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MITZPE DOSSIER

The Wrong Map

◇ URIEL ZEHAVI

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WE usually gate the Dossier. The map in this piece is the one the institutional class has not yet drawn — and I want to ensure the readers who most need to see it (Federation trustees, day-school boards, denominational leadership, and the rabbis running the institutions the framework) can easily read it. Consider it open. Forward it, post it, restack it.

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A Jewish day school board met this month to review renewal of a ten-year capital campaign. Enrollment softening — not collapsing, softening. Security costs up by a multiple over the last three fiscal years. Tuition past \$38,000 for the upper grades, which puts the real cost-per-seat, once scholarships are factored in, near \$55,000.

The board split along a line that was not there a decade ago. Parents who assume continuity as default and want the campaign renewed at scale, and demographers holding forecasts that suggest the campaign is funding infrastructure the community will not need.

The question on the table was not “is American Jewish life ending.” No one at the meeting framed it that way. The question was whether the capacity they were being asked to build would still be in use in 2045, or whether they were raising capital to subsidize the closing decades of a specific kind of institutional life.

Nobody at the meeting had a workable framework to answer it. Every Federation operating memo the board had read treated “American Jewry” as a single allocation category. Every communal-security presentation measured incidents — how many, what kind, where.

Neither told the board what it needed to know, which was: what is the trajectory of the community whose day school this is, and how does that trajectory differ from the trajectory of the American Jewish community in aggregate?

The question has an answer. It requires a map. This is the map.

Tenability Is the Wrong Question

THE post-October 7 conversation about Western Jewish life has run on two rails, and neither goes anywhere analytically useful.

One rail is dismissal — the engagement surge at Jewish day schools, the rise in synagogue attendance, the Federation Israel Emergency Campaign passing \$850 million by day 300, all read as evidence that the diaspora is fine, possibly thriving, certainly not in crisis.

The other rail is elegy — the 2025 calendar year’s twenty murdered Jews across four attacks on three continents, the 9,354 antisemitic incidents the ADL logged in the US in 2024 alone, the 344% five-year increase and 893% ten-year increase in that same measurement, all read as confirmation that the end is here and the only honest response is to grieve.

Both rails share the same analytical error. They treat the Western Jewish diaspora as a single object that admits a yes-or-no verdict. Neither premise holds.

Five questions sit unexamined inside “tenability.”

1. Physical safety — can Jews be protected at synagogue, at day school, on the street.
2. Institutional continuity — will the denominational, educational, and communal infrastructure still function in thirty years.
3. Religious transmission — will Jewish life be passed to the next generation in recognizable form.
4. Political standing — will Jewish institutional voice carry weight in the civic life of the host society.
5. Subjective belonging — will individual Jews feel this place is home.

Collapse all five into one question and every answer is either an overstatement or an understatement.

Rather we need ratio analysis. Capacity — institutional, educational, security, leadership — measured against pressure — ambient hostility, political erosion, demographic contraction. Read across communities, not across “the diaspora.” Read for trajectory — whether the ratio is expanding, holding, or collapsing — not for current-state verdict.

The Prizmah enrollment trend report is the illustrative case. Fifty percent of responding day schools reported new enrollments post-October 7 from families not previously on prospect lists. Sixty percent attributed the new interest to “change in climate.” Sixty-eight percent of inquiring families named fear of antisemitism as the driver.

Read through the dismissal frame, this is evidence of communal strength.

Read through the elegy frame, it is evidence of siege.

Read through ratio analysis, it is neither — it is an indicator of environmental pressure showing up on the capacity side of the ledger, which says nothing, by itself, about whether the capacity will still exist at the end of the arc the pressure produces.

The ratio is specific to a community, not the diaspora. The trajectory is specific to the sub-community inside that community.

The real analytical work is differentiation — and the institutional class responsible for allocating capital against the result has not yet publicly done it.

Five Indicators, Not Six

The framework reads trajectory from five load-bearing indicators. Each is specified by the metrics that measure it and the threshold values that distinguish the three categories — runway, parity, without runway. Parsimony is the discipline.

1. Day school sustainability.

The sustaining metric is enrollment trajectory over a ten-year window, read alongside tuition-to-median-Jewish-household-income ratio, scholarship capacity, and teacher pipeline depth. The final AVI CHAI Jewish Day School Census recorded roughly 292,000 students across 906 US schools in 2018-19, up from 185,000 in 1998-99. The growth was almost entirely Chassidic and Yeshiva World. Non-Orthodox day school share fell from 20% of total enrollment in 1998-99 to 13% in 2013-14 and has continued to contract. Roughly 40% of Jewish day schools carry fewer than 100 students — a financial-sustainability flag that has held across every census year since the metric has been tracked. Tuition at flagship-metro Prizmah-network schools now routinely exceeds \$40,000. In a community whose median household income does not support that tuition at the required enrollment density, the math stops mathing quickly.

2. Communal security infrastructure.

The metric is per-capita security spend, professionalization depth, and state-coordination sustainability. The UK Community Security Trust operates on a £72 million government commitment running through 2028 — £18M per year covering 200-plus Jewish educational sites, 28 youth movement camps, 100-plus communal sites. The US Nonprofit Security Grant Program was funded at \$274.5 million for FY2025 against a JFNA estimate of the actual annual cost of protecting US Jewish communal infrastructure at approximately \$765 million — less than 40% coverage. FEMA approved only 43% of 2024 NSGP applications. The Secure Community Network has grown from five employees to seventy-five since Pittsburgh 2018, and 93 federations now employ full-time security directors, a fourfold increase over five years. Australia's

federal government committed \$62 million (AUD) post-Bondi — \$30M synagogue rebuilding, \$32M institutional security — a decent absolute figure for a community of 117,000, and a late one.

