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READER EDITION

April 24, 2026

MITZPE DOSSIER

Two Middles

The extremes converge on Israel. The moderate cores diverge — and the architecture built for a shared middle cannot reach either one.

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CLASSIFICATION

Reader Edition

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WE usually gate the Dossier. This week we're not, because the argument here is the one we don't see people making at sufficient scale. Consider it open — forward it, post it, restack it. The reader who needs this hasn't seen it yet.

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On April 15, 2026, the Democrat from Arizona — astronaut, former Navy combat pilot, one of the names floated consistently in early 2028 Democratic presidential speculation — stood up on the Senate floor and walked Bernie Sanders's Joint Resolutions of Disapproval to a vote. Forty of forty-seven Senate Democrats voted to block a \$295 million sale of Caterpillar D9R and D9T armored bulldozers to Israel. Thirty-six voted to block a \$151.8 million sale of munitions. Both resolutions failed. Republicans held. The failure is nearly immaterial.

More alarming is the trajectory. Nineteen Democrats voted with Sanders on the first Block the Bombs resolution in September 2024. Eighteen in November. Twenty-seven in July 2025. Forty on April 15, 2026.

That is the curve of a caucus being reconfigured in real time, and the reconfiguration has a clear direction. Tzeva adom.

Kelly's floor speech cited "the reckless decisions being made by Prime Minister Netanyahu and President Trump" — language calibrated to the centrist Democratic primary voter a 2028 hopeful needs to reach, not to the DSA flank. Senator Elissa Slotkin, the Michigan moderate also on the 2028 shortlist, told reporters after the vote that she had struggled with the vote as much as any she had taken in Congress.

At this point, it's basic math. We have sorely mismanaged the messaging. A Democratic presidential aspirant reads the coalition, reads the donor base, reads the primary electorate, and concludes that voting to block weapons to an ally at war with Iran's proxies is the safer position in 2028. They'd be right (in that's it safer, not that it's morally correct).

That is the problem. *Fifty-Year Front* traced the terrain our adversaries spent half a century cultivating. This brief traces the ground as it shifted and sorted us away. We are all — yes, even those of us who were dyed-in-the-wool "progressives" or the as-a-Jew camp — we are toxic to the Democrat's party line. Whether you voted Trump or not, you might as well be wearing a red MAGA kippah — at least in the eyes of the party machers.

The Sorting Mechanism Doesn't Care What Israel Does

ISRAEL did not lose the Democratic Party because of Gaza, Netanyahu, or the settlements. No matter what Rahm Emanuel says to Bill Maher.

Israel lost the Democratic Party because the American political system sorts every culture-war-visible issue into two partisan containers, and once an issue enters the sorting apparatus, the outcome is structurally determined regardless of what the subject of that sort does or does not do.

The mechanism is named, mapped, and empirically mature. Matthew Levendusky's *The Partisan Sort* (2009) established the model. Once elites at the top of each party coalition converge on opposing positions, the cues propagate downward through the rank-and-file, and voters who had previously held cross-cutting combinations of views reorganize themselves along party lines.

Liberal Republicans and conservative Democrats — the Jacob Javitses and Howell Heflins of the pre-sort era — disappear, and with them disappears the cross-party coalition that single-issue advocacy once relied on.

Once partisan and social identities lock together, the emotional intensity of partisanship rises independent of actual policy movement.

Sorted partisans express greater anger toward the out-party. They assign it more extreme views than it holds. And they process new information through tribal rather than analytical circuits — even when the underlying policy disagreements have not extremized at all.

Shanto Iyengar and colleagues at Stanford tracked the affective gap itself: out-party feeling-thermometer scores began their sharp descent in the late 1980s. By 2016 the gap had doubled. By 2024 it sat near 55 points. I shudder to think what the numbers say today.

The mechanism has already processed three issues that we can view it by.

Climate change entered the sorting apparatus in 1992 — McCright and Dunlap document zero statistically significant partisan divergence on environmental concern from 1974 to 1991, followed by Republican voting scores collapsing in the early 1990s, conservative media attacks on the science by 1997, and a 45-point partisan gap by the Trump first administration. Immigration entered in 2009 — Gallup shows a 7-point gap on “immigration should be decreased” in 2008, widening to 17 points in 2009, reaching 52 points by the mid-2020s.

The mechanism is not novel. It is not a surprise. It has been running on other issues for thirty years.

Israel entered the sorting apparatus roughly in 2001, inflected sharply in 2014, and accelerated again after 2021.

Gallup's longitudinal series shows Democratic favorability toward Israel dropping 14 points after the 2014 Gaza war alone — under a Netanyahu government, yes, but a Netanyahu government making substantially different strategic choices than the one in office post-October 7.

Democrat favorability then ran 63% in 2022, 56% in 2023, 47% in 2024, 33% in 2025, and by March 2026 sat at a 44-point partisan gap — the largest ever recorded in the series. The narrowing began years before October 7, 2023.

The hostile claim is that Netanyahu alienated Democrats by integrating himself with the Republican Party.

Netanyahu is not solely responsible. Not even mostly responsible. Israel and the Democratic Party have both moved in opposite directions. Correct. The sorting was already under way. Netanyahu's Republican alignment was a response to a structural condition, not the cause of it.

Partisanship is the dominant variable structuring how Americans view every foreign policy question. In the 2008 Chicago Council data, Republicans and Democrats overlapped substantially on which threats mattered. By 2025 they agreed on two items — international terrorism and government corruption — and disagreed on everything else.

The Ukraine case, as we will explore below, is a knockout blow to the Bibi-did-this hypothesis.

Israel was not abandoned. Israel was sorted.

Abandonment implies a moral choice that a different moral choice on the other side could reverse. Sorting is a structural condition that moral choices in the vicinity cannot undo.

