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Jewish Philanthropy in Europe: Challenges and Changes

Exploring the Italian case in context

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Abstract

This paper presents preliminary findings of a work-in-progress on contemporary European Jewish philanthropy. The purpose of the paper is to show that European-Jewish philanthropy exists and how it is changing. It discusses both donations within Europe and towards Israel, focusing on the case study of Italy within the broader European context. As it represents a first attempt to study European- and Italian-Jewish philanthropy, this exploratory work shows how much more research is needed in the field. An important aspect that emerges from this research and which has a strong impact on the scope of the paper itself is the absence of real transparency in the field of fundraising in Italian Jewish institutions, both within Italy and towards Israel. The paper therefore suggests that it may become part of a more systematic project for enhancing transparency in Jewish philanthropic organizations to create a more competitive and clear environment for growth and impact.

After discussing the factors that make European-Jewish philanthropy invisible as compared to US-Jewish giving, the paper maps out pan-European Jewish agencies and initiatives and focuses on new trends of European-Jewish giving. One of the most significant challenges to a study of European-Jewish philanthropy is its heterogeneity, forcing research to focus on one country at a time. As no research has hereto focused on Italian-Jewish giving, the paper focuses on the Italian case and presents the results of the first survey on Italian-Jewish philanthropy focused on both institutions and private donors. Within the limits of available data, it presents mostly qualitative findings on trends of donations within Italian-Jewish organizations, on profiles of Italian-Jewish donors and the changing dynamics of modalities of giving. Findings on Italy are then compared with UK- and French-Jewish giving—as these represent the countries with the largest Jewish populations in Western Europe. This comparison shows how Italian-Jewish philanthropy is at the beginning of processes of change that are already well underway in other European countries. The paper concludes with recommendations on directions for further research, in addition to policies of better transparency.

Main Findings

General trends at a pan-European level

- Growth but invisibility of European-Jewish giving.
- Non-coordination of Jewish organizations at a pan-European level.
- Recent blossoming of innovative, targeted European-Jewish projects.
- Increasing European scope of a few European-Jewish foundations.

Italian-Jewish giving[1]

- Increase in project-focused giving.
- Italian-Jewish giving more directed to Israel than to local Jewish causes.
- Majority of Jewish giving to Israel through the central organization of Keren Hayesod (KH) but challenged by an increasing number of more focused organizations that raise funds for Israel and for local Jewish causes.
- Italian Jewish donors also give to non-Jewish causes, but less than to Jewish/Israeli causes.
- For Jewish Italian donors who defined themselves as secular and traditional priorities of giving are 1) Israel, 2) local-Jewish 3) local non-Jewish causes.
- Jewish Italian donors that defined themselves as Orthodox prefer to give to local Jewish causes, while their donations to Israel are decreasing.
- Almost all Italian Jewish donors give to non-profit organizations rather than through their own foundation.

Comparison with French and UK Jewish philanthropy

- UK and French Jewish federated campaigns versus Italian 'dispersed' fundraising.
- UK and French Jewish reinvestment in local Jewish causes and bypassing of central campaign and institutions.
- Rising significance of UK and French Jewish foundations.

[1] From data based on interviews conducted for this study.

Data availability and limitations

Despite expectations related to the availability of information on donations both within Europe, especially in Italy, and towards Israel, the lack of transparency of most organizations strongly impacts the availability of quantitative data on donations, constituting a strong limit to the current analysis. The difficulty of obtaining data may be one of the main reasons why the subject has not been studied until now and certainly contributes to the invisibility of European-Jewish philanthropy. Concerning donations to Israel, organizations such as Keren Hayesod (KH), Keren Kayemet le Israel (KKL) (which in Italy and other European countries still function as the main fundraising institutions for Israel), and the Women's International Zionist Organization (WIZO), were approached individually both at the national level in Italy and through their central offices in Israel. Practitioners and fundraisers confirmed the existence of updated data on donations, but refused to provide it for research and/or publication. This refusal may be in part explained by the current economic crisis. However, as pointed out by fundraisers and other professionals within the organizations, their refusal to give this type of information complied with precise policy rules, thereby indicating a deeper issue of transparency. In Israel KH and KKL are by law considered 'National institutions' and as such should make their documentation available to the public through the Central Zionist Archives with a lapse of no more than twenty years. However KH has not transferred its documentation since 1967 and KKL since 1982. Within Europe, data availability varies from country to country. In the UK since 1993, in order to obtain fiscal deductibility, charitable organizations must publish their accounts, with information on donations and expenditures for each year (Siederer, 2001). In France, this type of information is available through practitioners. In Italy, organizations had to be approached individually and most often refused to release this type of data. Some organizations in Italy did provide data that has been analysed in this paper.

Another limitation to this paper is the restricted number of interviewees for the survey on Italian-Jewish donors. The small sample does not enable us to generalize to a wider population. The survey may therefore serve only as preliminary findings on giving trends among those recognized as donors within the Italian-Jewish population.

Methodology

Research for this paper is based on published and unpublished material from institutions and donors. Data on institutions was obtained through published sources such as annual and donor reports, budgets, reviews of organizations websites, as well as through face-to-face or telephone interviews. The section on profiles of Italian-Jewish philanthropists is based on interviews with donors identified initially via Italian-Jewish organizations and, in a second stage, using chain referral sampling, a method widely used in qualitative sociological research, also known as 'snowball sampling' (Biernacki, 1981). This method is not probabilistic and it does not enable us to generalize to a wider population, particularly as the selection began from the Jewish organizations themselves. The survey may therefore serve as a first indication of the trends of giving of those recognized as donors within the Italian-Jewish population. I identified 35 donors of whom 25 agreed to release an interview (16 face-to-face and nine via telephone). I interviewed donors from Milan, Rome, Florence, Bologna, Trieste and Turin, between February and November 2009. Finally, through literature and interviews with key personalities of the British and French Jewish voluntary sectors, I compare the Italian case to that of the UK and France.

1. Introduction: the invisibility of European Jewish philanthropy

The most common definition of philanthropy is Payton's (1988) by which philanthropy is defined as a private action directed to promote the public good. Philanthropy has different expressions and can be grouped into three interconnected voluntary forms of activity: voluntary service, voluntary association, and voluntary giving. It denotes private action—whether performed by individuals or by organizations that carry out the wishes of individuals. It includes voluntary actions that aim to promote various social causes in different fields, such as, welfare, education, culture, and health. Philanthropy originates in religion and it is a fundamental tenet in most religions (Anheier & List, 2005). The main monotheistic religions—Judaism, Christianity, and Islam—place great importance on the believer's responsibility towards the poor, and giving charity is a religious injunction (Frenkel & Lev, 2009).

The roots of giving and philanthropy in the Jewish tradition hearken back to the Bible. The source for the Jewish commandment to give is found in Deuteronomy: "If there be among you a needy man, one of thy brethren, within any of thy gates, in thy land which the Lord thy God give thee, thou shall not harden thy heart, nor shut thy hand from thy needy brother" (15:7–8; translation from mechon-mamre.org). A long tradition of Jewish giving developed throughout the centuries in Europe, changing substantially in the nineteenth century in parallel with changes occurring in non-Jewish philanthropy (Penslar, 2001). Although a historical analysis would certainly aid in demonstrating the significance and deep roots of European-Jewish philanthropy, this paper will focus on the contemporary situation. For the purpose of this paper, Jewish philanthropy includes Jewish voluntary service, Jewish voluntary associations, and voluntary giving of money by Jews.

The purpose of this paper is to show that European-Jewish philanthropy exists and to investigate how it is changing. It discusses both donations targeted within Europe and towards Israel, focusing on the Italian case-study, as no research has hereto focused on Italian-Jewish giving. To further contextualize findings on Italy, they are compared with studies on giving by British and French Jewry, which are the largest European-Jewish communities. As it represents a first attempt to study contemporary

European- and Italian-Jewish philanthropy, this exploratory work will show just how much more research is needed in the field.

As has emerged from various interviews conducted in the framework of this project, European-Jewish philanthropy has a serious problem of visibility. Practitioners and academics, in Israel and elsewhere, tend to overlook European-Jewish philanthropy because of both quantitative and qualitative problems. The assumption is often that European-Jewish philanthropy is virtually nonexistent, since it is compared to the situation in the US, which, in terms of dollars donated, organizational structure, and professionalization, is far more mature. The centrality of US giving and US-Jewish giving in particular has overshadowed the study of giving from the rest of the world, in terms of both research and policy (De Borms, 2008). This monopoly has recently been challenged by studies that are showing how other centers, such as Israel, are also important players within the world of Jewish philanthropy (Schmid & Rudich, 2009b). In this context, European-Jewish philanthropy also deserves more attention, because of its rich historical past and because it is increasingly becoming a larger player both within Europe and globally.