3. Physical clustering.

The metric is geographic consolidation or dispersion over time, read against the institutional-density threshold below which communal infrastructure becomes operationally unsustainable. Eighty-five percent of Australia's roughly 117,000 Jews live in Sydney and Melbourne. Toronto's Jewish community concentrates in the North York/Bathurst corridor. Manchester's 30,000 is the largest UK community outside London. In the US, roughly half of American Jewry lives in six metros — New York, Los Angeles, Chicago, South Florida, Boston, DC. Clustering is operational density and concentrated target surface at once. The threshold below which institutional life breaks down is neighborhood-specific, not community-specific — a community of 10,000 with all 10,000 in one neighborhood sustains more than a community of 30,000 dispersed across a metro area.

4. Institutional leadership pipeline.

The metric is ordination and rabbinical-training rates against the aging-cohort replacement rate. HUC rabbinical enrollment fell from 214 in 2006 to roughly half by the 2022 restructure. HUC voted in 2022 to phase out the Cincinnati rabbinical program after 150 years in the city; the final Cincinnati ordination runs in spring 2026. In June 2024, HUC ended its ban on ordaining students in interfaith relationships — the third major non-Orthodox seminary to do so after RRC in 2015 and Hebrew College in 2023 [the admissions pressure is not subtle]. The USCJ Conservative-movement congregational count declined from 573 in 2011 to 552 in 2021 through mergers and closures.

5. Political-institutional vulnerability.

The metric is the political dependency structure sustaining communal infrastructure, read against the trajectory of that dependency. This is the indicator that most current diaspora-capacity frameworks omit and the one that moves the analysis fastest. American Jewish institutional security rests on NSGP funding, which in 2025 was conditioned on ICE cooperation, DEI restrictions, and anti-boycott compliance under the Trump administration — and on state-level hate-crime enforcement architecture that varies by political coalition. German communal infrastructure is a Federal Interior Ministry line item funding the Zentralrat der Juden, one of the specific budget lines the AfD has contested. French communal protection runs on the Vigipirate/SENTINELLE

deployment that French Jewish leaders are explicitly watching the 2027 election to assess. Political-institutional vulnerability is the hidden capacity variable. A community whose incident rate is stable and whose institutional infrastructure is current-state functional can still be without runway if the political substrate that sustains both is eroding faster than the community can replace.

One note on what is not here. Inter-marriage is not an indicator. It is an outcome variable driven by the interaction of the five indicators above — community density, institutional leadership, educational infrastructure, political standing, physical safety.

Though a popular metric to bandy about, inter-marriage [while admittedly problematic on several levels] is functionally irrelevant to the structure of this discussion — though it can be illustrative at times. Treating inter-marriage as an independent variable inverts the causal structure. The five hold. A sixth replaces one, not the set.

North America Jews Are Not One Community

American Jewry is, at a minimum, three communities.

American Orthodox — runway.

Pew's 2020 survey measured Orthodox fertility at an average of 3.3 children per woman against 1.4 for non-Orthodox. The Orthodox median age is 35. Conservative 62. Reform 53. Orthodox retention stands at 67%. The Pinker-Cohen demographic projection, drawing on Pew 2013 with 2020 validation, projects Orthodox share of US Jewry rising from 12% to 29% over fifty years — and, more consequentially, Orthodox share of the American Jewish child population rising from 22% to 51%. Within the Orthodox sub-community, Haredi fertility measured via the American Community Survey runs around 6.6 children per woman. The global Haredi share of world Jewry is projected to rise from roughly 14% today to 23% by 2040. On every indicator the framework reads — day school enrollment trajectory, institutional density, pipeline depth — American Orthodox infrastructure is building, not maintaining.

American non-Orthodox — parity moving to without runway.

USCJ congregational count 573 in 2011, 552 in 2021. HUC ordination down 41% since 2008. The closures are visible and named. The trajectory on the underlying five indicators is sharper than the congregational count alone suggests. Denominational membership data captures the institutions. It does not capture the contraction in Hebrew school hours, the decline in mid-career non-Orthodox Jewish professional life, the generational erosion of Shabbat observance among affiliated families.

The unaffiliated Jewish population is not a separate trajectory category in the framework. It is the outflow population the non-Orthodox denominational infrastructure is losing to. Counting unaffiliated Jews as a trajectory-distinct community treats non-engagement with Jewish communal infrastructure as itself a form of Jewish infrastructure. It is the absence of it.

Canadian communities — parity with structural distinctions.

Toronto and Montreal both run higher on institutional-density indicators than comparable US metros. According to the UJA Federation of Greater Toronto, 55% of Canadian Jews attend Jewish day schools, against 29% in the US. Canadian intermarriage runs at 35% compared to the US at 54%. Montreal's population decline has effectively stabilized, per University of Toronto sociologist Robert Brym's analysis for the CJN — driven by Haredi growth (the Montreal Haredi population is now over 20% of the city's Jewish community) and inflow from France. Toronto's political substrate is the structural concern. Toronto Police Service 2024 data showed Jews, less than 4% of the city population, targeted in 40% of all hate crimes and 81% of religiously-motivated hate crimes. Anti-Jewish hate crimes up 144% since 2021. The institutional infrastructure is strong. The political environment is the variable.

