Jewish identity is considered dangerous and unattractive.
- Decline in number of children receiving Jewish education.
- The Jewish People is not fulfilling a significant role in finding solutions to humanity's problems.
- Significant decline in Jewish knowledge and education.

Jewish Hard and Soft Power:

- Israel's military experiences relative decline.
- The American Jewish community experiences relative decline of its political influence.
- Israel is considered too much of a threat to both its citizens and Jews around the world.
- Israel is a pariah state.

Israel-Diaspora:

- Decline in national unity and ability for coordinated activity.
- Jewish survivors of nuclear attacks flee Israel.

Jewish Economics and Science:

- A global economic crisis leads to a substantial drop in Jewish wealth, as well as to violence directed at Jewish assets.
- A wave of economic populism leads to the economic decline of Israel.
- Massive emigration from Israel of high-quality human resources takes place unabated (*brain-drain*).

- Decline in interest in science and technology by Jews and reduced investment by Israel deprive Jews of a key source of security, wealth and international respect.

Leadership:

- Jewish leadership is mediocre, corrupted and disconnected.

External Environment:

- Growing cooperation between Islamic states that are becoming more Islamic and more advanced technologically; three Muslim countries have nuclear weapons; Turkey, out of the EU, becomes more Islamic; the West is less inclined to engage in wars.
- Major European cities become Islamic.
- Large-scale migrations from Islamic countries to Europe and from Latin America to the US change the demographic nature of countries including voting populations; efforts to stop it fail.
- High energy costs bring stagnation to the global economy; breakdown of the WTO system.
- Discovery that oil reserves are much lower than previously estimated brings the global economy to a massive slow-down; US slowly drifts away from Israel in a desperate attempt to secure oil.
- Reversal of democracy in Latin America, East Europe and Asia.
- Moderate Arab states face threats to their stability.
- A new kind of warfare against the Jews develops taking the form of violent attacks against Jews and Jewish targets in Israel and throughout the world; these attacks escalate into mega-terror resulting in mass killings, together with large scale hostage takings; Western countries adopt anti-Israel policies.
- Proliferation of WMD continues unabated including in unstable and also fanatic countries and actors, also in the Middle East.
- Terrorism annihilates key Jewish populations; terrorism regresses the world back to chaotic medieval times.
- Breakdown of international order.

Examples of policy directions and developments likely to lead to a Nightmare alternative future:

The Nightmare alternative future is the result of a combination of deteriorating external conditions and the failure to respond collectively and individually.

Section 5: Key Intervention Points and Potential Actions

The following section highlights some of the driving forces behind the trends highlighted in the opening section. Identifying the drivers helps in locating potential actions that by affecting the driver will modify the trend and yield over time a different state of affairs than the one that would have emerged without the intervening action.

Demography:

Jewish population size and composition is the outcome of four operational variables:

- International migration;
- Health and survivorship affecting death rates;
- Fertility levels, affecting the birth rates; and
- The balance of accessions to and secessions from the group.

These in turn are affected by the following main drivers:

- World system inequalities - mostly influence international migration and health and survivorship;
- National societal contexts - mostly influence international migration and health and survivorship;
- Jewish institutional interventions (determining who is in and who is out) - mostly influence accessions and secessions; and
- Personal socioeconomic and identificational characteristics.

Some of these drivers might not be effectively modified by Jewish collective actions. They are in large part the result of Jewish individual choice to gravitate towards prosperous countries and societies where they will experience better health, longer life expectancy and lower fertility rates. Jewish policy interventions in Israel and abroad should focus on the following areas where they might be effective:

- Identity: the group's definition, issues of inclusion and exclusion and transmitted content;
- Family: marriage, children and socialization;
- Society and Economics: migration, absorption and welfare; and
- Political: Jewish majority in Israel.

Within these areas are three main policy levers, which could be used to increase the number of Jews worldwide:

1. Redefining who is in and who is out and how one joins so that more “semi-Jews” are considered full members of the Jewish community. For example, bringing the children of out-married couples into the mainstream of Jewish society, particularly in Israel. This requires an upgrade of the current conversion policies and the institutions that govern them.
 2. Developing an attractive and durable Jewish identity, especially among the younger generation, so that more Jews voluntarily choose to affiliate themselves with the Jewish People. This requires deep reforms in the Jewish education system, starting with the Israeli state education system.
 3. Increasing birth rates: policy instruments can perhaps affect the statistical equivalent of one-half child per family, which when multiplied by millions of households over tens of years equals several millions of people. This requires developing adequate and affordable infrastructures for early childhood, a flexible policy towards workingwomen, housing provisions and tax exemptions for two-income households.
- In addition, with respect to composition in Israel, policy makers should give significant weight to preserving a viable Jewish majority in the State of Israel in determining its permanent borders, as well as improving Israel’s relative standing in terms of human development to encourage Aliyah of choice - this is likely to have some impact on the total number of Jews as Jews living in Israel are more likely to marry Jews and to have more children than Jews living outside Israel.
 - Regarding Aliyah, the state should enact policies friendly to “semi-Olim” - immigrants who reside in Israel but do not officially make Aliyah and multi-local Olim, who continue to work or live in other countries while residing in Israel, for example, by granting immigration rights and benefits even to Olim who continue to partially live outside Israel.