Israeli Multi-Axis Politics Cannot Read American Mono-Axis Sorting

Israeli political reasoning cannot natively parse American mono-axis sorting, because the two political systems run on incompatible grammars — and the mismatch is the mechanism by which even Israel's most American-fluent leaders still keep getting the American political system wrong.

Israeli political logic is built for a coalition system (with an average of 7.8 effective parties across the nine general elections since 1999). Identity moves independently on multiple axes — religious/secular, Ashkenazi/Mizrahi, hawk/dove, veteran/oleh — and coalition partners are assembled across those axes issue by issue.

A voter can be Haredi and left-economic. A coalition can contain Religious Zionism and Shas and Likud without that combination imposing a single position on judicial reform, Iran strategy, or settlement policy.

The entire operational grammar of Israeli politics is cross-cutting.

American political life has been running on the opposite grammar since the 1990s.

Party identity pre-loads positions across every culture-war-visible issue as a bundle.

If you know someone is a 2024 Democrat, you can predict their position on abortion, climate, immigration, LGBTQ policy, police funding, and Israel with roughly 75% accuracy — not because those issues are logically connected but because the sorting apparatus has connected them.

Israeli leaders who intellectually understand the bundling still default to coalition-logic instincts under operational pressure. The reversion point is not a failure of intelligence. It is the failure of a lifetime of political reflexes formed inside one grammar to sustain calibration inside a different one at the speed decisions require.

The paradigmatic demonstration is the March 2015 joint session. Speaker John Boehner organized Netanyahu's address on Iran without consulting the Obama administration. At least 58 Democratic lawmakers boycotted. Nancy Pelosi wrote afterward that she was "near tears...saddened by the insult to the intelligence of the United States." Representative John Yarmuth, a Jewish Democrat, described the speech as pure Dick Cheney playbook. The speech received multiple standing ovations in the room. Outside the room, it crystallized a Democratic perception that Israel had chosen a side in American domestic politics — and that the side was not theirs.

An Israeli coalition instinct reads the 2015 calculation as sensible. The Iran deal is an existential question. Congress is the relevant forum. Boehner offers the platform. What can you do? You have to take the platform.

The grammar of Israeli coalition politics assumes that policy disagreements cross party lines and that direct appeals across those lines are normal.

The American sorted grammar reads the same move as a tribal alignment — Netanyahu chose Team Red, full stop, and everything he says downstream is processed through that tribal assignment regardless of merit.

Michael Oren, Netanyahu's ambassador in Washington during the Obama period, warned internally that the partisan-capture strategy would prove costly. He was overruled. The overrule was not stupidity. It was coalition-logic instinct overriding sorted-politics analysis inside an Israeli decision-making apparatus built to run on the former.

The new MFA budget structure reproduces much of the same category error at scale. It seems that Sa'ar convened a single deliberative body — former spokesmen, IDF veterans, YouTube influencers, comedians — to design a single messaging strategy for a single American audience. The structure assumes one audience. The audience has two moral vocabularies. The structure will not reach the second vocabulary regardless of how much the Finance Ministry dumps into the budget.

Senator Chris Murphy, whatever his current rhetorical posture, has privately warned Netanyahu several times over the past decade about the alignment risks. The warnings were not cryptic. They were diplomatic kindness from a politician who understood the mechanism and assumed that a sophisticated Israeli prime minister would eventually hear it. He heard it. He could not operationally move on it.

The PM Best-Equipped to Read the System Still Cannot Navigate It

Benjamin Netanyahu is the most American-fluent prime minister in Israeli history.

That fact has to sit at the front of this section because every argument downstream depends on it. If the Israeli leader with the deepest American political formation still cannot navigate the sorting mechanism, then the mechanism is not navigable through conventional diplomatic craft. It is a structural condition.

The Netanyahu family lived in Cheltenham Township, Pennsylvania from 1963 to 1967, when Benjamin — known to his American classmates as Ben Nitay — graduated Cheltenham High School. He returned to Israel for IDF service, then returned to the United States in 1972 to attend the Massachusetts Institute of Technology. He was there through May 1976, with a break in 1973 to fight in the Yom Kippur War. He earned a degree in Architecture in February 1975 and another from the Sloan School of Management in June 1976. He was admitted concurrently to MIT's political science PhD program. His studies ended when his brother Yonatan was killed at Entebbe.

Then came his stint at the Boston Consulting Group from 1976 to 1978 — overlapping with Mitt Romney, who was at BCG from 1975 to 1977 — where Netanyahu was placed on a cross-European strategic planning team for the Swedish government, traveled to study Britain and France, and absorbed what he has since described as BCG's intellectually rigorous boot camp.

Then deputy chief of mission at the Israeli embassy in Washington (1982 to 1984). Then permanent representative to the United Nations (1984 to 1988).

No, I'm not trying to give you his CV. I want you to see how Western-literate he is and to see what he absorbed. Look at that UN tenure window. The Reagan second term.

The exact moment the evangelical-Republican-Israel alignment crystallized under the Moral Majority coalition. Which is precisely the realignment the partisan-sorting literature identifies as the consolidation phase of the modern American political system.

Netanyahu was physically present in New York. He was giving interviews to American outlets and watching the alignment lock into place in real time.

This is not a leader who stumbled into American partisan politics. This is a leader whose formative political education took place during the formation of the modern American partisan system, on American soil, inside the institutions that shaped the realignment.

And he still got trapped.

The Trump second-term alignment has been — by any metric an Israeli prime minister would have used in 2015 — successful. Six White House visits in the first thirteen months. First foreign leader welcomed at the White House in

the second term, February 4, 2025. Recognition of Israeli sovereignty positions that the Biden administration had blocked. Arms transfers that Democratic administrations would have slow-walked or conditioned. On the surface, the partisan-capture strategy delivered concrete outputs — Abraham Accords extensions, sovereignty recognitions, expedited arms transfers.