Mid-tier American communities — the most vulnerable category in the map, and the one the institutional class is least prepared to recognize.

The distinction between flagship (New York, Los Angeles, South Florida, Chicago, Boston, DC) and mid-tier (Cincinnati, St. Louis, Minneapolis, Pittsburgh, Atlanta, Houston, Denver) is not size.

Atlanta and Houston are not small.

The distinction is on the five indicators: day school density, institutional leadership replacement, state and local political dependency structure.

HUC's decision to consolidate rabbinical training out of Cincinnati after 150 years is an institutional vote on the demographic trajectory of Midwestern non-Orthodox Jewish life — the decision is made, the ordination runs in spring 2026, the campus closes, the local pipeline goes with it.

Cincinnati is not representative of mid-tier. It is the edge case where a flagship non-Orthodox institution has already called the trajectory.

St. Louis, Minneapolis, Pittsburgh are further along the curve than Atlanta or Houston. All are on it.

Aggregated population masks the differentiation.

The institutional capital flow treats "American Jewry" as one allocation target — JFNA's \$16 billion endowment and \$900 million-plus annual campaign operate on that frame.

The Federation model is geographically federated but strategically unified. It does not price the Orthodox runway sub-community's capital needs differently from the Conservative-movement contracting infrastructure's. It does not separate flagship-metro capital campaigns from mid-tier consolidation. The capital continues to flow by momentum and historical relationship, not by the trajectory the five indicators read.

That is the American map. Three distinct communities, one allocation frame.

The mismatch is the indictment.

Western Europe: France Is Without Runway

France is the sharpest community-level verdict this framework produces.

Peak French Jewish population — 530,000 in 1970, per the Institute for Jewish Policy Research. Current — 442,000 estimated for 2024. A 17% decline over fifty-five years, with the trajectory sharpening rather than flattening.

Aliyah from France ran at 1,109 in 2023, 2,200 in 2024, and 3,300 in 2025 — a 45% year-over-year acceleration and near-triple 2023 levels. The AJC Paris survey puts 38% of French Jews — roughly 200,000 individuals — as “actively considering aliyah.” Twenty percent have removed mezuzot from outside their homes. Sixteen percent have changed names on delivery apps to obscure Jewish identity.

The reader who has been paying attention will note that French antisemitic incidents fell from 1,570 in 2024 to 1,320 in 2025 per the TAU report. Great. But. Violent attacks actually rose — 106 to 126. Worrying. But the headline incident number came down. So, predictably, institutional voices describe this as stabilization.

The capacity framework reads it differently.

A community whose aliyah rate is accelerating while its incident rate is declining is a community whose exit decision has become uncoupled from any single incident threshold.

The exit trajectory is no longer responding to marginal improvements in the pressure side of the ratio because the capacity side has already been priced in.

French Jews are leaving not because 2025 was worse than 2024 but because the indicator they are reading is not the year-over-year incident count. It is the ambient state of French Jewish life. Their institutional leaders — explicitly naming the 2027 presidential election as the inflection point — have effectively confirmed what French Jewry is already doing. The Jewish Agency’s *One People* survey, fielded by Ipsos in September–October 2025, caught the indicator in a single number. 22 percent of French Jews report feeling safe in France. Not 22 percent unsafe. 22 percent safe.

Only 21 percent of French Jews report optimism about the future of their community. 40 percent in Europe overall. 46 percent in North America. 60 percent in Australia and South America. The divergence between those four numbers is what differentiation looks like as a bar chart — and it is almost exactly the shape the framework’s three categories predict.

The UK is parity-to-without-runway with a faster-moving political substrate.

CST operates on the £72 million commitment through 2028. Incidents ran 4,103 in 2023 — record high — 3,556 in 2024, 3,700 in 2025.

The institutional infrastructure is robust. The political substrate is the variable.

On 2 October 2025 — Yom Kippur — Jihad al-Shamie, a British-Syrian attacker who had pledged allegiance to ISIS [with a given name to match], drove a car

into worshippers at the Heaton Park Hebrew Congregation in Manchester and stabbed them. Two died.

UK Chief Rabbi Ephraim Mirvis, who does not write in hyperbole, said:

“This is the day we hoped we would never see, but which deep down, we knew would come.”

Aliyah from the UK ran 406 in 2023, 676 in 2024, 840 in 2025 — second consecutive year of growth, 19% acceleration year-over-year. The *One People* survey puts the ambient discussion higher than the operational count — 56 percent of European Jews report having discussed the option of aliyah inside the home. 64 percent in the UK specifically. The annual flow is what the discussion looks like when a portion of it moves to decision. The discussion base is several times larger than the flow.

The CST infrastructure did not fail. A Yom Kippur attack does not land the same way as a Tuesday-afternoon assault, and the political and cultural environment in which the attack became thinkable is outside the scope of what CST funding alone can address.

Controlled Surrender named that environment. The host culture’s pre-commitment to not naming the ideology, not confronting the clerics, not enforcing against the infrastructure. CST funding through 2028 is a capacity decision. The substrate decision — whether Britain remains a place where Jewish institutional life can continue to be funded into existence — is being made in different venues on different timelines by people who are not being invited into the CST funding conversation.