Identity:

Identification is the immediate outcome of three intervening mechanisms:

1. The amount of self-esteem related to Jewish group identification;
2. Being part of a Jewish in-marriage or an out-marriage; and
3. The amount of exposure to Jewish socialization and support frameworks.

These three intervening mechanisms reflect four main drivers:

1. The quality and intensity Jewish identification in the parental home;
2. The family of origin's socioeconomic status;
3. The prevailing model of the interaction of general society with the Jewish population in any given country; and
4. Relevant historical events, of which the Holocaust, Israel's Six Day War, the fall of the Berlin Wall or September 11th, provide vivid illustrations.

The process of construction, maintenance and transmission of Jewish identification is better understood as unfolding over the lifecycle. From the perspective of the Jewish People the four goals of identification should be:

1. A continuing Jewish lifecycle;
2. A Jewish personal identity;
3. A publicly manifested Jewish identity; and
4. Support for Israel and for other Jewish communities.

Achieving these targets requires the successful attainment of four instrumental goals:

1. A good knowledge of the Jewish cultural legacy;
2. The promotion of positive attitudes towards the Jewish People;
3. Frequent practice of uniquely Jewish normative behaviors; and
4. The development of predominantly Jewish social networks.

These goals are achieved through high exposure to a variety of socialization frameworks and overlap between them. The socialization frameworks include primarily Jewish parents, Jewish formal and informal education, living in or engaging with Israel, Jewish college programs, Jewish in-marriage and Jewish children. Israel appears to play a role in fostering greater identification but precisely how is not yet determined; e.g., does Israel attract more attention and emotional attachment when it is strong or when it is weak? Evidence can be brought to support either or both. It may also be less about strength or weakness and more about being a "winner" or a "loser." The overall effect

on Jewish identification tends to reflect the accumulation of exposure and overlap over the lifecycle.

While the impact of globalization on Jewish life is beyond the reach of Jewish institutional interventions, the internal processes of socialization and inter-generational transmission of Jewish values and identity lend themselves to policy interventions by the Jewish community. There is no single successful intervention approach and there are no panaceas, and there are differences of opinion as to whether the emphasis of communal strategy should be on quantity or quality, in-reach or outreach. The increasing polarity between affiliated and unaffiliated Jews has led to a major policy discussion regarding the focusing of efforts. There is an increasingly heard argument that resources invested in outreach to the unaffiliated are mostly wasted and that Jewish policies should favor “quality” over “quantity,” investing in improving the collective action capacity of the affiliated. A sub-argument has recently been advanced calling for the Jewish People to “let go” of the unaffiliated and focus on deepening the attachments of the “center” which is still “salvageable.” Others argue that quality and quantity are not competing goals, and that in order to achieve either the other is necessary - there is no Jewish quality without a certain quantity threshold and there is no Jewish quantity without quality of leadership, ideas and institutions. Specific ideas include:

- Seek novel forms of preserving and presenting the memory of the Shoah in ways appropriate to the mind sets and life worlds of generations that do not share the emotional experiences of “living” the Shoah personally or through close family relations.
- Include a “Jewish culture” core module in each Israeli university.
- Make cyberspace into an important instrument in the service of Jewish People cohesion and thriving.

Jewish Hard and Soft Power and Influence:

The power of the Jewish People as a whole in the first part of the 21st Century is unprecedented in Jewish history. Israel is a major Middle Eastern power with military capacities surpassing those of any combination of Arab states, supported by excellent intelligence and a regional perception of significant nuclear capacities. The special relationship between the US and Israel contributes an additional crucial element to Israeli power, and the Jewish community in the USA exerts significant influence, in

terms of political strength and soft power. However, the several key trends put into question the future of that power:

- Power is a relative concept: the possibility of a nuclear Iran and proliferation of weapons of mass killing to potential enemies of Israel may reduce significantly the net hard power advantage of Israel. New forms of confrontation taking the form of asymmetric medium-intensity conflict, as illustrated by Hezbollah and Hamas pose new types of challenges. New forms of anti-Semitism and anti-Israelism may increasingly delegitimize Israel, and domestic developments in the US may decrease Jewish influence and soft power.
- The global standing of the US may decrease, its involvement in the Middle East may diminish and its special relationship with Israel may be downgraded.
- The economic crisis may cause long-term damage to Israel and weaken Jewish communities reducing their action capabilities.
- Continuing conflicts may demoralize parts of the Israeli population and reduce their staying power.

At the same time, other trends point towards an increase in the hard and soft power of the Jewish People:

- Progress towards a Middle East peace agreement can significantly improve the global standing of Israel and reduce security dangers.
- Good relations with emerging superpowers, such as China and India, could upgrade the soft power of the Jewish People.
- Continuous scientific and technological as well as humanistic creativity could strengthen Jewish soft power.
- Improved policy planning and strategic thinking together with a new type of Jewish foundational leadership can significantly improve the uses of power and thus making it more effective.

While much depends on global, regional and local developments over which the Jewish People has little influence, it seems that Jewish power as a whole depends mainly on the Jewish People itself. By investing more into power-augmenting drivers and acting to reduce power-reducing drivers, its net power can be substantially upgraded and better utilized. Therefore, the following policy recommendations should be considered and implemented, in addition to operating the drivers as indicated above:

- Improving strategic thinking and leadership.