Look underneath it, though. Trump's May 2025 Middle East trip — his first major foreign travel of the second term — skipped Israel. A US official told Axios: "Nothing good can come out of a visit to Israel at the moment." Trump uncoupled the Saudi nuclear agreement from Israel normalization, reversing the structure Biden had built. He negotiated directly with Hamas for the release of American-Israeli hostage Edan Alexander in May 2025 without Israeli involvement. He conducted indirect talks with Iran in Oman. When Netanyahu arrived at the White House in February 2026 for his sixth visit, Israeli media described him as worried that Trump's rush for a deal might produce terms harming Israel's security.

Matthew Kroenig, the former Pentagon Iran lead, put the dynamic plainly on NPR before that February 2026 meeting. Trump is unpredictable. Trump likes deals. Trump wants to be the peacemaker. Netanyahu is worried about what that means for Iran strategy specifically. The most pro-Israel American president since Reagan, serving in a second term with an Israeli ally he has been explicitly aligned with since 2017, is a source of strategic anxiety for the prime minister who built the alignment — because the alignment delivers access without leverage, and access without leverage is not a strategy.

The partisan-capture strategy has produced this outcome. A Republican president the Israeli PM cannot fully trust on Iran. A Democratic caucus in which forty of forty-seven senators now vote to block weapons sales. And a Republican primary electorate in which 52% of voters prioritize lowering domestic prices over Israel funding. That is what the absence of a strategy looks like when it runs long enough to be observed in the wild.

The hostile claim — that Netanyahu did this to Israel — has the causal arrow backwards.

The sorting mechanism made bipartisan access impossible, and Netanyahu chose the partisan option the old grammar let him recognize as a choice.

It might be rational-within-the-trap. But it was still trapped.

AIPAC Is Defending Ground That Has Already Moved

AIPAC's architecture was built for a consensus that no longer exists.

Some several decades of institutional decisions were calibrated to sustain and operate inside a bipartisan environment the sorting mechanism has since dismantled, and the institution has not restructured to match the dismantling.

The operational expansion under Howard Kohr, who led AIPAC from 1996 to 2024, is the surface story. Budget from \$105 million in 2011 to \$164 million

in 2022. Staff from 40 to 300. Claimed membership above five million. Seventeen regional offices.

The expansion is real, but it is expansion of a consensus-era architecture, not redesign of it.

More regional offices mean more venues delivering the same bipartisan message to a bifurcating audience.

The layer under that story is the 2021 break with the no-endorsements policy. In December 2021, AIPAC announced the creation of two political vehicles: AIPAC PAC for direct candidate contributions, and the United Democracy Project as an independent-expenditure super PAC.

The leadership framed the move as a response to the changed environment.

Tom Dine, who ran AIPAC from 1980 to 1993, called it “a public failure” and urged a return to the no-endorsement rule. Dine was right about the failure. He was wrong about the remedy.

The failure is not that AIPAC started endorsing. The failure is that AIPAC started endorsing inside an institutional identity that was grounded on not endorsing — and therefore cannot do the endorsing work credibly.

UDP’s 2024 cycle is an empirical demonstration. The super PAC raised \$68.4 million through August 2024 — Jan Koum alone contributed \$5 million — and deployed it primarily against two Democratic incumbents: Jamaal Bowman in New York’s 16th district and Cori Bush in Missouri’s 1st. They spent \$9.9 million opposing Bowman and \$4.8 million supporting challenger George Latimer. Which the New York Times described as more than any single-interest group had ever spent on a single House race.

Look at what UDP did not do in the races it won.

Justice Democrats communications director Usamah Andrabi noted afterward that not one UDP advertisement in the 2024 cycle mentioned Israel. Not one. [That is an admission encoded as a media buy.] The organization whose operating purpose is pro-Israel advocacy ran its most consequential political operation by refusing to argue on the substance of its mission — because the Israel-based argument no longer wins inside a Democratic primary. Which is AIPAC’s institutional disclosure that the consensus method has stopped working.

Kohr himself made the admission plainer in a November 2023 donor-only meeting. Asked how to encourage members of Congress to stand up to what he called “pro-Hamas” claims, Kohr outlined an enforcement architecture: Members who support Israel would be helped politically. Members who work to weaken Israel would be defeated at the ballot box. The statement is strategic enforcement-through-primary-challenge. It is not consensus-plus-lobbying. It is the operating model after the operating model changed.

Post-October 7 fundraising surged. AIPAC received roughly \$12 million per month in pledged donations through September 2023. October 2023 alone

brought over \$40 million. November and December 2023 combined: roughly \$50 million. The total haul through late January 2024: \$90 million.

The money came in because donors understood Israel was in existential danger and an American pro-Israel institution needed resources. The institution receiving the resources did not read the moment symmetrically. The dollars funded an expansion of the existing architecture rather than a redesign.

Kohr retired at the end of 2024. Elliot Brandt succeeded him. The transition did not produce a public strategic reset. Brandt inherited the outgoing framing — AIPAC as the tip of the spear for pro-Israel policies in Congress — which is the operational language of a pre-sorting era institution addressing a sorted audience, and the mismatch is visible in the sentence itself.

Why can AIPAC not restructure into parallel partisan affiliates? Three reasons, each structurally decisive.

First, institutional identity. AIPAC's legitimacy claim — the reason members of Congress take its calls — is grounded on bipartisan access. A public split into Democratic-aligned and Republican-aligned affiliates would delegitimize the claim that produced the access in the first place, and it is not clear that the affiliated structures could then rebuild separate legitimacy inside their partisan containers faster than AIPAC would lose the bipartisan legitimacy it still partially holds.

Second, donor coordination. AIPAC's donor base is itself sorted, roughly along the denominational lines the next section covers in detail. Republican-aligned donors and Democratic-aligned donors both write checks to AIPAC because they accept its bipartisan cover. A public split forces each donor pool to choose, and the split almost certainly does not produce two institutions each as well-funded as AIPAC is today.