Germany is parity with structural vulnerability.

Roughly 118,000 registered Jews. Incidents declined from 6,560 in 2024 to 5,729 in 2025. The AfD won 20.8% in the February 2025 federal election — second place nationally, 32.5% to 38.5% across the East German states — and in the same year was classified by the Federal Office for the Protection of the Constitution as a “confirmed right-wing extremist endeavor” [a state-funded investigation of the second-place party]. The AfD has appealed that ruling. The Zentralrat der Juden is funded out of the Federal Interior Ministry — the German state funds the Jewish representative body, which is a stability arrangement only as long as the state maintains the post-1945 consensus. That consensus is no longer uncontested in German politics. A parity-level capacity rating for Germany that does not price this is understating the trajectory.

The Northwestern European communities — Netherlands, Belgium, Scandinavia — are without runway on scale alone. The infrastructure thresholds below which full communal life cannot be sustained are population-dependent, and these communities sit below them. Belgium’s incident count rose from 129 in 2024 to 232 in 2025, with physical assaults up from 27 to 32. Institutional contraction in the Netherlands has been running for two decades. These communities are already in terminal trajectory on infrastructure scale, before any capacity-to-pressure calculation runs.

Italy and Spain are distinct small-but-functional cases. Italy's community is stable at roughly 45,000. Spain's community is expanding slightly through the 2015 Sephardic return-of-nationality law. Both sit outside the Northwestern European contraction pattern. Neither is in the five-indicator runway category. Both are parity with specific structural features.

France is the verdict. The rest of Western Europe sits on a spectrum whose shape France has already defined.

The France verdict is not in any Federation operating memo this year. Help it get there.

Australia, the Pacific, and the Scoping Lines

Australia was the quiet runway community through 2023.

Small (roughly 117,000), concentrated in two metros, institutionally robust, politically insulated. It is not that community anymore.

The acceleration phase ran fast.

ECAJ's incident data for the full Jewish calendar year — 472 incidents in 2022, 1,200 in 2023, 2,062 for the year ending September 2024, and 1,654 for the year ending September 2025. A near-quadrupling between 2022 and 2024 followed by sustained elevation. Adass Israel Synagogue in Melbourne was fire-bombed in December 2024. The Lewis' Continental Kitchen kosher deli in Bondi was arsoned [this word feels odd, but I'm sticking by that choice] in October 2024 — Australian intelligence later determined Iran directed the attack, and in August 2025 Australia expelled Iran's ambassador, the first Western country to do so. A Melbourne synagogue was arsoned on 4 July 2025 while a Shabbat meal was in progress inside.

Then, 14 December 2025. Sajid Akram and his son Naveed, father and son, inspired by ISIS ideology, attacked Jews on Bondi Beach during Hanukkah. ISIS flags littered their car. The motivation was clear and that motivation led to fifteen massacred people. Driven by Jew-hate. The deadliest mass killing in Australia in nearly three decades. Of the twenty Jews murdered worldwide in antisemitic violence across 2025 — Bondi, the DC Capital Jewish Museum shooting in May, the Boulder flamethrower attack in June, Heaton Park Manchester in October — fifteen died from that one attack on that one theretofore family-friendly beach.

The political substrate had been moving faster than the security infrastructure could compensate.

The Albanese government recognized a Palestinian state in September 2025, three months before Bondi.

The Australian Special Envoy to Combat Antisemitism, Jillian Segal, had delivered 49 recommendations in July 2025. The government had implemented zero of them by 14 December.

ECAJ CEO Alex Ryvchin, speaking after the attack, did not hedge: the writing had been on the wall, and this sort of thing was always going to happen.

Prime Minister Albanese announced a Royal Commission on 8 January 2026, with terms of reference including government and National Intelligence Community inaction since 7 October 2023 [a Royal Commission into the government's own inaction].

The indicator verdict: Australia sat on runway through 2023 on all five metrics. It now sits on parity. Whether it holds at parity or crosses to without runway depends on whether the Royal Commission produces structural reform of the political environment or produces the theatrical-inquiry outcome that Australian Royal Commissions, like their British and Canadian analogues, often produce. The security capital flow — \$62 million (AUD) post-Bondi — is adequate as a one-time appropriation and insufficient as a trajectory response.

New Zealand is parity at small scale.

A community of roughly 7,000. Incidents ran 131 in 2024 and 143 in 2025. Distinct political environment from Australia. The framework applies, but the analytical resolution is limited by community size.

Three scoping lines.

Latin America — Argentina, Mexico, Brazil — is its own institutional logic. Argentina's roughly 171,000 Jews, the largest community in Latin America, operate on a demographic and political pattern shaped more by Argentine economic cycles and political populism than by the North Atlantic diaspora dynamics the framework reads. Aliyah from Argentina tracks peso collapse more reliably than antisemitism-incident data.

The FSU — Russia, Ukraine, Belarus — is shaped by post-Soviet conditions and the active Ukraine war. Russian aliyah ran 43,500 in 2022, 19,500 in 2024, 8,300 in 2025. These are migration flows driven by war and regime stabilization, not the capacity-to-pressure dynamics of Western communities.

South Africa — 50,000 Jews, down 60% from the 1970 peak, 1% aliyah rate in 2021 — is closer in pattern to the Western framework but sits inside a state that has taken Israel to the ICJ on genocide charges, which places it in a trajectory category that merits its own full treatment.