One way to begin evaluating the changing balances between American and other regions' Jewish philanthropy may be by looking at comparable elements of their giving to Israel. In general, the share of Diaspora Jewry's unilateral transfers in Israel's total dollar revenues, inclusive of exports and other sources of income, has been declining in the last decades, whereas Diaspora transfers continue to be significant for the individual recipient organizations (DellaPergola, 2000:17). The diminished share of Diaspora Jewry's unilateral transfers is mostly due to the exponential growth of the Israeli economy in the last two decades, a period in which the Israeli third sector has also witnessed continuous growth (Gidron et al., 2004:13–21). However when analyzing specifically the source of income of philanthropic institutions in Israel, a recent survey has shown that as of 2006, 67.5% of income, amounting to 5.1 billion NIS (Schmid, 2009), came from abroad. Israel continues to be a big importer of philanthropic funding from the West, but information on donations to Israel per continent or country is not available.

To attempt evaluating the weight of European-Jewish donations to Israel as compared to the US, we may try to focus on donations to the Jewish Agency and to the Hebrew University. These are not the only recipients of donations from Diaspora

Jewry, but they are among the most important and the only ones on which we found some information on the relative weight of donations.

One indicator that the 'rest of the world' is increasing its giving as compared to the US may be deduced by comparing donations to the Jewish Agency for Israel from the US through the United Israel Appeal to those from the rest of the world through the Keren Hayesod (KH). These observations need to be contextualized within the larger picture of the decreasing support of American Jews to the Jewish Agency, a phenomenon that has increased since the 1980s and 90s, parallel to the rise in the number and scope of private foundations investing directly in a number of enterprises within Israeli society (Gidron et al., 2007:18). Findings on the diminishing significance of American support to the Jewish Agency, as compared to other regions, are also consistent with recent literature on American-Jewish giving, which shows how American mega-donors and Jewish foundations 'give the majority of their dollars to non-Jewish causes and institutions' (Tobin, 2007:1; Tobin, 2003).

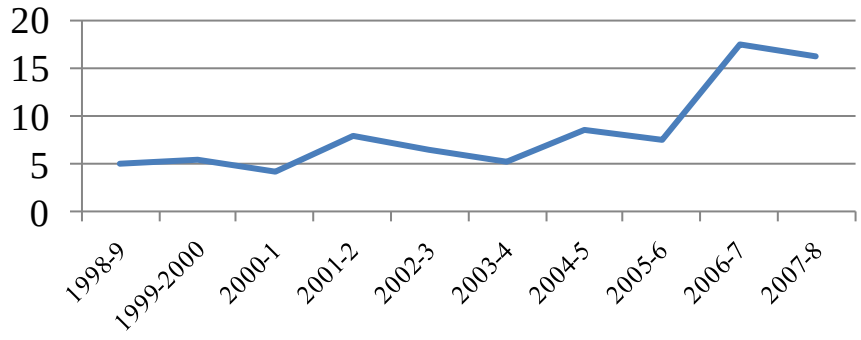
Within these limits, however, the United Israel Appeal and KH continue to be significant organs mediating Jewish Diaspora donations to Israel; in Italy and other European countries, KH is indeed still the main receiver of donations to Israel. Aggregate numbers on the revenues of the Jewish Agency show that the share of donations of the US United Israel Appeal out of the total revenues of the Jewish Agency diminished from 54% in 2003 ($256M out of a total of $467M) to 44% in 2006 ($247M out of a total of $549M), to 40% in 2008 ($257M out of a total of $642M). The share of KH in those years rose from 16% in 2003 ($78M) to 17.5% ($97M) in 2006, maintaining its commitments through 2008 (Jewish Agency, 2003–2009). It may be worthwhile to note that amounts raised by KH in its campaigns differ from the funds received by the Jewish Agency: comparing annual reports of the Jewish Agency with those presented to congresses of the World Zionist Organization, we find, for example, that in 2001 KH raised $100M worldwide, of which only $75.8M were transmitted to the Jewish Agency (Jewish Agency, 2001:39; World Zionist Organization, 2002:122).

Of the total funds raised from KH, donations raised from the European campaigns—Austria, Belgium, Denmark, France, Germany, Italy, Holland, Spain, Sweden, and Switzerland—have been growing since 1998: from $25M in 1998 to $32M in 2001 (32% of the total $100M) to $196M (36.8% of the total $532M) between 2002 and 2005. Quantitative information since 2006 was not available, but

interviews with KH European-Region representatives confirmed that after the highlight of the Emergency Campaign during the Second Lebanon War, European campaigns have met and even raised their annual commitments. The lion's share within KH remains the English-speaking countries (Australia, Canada, New Zealand, UK, and South Africa) that, between 2002 and 2005, raised $258M, or 48.4% of the total (World Zionist Organization, 2002–2006). Latin America is another important player within KH, a factor that is particularly interesting, considering the relative small and declining Jewish population in Latin America as compared to the US (DellaPergola, 2006:581). A recent study has demonstrated that, while the number of donors to KH from Latin America has diminished, the amounts raised cumulatively by Latin America remain stable, and that, within Latin America, countries as Mexico for example are particularly generous (Liwerant, 2010). Since 2002, KH has also developed its eastern region, which includes the former Soviet Union and other eastern European countries, along with the Far East and Asia. Geographically speaking, this is the largest KH zone, and the organization is looking with a mixture of growing interest and concern at the larger role that Russian-Jewish philanthropists may want to take in the organization (Pfeffer, 2009).

The relative rise in European donations to Israel can also be observed in the changing percentages of US and European donations to Friends of Hebrew University. It is important to note that in this case donations are not only from Jews, even if Jews still represent the majority of donors to Friends of Hebrew University worldwide. Out of the total amounts donated through the Friends of Hebrew University in the last ten years, the US share diminished in percentage from 59.5% ($43M of the total $72M) in 1998/1999 to 50.8% ($45M out of the total $88M) in 2007/2008, while European donations rose from 6% ($4M of the total $72M) to 15.5% ($14M out of the total $88M) in those same years, and the UK remaining stable at around 6% of the total (average $5M).

Graph 1. Donations from European Committee of Friends of Hebrew University (%)



Source: Hebrew University President Report 1999–2009

Although this is only one case showing the dynamics of European versus American trends in donations to Israel, it may be considered as an indication of the growing role of European Jewish philanthropy.

One of the most important factors in philanthropy in 2009 has been the scale of the impact of the global financial crisis on giving.[2] The crisis has had a heavy negative impact globally, increasing needs and threatening charitable commitments. In the UK, the economic downturn has resulted in an 11% decrease in the total amount given (UK Giving, 2009). In France, a recent study has shown the impact of the crisis on foundations, struggling to maintain their commitments facing increased pressure and diminishing donations (Centre Français des Fondations, 2009). The world of Jewish philanthropy in particular is suffering also in its image and substance by the various financial frauds such as Madoff and other 'mini Madoffs' (Sarna, 2009). Implications on the Israeli non-profit sector have been assessed (Schmid & Rudich, 2009a). Interviews revealed that, as a consequence of the current economic crisis, which is hurting worldwide but especially the US, the balance between US and 'the rest of the world' Jewish philanthropy will further highlight the scope of non-US Jewish giving to Israel and elsewhere. In this context, this crisis may be seen as an opportunity for European-Jewish philanthropy to prove globally that it is becoming an increasingly major player and that it should become more visible.

The problem of the visibility of European-Jewish giving may be explained by various factors. First, research on contemporary philanthropy is often based on the US-UK model, due to more advanced professionalization as well as greater

[2] Research for this paper was completed in 2009.

transparency reflected in data availability (De Borms, 2008). This also impacts research on global Jewish philanthropy, which is often focused exclusively on the US-Jewish experience.

Second, the impossibility of conceiving of European-Jewish philanthropy as a monolithic phenomenon also impacts its overall visibility. Reflecting the broader logic of the Jewish presence in Europe, 'the overarching concept of Europe cannot hold without referring to its parts separately' (DellaPergola, 2009, 4).

The invisibility of European-Jewish giving also reflects deeper aspects of European donors' mentality as opposed to those in the US. As observed by practitioners working with both American and European Jewish donors, the latter tend to have a lower profile in showing publicly how much they have and give. This reflects different general population's attitudes towards discretion and perceptions of generosity (Wright, 2002). For most Europeans, money is a delicate issue, often a taboo. Jews in particular may prefer avoiding public exposure for fear of raising anti-Semitic accusations against wealthy Jews.