Third, board legitimacy. The AIPAC board of directors is drawn from the consensus-era lay leadership class. The board composition itself is an institutional anchor to the old model. A restructuring mandate would require either replacing the board or persuading it to oversee its own obsolescence — neither of which is a thing institutional boards typically do.

AIPAC is not structurally incapable of change. It is structurally incapable of this specific change from its current starting position — without a major, painful push anyway. That is why the architecture this piece will eventually describe — parallel partisan coalitions — likely has to be built somewhere other than inside AIPAC.

The Coalition Fractured on Both Sides — Republican and Jewish

Both party coalitions are fracturing on Israel simultaneously, and the Republican fracture is converting at a rate that forecloses any long-term partisan-capture strategy.

The Democratic collapse is the more visible front. The piece of the picture that receives systematically less attention is that the same mechanism is running on the Republican side, and running faster than Democrats converted on Ukraine.

The IMEU/YouGov December 2025 survey is an unambiguous indicator. Among Republicans under 45: 51% prefer a 2028 presidential candidate who supports reducing taxpayer-funded weapons to Israel. 53% oppose renewing the current 10-year, \$38 billion Memorandum of Understanding that expires in 2028. 51% oppose entering the 20-year, \$76 billion MOU reportedly under negotiation. 74% agree that taxpayer-funded weapons to Israel should be reinvested in lowering domestic healthcare costs.

Netanyahu net favorability among Republicans over 45: +40. Among Republicans under 45: +2. What a gap. Thirty-eight points inside the same political party — which is to say, the Republican Party of 2035 is not the Republican Party of 2025, and the replacement dynamic is already visible in the current data.

Pew's September 2025 survey confirms the trajectory. 19% of Republicans said Israel had been going too far in military operations in Gaza, up from 12% in December 2023. 41% of Republicans held an unfavorable view of Israel, up from 27% in 2022. Gallup's March 2026 series showed Republican favorable views of Israel at 69% — down 15 points from 2025 and the lowest level in over two decades.

The America First realignment is accelerating the effect. Tucker Carlson, Candace Owens, J.D. Vance in rhetorical moments, the podcast right broadly — the conservative media ecosystem that Republicans under 45 actually listen to has been running Israel-skeptical content at scale since 2023. The content does not present itself as left-coded. It presents itself as nationalist, anti-interventionist, skeptical-of-elite-consensus — which is to say, it reaches the exact Republican demographic most available for generational-replacement sorting.

The Jewish community itself has already sorted into two partisan containers that cannot be lobbied as a single constituency.

Pew's 2020 Jewish Americans study is the definitive data anchor. Orthodox Jews: 75% Republican or Republican-leaning, up from 57% in 2013. Reform Jews: 80% Democrat or Democrat-leaning. Orthodox Trump approval in the 2019–2020 fieldwork window: 81%. Overall American Jewish Trump disapproval: 73%. Half of Orthodox Jews told Pew they had “not much” or “nothing at all” in common with Reform Jews. The feeling seems to be reciprocal.

Manhattan Institute's October 2024 survey captured the denominational political behavior heading into the election. Harris margin overall: +36. Reform: +53. Unaffiliated: +45. Conservative: +14. Orthodox: –29. Trump net favorability: overall –39, Reform –56, Orthodox +25. The Trump favorability gap between Orthodox and Reform Jews is not a community with internal disagreements. It is two communities occupying the same demographic census category and moving in diametrically opposed political directions.

The JEI/Mellman post-election exit poll confirmed the Manhattan Institute projection. Harris 71%, Trump 26% overall. By denomination: Reform 84% Harris, Conservative 75% Harris, unaffiliated 70% Harris, Orthodox 74% Trump. By religious attendance: 81% of Jews who never attend services voted Harris; 61% of those attending more than monthly voted Harris.

The Tablet and Split Ticket precinct data showed the effect at the neighborhood level. Heavily Orthodox Lakewood, New Jersey: Biden received 17.2% in 2020, Harris 11.2% in 2024. Lakewood precinct 27: Trump 366-0. Precinct 36: 560-1. Squirrel Hill, Teaneck, Scarsdale all shifted Republican by 3 to 12 points between 2020 and 2024.

The Orthodox surge inside the Jewish vote is a communal realignment running in parallel with the denominational institutional realignment it expresses politically.

The claim [if it could ever rationally exist given the old joke about two Jews and three opinions] that the American Jewish community speaks with one voice on Israel is empirically dead. A coalition that includes 74% Trump Orthodox voters and 84% Harris Reform voters cannot be lobbied as a single constituency because the two halves of the coalition now trust different political validators, read different media, and process the same Israel question through different moral vocabularies.

Mark Mellman, who runs Democratic Majority for Israel, put it diplomatically: “There’s a fight going on in the Democratic Party. It’s a hard fight.”

The undiplomatic version is that the fight is over, and the winner did not win because of Israeli conduct — the winner won because the sorting apparatus does not negotiate.

Two cores are fracturing simultaneously. The hinge constituency that AIPAC’s consensus-era architecture was built to represent has disassembled into two partisan constituencies, and each of those constituencies has internal generational dynamics running the same mechanism one layer deeper.

That is not a recoverable environment. That is the environment for which a different architecture has to be built.

The Inverted Horseshoe: Two Middles, Two Vocabularies

The political extremes converge on Jews and Israel. The moderate cores diverge. That second observation — not the first — is where the structural consequence for institutional advocacy lives, and the moderate-core divergence operates on a mechanism with a name and an empirical literature behind it.

Horseshoe theory, attributed to the French philosopher Jean-Pierre Faye in *Théorie du récit*, observes that the political extremes bend toward each other: the far right and the far left, nominally opposite, converge on structural features like authoritarianism, conspiracy, and — the application most relevant to this brief — antisemitism.