The scoping is not really avoidance. Each of these communities has its own institutional structure, its own political substrate, and its own capital-flow environment.

Collapsing them into the North Atlantic map produces categorical confusion that degrades the analytical value of the map for both the North Atlantic communities and the scoped-out communities. The map shows what it shows.

The Royal Commission reports in December 2026. The trajectory verdict is available now.

Incidents Are the Output. Capacity Is the System.

Institutional leaders who allocate capital against antisemitism-incident data are allocating against a lagging indicator.

Incidents are the output of a system. They are what happens when pressure exceeds capacity at a specific place and time. Measuring them is necessary because the deaths and injuries and harassment are real and the institutional response to each has to be precise. Using them as the primary signal for trajectory is a grave analytical error. They tell you what already happened. They do not tell you whether the institutions that respond to them will still exist in twenty years.

Which is basically the same analytical error *The Fifty-Year Front* named in the foreign-policy domain — institutions measuring the output their adversary generates and funding against the measurement, while the adversary builds terrain the institutions refuse to recognize as the strategic category.

Federation capital allocated against incident counts is the diaspora version of MFA shekels allocated against the latest hostile headline. Two operational domains, one structural failure.

The structural reasons are specific. Reporting conventions vary — CST, ADL, ECAJ, TAU all use different methodologies and different definitions of “incident.” Definitional drift is real — the categorization boundaries around harassment, intimidation, physical assault, property damage, and hate speech have shifted measurably over the past fifteen years. Reporting-institution political positioning affects what gets counted and how — the ADL under Jonathan Greenblatt is not the same measuring instrument as the ADL under Abraham Foxman. And aggregation obscures local trajectory — a national number up 15% tells you nothing about whether Cincinnati is stable and Atlanta is collapsing.

Most consequentially, incident counts are responsive to recent events, not to the infrastructure conditions that determine whether the community can respond to those events over time.

Two communities with comparable incident rates can have completely different capacity trajectories.

Germany’s incident count declined from 6,560 in 2024 to 5,729 in 2025.

The UK’s declined from 4,103 (the 2023 record) to 3,556 to 3,700.

On the incident metric, both are improving modestly.

On the capacity framework, the UK sits on parity with a stable political substrate while Germany sits on parity with a substrate that is actively contested by a party now sitting at 20.8% of the Bundestag vote and officially classified as right-wing extremist.

These are not communities on the same trajectory. Incident data does not discriminate between them.

The same analytical problem applies inside communities.

Pre-Bondi Australia and post-Bondi Australia are not the same community on the capacity framework. The five indicators moved. The incident data moved as well, but the incident data was lagging — the 316% incident spike between 2022 and 2024 was the signal that the political substrate was shifting, and the

institutional class read it as the problem rather than as the indicator of the problem.

The Segal recommendations came in July 2025. The government implemented none of them.

The indicator — incidents — was visible. The underlying condition — political substrate erosion — was not addressed.

The attack on Bondi Beach in December did not happen because Australian institutional security spending was too low. It happened because the political substrate that determines whether institutional security funding, hate-crime enforcement, intelligence prioritization, and political will to treat anti-Jewish violence as terror had degraded past the point where the institutions could compensate.

The political-substrate layer is the hidden capacity variable.

American Jewish institutional security depends on the federal NSGP and state-level coordination. The NSGP's recent conditions — ICE cooperation requirements, DEI restrictions, anti-boycott compliance — align the grant structure with one partisan coalition in a way the grant structure did not historically require.

The Trump administration's early-2025 freeze of reimbursements during FEMA review is not a one-off administrative delay. It is an indicator that the grant infrastructure is now firmly inside the partisan-sort trajectory, and the partisan sort does not run backwards.

The Two Middles traced this mechanism at the Israel-policy layer. The sort does not negotiate. NSGP conditionality is the same dynamic on a different clock — federal funding for Jewish institutional security now sits inside the same sorted environment the Democratic caucus's April 2026 arms-sales votes already confirmed.

The institutional class that still thinks it can engineer a return to the pre-sort consensus is misreading what the sort is.

French institutional protection runs on Vigipirate/SENTINELLE state deployments that are politically contested. German communal infrastructure is a line item in the Federal Interior Ministry budget that the AfD has named. Australian institutional security coordination depends on the NIC and the federal government — and the post-Bondi Royal Commission terms of reference name both as subjects of inquiry.

Community-by-community capacity trajectory revised for political substrate:

- American Orthodox runway confirms. The Orthodox sub-community's institutional infrastructure is least exposed to the federal political sort because its capital is internal and its political coalitions are more insulated.
- American non-Orthodox revises from parity toward without runway. The institutional infrastructure is sufficient for current state. The substrate it

relies on — federal security funding, state hate-crime enforcement, denominational political coalitions — is moving.

- France's without-runway verdict is confirmed and sharpened.
- Germany revises from parity toward without runway because the substrate trajectory moves faster than the institutional capacity can be rebuilt.
- The UK holds at parity — CST and UK government have committed through 2028 and the political environment, while under pressure, is not substrate-eroding at the rate Germany or France is.
- Australia revises from runway to parity and sits at risk of without runway pending the Royal Commission's actual output, not its announcement.

The political-class task inside Jewish communal infrastructure is different now. It is to stop building toward a substrate the sort has already moved past.