The invisibility of European-Jewish philanthropy as a whole reflects deeper issues of European-Jewish and European identity itself. Mirroring wider debates on European identity, intellectuals and policy-makers are engaged in a discussion of whether there is such a thing as European-Jewish identity. For some, it is mainly constituted by its exposure to the different 'ambiances' of national idiosyncrasies (Graham, 2004). For Pinto, only in the post-Communist era has European-Jewish identity begun to regain visibility as the third pillar of world Jewish identity, facing stereotypes and ideological challenges from both Israeli and American Jewry (Pinto, 1996). In particular after the Holocaust, Zionists and American Jews shared a similar reading of Europe as a continent of intolerance and injustice, with a lost Jewish past but no significant Jewish life. This view has been challenged as a consequence of the end of the communist regimes in eastern Europe. Americans and Israelis have realized that, even when given the possibility to leave, Jews have stayed in Europe and that European-Jewish life is thriving once again.

These factors all contribute to the 'invisibility' of European-Jewish philanthropy and may also correspond with the low profile European Jewry has vis-à-vis pan-European institutions. While Jewish socio-political and economic integration in European national societies is high, on the pan-European level, Jewish communities do not interact with the EU institutions and bodies.

However, according to some key personalities from pan-European Jewish organizations interviewed for this project, this situation is changing as European Jewry attempts to raise its profile through a series of initiatives that are challenging its passive image at the European level. This recent multifaceted phenomenon has cultural and political implications and is also related to a more active European-Jewish philanthropic field as may be seen by the louder voice of the European Jewish Congress, the political initiative for the improvement of the relationship between the European Union and Israel through the European Friends of Israel, funded by European Jewish philanthropists, and the new focus of a growing number of European-Jewish foundations on European-Jewish projects. There is a correlation between such initiatives and the new, European, focus of international Jewish organizations such as the American Jewish Joint Distribution Committee (JDC) or groups of foundations such as the Westbury Group, which will be discussed later, who are now looking to Europe for additional active partners. The present research on European-Jewish philanthropy is therefore a good and timely opportunity to better understand dynamics for potential growth.

An exploration on European-Jewish philanthropy faces a series of challenges, both structural and methodological. First of all, the heterogeneity of the European-Jewish context poses a challenge in terms of analysis as in terms of policy. Each country has a different Jewish demography and history, impacting on the size, structure, and culture of local Jewish giving. In Italy, there are even substantial differences between cities, and within a city there are differences among communities of different ethnic origin.

Secondly there are diversified regimes of tax relief in relation to charitable gifts. Although most European countries do offer some form of tax relief, there is considerable variation in the types of organizations that are eligible for tax breaks and the level of relief is often low (Pharoah, 2008). In Italy, low tax deductibility and the complex bureaucracy regulating it, is considered one crucial factor in the Italians' low propensity to give (Ganduilla, 2003).

Different relations between the state and civil society are reflected in different expectations from the state, the voluntary sector, and the role of private philanthropy within it (Anheier, 2001). This is true of Europe in general as compared to the US, and within Europe itself. In Europe, the state, through higher taxes, provides many social services that private philanthropy supports in the US. Within Europe,

differences can be seen, for example, between Italy and France, on the one hand, where citizens have traditionally relied on the state for social welfare provision, and Britain on the other, where there is widespread scepticism towards the capacity of the state to provide the necessities of the citizens, which accounts, in part, for the different size and maturity of its non-profit sector (Kendall & Knapp, 1996). These differences also have an impact on the relative scope of the Jewish voluntary sector and on how local Jewish services are funded by the state through tax-payers' money. Interviews revealed, for example, that while in Belgium salaries of Rabbis are paid by the state, in Italy they are paid entirely by the local community. Also, financial support of schools varies from country to country depending on local laws and level of government support for minority schools. For example, while the Copenhagen Jewish school receives 85% of its income from the government, the Swiss Jewish schools receive no financial support from the State (Abramovich, 1989:346). In Italy, Jewish elementary schools receive 50% of their income from public funding, while secondary schools rely exclusively on tuition fees, contributions from the communities, and donations. These differences may have an impact on the choices philanthropists make regarding their priorities of giving.

Varying juridical contexts across Europe also constitute a barrier to communication, fund-raising, and coordination. This is especially significant for philanthropy targeting foreign countries. Interviews with practitioners revealed, for example, that while in France donations towards local and foreign causes have the same tax deductibility, in Belgium and Switzerland there has to be fundraising also for local activities to justify tax reduction. This however has not undermined Belgian, and primarily Swiss, giving towards Israel, as they are recognized by most practitioners as the largest European players in giving towards Israel.

Legislative diversity regarding transparency of charitable organizations has an impact on data availability. Since 1993, UK charitable organizations are obliged by law to publish data on accounts and expenditures for each year in order to obtain fiscal deductibility (Siederer, 2001). Charity organizations have to send annual financial reports to the Charity Commission and are publicly searchable through the web (www.charity-commission.gov.uk) providing precious tools of analysis that are unavailable for other countries. This uneven availability of information constitutes another important methodological challenge to the study of European philanthropy in general and European-Jewish philanthropy in particular.

These factors force us to look at one European country at a time and only then proceeding with comparisons. Total absence of enquiries on Italian-Jewish giving, a relatively scarce Italian-Jewish population, and linguistic barriers have resulted in the exclusion of any mention of the Italian case in research and debates on contemporary European-Jewish giving. As no attention has hereto focused on Italy, we take it as our initial case-study and then compare it to other European cases. However, to better understand the European context, the paper will first map out pan-European Jewish agencies and explore the changing trends in European-Jewish philanthropy.

2. Pan-European initiatives: challenges and trends

Jewish institutions with a pan-European scope may be divided into three groups: European organizations that claim to represent all European Jews, American-Jewish organizations that operate in Europe, and organizations and/or initiatives that do not claim to represent all European Jews but work for specific causes at a pan-European level (Van Emden, 2009). Most of these organizations employ some professional practitioners but mostly volunteers working at various levels. They may be included in a study of philanthropy, if we intend philanthropy also as voluntary service and voluntary association. Mapping out what and how Jewish institutions operate at the pan-European level enables a better understanding of trends in European-Jewish philanthropy and how they are changing.

The European Jewish Congress, (EJC) (www.eurojewcong.org) is the umbrella organization of Jewish communities in Europe. Established in 1986 as an autonomous regional branch of the World Jewish Congress, it operates in foreign, political, and public affairs, particularly against anti-Semitism and in establishing dialogue with the Catholic Church. Paris-based, it incorporates 41 Jewish communities, well over the European Union 27 member states, extending to include the Russian Federation, Morocco, and Tunisia. In the last two years, the EJC has raised its profile with a new leadership that is working towards a new active role for European Jews vis-à-vis European institutions and world Jewry. This new strategy led the EJC to open a permanent office in Brussels in October 2009 to work directly with EU institutions. It is still too early to evaluate if the grandeur of the opening ceremony will be matched by effective work at a pan-European level. Since 2007, the EJC is presided by Viatcheslav Kantor who is also, since 2005, President of the Russian Jewish Congress and, since February 2006, founder, chairman, and main philanthropist of the European Jewish Fund.

The European Jewish Fund (www.europeanjewishfund.org) was established in 2006 to focus on young people and their connection to Judaism. Mainly funded by its president and founder Kantor, the Fund is active in the fight against assimilation, anti-Semitism, and racism, sponsoring projects for Holocaust memory and Jewish education. While as we read in its website, it portrays itself as a pan- European Jewish platform, the Fund only includes 26 countries, mostly from eastern and central Europe and the Balkans, and is far from covering all European and/or EU states.

Another pan-European umbrella body for Jewish communities and organizations is the European Council of Jewish Communities (ECJC) (www.ecjc.eu). London-based, it was created by the JDC in 1968 as the coordinating and planning body for social-welfare services, education, and culture for European-Jewish communities. With the aim of 'Strengthening Jewish life in Europe', it organizes pan-European conferences of practitioners in education, social care, and community leaders, together with young leadership and in collaboration with other Jewish institutions. In 2004 it consisted of 70 welfare and umbrella organizations from around 40 countries. Some institutions belong both to the EJC and to the ECJC, while others to only one of them. Until 2005, financial support came from American Jewish organizations, mainly JDC, but also B'nai B'rith and others. In the last three years the JDC's support has come to an end. As a result, European Jews have been stimulated to donate and become more involved.

According to academics and practitioners, three major factors challenge the work of these European Jewish organizations: lack of or partial representation, lack of coordination, and lack of professionalization (Elazar, 2005). Because of these weaknesses and following a pattern of involvement in European affairs from the end of World War II, until very recently it was several American Jewish organizations that attempted to fill in the void.