The primary path for the horseshoe? Far-right respondents endorse classic conspiracy and dual-loyalty tropes. Left-wing respondents endorse Israel-as-colonial-oppressor framings.

The vocabularies differ. The underlying structure — Jews or Israel as uniquely malevolent actor — is the same.

Over the past year, you'd need to be functionally illiterate to miss this growing trend. Tucker Carlson ran conspiracy content about "globalist Jews" on the right. Candace Owens suggested on her podcast that Israel was involved in Charlie Kirk's assassination because Israeli cellphones had been detected in the area. On the left, Zohran Mamdani, the Queens state assemblyman who won the New York City mayoral race in November 2025, told supporters that the boot of the NYPD on a civilian's neck had been laced by the IDF. Different costumes, same opera.

That the extremes converge is the observation the horseshoe literature has been making for fifty years. The inverse is also true to an extent. The extremes converge, yes. And, functionally, the moderate cores diverge — and the moderate-core divergence is the structurally consequential phenomenon, because the extremes are not the audience any institution is actually trying to reach.

The analytical spine for the inverted observation is Jonathan Haidt's Moral Foundations Theory. Graham, Haidt, and Nosek established in 2009, across four studies, that liberals and conservatives activate different subsets of the same moral psychology. Liberals rely disproportionately on two individualizing foundations — Harm/Care and Fairness/Reciprocity — and discount three binding foundations: Ingroup/Loyalty, Authority/Respect, and Purity/Sanctity. Conservatives rely roughly equally on all five. The finding has been replicated across dozens of studies, in multiple countries, and across issue domains.

Apply the finding to Israel.

A moderate Democrat processing a news item about an IDF strike in Gaza routes the item through the Harm foundation — how many civilians, what was the proportionality, what does humanitarian law say — and the Fairness foundation — is the use of force proportionate, was there a reasonable alternative, how does this read against the universal standard. These are the dominant foundations the moderate Democrat's moral psychology activates by default.

Loyalty, authority, and sanctity are secondary. They are present but in no way are they load-bearing.

A moderate Republican processing the same news item routes the item through:

- (1) Loyalty — Israel is the ally, the ally is defending itself, allies get support;
- (2) Authority — the Israeli government authorized the operation inside its own sovereign decision-making, and the challenge to that authority is itself suspect — and
- (3) Sanctity — the land carries biblical covenantal significance, the people carry religious significance for the evangelical base, the moral weight of the ally is substantially higher than neutral third-country weight.

Harm and Fairness are present but not dominant. The binding foundations carry the moral load.

The same event enters two completely different moral processors.

The bipartisan message AIPAC spent seventy years crafting assumed that a single moral vocabulary — a vocabulary built on security alliance, shared democratic values, and strategic cooperation — could activate both processors simultaneously.

That assumption held as long as the political coalitions both contained moderate voices using substantially overlapping moral vocabularies.

Once the coalitions sorted, the vocabularies bifurcated, and the single-message architecture started failing — not because the messaging got worse but because the audience split into two audiences the message was not built to address.

The denominational data above is the test of the theory running in real time.

Orthodox Jews, whose religious practice maximally activates Loyalty (Jewish peoplehood), Authority (rabbinic structure, Torah obligation), and Sanctity (Shabbat, kashrut, holiness codes), align 75% Republican. Reform Jews, whose religious practice minimizes the binding foundations and emphasizes Harm and Fairness (tikkun olam, universal justice, social concern), align 80% Democrat.

Same people, same Israel, same news.

Two different moral vocabularies. Two different political containers.

The operational implication is brutal.

An Israeli official activating binding-foundation rhetoric — Netanyahu in any of his American media appearances since 2023 speaking about sovereignty, alliance, biblical inheritance, civilizational defense — reaches the moderate Republican core with high fidelity and reaches the moderate Democratic core with approximately zero signal-to-noise.

An Israeli official activating individualizing-foundation rhetoric — the proportionality argument, the humanitarian law frame, the civilian-casualty accounting — reaches the moderate Democratic core at reasonable fidelity and reads to the moderate Republican core as dangerously close to conceding the adversary's moral frame.

There is no register available to a single messenger that simultaneously reaches both cores adequately. And the attempt to split the difference produces a bland message that reaches neither.

This is the diagnostic that makes the architectural prescription unavoidable.

If the two moderate cores process the same facts through two different moral processors, and if the institutional vehicles designed to reach them were all built for a single processor, then the vehicles are mismatched to the terrain.

No amount of better messaging inside the existing vehicles fixes the mismatch.

The vehicles themselves have to be redesigned — or replaced — with two-track architecture that speaks each moderate core's native moral vocabulary through messengers those cores already trust.

The extremes have converged. The cores have diverged. The architecture has to follow the cores, because the cores are where the votes, the donors, and the policy outcomes actually live.

The Affiliate Structure That Was Never Built

Two-track advocacy architecture is not a novel institutional form. It is the default structure in at least three mature American political-movement traditions.

What is novel — what has never been attempted — is building the structure for a foreign policy question, inside a movement whose founding institutions were designed for bipartisan consensus and have never mutated away from that design.

Start with reproductive rights. The National Abortion Rights Action League, founded 1969 and now operating as Reproductive Freedom for All, runs three coordinated entities: a 501(c)(4) for advocacy and lobbying; a 501(c)(3) foundation, incorporated 1977, for research and education; a PAC for direct political operations. Thirty-five state affiliates carry the work at the state level with substantial operational autonomy. The entities coordinate research, share data, calibrate timing on major announcements, and deploy separately through messengers calibrated to their respective audiences and venues. The structure is federated by design.