- Advancing an overall Middle East peace agreement, supported by Islamic countries, the USA and most global powers.
- Better organizing political action in the US and building up Jewish political action capacities in other countries and the European Union.
- Initiating Jewish People Tikkun Olam - Mending the World - projects, which inter alia upgrade the global standing and soft power of the Jewish People.

Israel-Diaspora Relations:

The relations between Jews in Israel and outside of Israel have several drivers:

- External threats to Israel: when Israel is under threat relations tend to deepen and go into their well-worn emergency mobilization mode.
- Israel as a source of strength/weakness for Diaspora Jews: when Israel's policies and achievements are perceived as a source of pride and strength for Jews outside of Israel, relations tend to deepen and vice versa.
- The Diaspora as a source of strength/weakness for Israel: when Jewish communities are perceived as critical to Israel's strength and security, Israelis tend to invest more in maintaining the relationship and Jews outside Israel tend to find greater value in the relationship.
- Israel's Jewishness: the more Israel is perceived as "Jewish" the more Jews outside of Israel see it as their own.

The level of similarity between Israeli Jews and Diaspora Jews: the more similar, the more likely the relationship is to be stronger.

- The scope and nature of interaction, consultation and cooperation: the more opportunities for interaction and cooperation based on real content and true consultation, the deeper the relationship.
- Mutual judgments and values: negative judgments about Israel and negative views by Israelis of life outside of Israel tend to undermine the relations.
- Source identity: the more a Jew is a-priori identified as such, the greater the identification with Israel.
- Israeli policies on religious steams.
- Views of spiritual and political leaders.
- Existence of family members in Israel.
- In Israel - images of the Diaspora in education and mass media.

Policies that could help broaden and deepen the relationship include:

- Investing in improving Israel's relative standing in the world with an eye towards making it into a model country.
- More intense interaction aided by globalization and information technologies.
- New forms of cooperation between Israel and Jewish communities based on partnerships and shared projects.
- Constant circulation and exchanges between Jews in Israel and around the world.
- Develop a new vision of the relationship based on mutual cooperation and reciprocity.

Specific ideas include:

- Establishing a Jewish "Consultative Forum."
- Improvement in Israel of understanding of the Jewish People and of its main communities with devotion of more time in the Knesset and the Cabinet to Jewish People issues, better mass media coverage and upgrading of relevant subjects in schools and universities and in the mass media.
- More programs to bring young persons to Israel for at least one year, such as through an expanded MASA. At the same time, programs should be initiated to bring selected young Israelis to live and work for one year in Jewish communities abroad.
- Urgent development of new forms of 'multi-local aliyah' for those willing to have two or more residences in Israel and elsewhere.
- Taking into account the needs of the Jewish People as a whole and consulting its leaders in making Israeli decisions that have significant impact on the future of the Jewish People worldwide.
- Search for new and shared projects and forums.
- Establishment of a core staff in the Prime Minister's office, together with a Minister of Diaspora Affairs, in charge of conducting a strategic dialogue with heads of major Jewish organizations.
- Shared thinking between Diaspora and Jewish intellectuals, leaders and opinion shapers should take place on redefining Jewish and Zionist values and principles so as to adjust them to changing situations, while preserving their core essence.
- New Zionist projects taking the place of abandoned ones should be undertaken as Jewish People projects.

The economic condition of the Jewish People has several key drivers:

- Global economic trends;
- Security conditions in Israel;
- National economic trends and policies in places with major Jewish communities;
- Israeli economic policies;
- Access of Jews to sources of wealth creation;
- Giving to Jewish causes, especially in comparison to general causes;
- Inter-generational funds transfer; and
- Cost of Jewish lifestyle, membership and education.

Specific policy recommendations include:

- Adopt emergency measures to live through the economic crisis without long term damage.
- Seek new financial resources for Jewish People activities including options that in some communities were rejected in the past such as governmental financing of religious, and therefore Jewish, education (outside of Israel).
- Educational policies in Israel and the Diaspora should help to influence the career choices of the young so that they can successfully integrate into the knowledge-based economy. This is particularly urgent for the economically backward sectors of the Jewish People - mostly the Haredi population in Israel.

Leadership:

The quality of Jewish leadership - political, religious and cultural - is a key condition for the future thriving of the Jewish People. Drivers of leadership include:

- Availability of people willing to dedicate themselves to leading the Jewish People;
- Access to official leadership positions;
- Diversity of paths to leadership; and
- Educational and financial support to aspiring leaders.

The current leadership situation in Israel and parts of the Diaspora gives cause for concern. It should be a Jewish policy to aim to improve this situation, by modifying selection and career mechanisms, fostering cooperation between leaders, promoting

young leaders and encouraging potential leaders to withdraw for some time from their milieu and public activity to return later in new shape and into a new situation. Jewish organizations must have greater younger generation representation. Jewish organizations should give the younger generation a bigger role. Grassroots young leadership initiatives should be encouraged and supported. More attention should be given to developing rabbis who, in addition to high quality Jewish religious knowledge are familiar with modern thought and understand the world. The monotheistic idea and Jewish morals and ethics should be applied and made relevant to the pressing problems of humanity, such as justice and genetic engineering. A fundamental long-term policy aim is to strengthen the Jewish People's capacity to respond to new challenges.