The American Jewish Committee (AJC) was the first American Jewish advocacy organization to establish an official presence in various European cities after World War II, with the aim of stimulating European Jewry to exercise power and leadership and work with Jewish communities to promote pluralism and respect for diversity. Its office in Berlin was the first Jewish-American institution to develop a program in Germany. From 1997, its aims have refocused on enhancing relationships between American Jewry and the growing Jewish community in Germany, and serving as an outpost for contact with Jewish communities in eastern Europe. Another permanent AJC office is UN Watch in Geneva, to 'promote fair and non-discriminatory application of the purposes and principles of the UN Charter' in what concerns Israel and the rights of Jews (www.unwatch.org). The last creation of the AJC is the Transatlantic Institute (www.transatlanticinstitute.org), an NGO founded in 2004, and strategically based in Brussels to foster ties between the European Union, Israel, and the United States.

The American Jewish Joint Distribution Committee (JDC) has a long historical philanthropic presence in Europe. Its European branch, Paris-based, has activities in both western and eastern Europe, but it does not raise money for and in western Europe. To fulfil its aim of helping Jewish communities 'become self-sustainable, vibrant communities', JDC in western Europe focuses on strategic consulting, community development, creation of a network of lay leaders, practitioners, and volunteers, and professional training. While it has always been interested in stimulating local giving, this strategy has recently been emphasised to encourage European Jewry to fulfil a stronger role, especially addressing Jewish needs in central and eastern Europe and the former Soviet Union. As we shall see, while a small number of European-Jewish foundations are starting to follow this direction of philanthropic giving towards other European-Jewish needs, the majority of Jewish giving in Europe is still directed locally or towards Israel. One way through which the JDC is trying to engage European Jewry towards their eastern European counterparts is through the European Encounters Seminars, a program that provides eastern and central European Jewish community leaders with capacity-building opportunities related to EU affairs, fundraising, program development, and project management. This program is done in collaboration with the ECJC and the Centre Européen Juif d'information (CEJI), whose activity may be considered one sign of the changing dynamics of American- versus European-Jewish organizations.

CEJI was founded in Brussels in 1991 in cooperation and with support of the American Anti-Defamation League but with European Jewish funding (Clayman, 1999). Operating in more than a dozen European countries as 'a Jewish voice at a European level', it may be considered an example of a European-Jewish initiative that does not claim to be representative of all European Jews, but is more focused, proactive, and professionally run (Van Emden, 2009). CEJI focuses on interfaith dialogue and 'facilitating Jewish participation in the European Union'. Supported by the EU, by Jewish and non-Jewish foundations, and mainly by private European/British Jewish philanthropists, the organization is aiming to extend its visibility in western Europe. CEJI is one initiative that is beginning to show how, when focused on specific fields, a pan-European Jewish initiative with European sources can work.

One sign of the new scope and vitality of European-Jewish initiatives that is worth consideration is the shift in focus towards Europe by the Westbury Group, an informal

association of twenty-five international Jewish-oriented foundations. Since 2007, the Westbury Group has focused its attention on European-Jewish initiatives and on ways to stimulate European-Jewish philanthropy. For this purpose, in August 2009 the Westbury Group published *Compass*, a guide of new Jewish initiatives in Europe (www.compasseurope.org). The renewed interest in European-Jewish philanthropy expressed in *Compass* and by the forum of the Westbury Group as a platform in which practitioners and philanthropists share and exchange best practices and information without the barriers of bureaucratic/political/ideological structures, are a very interesting new phenomenon, which will potentially bring sustainable change in the panorama of European-Jewish philanthropy.

Eleven out of the twenty-five foundations of the Westbury Group are European-based. Four of these European-Jewish foundations, which previously limited their giving to local Jewish causes, have in recent years broadened their giving to wider European horizons inaugurating a new and interesting trend of European-Jewish giving. This is an innovative strategy also when considered within the wider context of European foundations in general, which, as Anheier has argued 'remain largely domestic actors' (Anheier & Daly, 2005:132). The new focus of a number of western European Jewish foundations towards eastern European Jewish needs may also be explained by internal logics of European Jewry, most importantly the regained predominance of the West in demographic and socio-cultural terms (DellaPergola, 2009a). Among these Jewish-European foundations that are shifting their focus towards Europe, we find the London-based Hanadiv Charitable Foundation, the Paris-based Fondation pour la Mémoire de la Shoah and the Hague-based Dutch Humanitarian Fund.

Hanadiv Charitable Foundation or The Rothschild Foundation Europe (www.rothschildfoundation.eu) is a UK-registered charity established in 2000 as a grant-making foundation whose aim is to support and strengthen Jewish life in Europe by providing grants to further academic Jewish studies, Jewish heritage and culture, civil society, and community-building throughout Europe. It operates in 40 European countries including in western Europe. Its capability of identifying new trends and areas of need in Europe enables the Foundation to face the changing balances of European-Jewish needs and challenges in innovative ways.

The two other Jewish foundations that are part of the Westbury Group—the Paris-based Fondation pour la Mémoire de la Shoah and The Hague-based Dutch

Humanitarian Fund—are public foundations set up to receive money and property from the confiscated belongings of Jews during World War II and kept by French and Dutch state apparatus and financial institutions. These public foundations receive most of their money from their respective governments, which raises the issue whether they should be considered philanthropic players in the first place. Since the funds come from the government they were not voluntarily given, which is one requirement for philanthropy. However since the money is used for humanitarian projects, the organization could be considered philanthropic. Foundations can be created and set up by a government, receive significant government support, and even have government officials sit on their boards. Yet, they cannot be an instrument of government policy whether international, national, or local (Anheier & Daly, 2006). If we consider the critical factor being the degree of independence these organizations have from the government, these institutions can be considered philanthropic entities even when they receive significant government support. Other foundations of this type work in Europe, but while the Dutch and French foundations give to projects on a pan-European scale, the Foundation for Belgian Judaism, for example, distributes exclusively to local Jewish communities and local education projects.

The Paris-based Fondation pour la Mémoire de la Shoah (www.fondationshoah.org), created in 2000, supports projects in all areas of research of the Shoah, including education, memory, and solidarity. Between 2000 and 2007 it financed more than 1300 projects, the largest one being the Shoah Memorial in Paris, 80% of whose annual budget the Foundation covers. Within the Foundation's disbursement, however, the proportion to projects other than the Parisian Memorial has been raising from 39% in 2005 to 64% in 2008 (Fondation pour la Mémoire de la Shoah, 2008). These other projects include solidarity towards Holocaust survivors in France, Israel, and eastern Europe, in collaboration with other European, Israeli, and American organizations.

Also The Hague-based Stichting Joods Humanitair Fonds, the Dutch Humanitarian Fund (www.jhf.nl), which began operating in 2002, includes in its scope other European-Jewish projects. Its grant-making reach has increasingly focused on eastern and central European Jewish life, while reserving 10% of its expenditure to supporting civilian victims of war situations.

These new directions of giving by a number of European-Jewish foundations are an interesting new trend in contemporary European-Jewish giving. In this chapter we

have seen how different Jewish agencies are acting at various levels in Europe. While official pan-European Jewish agencies are still trying to face the challenges of coordination among different national communities, aiming at raising the profile of European Jewry as a whole, an increasing number of project-focused initiatives are starting to revitalise the panorama of European-Jewish initiatives and hopefully also stimulate European-Jewish giving. Within this context, Italian Jewry is quite isolated, as is shown, for example, by the fact that no Italian initiative was included in the *Compass* guide. A greater awareness of what is happening at a European level may be of strategic significance for Italian Jewry and other small European communities. At the same time, understanding the changes and specific challenges of Jewish philanthropy within each national context may also be of significance for better implementing pan-European initiatives. To better understand Italian-Jewish giving, we first explore the general Italian context and then discuss contemporary Italian-Jewish giving.

3. The Italian case-study

The literature shows that the Italian non-profit sector is a relatively young one, whose development has been accelerated by the progressive withdrawal of the public sector from a wide amount of services, especially in the sectors of welfare, education, and health (Barbetta, 1997). Since the beginning of the 1990s, these services are increasingly fulfilled by non-profit organizations while the main financial responsibility remains within the public sector. Parallel to this growing significance of the Italian non-profit sector, scholarly works have started to focus on its institutional and historical context and to evaluate it economically. Since 2001, the publication of a statistical enquiry on Italian non-profit organizations has produced a series of information regarding the institutional profile, the financing structure, and the territorial distribution of the organizations (Istat, 2001). In an international perspective, the Italian non-profit has been described as: a young sector, but in strong growth. By 1999 the non-profit sector in Italy occupied a sizeable role in the Italian economy and society (Barbetta et al., 2004). Other scholars emphasize how the non-profit sector in Italy is of smaller dimensions as compared to international standards, concentrated in the northern and central regions of the country; and with a relatively limited role of private philanthropy (Cima & Buono, 2003).