The opposing side built an even more extensive version. The National Right to Life Committee operates 50 state affiliates and roughly 3,000 local chapters, claims 7 million members, runs a \$9-plus million annual operating budget, and deploys both a candidate-contribution PAC and — critically for the AIPAC comparison — the National Right to Life Victory Fund, established 2012 as an independent-expenditure super PAC. The Victory Fund claimed a 79% win rate across 295 endorsed candidates in the 2020 cycle.

The structural parallel to AIPAC PAC plus UDP is exact. The key difference is that NRLC's affiliates speak in voices calibrated to their local political environments, while AIPAC's endorsements come through a single central voice that can't credibly speak in two partisan registers at once.

Labor built an older version. The AFL-CIO PAC lineage traces to 1946, restructured under its current name after the 1955 merger. Individual union PACs — SEIU COPE, UAW-V-CAP, AFSCME PEOPLE — operate in coordination with the federation but deploy separately, calibrate their messaging to specific union memberships, and when necessary break with the federation on specific races without fracturing the federated relationship.

The Sierra Club has run a 501(c)(4) plus 501(c)(3) Foundation plus PAC plus state chapter structure on the environmental side since before the modern sorting mechanism accelerated.

The architectural vocabulary is specific. State affiliate. Local chapter. Sister organization. Dual-affiliate structure. Coordinated entities with separate operational deployments.

The IRS structures — 501(c)(3) for educational and research work, 501(c)(4) for advocacy and lobbying, PAC for candidate contributions, super PAC for independent expenditures — are the legal plumbing that makes the architecture possible.

AIPAC already has the plumbing. AIPAC PAC, UDP, AIEF as the 501(c)(3) sister organization, and the main 501(c)(4) are the four entities.

The apparatus exists. But the apparatus is deployed as single-voice, not as sister-organization.

Why has Israel advocacy not mutated to the sister-organization model already?

The causal chain runs through founding-era path dependence. AIPAC was constituted in 1954, inside a bipartisan consensus environment, by founders who assumed the consensus was the terrain.

The institutional decisions made in the next seven decades — Kenen's no-endorsement rule, the foundation of AIEF as educational-trust form in 1988, the expansion under Kohr along centralized-messaging lines, the 2021 PAC and UDP rollout structured as extensions of the central voice rather than as sister organizations — all reinforced the single-voice premise.

The institution mutates incrementally. The mutation required to shift from single-voice to sister-organization is discontinuous, not incremental.

Several secondary blocks compound the path dependence.

An Israeli ministerial class has been sorted — already — into Republican-recognizable American media venues. Smotrich and Ben-Gvir on Christian broadcasting. Netanyahu on Fox. Eylon Levy across the Anglophone center-right.

These messengers can be calibrated tomorrow to reach the moderate Democratic core by topic and tone, and the calibration will fail on arrival, because the messengers are already tribally assigned in the audience's perception.

A sister-organization architecture cannot use the messengers AIPAC has on hand. It needs different messengers. Building the Democratic-facing messenger pool from scratch takes a decade.

Further, AIPAC's donor base is itself sorted along denominational-partisan lines.

Republican-aligned donors who believe in Israel write checks to AIPAC because AIPAC's bipartisan positioning launders the partisan alignment as universal support.

Democratic-aligned donors who believe in Israel write checks to AIPAC for the inverse reason: the bipartisan positioning lets them support Israel without signing on to centrist or right-leaning politics.

A sister-organization split forces each donor pool to choose — which means some donors leave entirely, some donors halve their giving across both sister organizations, and the total combined intake very plausibly declines rather than growing.

To be clear, no parallel-affiliate structure has been built on a foreign policy question because foreign policy questions have historically remained inside the bipartisan-consensus zone in American politics.

Now that Israel, Ukraine, and China policy are all sorting into partisan containers, the precedent will start existing — but the first institution to build the new architecture pays the full innovator's tax, and institutional boards typically prefer the costs of inertia to the costs of being first.

The new Israel-aligned institutions that have formed since 2023 gesture at the architecture without completing it.

The Democratic-flank slot, in particular, remains empty — because the institution that was supposed to fill it is not, on present evidence, Israel-aligned.

J Street has spent fifteen years printing “pro-Israel, pro-peace” on its letterhead while functioning as the Washington-respectable permission structure for opposing concrete Israeli security measures under cover of supporting Israel in the abstract.

On April 12, 2026, Jeremy Ben-Ami announced that J Street will no longer support U.S. assistance for Israeli defense systems when the current MOU expires in 2028 — which is to say, an organization trading on a “pro-Israel” brand now opposes continued American support for the interceptors that kept 700,000 American citizens in Israel alive during Operation Roaring Lion's missile salvos.

An organization that will not defend the interceptor above a kindergarten in Sderot is, plainly, an anti-Israel organization whose brand is older than its current position and needs updating. [The brand will get updated when the donor base does the math; not before.]

Democratic Majority for Israel is the institution that actually occupies the Democratic-aligned pro-Israel slot — center-Democratic PAC, operationally unambiguous, at a fraction of the scale a sister-organization architecture would require.

IMEU Policy Project runs from the opposite direction, explicitly anti-weapons-to-Israel.

ZOA operates Republican-aligned without formalizing the partisan positioning.

The space of new institutions exists. None has built the sister-organization architecture at the scale the two-track environment requires.

The architecture remains specifiable in form, and unbuilt.

The MFA Is Funding the Wrong Category

The MFA budget allocated to public diplomacy is being deployed into a terrain the budget's architecture cannot read, which is why the marginal return on additional shekels is near zero.

The 2025 allocation was a twenty-fold increase over the pre-war typical annual allocation of roughly NIS 27 million. The December 2025 government approval — announced jointly by Finance Minister Smotrich and Foreign Minister Sa'ar — brought the 2026 total to approximately \$729 million.

Sa'ar framed the purpose as a diplomatic campaign aimed at foreign policy-makers combined with a cognitive campaign targeting “global public opinion.”