NSGP reform conditioned on DEI restrictions is not the aberration — it is the structural position federal Jewish institutional funding now occupies.

The advocacy posture that treats 2025 conditions as deviation from a recoverable baseline is spending political capital against a clock that is not running.

The coalition work that still matters is work that maps to the sorted environment. State-level relationships where the coalition holds. Federal relationships that assume the conditions are the norm. Parallel structures where the federal substrate cannot be relied on. The institutional class allocating capital by momentum has a political-class mirror — the advocate allocating political capital by restoration. Same error. Different ledger.

Incident data, read alone, would give different verdicts on several of these communities. That is the point. Incident data is the output the system generates.

Capacity — institutional, structural, political — is the system that generates it.

Institutions allocating against output are always one cycle behind the system.

The Floor the Framework Does Not Read

ONE qualifier the capacity framework needs — without it the framework reads more optimistic than the ground warrants.

The substrate's direction in most Western host societies is downward, and the direction is not primarily being set by variables the framework treats as available to institutional intervention.

It is being set by Islamist demographic and ideological momentum inside host societies. By the cleric networks Britain has declined to confront for forty years. By the Qatari academic funding the United States has declined to sanction for two [Section 117 is a public filing — the reason the sanction has not come is not access to the data]. By the elite capture of European interior ministries by coalitions whose policy positions treat Jewish communal security as a category subject to negotiation. Two scales, one trajectory.

The floor that mechanism sets is the 2025 casualty count — the highest toll in three decades per the Tel Aviv University Annual Report. Each of the four major attacks that produced it landed in a community whose institutional infrastructure was functioning on most metrics. Capacity wasn't the failing variable.

The capacity indicators, by their construction, read institutional trajectory — not the physical-risk trajectory the substrate is setting. A community reading “parity” on day-school enrollment, security spend, leadership pipeline, and clustering can still sit above a physical-risk trajectory whose slope is being determined upstream of all of those variables.

The rabbi reading from the pastoral side of the community — Jews walking into his shul, children in his day school, families asking whether to raise their kids there — is reading that floor directly. He is not wrong to be pessimistic about what the floor is doing. Indeed, he's right.

The institutional class measuring capacity is not reading the floor at all. The two reads answer different questions. The rabbi's question is the more proximate one for the people in front of him.

The framework still works for the question it is built to answer — which communities are on trajectories that justify capital reallocation, which institutional investments scale with growth, which scale with maintenance, which are funding infrastructure the community will not need. What the framework cannot do is tell the rabbi what to say to the mother who is deciding in April 2026 whether her six-year-old should still be in the day school by kindergarten in 2027. That decision is being made against the floor, and the floor is moving the wrong way.

What the framework can do is tell the rabbi which of two conversations he is having. Pessimism read against structural drift is honest. Pessimism read against structural resilience is a call to keep building. Same floor, different maps. The rabbi reading the former is owed that read by the institutions

whose job it is to fund against it. The rabbi reading the latter is owed the same honesty in the other direction. The map does not override the floor — it tells the rabbi what the floor is doing at altitude.

Israel Brief reads capacity, not incidents. Structure, not news cycle. Subscriber-funded. If this analysis is worth reading, it is worth paying for.

Where the Pattern Puts Each Community

The historical record of Jewish diaspora trajectory is not rhetorical weight. It is data.

Five anchor windows structure the record. And if you think “ancient history” isn’t relevant, you are sorely mistaken.

1. **1290 Edict of Expulsion** — Edward I expels England’s Jewish community after a century of legal marginalization, blood libels, taxation-driven asset extraction, and ghetto-like residential restrictions. The expulsion is the legal culmination of a trajectory that had been measurable for a century.
2. **1306 and 1394 France** — Philip IV and then definitively Charles VI expel French Jews after the pattern repeats on the French royal side of the Channel.
3. **1492 Alhambra Decree** — Ferdinand and Isabella expel roughly 800,000 Jews from Spain after the 1391 pogroms, the Inquisition, and blood-purity statutes — centuries of infrastructure erosion before the decree itself.
4. **1920s-1930s Germany** — the most integrated Jewish community in Europe in 1920 is subject to the Nuremberg Race Laws by 1935 and industrial-scale genocide by 1942. From Weimar’s structural stability to Nuremberg is fifteen years.
5. **1945-1972 Arab-state communities** — approximately 850,000 Jews flee or are expelled from Arab-majority countries, with the Farhud pogrom in Baghdad in 1941 and Tripoli in 1945 as pre-expulsion signals, through the final clearances of Libya (declared Judenrein by 1970) and the Syrian confinements of the post-1967 period.

The scholarly record is settled. Wistrich, Nirenberg, Julius, Lewis — the disagreements are about causes and emphases. The continuity is not in dispute.

The analytical discipline for reading the current record against this is pattern-matching, not prediction.

A community that pattern-matches 1928 Germany is not on a fate line toward 1942.

The structural features of 1928 — an integrated community, an extremist party at roughly a fifth of the national vote, state-subsidized institutional infrastructure under political contest, a macroeconomic shock recent enough to shape voter behavior — are legitimately comparable to current conditions in specific communities.

Pattern-matching produces attention allocation, not inevitability claims.

The reader who wants the framework to produce “and therefore X will happen” is asking the wrong question of it.