Scholars have tried to analyze the factors that may have influenced Italians' low propensity to give: the substantial reliance on the state for social welfare provision; confusion at the juridical level in definitions of associations, foundations, and social cooperatives (Gemelli, 2006); limited professionalism of the organizations; and, particularly, slow development of fundraising techniques (Cima & Buono, 2003). In this respect, the situation is recently changing, as demonstrated by the birth of Assif in 2000 (www.assif.it), an association of professional fundraisers in Italy, based on the values of transparency, trust, and accountability (Barbetta, 2008).

The low propensity to give in Italy is also influenced by the low level of tax relief per donations and considerable variation in the types of organization eligible for tax-breaks: nine different regimes for individual donors and ten for companies (Gandullia, 2003). Tax reductions for donations to institutions for charity, medical assistance, education, art, and research were established only in 1997. In 2005, the "5‰ law" (*Legge 5 per mille*) introduced a free option for the contributor to give 0.5% of his personal income tax to a specific non-profit organization. Another law that has a

particular significance for Jewish and other religious institutions is the "8‰ law" (*Legge 8 per mille*). First accorded in 1985 with the Catholic Church, and from 1996 with Jewish communities and other religious minorities, it establishes support from the state for religious institutions through devolving 8‰ of total personal income tax on the base of the number of preferences expressed by contributors. Both the 5‰ and 8‰ laws introduce free options for the contributor to give to a non-profit organization of his choice. Revenues from these laws are important parts of the budgets of Jewish organizations. However, coherently with Borgloh's argument for Germany (Borgloh, 2008), our interviews revealed how also in Italy for some taxpayers using the 5‰ and 8‰ option, is perceived as a substitute for donations.

Compared to other European countries, the Italian non-profit sector is still relatively small, but growing. That being said, the role of private philanthropy in this growth is minimal. Fees and charges are the dominant source of civil society organization income in Italy (60.7%), distancing government support (36%) and philanthropy (3.3%) (Cima & Buono, 2003:18). If, however, the value of volunteering is included, philanthropy's share of Italian civil society organizations swells to 20%, as opposed to the 3% represented by monetary contributions alone. Thus volunteering, not cash donations, is the most important form of philanthropy in Italy' (Barbetta et al., 2004:255). However, even with the value of volunteer time included, the share of philanthropic donations to Italy is lower than that in other developed countries.

Scholars have also noted the scarcity of grant-making foundations in Italy, even if these have recently developed with the phenomenon of banking foundations. For historical reasons, a number of Italian banks were of a mixed nature of banking and philanthropic institutions. At the beginning of the 1990s, a series of laws introduced high fiscal incentives for these banks to separate their banking and foundation activity with specific aims of public and social utility (Gemelli, 2006). While still amounting to only 2% of all foundations in Italy, the banking foundations are showing their significance as granting bodies for an increasing number of non-profit organizations in Italy, especially in the sector of art, welfare, education, and research (Barbetta, 2008). Among the projects supported, a few are also linked to various Jewish institutions, for example, for the restoration of ancient synagogues, museums, and Holocaust historical research.

The growing importance of foundations in Italy may be seen by the statistical survey published in 2007 (Istat, 2007). Foundations in Italy were found to be around 4,720, a growth of nearly 57% compared to the 2001 survey. Also family foundations are growing in Italy, and, as other foundations in Italy, they have often a double, sometimes triple character: they may be operating, grant-making, and grant-seeking bodies at the same time, thereby generating the definition of 'mixed' foundations (Pharaoh, 2009). Like foundations in general, neither are family foundations distributed homogenously in Italy. It may be interesting to note that this uneven geographical distribution is also reflected in the distribution of Italian-Jewish institutions in Italy with Lombardy at the head: Milan, while having only half the Jewish population of Rome, has more Jewish institutions than the latter.

As in many other aspects, in which we see how Italian-Jewish philanthropy reflects the general characteristics of Italian philanthropy, this uneven distribution of Jewish organizations in Italy, leads us to the discussion of Italian-Jewish giving.

4. Contemporary Italian-Jewish giving: Giving to local Jewish causes

While in other European countries scholarly and professional attention to Jewish giving has increased in recent years, no scholarly work has focused on Italian-Jewish giving. Various reasons can explain this absence, most importantly the lack of transparency and professional fundraising in Jewish institutions in Italy. Within these limits, the following survey presents the first preliminary findings of this research focused on both Jewish organizations and private donors to explore if and how Jewish philanthropy has changed in Italy in recent years.

According to the concept of a core Jewish population, there are in Italy 28,500 Jews (DellaPergola, forthcoming), the majority of which lives in Rome (around 15,000) and in Milan (around 7,000), while the rest is scattered in other cities, mostly concentrated in the northern and central part of the country. Italian Jews are affiliated with 21 Jewish-Italian communities, which are federated in the Unione delle Comunità Ebraiche (UCEI), the political representative of the Jewish communities to the government. The UCEI—which is not a fundraising institution and does not generally receive donations even if it did receive in the past—is expected to provide coordination of cultural and religious needs of the communities and support of smaller communities that cannot provide for themselves. Since 1996 the UCEI, as the official representative of Italian Jewry with the Italian state, distributes the income from the 8‰ law, between all the Jewish communities and to single projects from different institutions especially dedicated to Jewish culture, heritage conservation, and welfare (Otto per mille, 2009). Interestingly, the income from the 8‰ law to the UCEI is much higher than the number of Jewish tax payers in Italy would indicate, raising questions whether amongst them, on top of the 'sympathisers' there may be 'hidden' Jewish or 'distant' Jews who do not identify with the main institutions (Canarutto, 2009). Since 2005, the UCEI also mediates funding from the state for projects of restoration and Jewish heritage.

Each Jewish community is an independent legal institution and provides various services such as welfare for the needy, schools, and old-age homes, according to its numeric and financial means. On top of 21 Jewish communities there are over 70 foundations and organizations which can receive donations for local Jewish causes

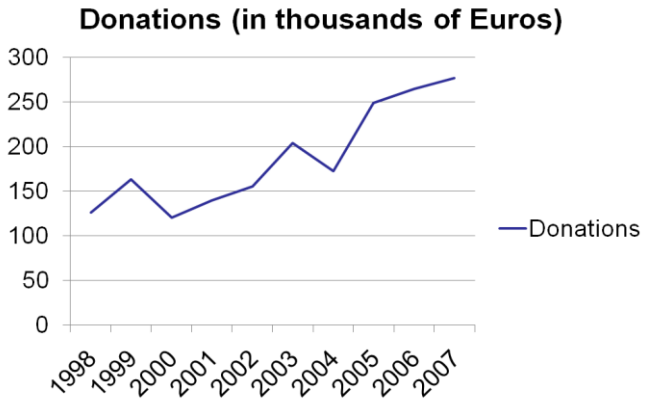
and for Israel. All these organizations do separate fundraising targeting the same relatively small pool of donors.

It has been impossible to analyze the weight of private philanthropy in Italian-Jewish organizations in an aggregate form as most organizations refused to provide information on their budget. However, we may explore the situation in the main communities of Rome and Milan by analyzing the budget of the Jewish community of Milan and of the Deputazione Ebraica di Assistenza e Servizio Sociale, the welfare institution of the Jewish community of Rome. The most recent available budget for both organizations is from 2007.

Within the general budget of the community of Milan, which does not include the school or the old-people's home, annual donations amount to only 5% of sources of income while contributions from members reaches 70%. In the school budget the largest source of income is tuition fees, 55%, while private donations are only 2%, and grants from two internal foundations contribute to 4% of the annual budget. As confirmed by practitioners within the communities, and mirroring the wider picture of the Italian mentality towards state provision, once paid the contribution to the community, the majority of Italian Jews expect the community to provide services. The amount of the contribution to the community is established by an internal committee on the basis of estimated revenues declared by the member, but is not compulsory. Many perceive their giving to the local community as taxes, while only giving to Israel is perceived as a donation.

Even if donations play a relatively small role within the general budget, they have been growing in the last years, as shown by the following graph.

Graph 2. Donations to the general budget of the Jewish community of Milan



Source: Comunità ebraica di Milano, Budget 2007

This graph focuses only on donations within the general budget of the Jewish community of Milan and does not include exceptional donations, such as the €8 million donation for a new old-people's home in 2007. As confirmed by interviews with practitioners within the community, project-focused donations are now an essential condition for donations and are the only type of donations that are growing.

In Milan the budget of the welfare service is included within the budget of the community. The welfare service provides services for the elderly, families, and at-risk youth. Efforts to increase private donations are intensifying, particularly to face the current crisis and the diminishing contribution of internal and external foundations (Bollettino, I Nuovi Poveri, October 2009).