Specific policy directions include:

- Establishment of a Jewish People Leadership Academy, where major Jewish decision-makers and up-and-coming leaders from Israel and the Diaspora will explore in-depth the critical issues of the Jewish People within long-terms and holistic perspectives.
- Encouraging more circulation between the public sector, academia, think tanks and the private sector.
- Give priority to initiatives of youth groups and provide them with financial and other kinds of support.
- Set up advisory agencies to provide counsel and support to incipient and developing grass roots initiatives and provide training to would-be initiators.
- Better exchange of experience, coordination and cooperation between Jewish organizations and decision-makers.
- Strengthening development of Jewish People policy professionals that serve as policy advisers.
- Accelerate injection of "fresh thinking" into main decision making bodies according to the principle of 35-35, namely that about 35% of the members of main decision-making bodies should be below the age of 35, and that diversity of main decision making bodies should be increased to include more women and persons from different social strata.
- Hold periodic leadership retreats to discuss in depth main strategic issues, on the basis of position papers surveying relevant experiences and positing new options.

Iconoclastic persons and independent thinkers should participate in such retreats with discussions being off the record.

- Jewish organizations should focus on encouraging creativity and innovation, such as by setting up “strategic” staff units protected from current pressures and bureaucratic politics, but fully conversant with organizational realities.

External Developments

The Jewish People is different from a state or a combination of states. It does however have some characteristics of a polity, albeit one that has to give special care to the many voices and groups within it. In this sense it is justified to think, plan and act in terms of “external relations” of the Jewish People.

Specific policy directions include:

- Forming a long-term strategy towards Islamic actors on five levels:
 1. Towards Islam as a global civilization with major attention to non-fanatic streams, groups, leaders and states;
 2. Towards growing Islamic communities such as in France;
 3. Towards Islamic extremist terror groups and networks;
 4. Towards particular actors and events such as Iran and its nuclear policies and Hamas; and
 5. Towards Islamic states and leaders.
- Paying much more attention to emerging global powers and in particular China and India;
- Fostering friendly relations with substantial mid-size players such as South Korea and Brazil;
- Upgrading relations with the European Union;
- Engaging in ongoing regular relations with the Catholic Church;
- Developing a better understanding of the trends in Protestant denominations and laying the groundwork for closer relations with relevant groups;
- Building bridges to increasingly important ethnic groups, such as Asians and Hispanics in the US; and
- Intensifying activities towards global organizations including United Nations bodies and international NGO's where persistent efforts may provide positive results.

Summary

The Jewish People in 2030 - Alternative Futures was undertaken with the mission of providing insights into possible futures of the Jewish People and the variables that are likely to shape them. The project sought to identify a variety of policy instruments that could be put to use by a wide range of decision-makers in the Jewish world who seek to increase the probability of a thriving future for the Jewish People and decrease the probability of negative futures. This project represents the embryonic stage of an ongoing process, and is intended to serve as a basis for thinking about the future, imagining its possibilities and the best policies to shape it.

As in all projects undertaken by the JPPPI, the diversity of views and goals within the Jewish People is clearly acknowledged, and yet the project is not value-neutral. It firmly asserts as its underlying value position that a thriving future for the Jewish People as a whole is one in which the Jewish People is thriving in terms of culture, quality of life and sense of cohesion, based on pluralistic Jewish values, with the State of Israel constituting the core state of the Jewish People. The analysis of the alternative futures and especially the policy directions take this fundamental value as their point of origin.

With a thriving future for the Jewish People as the guiding light, the project reached into the deep roots of rise and decline theories to gain a deeper understanding culled from 22 top thinkers on the topic, of the various drivers that account for the rise and decline of great civilizations. While some factors are external and cannot be controlled by a civilization, it is remarkable to note how many of the factors that contribute to thriving or decline pertain to the internal dynamics of the civilization itself - and are therefore susceptible to influence by forward looking leaders and creative key actors. The analysis also highlights the importance of nurturing the valuable assets of the Jewish People, such as certain traditions, the sense of community and investment in education, science and technology.

Based on these insights, the project identified several dimensions or prisms through which to think in a comprehensive and integrative manner about the future of the Jewish People. Acknowledging the particular importance that external developments have in shaping the future of a very small people, the project explored in equal measure both the external and internal dimensions. The external dimensions included broad

categories such as the global map of power, global demography and economics, while also highlighting dimensions that are directly related to the Jewish People such as the conflict in the Middle East and the proliferation of weapons of mass destruction. The internal dimensions were those directly identified in the rise and decline theories as critical to the thriving of a civilization including demography, identity, power, economics, community cohesion as manifested in the Israel-Diaspora relationship, and the leadership that is necessary to steer a civilization towards continued thriving and away from decline. Under each dimension, JPPPI fellows and external experts provided their insights regarding the key trends as well as projections into the future and possible changes from these projections.

Having provided a basis for a comprehensive overview of the major trends likely to affect the future of the Jewish People, the project turned to the future making use of two well-worn methods: morphological analysis and alternative futures. The morphological analysis, which is expanded upon in the appendix, allows for a freer use of the imagination, a bit like a game of Lego. On each dimension the chart offers several possibilities, and the reader is free to 'mix and match' them to chart a possible future. The permutations are enormous and enable exploration of a wide range of alternative futures. The morphological analysis is intended mostly as an exercise in thinking about the future that allows the user to experiment with original and thought-provoking combinations of future conditions.