Current communities against the anchor windows:

Late-sequence phase. France pattern-matches late pre-Alhambra Spain and late pre-1306 France. A community at historical-peak-minus population, centuries of integration and contribution, concentrated political pressure, documented community exit accelerating, institutional leadership explicitly naming the inflection point. South Africa pattern-matches late-1940s Arab-state communities — formal government hostility, 1% aliyah rate, the judicial-institutional targeting of the host state’s foreign policy against Israel.

Mid-sequence phase. Germany pattern-matches late Weimar — integrated community, extremist party at a fifth of the national vote and officially classified as extremist, state infrastructure under political contest, macroeconomic stress visible. Australia pattern-matches the acceleration phase of the 1930s — community growth interrupted by rapid incident escalation culminating in deadly mass attack, political establishment slower to respond than the threat moved. These are mid-sequence placements, not late-sequence. The structural features are present. The political outcomes are not predetermined.

Stable-interval phase. American Orthodox pattern-matches 19th-century Pale of Settlement core communities — demographic growth, internal infrastructure development, relative insulation from the political trajectory of the broader host environment. The UK pattern-matches late Victorian/Edwardian stability — institutional robustness, state partnership, incident pressure but not systemic legal deterioration. American non-Orthodox pattern-matches something that has no clean historical analogue, which is itself diagnostic — the non-Orthodox denominational decline is a structural-demographic contraction rather than a host-environment expulsion, and the historical record is thinner on infrastructure collapse by voluntary disengagement than on infrastructure collapse by external pressure.

Does pattern-matching justify the reconfiguration of diaspora institutional capital? The record shows specific phases. The record shows specific communities at specific phases. The record does not show what happens next in any community. The record shows what has happened in communities structured like each current community.

The Decision Surface

The framework produces a decision surface. It does not produce prescriptions.

For runway communities — American Orthodox, at the sub-community level — the decision is whether current capacity investment is a ceiling or a floor. JFNA manages roughly \$16 billion in endowment assets, raises over \$900 million annually, distributes \$2 billion-plus from foundations and endowments. The LiveSecure initiative launched in 2021 at \$54 million over five years — roughly \$11 million per year. For a sub-community whose child-population

share is projected to move from 22% to 51% over fifty years, \$11 million per year in dedicated infrastructure investment is maintenance capital, not growth capital. The decision: is the Orthodox runway an expected outcome the institutional class will simply watch materialize, or is it a growth trajectory that justifies explicit capital allocation on the growth frame rather than the maintenance frame.

For parity communities — the UK, Canadian urban centers, American non-Orthodox flagship metros, Australia at its new parity level — the decision is which moves in the next five-to-ten-year window either consolidate runway or lose it. The UK's CST funding certainty through 2028 is the consolidating move, but the question is what the 2028-onward commitment looks like, and whether the 2028 political environment that determines it can be engaged now. The parity communities do not have time they do not know they are using.

For without-runway communities — France, Northwestern European communities below sustainability threshold, South Africa, the most structurally exposed American mid-tier communities — the decision surface splits.

Building continuity infrastructure — preserving specific institutions, cultural artifacts, archives, rabbinical training materials, cemeteries, documented communal histories — is one institutional strategy. Managing dignified contraction — planning for eventual near-complete exit, coordinating with aliyah infrastructure, maintaining dignified closure of institutions rather than neglect — is another.

Neither is prescribed. Both are live institutional strategies that can be named. To refuse naming the two is to choose the third path by default — continuation by momentum.

The *One People* survey also recorded a generational signal the capacity indicators do not register. 91 percent of Israelis say it is important that their children feel connected to Israel. 58 percent of Global Jewry say the same. A 33-point gap in what the two sides of the relationship think the next generation's obligation is. The absorption architecture the Jewish Agency is building assumes a diaspora that still transmits the Israel connection as a communal obligation. That transmission is weakening on the diaspora side — which means the absorption architecture may eventually face a demand curve lower than the forecast. Not because the crisis communities are not exiting, but because the next generation may not read Israel as where they exit *to*.

The aliyah infrastructure question surfaces as structural implication, not individual prescription. The Israeli government's recent actions are the baseline. The Jewish Agency and Aliyah and Integration Ministry expanded aliyah fairs to the US, France, UK, Ukraine, Georgia, Argentina, Mexico, South Africa, and Australia, with first-ever Sydney and Melbourne fairs held late last year and had over 20,000 global participants.

The ministry announced a NIS 170 million absorption program in February 2025 and ran an “emergency immigration” drill late 2025 to test readiness for a mass-arrival scenario. Doron Almog, Jewish Agency chair, has forecast a

potential wave of one million olim in coming years. Between 2022 and 2025, North American aliyah applications rose 50%. Nefesh B’Nefesh facilitated 4,150 North American olim in 2025 — one of the largest annual totals in its 23-year history.

The Israeli state is building aliyah infrastructure against a trajectory the diaspora institutional class has not yet publicly come to terms with. The coordination question — whether diaspora institutions engage aliyah infrastructure as a complementary line of institutional work, or treat it as a separate line the Israeli government manages — is the decision surface the framework produces. No prescription is required. The decision is there whether or not the institutional class uses it.

The first meeting is not about capital. It is about vocabulary. A Federation board that cannot say the word “terminal” about a specific community cannot allocate against a map that requires it. A denominational leadership that cannot say “runway” about a sub-community whose growth is funded at maintenance levels cannot build against the growth. The institutional class’s first problem is linguistic, not analytical — and the absence of the vocabulary is a poor choice that does more harm than good.