An interesting recent phenomenon in the Milan Jewish community is the success of the volunteer organization Volontariato "Federica Sharon Biazzi Onlus" whose activities are increasingly becoming essential to many services of the community. This association of volunteers, the only of its kind among Italian Jewry, was founded in 2001. It is interesting not only because it fulfils an important role within the community in terms of service but also as a way of strengthening community building, of bridging between groups and ages within the community. Most of the funding of the institution comes from private donations, mainly small donors, followed by revenues from 5‰-tax income and donations from bank-origin foundations for specific projects. As we mentioned, volunteering is the most important form of philanthropy in Italy (Barbetta et al., 2004) but attempts made to emulate the model of the Volontariato Biazzi in other Jewish communities have not succeeded.

In exploring trends of donations among Jews in Milan, specific attention has to focus on the different Jewish subgroups that exist there as a consequence of migration from Egypt, Persia and Lebanon between the 1950s and 1970s. In most cases, these various immigrant populations are more religious than veteran Italian Jews and, while valuing the assistance they received from Italian Jews when they arrived as refugees in the country, they also perceive the difference in their philanthropic practices and how these have changed. Interviews revealed that while until five years ago, Persian Jews—who arrived in Milan in the 1960s—gave generously to the local community, to their own institutions, but mostly to Israel through institutions such as KH, the situation has since changed. In the last five years, as a result of the emigration of the wealthiest representatives of the Persian community, donations have significantly

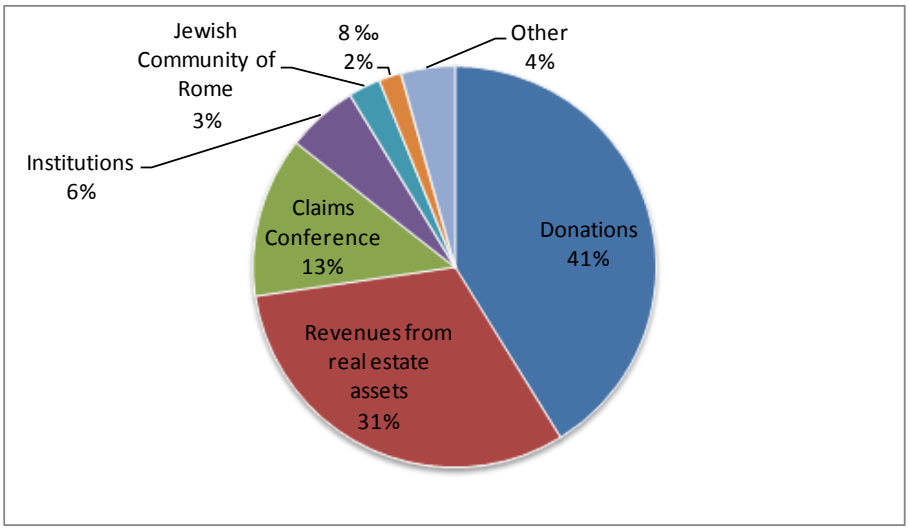
declined and are restricted to helping Persian Jews both locally and in Israel. This aid is usually direct, and does not pass through central organizations such as the local Jewish community or the KH, which are perceived as not responding to their particular needs. Other groups of immigrant Jews in Milan who have recently changed their philanthropic practices are the Lebanese Jews who arrived in Italy in the early 1970s. While previously active in donating to the main Jewish community of Milan and KH, Lebanese Jews have recently focused their giving towards their own organizations, especially a school and other organizations of religious education. This shift towards creating and giving to their own institutions, which better respond to their religious needs, has grown in parallel to their decreasing giving towards Israel and local Jewish causes through the main community. From the perspective of the main community, the creation of parallel institutions is seen as a dispersal of precious energy and money. As is happening elsewhere, in Milan as well distrust of the central institutions and more focused giving pose challenges to the local philanthropic panorama.

In considering the role of donations to Jewish communities in Italy, special attention must be given to bequests, a crucial element of Italian-Jewish giving, both to local Jewish causes and to Israel. Seen from the institutional perspective, it appears that Jews in Italy in the past preferred giving through bequests rather than *inter vivos*. This may be explained by a basic distrust towards the state, as people do not want the state to know of their personal assets. This holds in particular concerning donations to Israel, as until a few years ago it was very complicated to give to an organization that dealt with foreign countries and people preferred to give in the form of bequests. Although still representing an important source of income, bequests to the communities are diminishing in both Milan and Rome.

Exploring how donations have changed in Rome in recent years, interviews revealed that there are still differences in giving between the Roman and Libyan communities. Upon their arrival in 1967, Libyan Jews, while formally accepted within the local Jewish community, established and financed their own institutions, which, to this day, are supported exclusively from local Libyan-Jewish giving. Interviews also emphasized how Libyan Jews are more generous than Roman Jews, especially in giving to Israel, while Roman Jews give more to the Deputazione, the welfare institution of the community.

Formed through the unification of a number of old confraternities, the Deputazione is an independent institution from the local Jewish community, which, nonetheless, provides three out of the eleven members of the board of the Jewish community. Professionally run, it provides legal, economic, and health assistance to 10% of the 15,000 members of the Roman community. As can be seen in the following chart, in 2007, private donations represented 41% of its sources of income (tot. €1.107.131).

Graph 3. Rome, Deputazione Ebraica, Sources of income 2007



Source: Rome, Deputazione Ebraica, Budget 2007.
www.deputazioneebraica.com/bilanciosintetico

While percentages of donations *inter vivos* vary annually, the relative high percentage coming from interests from real estate assets is a stable element in the budget of the Deputazione while new bequests are unpredictable.

Between 2004 and 2007, the last year for which data was available, donations to the Deputazione increased both in terms of numbers of donors and amounts given. As may be seen by the following table, the number of donors to the Deputazione increased, both small and large donors.

Table 1. Donors to Deputazione per amount of donations (in euro)

	2004	2007
Less than 100 euro	256	312
Between 101 - 500 euro	87	155
Between 501 – 1000 euro	17	30
More than 1000 euro	12	44
Total donors	372	541

Source: Rome, Deputazione Ebraica, Rapporto di attività, 2007.

The 541 donors to the Deputazione in 2007 represented 3.6% of the total number of members of the Roman Jewish community. Another interesting element regarding the Deputazione is the exponential growth of project-focused donations, which have risen from €15.843.50 in 2004 to €181.158.88 in 2007. It may be interesting to note that the Deputazione is the only completely transparent Jewish organization in Italy, publishing sources of income and expenditure on its website and providing extensive information upon request. This may help give an indication of how transparency encourages giving.

Aside from donations through community institutions, other forms of informal donations occur but are difficult to assess. Interviews attested that informal donations through rabbis in both Rome and Milan have increased in recent years; these donations are often specifically targeted at the poor and come from people who mistrust the structure of the community and delegate the rabbi to distribute their donation.

The combination of more focused giving and mistrust of the central institutions, along with the perception of increasing needs has recently caused the creation of parallel independent organizations. In Rome, Masbia Le Kol Hai Razon ONLUS was formalized as an organization in 2009. The association distributes food and new clothing on a monthly basis to an increasing needy population in Rome and elsewhere, with the help of young volunteers from the local Jewish school. Although targeted mainly at the Roman-Jewish population, this distribution does not exclude non-Jews; furthermore, in times of emergency, as in the case of the earthquake of April 2009 in Abruzzo, Masbia Le Kol Hai Razon distributed clothing to the local

non-Jewish population. While it has begun to receive cash donations, its donations are mainly based on in-kind gifts.

In Milan, as we said, distrust of the central community structure, coupled with a rising religious population, have induced some donors to shift their donations to their own school and religious institutions. This trend, both in Rome and Milan, of creating independent and more focused institutions is interesting also because it relates to a more global phenomenon of distancing from the central organizations in favour of more focused projects. In Italy, this phenomenon may be seen both ways: as a more hands-on approach to giving, but also, in the context of the small and diminishing numbers of both the target population and the donors, as a dispersal of organizational and financial resources.

5. Giving to Israel

Similar to other Diaspora Jewries, and continuing a long historical tradition, Italian Jews give to Israel. While the majority of Italian-Jewish donors interviewed for this project emphasized the significance of their giving to Israel, organizations that fundraise for Israel refused to provide data. As we mentioned, this problem is not limited to Italy, as professionals of KH and KKL in the central offices in Israel confirmed that the information exists but that the organizations' policy forbids providing it for research and publication. Various reasons were given to justify their refusal to provide data: respect of the discretion of donors, fiscal reasons, fear of competition of other organizations. These factors have contributed and/or are used as excuses for non-transparency, both on the Italian and Israeli sides. However from interviews with representatives of organizations that mediate donations from Italy to Israel, we have gathered some qualitative information that may be interesting to start assessing recent changes in Italian-Jewish philanthropy to Israel.