The project then goes on to outline and describe four distinct alternative futures: *Thriving*, *Drifting*, *Defending* and *Nightmare*. These four futures were arranged on two intersecting axes - external and internal conditions. The Thriving future is the desired future for the Jewish People, in which the external environment is safe and positive towards Jewish individual and collective life, while the internal dimensions of Jewish life point in a strong direction. The realization of this future requires active guidance and initiative by Jewish leaders and entrepreneurs in order to avoid a future of Drifting, in which Jews drift away from the Jewish community, assimilating into an external environment that is supportive and inviting. While the Drifting future might be very pleasant and positive for Jews as individuals it reflects an overall decline of the Jewish People as a whole. Facing the Thriving and Drifting alternative futures are the Defending and Nightmare futures. This pair is also intended to demonstrate the importance of action, initiative and leadership. While both futures reflect

negative external conditions where Jews find themselves individually and collectively threatened, a Defending alternative future demonstrates that even under strenuous external conditions, the Jewish People could become stronger. While this is not a future that is to be desired in itself - the Thriving alternative future is clearly the preferred choice - it is the preferred future and the one to which the Jewish People should strive when the external environment turns menacing. A nightmare alternative future is one where Jewish inaction, apathy and systemic failure combine with worsening external conditions to bring about substantial damage to Jewish collective life and even to Jews as individuals.

All four alternative futures are considered possible in the 2030 timeframe, although the relative probabilities remain open. The alternative futures section provides a more detailed description of what each alternative future might look like, designed to stimulate the imagination and encourage Jewish decision-makers to consider what alternatives that they might have previously ignored. To underline the importance of imagining alternative futures, the section concludes that the four types of alternative futures are also - in many ways - the “pasts” of the Jewish People, with Jewish history being essentially a narrative moving through these four phases with periods of Thriving, Drifting, Defending and Nightmare. The history of the Jewish People has also demonstrated that the transition from one phase to another can sometimes be very rapid with the Jewish People moving from Thriving to Nightmare in the space of a few years and vice versa.

Imagining such divergent futures and acknowledging the importance of human agency in steering the Jewish People towards the Thriving and Defending futures and away from the Drifting and Nightmare ones (depending on the respective external environment) begs the question: What should one do to avoid the negative futures and bring about the positive ones? As the JPPPI is a policy planning institute and the alternative futures project is intended as a tool for aiding policy planning, the last section of the project offers an analysis of the drivers that influence the Jewish condition in each dimension and highlights key intervention points where conscious choices can be made and concrete actions taken to influence trends so that the Jewish People develops towards a desired future and away from a not desired future. These are suggestions and directions for thinking, but each Jewish leader, activist, and entrepreneur who seeks to shape the Jewish future in the directions charted in this

project should use this project to formulate his or her own answer to the challenge of shaping the desired Jewish future.

This project suggests directions for thinking to assist Jewish leaders, activists and entrepreneurs who seek to shape the future and answer the particular challenges of shaping the desired Jewish future.

APPENDIX - EXPANDED MORPHOLOGICAL ANALYSIS

Jewish "Momentum" - Internal Axis

| Dimension | Neutral | Negative | Positive | Other | (+) Wild | (-) Wild |
|-------------------------|--|---|---|-------|---|--|
| Demography: numbers | 14 Million Jews - present trends continue as expected. | 12 Million Jews due to growth in number of out-marriages with children of out-marriages opting out. | 15 Million Jews due to significant decrease in out-marriages, increase in identification and children of out-marriages opting-in. | | New ideas lead by a charismatic "prophet" figure turn Judaism into a highly popular religion of choice; new groups such as Bnei-Menashe are incorporated into the Jewish People and bring the numbers up to 20 Million. | Mega-terrorism/ catastrophic event wipe out Jewish concentrations in Israel, and/or NY and LA bringing the total number of Jews down to 6 Million. |
| Demography: composition | 50% of Jews live in Israel. | 80% of Jews live in Israel due to diminishment of Diaspora Jewry; Jews form only 65% of total Israelis; European and Latin America Jewry disappear as active communities. | Economic prosperity leads to increased Aliyah with 2/3 of Jews living in Israel. | | New Jewish centers emerge in India and China due to economic prosperity, highly favorable conditions and local conversions. | Mega-terrorism/ catastrophic event drastically reduces Jewish concentration in Israel and the US. |
| Identity | Mixed trends continue as now with greater polarization between the highly identified and the non-identified. | Globalization erodes Jewish identity; the Jewish People are not fulfilling any important role in finding solutions to humanity's problems. | Jewish creativity in culture, religion and faith provides new and relevant meaning to being Jewish; Jewish People particularly active in Tikkun Olam. | | A new spiritual leadership brings forward new forms and ideas about being Jewish that appeal to non-identifying Jews without creating a schism with traditional Jews. | Judaism becomes more fossilized, and less relevant with more and more Jews actively rejecting Jewish identity. |