What this does not do is tell individual Jews what to do. The framework reads communities, not persons. An individual Jew in a without-runway community may have every reason to build a life there. An individual Jew in a runway community may have every reason to leave. The framework has no standing to address either case. It addresses the institutional class whose job is to allocate capital against the map, and it tells them what the map says.

Scenarios: Four Paths, One Most Likely

Four paths sit on the decision surface. The probability distribution across them reflects what the prior two briefs in this arc established about Israeli institutional politics, and what extends by straightforward analogy to diaspora institutional politics: reallocation is harder than continuation, and the arithmetic usually loses to the politics.

1. Full-diaspora continuity with capacity investment.

This is the path the institutional class publicly describes itself as on. Coordinated capital reallocation sufficient to rebuild communal infrastructure across the full map, new institutional formation where the current Federation-and-denomination structure cannot scale, political alignment across fragmenting denominations. The prerequisites do not exist in current visible form. No Federation strategic plan, no denominational long-range document, no publicly released philanthropic framework from any of the major funders operating on this scale names this as the operating strategy. Probability: roughly one in ten. Stated not because the case is impossible but because the institutional prerequisites are absent and the creation of those prerequisites is itself a large-capital project no actor has taken up.

2. Tiered continuity with strategic concentration.

Capital flowing from low-runway communities to high-runway communities at explicit institutional direction. Some version of this is partially visible already in the pattern of Federation capital campaigns — new JCC builds in some metros, consolidation in others — but operating as implicit rather than named strategy. The politically difficult step is naming it: the moment a Federation says aloud that it is redirecting capital from Cincinnati to Miami because the demographic trajectory justifies the redirection, the community the capital leaves is owed an accounting the institutional class has not developed the vocabulary for. Probability: roughly three in ten. Likely to continue as the implicit pattern without explicit adoption, with the downside that implicit tiering is less efficient than explicit tiering because the implicit version still pays political costs to opponents of capital redirection who cannot be engaged on merit.

3. Managed contraction with aliyah acceleration.

Honest institutional acceptance that specific communities — France, South Africa, Northwestern European below-threshold communities, specific American mid-tier communities — are on terminal trajectories. Capital redirected toward continuity-infrastructure preservation in those communities and toward aliyah absorption capacity rather than toward maintenance investment. The Israeli state is effectively building half of this scenario unilaterally. The Jewish Agency is effectively operating on it. The diaspora institutional class has not publicly adopted it, because the political cost of naming specific communities as terminal is high enough that the institutional actor closest to adoption can always defer by one more budget cycle. Probability: roughly one in four. Partial adoption is happening whether or not anyone names it.

4. Momentum.

Current pattern. Capital flows by historical relationship, Federation-campaign inertia, and denominational political equilibrium rather than by map. Piecemeal consolidation where individual institutions fail, piecemeal expansion where individual donors concentrate, no strategic direction at aggregate level. Probability: roughly two in five. This is the highest-probability path because it is the lowest-friction path. It is also the path that produces the worst aggregate outcome across the map, because capital continues flowing to contracting infrastructure in parity and without-runway communities where it generates the lowest marginal return, while expanding infrastructure in the runway sub-community is funded at maintenance levels.

Across the four paths, the weighted trajectory favors the path with the worst outcome.

Four scenarios, one most likely, one that matters. Forward it to the trustee who hasn't seen the map yet.

This is the specific character of institutional-system failure the prior two briefs documented in the Israeli context — political friction favors continuation, continuation compounds the arithmetic it is losing, the arithmetic does not reward patience. The diaspora institutional class is not Israeli politics. Yet, sadly, the failure mode is the same.

The reader who is not a trustee has standing the trustee does not — the standing to ask. Ask the Federation what map it is using. Ask the day-school board what trajectory the capital campaign is priced against. Ask the denominational leadership which sub-community the scholarship pool is designed to serve. Momentum holds because the people who could force it to stop are assumed not to be watching. Watch.

The institutional class responsible for diaspora continuity is still allocating capital by momentum against an inherited map. The actual map is three categories of community, read on five indicators, priced against a political substrate the aggregate allocation model cannot see.

It exists whether or not the institutional class reads it.

The decision surface exists whether or not the institutional class uses it.

Whether Jewish life in the West is ending was always the wrong question.

The question is whether the people whose job is to steward Jewish communal infrastructure are doing that job against the map that is actually there.

— *Uri Zehavi · Intelligence Editor, Israel Brief*

ABOUT THE AUTHOR

Uriel Zehavi

EXECUTIVE DIRECTOR · MITZPE INSTITUTE

Uriel Zehavi is the executive director of Mitzpe Institute, where he writes the daily Israel Brief and co-directs its Institutional Intelligence practice with Modi Zehavi. He is the author of four books from Mitzpe Press and advises Israeli and allied clients on strategic communications for Western audiences.



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Mitzpe Institute is an intelligence and strategy organization focused on Israeli security, diaspora threat assessment, and the strategic challenges confronting the Jewish people and the West. We produce daily intelligence, forensic analyses, strategic assessments, and tactical briefings read by policymakers, military leaders, and institutional decision-makers across more than 90 countries and all 50 US states — from the Knesset and the US Congress to allied governments, major policy institutions, and Jewish organizational leadership worldwide.

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