Most of Italian-Jewish giving to Israel is still mediated through Keren Hayesod (KH). As in other countries, one of the most important fundraising challenges facing this organization is the shrinking number of 'big donors'. Until a few years ago the largest part of the campaign derived from a small quantity of 'old donors', the cohort of Holocaust survivors and witnesses to the birth of the State of Israel who had a 'visceral' emotional relationship with Israel. The number of big donors in Italy, like elsewhere, is shrinking because of retirement, generational change, emigration, and the drifting away of a number of donors who are changing the causes to which they give. To face the diminishing donations from these donors, KH Italy has tried to expand its donor base and to transform its image from an elite philanthropic organization to a more inclusive one that includes younger and medium-range donors. The enlargement of the base has been a successful strategy; interviews revealed a 20 to 30% increase in the 2008 campaign, as compared to the previous year. The modalities of giving are changing as well: while 'old donors' did not question how their donation was spent and gave most of their money without a specific direction, now the significance of donations to specific projects is growing, especially among the young. However, in Italy, as compared to other European countries, the majority of donors, old and young, still trust the institution and are not particularly interested in knowing where the money they give goes. This may be the main reason why KH is

still the main receiver of donations for Israel in Italy, but things are slowly changing, with a still minor but increasing number of donors that are drifting away from KH to other more direct projects in Israel. Another important change in KH policy in Italy, as in the rest of the world, is the reinvestment in the local Jewish community. In this context, Italian KH is only starting to change its attitude as compared to other countries such as the UK and France. In Italy, KH involvement with local Jewish causes is minimal and only for specific projects that deal with Israel, for example, contributing towards local Zionist youth groups or organizing trips for Italian politicians to raise exposure to and awareness of Israel.

Keren Kayemet LeIsrael (KKL) is another traditional institution that fundraises for Israel, playing on the emotional and environmental link of the Diaspora to the land of Israel. With two main offices in Rome and Milan, it is the organization that deals with donations to Israel with the highest number of paid employees in Italy. Representatives in Italy argued that there have not been changes in the amount and profile of donors in the last twenty years with the bulk of the donations coming from a large base of small donors (€10–50–100), 95% of whom are Jewish. Most of the income, however, is from bequests, even if this is decreasing. A close correlation was remarked between the increase in donations and times of crisis and emergency. Like KH, to face the increasing demand for project-focused giving, KKL remarkets its products by assigning specific 'projects' per country. However, lack of transparency and recent scandals—overhead expenditure, redirecting of donor funds to other destination than the ones for which they were raised, etc.—have induced a growing number of donors to give to other institutions.

Since its inception in 1927, Adei (Association of Italian Jewish Women) was the only association of Jewish women in Italy for many decades, until it joined Wizo (Women International Zionist Association), becoming the Italian Federation of Wizo under the name Adei-Wizo. Beside its fundraising functions for Israel, the Adei-Wizo plays an important role within local Jewish communities, as it organizes various activities and courses, and in the smaller Jewish communities it substitutes for the community itself in providing services. Interviews revealed that, as for other organizations, most Italian donors trust the institution and do not ask for details. Funds for Israel are still raised through traditional fundraising events such as bazaars or special dinners. There are, however, some signs of change in the affiliation to the organization: between 2007 and 2009 the number of younger members increased by

13%. This infusion of younger members has not yet substantially influenced changes in fundraising activity. However, in the last decade and until 2009, donations have been increasing: in 2008-9 Italy was between eighth and tenth place on the Wizo international contribution list, an impressive performance considering its small Jewish population. As in other countries, in Italy too a new, active leadership is trying to challenge the perception of the Adei-Wizo from a traditional 'ladies society' to a modern organization with challenging programs that may engage more and younger donors and activists. This strategy - which in Italy has yet to produce substantial change - is paralleled by stronger exposure of representatives of Wizo Europe in international forums such as the EU, where they are raising a more assertive voice in defence of Israel and women's rights.

Donations to Israel are also part of the agenda of other types of institutions such as B'nai B'rith, which balances between local Jewish needs and Israel, to which, interviews revealed, at least 15% of locally-raised funds go. Other than these national organizations, which have branches in many Jewish communities, there are also different organizations such as the 'Friends of...' type of organizations, linked with universities and museums, which all do separate fundraising targeting mostly Jewish but also non-Jewish donors: the Milan-based Friends of the Hebrew University (founded in 1977), the Venice-and-Trieste-based Friends of Alyn Hospital (founded in 1984), the Torino-based Friends of the Tel Aviv Art Museum (founded in 2001), the Rome-based Friends of the Technion of Haifa (founded in 2004). Most of these provide some kind of tax-exempt status for donations and bequests which, at least in one case, account for more than 75% of donations. On top of these there are friends of Israeli non-profit organizations such as Italian Friends of Machschava Tova and Italian Friends of Tzad Kadima, which were created since 2006.

As we can see, since 2000 there has been an increase in direct-fundraising organizations, in most cases because activists and main donors drifted away from central organizations to focus their philanthropy on more specific project-focused giving. Bypassing the central organizations in favour of more direct giving to Israel is starting to happen in Italy as well, albeit at a slower pace than in other countries.

6. Secular foundations founded by Jews

Up to this point we have analyzed local Jewish organizations in Italy and the main vehicles of Israeli-targeted donations. On top of these there are a series of secular foundations founded by Jews. Italy has a long history of Jews giving to secular causes, an interesting phenomenon of Italian Jewish philanthropy, which I have analyzed elsewhere (Levi D'Ancona, 2006 and 2010). Some secular institutions that were founded at the end of the nineteenth century are still functioning today, the most important of which is the Società Umanitaria in Milan. Another secular institution founded in 1903 and still existing today in Mantua is the Istituto Franchetti, which, by statute, has two members of the local Jewish community on its board. It is a grant-making foundation, which gives scholarships to local non-Jewish students especially in the fields of medical and engineering studies. Recently the institution has also sponsored courses in Jewish studies at the local university. All other secular institutions founded by Jews are completely independent of the local Jewish community.

In the first study on family foundations in Italy, published in 2009, it was estimated that 12% of the 4,720 foundations in Italy were family foundations (Bolognesi, 2009). The authors identified 550 family foundations, of which only ninety were analyzed because of the limited availability of data. Among these there are at least 5 family foundations founded by an Italian Jew, an interesting fact, considering that Italian Jews represent less than 0.04% of the Italian population. Among the family foundations analyzed by Bolognesi, there is the De Benedetti Cherasco Foundation in Piedmont, a particularly interesting player within the context of Italian Jewish philanthropic practices, notable for its innovative practices, strategic thinking and complete transparency. Founded in 2002 it is a secular, grant-making family foundation, which combines giving to local secular and Jewish heritage causes, and scientific research in Israel. This foundation is the only institution linked to an Italian Jewish philanthropist who participates in venture philanthropy projects, an innovative and rare phenomenon in Italy (da Silva, 2007).

The second family foundation founded by a Jew in the Bolognesi study is the Levi Montalcini Foundation, established in 1992 by the Italian Jewish Nobel laureate Rita Levi Montalcini. Since 2001, this foundation has been entirely devoted to the education of women in Africa, recognizing women's education as the key factor in the

progress of the continent. In its humanitarian work, the Levi Montalcini Foundation, together with the Zevi Foundation– not in the afore-mentioned list - is the only Italian organization linked to Jewish Italian funders that collaborates with the JDC in some of its secular projects in Africa. The JDC itself has a long presence in Italy, mainly in assisting Jewish refugees and trans-migrants from the 1920s to the 1970s. Now the JDC office in Rome is mainly focused on projects in Africa. As revealed by interviews for this paper, contacts between the JDC and Italian Jews are very limited. The only formal contacts between JDC and Italian Jewry are through these secular foundations founded by Jews, who are also the only indication we have found of Italian Jews directing their giving elsewhere rather than to Italy or Israel. While the JDC and other Jewish organizations in North America and UK are developing programs of giving and volunteering in non-denominational-humanitarian causes as ways to involve Jews at the margins of Jewish institutions (Belman, 2009), in Italy only independent private foundations are involved in this type of work.

Because of their structural independence, and because the philanthropists behind them seem to be the most up to date with the developments of local and international philanthropy, these secular institutions founded by Jews are an interesting new phenomenon in Italy. The innovation, strategic giving and transparency of these organizations will hopefully be a model for further developments. Until now, reflecting the general situation in Italy (Gemelli, 2009), the growing number and variety of family foundations has not affected the general philanthropy patterns of Italian Jews, who prefer to give to central organizations, mostly to Israel, rather than support new initiatives.

Having explored the main organizations to which Italian Jews donate, the discussion will now focus on the preliminary results of the first survey on Jewish philanthropists in Italy.