“Global public opinion” is the category error.

There is no global public opinion, and there is no American public opinion. There are two American publics, sorted, processed through two different moral vocabularies, reached by two different messenger networks.

A cognitive campaign targeting the composite is a cognitive campaign targeting an analytical fiction. The dollars — the shekels — spent on the composite enter a single pipeline, emerge through single-voice messengers, and arrive at an audience that divides them cleanly along the sort line.

The structure of the January 2025 brainstorming sessions reproduces the category error at the operational level. Sa'ar convened a single deliberative body — former government spokesman Eylon Levy, former IDF English spokesman Jonathan Conricus, INSS fellow Ophir Dayan, StandWithUs executive director Michael Dickson, makeup YouTuber Ashley Waxman-Bakshi, Israeli model Nataly Dadon, comedian Yohay Sponder — to design a single messaging strategy. Subsequent consultations with civil society institutions — Jewish Agency, ELNET, AJC, Nefesh B'Nefesh, NGO Monitor, World Zionist Organization, HonestReporting — added weight to the same single pipeline.

The deliberative architecture is a committee designing a message. The audience is not a committee's counterpart. The audience is two audiences.

The Clock Tower X LLC contract, signed in 2025 under Sa'ar, pays the US-based firm \$6 million to produce digital content and — this is the line from the FARA filings — influence how large language models respond to Israel-related topics. The premise assumes that AI discourse is a unified space. AI discourse is not a unified space. The language models encounter training data that is itself partisan-sorted, Democratic-leaning outlets and Republican-leaning outlets producing content with different framings of the same facts, and the model outputs split across the underlying sort when probed from different user contexts.

Much like the rest, influencing AI discourse as if it were one object is another avoidable category error.

David Weinberg at the Misgav Institute warned in the Jerusalem Post against specific failure modes: do not set up a grand hasbara directorate layered on

existing structures; do not consume budget on hasbara research and consulting firms; do not try to outspend TikTok's anti-Israel posts.

Weinberg's instinct on the failure modes is correct. His frame — that the problem is execution quality inside a correct category — misses the deeper diagnosis.

The category itself is wrong. A single well-executed message calibrated for global public opinion cannot land simultaneously on the moderate Democratic core's individualizing foundations and the moderate Republican core's binding foundations.

The secondary failure is messenger pre-sorting. The Israeli bench most visible in American media since 2023 — Smotrich, Ben-Gvir, Netanyahu, Levy — has been absorbed into the Republican-recognizable validator network by the audience's default processing, regardless of the substance of what those messengers actually say.

A moderate Democratic voter watching Smotrich on any American platform processes Smotrich's remarks through the pre-assigned tribal marker before the remarks are even fully heard. No matter how many millions of shekels are deployed to bring those messengers to the forefront reaches one of the two moderate cores at reasonable fidelity. It reaches the other at approximately zero.

A two-track MFA directorate would deploy differently. Republican-track messaging through Republican-recognizable messengers, on evangelical broadcasting, on national-security conservative platforms, through think-tank partners calibrated to Heritage, Hudson, AEI. Democratic-track messaging through Democratic-recognizable messengers — which Israel currently does not have at sufficient scale — on humanitarian-law frames, on shared-democratic-values frames calibrated to Obama-alumni foreign policy networks, through think-tank partners calibrated to Brookings, Carnegie, CNAS.

The two tracks would share intelligence, research, and timing coordination. They would not share messengers or venues or framings. *Fifty-Year Front* diagnosed the execution failure. This diagnosis specifies why the category being executed is the wrong category to begin with. Upping the budget without restructuring the category only scales the mismatch.

Israel Has Eight to Twelve Years on the Ukraine Clock

Ukraine is the precedent where the full arc has already played out inside a window short enough for the trajectory to be readily legible. The arc ran from bipartisan hero's welcome to partisan stalemate in roughly 28 months. The Israel arc has been running for roughly 25 years and is substantially further along the same curve.

December 21, 2022: Volodymyr Zelenskyy addressed a joint session of Congress in his first trip outside Ukraine since the February 2022 invasion. Nancy Pelosi introduced him. The chamber delivered multiple standing ovations. Republican senators praised him unreservedly — Lindsey Graham called it one of the most inspiring joint session speeches he had ever witnessed. Rob Portman

endorsed accelerating aid. Chuck Grassley called the speech historic. The bipartisan welcome was real. The durability of the bipartisanship was an illusion produced by the sorted mechanism not yet having processed the issue.

The trajectory from that December ovation:

By April 2022, 14% of Americans said the United States was doing too much to support Ukraine.

By September 2023, 41%.

By December 2023, 50% of Republicans — up from 9% in March 2022 — said the United States was providing too much support. Forty-one-point intra-party shift in 22 months.

In October 2023, roughly 100 House Republicans stripped \$6 billion in Ukraine aid from a government funding bill.

In February 2024, the Ukraine-Israel-border supplemental deal failed on the Senate floor after Trump publicly lobbied Republicans to kill it.

By March 2025, the Chicago Council recorded a 47-point partisan gap on support for Ukraine.

Zelenskyy's position in December 2022 was structurally stronger than Israel's has been at any point in the last decade. He had the sympathy of a bipartisan Congress. He had operational cooperation with a Democratic administration and a substantial Republican bench in the Senate. He cultivated no settlements across the Green Line. He endorsed no Republican president. He appeared at no partisan political events. He didn't give speeches arranged by one party's speaker against the wishes of the executive.

Ukraine did everything the consensus-era advocacy playbook prescribed. Ukraine was still sorted, in less than two years, because the sorting mechanism does not process the advocacy choices — it processes the elite cues, the validator networks, and the media ecosystem bifurcation, and those all tipped regardless of Kyiv's conduct.