| Dimension | Neutral | Negative | Positive | Other | (+) Wild | (-) Wild |
|----------------------------|--|--|--|-------|---|---|
| Hard Power | Israel manages its conflict with its enemies with ups and downs but no large scale violence or peace. | Israel is confronted by existential threats and experiences a dangerous erosion in its relative qualitative edge. | Through wise investments Israel is able substantially increase its qualitative military edge, while achieving a cold peace with Syria. | | A comprehensive Middle East Peace secures Israel and Iran abandons its nuclear plans. Israel maintains its military superiority even in the absence of immediate threats. | Israel's military experiences a fatal nuclear blow coupled with a massive decline in its relative standing and highly restricted ability to gain access to arms. |
| Soft Power and Influence | Jewish communities maintain their current level of political influence; Israel and the Jewish People are treated with a mix of disdain and admiration. | Jewish communities experience decline in their influence as a result of demographic shifts; Israel is viewed as a global liability and becomes a pariah state. | Jewish communities and organizations improve their mobilization capacities locally and worldwide to achieve increased influence; Israel and Jews make even greater contributions to culture and science. | | A peaceful Israel is welcomed by all nations and a period of cultural and scientific creation improves the standing of the Jewish People and Israel. | Israel and the Jewish People are set as global outcasts with virulent anti-Semitism a global and acceptable phenomenon and Israel being thrown out of the United Nations. |
| Israel-Diaspora (Israel) | | Jewish attributes of Israel are diluted in favor of normalization and regional integration; Israel's security situation is severe; no significant Jewish creativity in Israel. | Israel is a Jewish state, whose Jewishness is manifested in various ways, both public and individual; Israel's security position is stable; Israeli society is economically and qualitatively attractive to Jews; Jewish creativity is blossoming in Israel and in Diaspora. | | | |
| Israel-Diaspora (Diaspora) | | Global decline of Jewish communities; decline in number of children receiving Jewish education; apathy in young generation towards Israel and Jewish community. | Cultural and economic growth of large communities; Jewish children, even in out-marriages receive Jewish education; many learn and speak Hebrew. | | | |

| Dimension | Neutral | Negative | Positive | Other | (+) Wild | (-) Wild |
|-------------------------------|--|--|---|---|---|---|
| Israel-Diaspora (Peoplehood) | Mixed trends continue as now with manifestations of solidarity mostly the outcome of crisis and a sense of danger. | Decline in national unity, collective identity and ability for coordinated activity. Significant decline in Jewish knowledge and education. | Jewish People enjoying unity with diversity with expanded ability for collective activity; Israel and Diaspora more closely woven through networks and Internet. | | A new idea emerges creating a new global sense of collective identity manifested in new ways. | Israel is increasingly perceived by Jews as a threat to their identity and even survival and they actively reject Israel. |
| Jewish Economics | Israel experiences a slight increase in growth rates with higher education muddling through. | Israel experiences a wave of economic populism; most Jewish wealth found in the hands of Jews who do not care for Jewish causes. | Israeli economy is booming fueled mostly by hi-tech and structural reforms; increase in financial resources available for Jewish causes and considerable investments made in Jewish future. | | Israel jumps to head of world indices. | Due to continued mismanagement and corruption and spurred by a global recession the Israeli economy collapses; Jews experience substantial loss of wealth due to global crisis. |
| Jewish Science and Technology | | Decline in interest in science and technology by Jews and reduced investment by Israel deprive Jews of a key source of security, wealth and international respect. | Focused investment in science and technology by Jews brings achievements that increase Jewish security, wealth and international respect. | Scientific breakthroughs lead to questions on the nature of human belonging and identity. | Jewish energy project takes oil out of the global equation; Jewish scientists are prominent in teams that find solutions to AIDS and malaria. | WMK's are used to annihilate Jewish concentrations in Israel and the US. |
| Leadership | Leadership is mostly "management-like" offering reasonable management, but not much more. | Jewish leadership is corrupt and mediocre offering no new ideas and actions. | Jewish leadership is at a very high personal and professional level making critical decisions to Jewish thriving. | | A new Jewish "king/Messiah" figure emerges ushering in a new Jewish "golden age." | |

External Environment/External Axis

| Sub-Dimension | Neutral | Negative | Positive | Other | Wild (+) | Wild (-) |
|--|--|--|---|---|---|--|
| Global Main Actors | The global power map is more or less as now, with the exception of China becoming more powerful but without challenging the dominance of the US. | Growing cooperation between Islamic states that are becoming more Islamic and more advanced technologically; three Muslim countries have nuclear weapons; Turkey out of the EU becomes more Fundamentalist; West is less inclined to engage in wars. | The world is enjoying a benign "Pax Americana." | China and India global powers; European Union incorporates Turkey and challenges US power; US looks inward. | War is becoming a thing of the past with world powers and world systems highly able to detect and prevent crises before they blow up into major wars. | The global system breaks down and spirals into a prolonged period of chaos and extreme violence. |
| Proliferation of Weapons of Mass Destruction | | Proliferation of WMD continues unabated including to unstable and fanatic countries and actors in the Middle East. | Determined Western and global action stops proliferation of nuclear weapons, freezing Iranian nuclear programs and slowing down diffusion of dangerous knowledge. | Within determined efforts to stop proliferation, there is growing pressure on Israel to join a reinvigorated global treaty requiring it to reveal nuclear, biological and chemical weapons capacities and give them up. | The world is able to enact strict non proliferation and begin a determined process to roll back existing nuclear reserves with substantial success. | The world experiences a major use of nuclear weapons in war. |
| Terrorism | Terrorist attacks take place on occasion but fail to transform the geo-political system. | There is a global increase in terrorism including a number of mega-attacks on population centers. There is an increase in attacks on Israeli and Jewish targets. | Islamic terrorism declines significantly thanks to a combination of stern Western countermeasures and an anti-terror reaction by leaders of Islam and Islamic states. | | Terrorism is eliminated and becomes a phenomenon of the past - much like the wave of anarchist terrorism in the early 20 th century. | Terrorism takes the world back to chaotic medieval times; Terrorist mega-attacks annihilate major Jewish population centers. |