The INSS analysis in March 2025 named the parallel directly. The case of Ukraine is a serious warning sign for Israel. The Israeli think tank closest to the Israeli defense establishment read the trajectory correctly and articulated it publicly. The operational response to that warning has been insufficient — not because Israeli analysts failed to recognize the mechanism, but because Israeli institutions are built to respond to conditions the mechanism renders obsolete.

Israel runs approximately eight to twelve years ahead of Ukraine's on the sorting timeline — not because Israel is further from collapse but because Israel's sorting began earlier. Ukraine reached the 47-point partisan gap in 28 months. Israel reached the 44-point gap in March 2026 and will cross 47 points in a cycle or two.

The difference is that Israel's advocacy infrastructure outlasted the consensus conditions by roughly a decade — the institutional lag.

That lag is the window in which a sister-organization architecture could have been built. The window is closing.

Scenarios: Four Paths Forward, One Unbuilt

Four paths are live. Three accept decline in different forms. One requires institutional innovation that is itself structurally disfavored by the conditions making it necessary.

The scenarios are not equally probable.

Political friction, donor inertia, and institutional path dependence all weight against the innovation path precisely when the innovation path is the only one that does not accept decline.

- **Partisan capture doubled down.** The path of least institutional resistance. Netanyahu-Trump alignment extended through the second Trump administration and into 2028, with Israeli ministerial reliance on Republican access as the operational default. The path is stable through 2028 given current institutional inertia and the operational benefits the alignment has delivered on specific outcomes — Abraham Accords extensions, sovereignty recognitions, expedited arms transfers. The path becomes unstable after 2028 as the Republican generational fracture widens. By 2032 or 2036, the Republican under-45 cohort that preferred reduced weapons to Israel is the Republican primary voter. The partisan-capture strategy's shelf life is measured in political cycles, not decades. It is the probable path through 2028. It is not a long-run strategy.
- **Bipartisan consensus restoration.** The path of greatest institutional comfort and least analytical honesty. AIPAC reformist wing, DMFI centrist messaging, intensified legislator tours, additional primary interventions calibrated as defense rather than transformation. The path assumes the sorting mechanism reverses, or that institutional pressure can reverse it. Neither has occurred on comparator issues. Climate has shown no partisan reunification in 34 years since the 1992 inflection. Immigration has shown none in 17 years since the 2009 inflection. The probability of dominant success for this path is near zero. The probability of substantial institutional resources being consumed while the path fails is high. AIPAC's 2024 UDP operations, already described as a public failure by Tom Dine, are the current demonstration of this scenario running and consuming without delivering dominance.
- **Two-track parallel coalitions.** The unbuilt architecture. Differentiated Democratic-aligned and Republican-aligned sister organizations, sharing research and timing but deploying separately through messengers calibrated to each partisan core's moral vocabulary. Probably requires new institutional formation outside AIPAC and requires substantial donor reorganization that sorts existing pro-Israel capital into two separate funding streams rather than the current unified stream that AIPAC launders. Probability of dominant adoption within five years: low, absent major donor and institutional

reorganization that no current actor is visibly driving. Probability of partial adoption through new institutional formation outside AIPAC: higher and rising, as the operational failures of the first two scenarios force capital reallocation by attrition. The path that would matter most is the least likely under current conditions — precisely because the conditions that would make it likely are the conditions we, sadly, argue have not yet been recognized by the institutional class that would need to build it.

- **Managed decline with diaspora repositioning.** The path that accepts the American ground has moved decisively and builds elsewhere. Contingent on Israel-Europe realignment maturing, on Israel-Asia partnership depth, and on diaspora institutional capacity to absorb functions American advocacy structures currently perform. Probability strongly conditional on external factors: Europe relationships have been strained by Spain's and Ireland's 2024 Palestinian state recognitions and EU court interventions. Asia relationships with India and Japan are deepening but have not reached a scale that would compensate for American erosion. Diaspora institutions outside the United States have capacity gaps that would take a generation to close. The path is operationally available but structurally dependent on maturity that does not yet exist. [The diaspora question itself is a separate analysis this brief will not attempt to resolve — the Dossier next week scopes it.]

The probability-weighted surface favors scenario 1 through 2028 and scenario 2 as the institutional default that keeps consuming resources indefinitely. Scenario 3 is the scenario that matters for long-run outcomes and is the least probable in the short run. Scenario 4 becomes more available as time passes and external conditions mature, which is to say, Scenario 4 becomes more available at precisely the rate at which it also becomes more necessary and less a choice.

None of the four scenarios returns the coalition to the pre-2014 bipartisan consensus, because that consensus was not a choice any institution made. That environmental condition that has ended.

The question is which of the four paths the institutional class selects in the absence of restoration, and the answer the scenario analysis produces is that the class will most probably select the path of least institutional resistance — which is the path that accepts the most decline.

The sorting mechanism does not negotiate. And the institutional inertia that produced AIPAC's current positioning, Netanyahu's partisan-capture default, and the MFA's single-audience hasbara pipeline will not be dissolved by better messaging, sharper talking points, or an additional NIS 2 billion in public diplomacy allocation.

Bipartisan outcomes — Iron Dome reauthorizations, arms transfers that clear the Senate, sovereignty statements that hold across administrations — remain attainable in the new environment, but they are attainable only through a two-track architecture addressing two bifurcated moderate cores through

two separate messenger networks coordinated at the research and timing layer and deliberately differentiated at the delivery layer.

The bipartisan method that produced those outcomes for seventy years is over.

The bipartisan outcomes are not.

The architecture that replaces the method has not yet been built, and the institutional class that would need to build it is still operating on assumptions formed inside a consensus that ended twelve years ago.

Kelly will stand up again. So will the Democratic senator who follows him. So will the 2028 Republican primary voter who tells the pollster that Israel funding should be redirected to domestic priorities.

The ground has already moved. The only live question is whether any institution builds on the ground that is actually there.

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