| Sub-Dimension | Neutral | Negative | Positive | Other | Wild (+) | Wild (-) |
|----------------------------------|---|---|---|--|--|--|
| Energy | Oil continues to be a factor in relations between states, but on the whole neither producers nor buyers disrupt the system. | Increasing demand for energy from Asian countries drives oil prices up, accompanied by increasing competition for oil and resulting in a slow-down of the global economy; oil money supports radical and authoritarian regimes. | Following additional finds of oil fields and increasing reliance on alternative energy, oil prices stabilize at a low level while meeting rapidly increasing demand from Asian countries. | Destabilization of main oil producing countries in the Middle East leads to Western intervention supported by China and India with military occupation of main oil fields to assure stability of oil supplies. This is received in Islamic countries as a declaration of war on Islam. | Alternative sources of energy marginalize oil and oil producing economies. | Sudden discovery that oil reserves are much lower than estimated brings global economy to a halt; US turns against Israel in desperate attempt to secure oil. |
| Palestinians and the Middle East | Israel and the Palestinians go through alternating periods of relative peace and conflict. | Constant and escalating conflict between Israelis and Palestinians. Many Middle Eastern countries unstable. Region economically stagnant. | A cold but stable peace between Israel, a Palestinian state and Syria. | Following a regime change in Iran and Islamic terror threats against pro-Western ME countries, Iran, Iraq, Egypt and Israel sign a mutual defense and economic development agreement and join NATO as a block. | Palestinians and ME countries maintain fairly normal relations with Israel. Iraq stabilizes as a democracy. Iran abandons nuclear option. Democracy makes headway in the Middle East without destabilizing the region; the Palestinian state develops in cooperation with Israel and becomes a model of cooperative conflict resolution. | Palestinians take over Jordan after an uprising and establish greater Palestine preparing it as a base to launch an attack to destroy Israel. Egypt is showing signs of instability and reversal of peace agreement. |

| Sub-Dimension | Neutral | Negative | Positive | Other | Wild (+) | Wild (-) |
|-------------------|---|---|---|---|--|---|
| Global Demography | Ethnic enclaves continue to exist in Western countries, without integrating, but also without serious disruption to host countries. | Large scale migration from Islamic countries to Europe and from Latin America to the USA changes demographic nature of countries including voting populations; efforts to stop it fail. | Due to major efforts in the US and EU immigrants integrate into Western countries adopting Western liberal democratic values. | The EU and US driven by domestic pressures and anxiety about culture and security take strong measures to stop immigration from Islamic and Latin American countries. These are largely successful, but feed hate towards the West. | Economic development in Muslim and African countries reverses demographic trends including return of Muslims in Europe to northern Africa and Middle East (Irish model). | Ethnic strife leads to a new world war; Global outbreak of mass killing virus reduces populations by 25%. |
| Global Economy | The global economic crisis passes and the global economy continues to grow; inequality persists but does not widen and poverty is reduced. | The global economic crisis lasts for at least a decade resulting in lost growth and opportunities followed by years of stagnation. | The global economy thrives with intellectual capital being a main asset determining economic success. | The global economy is doing well in aggregate terms but increasing disparity between and within countries leads to backlash against globalization and domestic unrest. | Global growth leads to eradication of poverty. | The global economic crisis leads to resurgence of protectionism and a Breakdown of WTO system leading to economic collapse in most countries. |
| Global Cultures | Western culture moves in part towards post-modernity with increasing search for meaning of life, de-secularization, self-searching and seeking of roots, together with some fusion with Asian traditions. | There are increasing tensions between cultures, not yet violent in form but with increasingly deep repercussions on global discourse. | An environment of peaceful exchange between cultures exists with the emergence of universal values and a sense of global tolerance. | | A new sect with an outstanding charismatic leader gains many adherents. It supports global brotherhood and peace. The new sect is successful, especially among intellectuals, becoming a major global force for peace. | Cultures and civilizations are the fault lines of a global violent clash. |

| Sub-Dimension | Neutral | Negative | Positive | Other | Wild (+) | Wild (-) |
|-------------------|--|---|--|--|---|--|
| Religion | Religion provides solace and meaning to many, but is also used by fanatics to stoke conflict. | Islam and Christianity on track to confrontation with Jews firmly on Christian side; Moslem violence against Jews and Israel on the rise; deterioration of Jewish-Christian relations due to a non-European Pope; Shoah fatigue and continuation of conflict. | Islam is moderated by globalization and adopts values of pluralism, tolerance and restraint from violence; A flowering of Jewish-Christian relations; global interest in Israel and Judaism; Jerusalem becomes a center for religious creativity and inter-faith dialogue. | | Religion becomes a source of global peace. | All out religious war; A charismatic Muslim leader unites the Muslim world in a bloody and vicious war on the infidels. |
| Global Governance | More or less the same as now, with some changes in the operations of the UN and the composition of the Security Council which make no real difference. | The global system becomes highly populist turning against minority groups and minority countries, making it increasingly difficult to openly sustain a Jewish identity. | International governance improved substantially upgrading global ability to address common challenges and threats; general tendency towards protection of minorities and small states. | A coalition of the USA, the EU and China together with some additional big powers forms a block operating partly within and partly outside the UN which in fact dominates global politics and economy. | Establishment of strong international order with strong protection for minorities - may happen following instances of nuclear mega-terror. | Breakdown of international order. |
| Anti-Semitism | Continues more or less as now, as a moral problem and an irritant, but not having any serious consequences. | Widespread hostility towards the Jews, particularly towards Israel. | Considerable decline in hostility towards Jews as a result of attainment of regional peace and elimination of global terror; increase in power of China and India spreads ideas of multi-ethnicity and religious pluralism. | | Main Jewish organizations, the government of Israel and a large number of Islamic leaders and organizations agree to cooperate in fighting against anti-Semitism and anti-Islamism and set up a joint Anti-Religious and Cultural Hate League which becomes a major and effective global actor. | A new kind of warfare against the Jews develops taking the form of violent attacks against Jews and Jewish targets in Israel and the world. These attacks escalate into mega-terror resulting in mass killings, together with large scale hostage takings; Western countries adopt anti-Israel policies. |

| Sub-Dimension | Neutral | Negative | Positive | Other | Wild (+) | Wild (-) |
|------------------------------|---|--|---|-------|----------|---|
| Cyberspace | Increasing scope, variety and uses of cyberspace. | Misuses of cyberspace for diffusion of hate and mass terrorism lead to strict global control over cyberspace. Some countries use cyberspace for brainwashing with strict control over access and content with the help of cyberspace-controlling new technologies. | Cyberspace increasingly brings people together serving as a tool of cultural exchange. | | | |
| Natural and Health Disasters | Occasional natural and health disasters have minimal global impact. | Natural and health disasters disrupt key Jewish population centers. | Climate control and health management systems become increasingly effective at minimizing and controlling fallout from disasters. | | | Global warming leads to rising sea levels in the Mediterranean; earthquakes in the ME; pandemics; freak weather situations. |

JPPPI MAIN PUBLICATIONS

The Jewish People Policy Planning Institute – Annual Assessment 2004-2005 The Jewish People Between Thriving And Decline *JPPPI Staff and Contributors* 2005

To succeed, large resources, judicious coping with critical decisions and careful crafting of long-term grand-policies are needed. The full volume contains analyses of the major communities around the world and in-depth assessments of significant topics.

Between Thriving and Decline – The Jewish People 2004, Executive Report, Annual Assessment No. 1 *JPPPI Staff and Contributors* 2004

Facing a Rapidly Changing World – The Jewish People Policy Planning Institute, Executive Report, Annual Assessment No. 2, 2005 *JPPPI Staff and Contributors* 2005

Major Shifts – Threats and Opportunities – The Jewish People Policy Planning Institute, Executive Report, Annual Assessment No. 3, 2006 *JPPPI Staff and Contributors* 2006

Societal Aspects – The Jewish People Policy Planning Institute, Executive Report, Annual Assessment No. 4, 2007 *JPPPI Staff and Contributors* 2007

The Jewish People Policy Planning Institute, Executive Report No. 5, 2008, with a Special Section on Women in Jewish Society *JPPPI Staff and Contributors* 2008

Institut de Planification d'une Politique pour le Peuple Juif, Rapport Annuel du JPPPI 2005/2006, Le Peuple Juif en 2005/2006, Entre Renaissance et Declin, Special edition in French *JPPPI Staff and Contributors* 2006

A Strategic Plan for the Strengthening of Jerusalem *JPPPI Staff* 2007

China and the Jewish People: Old Civilizations in a New Era *Dr. Shalom Salomon Wald* 2004.

This is the first strategic document in the series: Improving the Standing of the Jewish People in Emerging Superpowers Without a Biblical Tradition.

Muslim Anti-Semitism, The Challenge and Possible Responses *Prof. Emmanuel Sivan with the collaboration of Dr. Dov Maimon* 2009

Position Paper: Global Jewish People Forum *JPPPI Staff* 2005

The position paper examines president Moshe Katsav's initiative to establish a "Second House" and makes a number of recommendations.

Soft Power – A National Asset *Dr. Sharon Pardo*

Today's global changes in the international arena require more consideration of soft assets possessed by the Jewish People. Prepared for the 2005 Herzliya Conference.

Strategic Paper: Confronting Antisemitism – A Strategic Perspective *Prof. Yehezkel Dror* 2004

The increasing ability of fewer to easily kill more and more makes new antisemitism into a lethal danger that requires comprehensive, multi-dimensional and long-term counter-strategies.

Alert Paper No. 2: Jewish Demography – Facts, Outlook, Challenges *Prof. Sergio DellaPergola* 2003

There may be fewer Jews in the world than commonly thought, and if the current demographic trends continue unchanged, there might be even fewer in the future.

Alert Paper No. 1: New Anti-Jewishness *Prof. Irwin Cotler* 2003

The new Anti-Jewishness consists of discrimination against, or denial of, the right of the Jewish people to live, as an equal member of the family of nations.

A Road Map for the Jewish People for 2025 *JPPPI Staff* 2006

Published in the context of the Alternative Futures for the Jewish People 2025 project. Prepared for the Herzliya Conference.

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