7. Contemporary Jewish philanthropists in Italy

The research population of the survey consisted of Jewish-Italian citizens, men and women, engaged in philanthropic activity as donors and/or volunteers in non-profit organizations, religious organizations, and/or other social enterprises. The research population was identified initially from Jewish organizations in Italy and, in a second stage, using chain referral sampling (see Methodology). We are aware of the quantitative limitations of this restricted pool of donors. However we trust that the survey may serve as preliminary findings on those identified as major Jewish donors by Italian-Jewish organizations. These findings do not claim to be exhaustive, and can only be considered as a first attempt to understand trends and dynamics in Italian-Jewish giving.

Our sample included a small number of women (25%), half of whom were born outside of Italy. This relative low occurrence of women as philanthropists is consistent with information from interviews with organizations such as Adei-Wizo and KH Women's Division, which argue that Jewish women give less than men in Italy. It may be suggested that this difference is due to the still existing wage gap between men and women in Italy and to the fact that business ownership by women is not growing as it is in the UK or in the US. However, even in this small sample, we find that most women philanthropists also give time and energy as presidents, fundraisers, and organizers. This may be an indication of persisting gender differences among Italian Jews, different from what is increasingly happening in the US, the UK, and in Israel (Schmid & Rudich, 2009b; UK Giving, 2009).

Our sample includes 36% of foreign-born donors. This finding may contribute to show how the predominance of foreign-born givers is changing. First, Italian Jews are now taking on a more significant role, particularly in regards to local Jewish causes. Second, the ageing and emigration of 'big donors' is causing a change of the guard, even if there are still differences according to origin, especially in what concerns giving to Israel. As one Italian donor—very active in a series of philanthropic initiatives in Rome—put it: 'We Roman Jews learnt what *tzedaka* was from the Libyan community.'

There is a wealth of literature on religion and philanthropy, which argues that religious affiliation and attendance at religious services have historically been and remain positively correlated with charitable giving (Bekkers, 2007). In our limited

sample, 56% of interviewees defined themselves as secular/no practice, 28% as traditional, and 16% as Orthodox. The great majority of secular donors prefer to give to Israel, some in combination with local Jewish causes, especially education, and to non-Jewish causes even if to a smaller degree. Traditional donors split their giving between Israel, local Jewish causes, and, to a lesser degree, local non-Jewish causes. It is interesting to note that both secular and traditional donors give to non-Jewish causes, even if generally to a lesser degree than to Jewish ones. Orthodox respondents said they preferred giving to local Jewish causes; most of them described their giving as consumption philanthropy, that is, charitable giving that supports causes from which the donors themselves benefit.

Literature has shown that the relationship between age and philanthropy is positive (Bekkers, 2003). In our sample, 60% are over 65 years old, born before the end of World War II; 40% are between 35 and 65, while no donor under the age of 35 was found. The absence of a younger cohort is consistent with other factors regarding Italians in general as compared to other European countries, such as extended studies, late entrance into the job market, especially for high qualified jobs, and late marriage. While literature and practitioners in the US, the UK, and Israel have recently focused on the new generation of philanthropists, of young entrepreneurs, between 30 and 40 years old, especially from the world of high-tech, this group is still very rare in Italy. Interestingly, all the donors in the 35–65 cohort are philanthropists involved directly with their particular project. In most cases, these donors were involved with other organizations before and, at a certain point of their life, decided to set up and/or focus on one organization for which they volunteer and to which they give. So we cannot speak of new donors, but mostly donors who have decided to change their way of giving. In looking at the causes given within this age bracket, we notice that, while Orthodox Jews have changed toward giving locally and to more religious causes, the traditional and secular give to Israel. Regarding the eldest cohort, 70% give more to Israel, while the others balance between Israel and local Jewish and/or secular causes. Only 20% of the eldest donors are engaged actively with the institution to which they give, while the majority gives without asking questions or being involved.

Although we have only one case of two generations of the same family represented in our pool, 84% asserted that their parents were a strong role model in giving. This is consistent with the literature which recognizes giving as a form of pro-social behaviour, and that parental background affects giving by the children's

generation. Most of the interviewees, however, expressed concern over the continuation of their children in their paths of dedication to others.

It is not possible to learn about monetary level of giving by Jewish donors since the vast majority of the donors I interviewed refused to answer questions regarding the levels of their philanthropic giving. A combination of factors may explain the reticence of most to give financial details on their donations: a mentality of modesty, not wanting to show how much one has and gives; a perception of giving less than what others may think they give. Some of those who said they gave not out of their income but out of their assets, answered that they did not know how much they gave. Those that did respond said they gave annually, with alterations depending on the year. The amounts that were declared for 2008 (by 28% of the respondents) ranged from a minimum of €15,000 to a maximum of €150,000.

When asked to what causes they give, the majority responded they gave to Israel (72%); 56% give more or only to Israel. 61% of the respondents who said they give to Israel, give mainly through KH. The other donors to Israel give mainly to higher education and, to a lesser degree, to at-risk youth. 44% give more to local Jewish causes, 8% of which give only to local Jewish causes, for religious related services as synagogues, school, welfare. Others give to Jewish culture and education, museums, and welfare.

48% of donors interviewed responded that they also give to non-Jewish causes. Some mentioned that because of an increase in anti-Semitism and anti Zionism, and particularly in times of crisis, they shifted their focus more on Jewish-Israeli causes. Most of the non-Jewish giving is concentrated on culture and education. Those who give to non-Jewish causes were all Italian Jews following family patterns inherited from the past. The philanthropic act towards non-Jewish causes is focused on the local; in most cases it is parallel but smaller than towards Jewish-Israeli causes. It is the same philanthropists that give to Jewish and non-Jewish causes. Non-Jewish giving is justified in phrases such as ‘we are Jews in society; we have to give to non-Jewish causes.’ These findings on secular giving, however, must be considered carefully, as by the nature of the pool of donors interviewed, which began with an indication by Jewish institutions, it is most probably biased in this sense.

Regarding modalities of giving, almost all the Italian-Jewish donors interviewed give to non-profit organizations, and do not found nor give through their own foundation. Only one of the donors interviewed set up his own family foundation.

40% give mainly to one organization but also to others while 16% of our respondents give only to one organization. 56% give to an organization without specific attention as to where and how the donation is used. The issue of trust in this context is crucial. As confirmed by various interviews with those responsible for fundraising in Italy, trust in the organization and, more often, in the person who mediates the connection with the organization, is the most important factor in giving. Only a small minority of Italian-Jewish donors explicitly calls upon the non-profit organizations to exhibit performance and effectiveness and to adopt business-like management methods as is increasingly happening in the US, the UK, and Israel (Silver, 2008). 44% expressed their preference for project-focused giving; half of these explicitly referred to their philanthropic trajectory towards a more specific project of which they could see more results and control its impact. For this purpose they set up independent organizations, mostly branches of international 'Friends of…' or voluntary organizations targeted at the local community. Involvement in the organization is high among our respondents: 72% are involved in many aspects of the main organization to which they give, often as president, as fundraiser, or other. This reinforces what the literature has shown about how giving and volunteering are mutually reinforcing activities (Havens, 2006).

Another factor that emerged from our interviews is the lack of social networks of Jewish philanthropists in Italy. Informal networks nurture social capital and play a major role in promoting private philanthropy. Italian-Jewish donors do not have formal or informal platforms upon which to exchange opinions and information. 12% responded that their network was rather at the Jewish international level, while only 1 respondent is part of non-Jewish networks of Italian philanthropists. All answered that no networks of Jewish philanthropists exist in Italy.

When asked the open question of 'why do they give?, the great majority answered that their giving related to their Jewish identity (88%). Only 16% mentioned a religious duty to give, the others emphasised the significance of solidarity 'as a way to participate and feel Jewish', a sense of responsibility being 'higher for Jews because it's part of their culture', or giving out of a 'feeling of being part of one family', 'the need of giving back to society', 'the need of doing something to safeguard the Jewish continuity'. 28% said that giving was also a pleasure, a passion.

For 16% of the respondents, the motivation to give changes according to the direction of giving; while giving to local Jewish causes is perceived as a kind of tax, giving to Israel is felt more as the 'real' donation. Donations to Israel are still justified

by the perception of Israel in need—particularly during emergency campaigns—Israel as the home for the Jew, who is always a potential refugee, and also as a way to compensate psychologically for the frustration of not having the courage to make Aliyah (immigrate to Israel under the Law of Return). As one interviewee put it 'I give to Israel out of the Diaspora complex of not having succeeded myself in making Aliyah.'

Although literature and interviews with practitioners in the UK and France have emphasized how motivations to give to Israel have changed recently, especially among the younger generation of donors, Italian-Jewish donors are still at the beginning of these changes. The perception that domestic Jewish needs are a priority is still minor but slowly growing. A minority of Italian-Jewish donors perceives the greatest long-term threat in assimilation and believes that the situation may be changed through investments in key assets of the Jewish continuity such as Jewish education. The majority of money that is given to Italian-Jewish causes is directed not towards education but rather towards Jewish cultural heritage, such as museums, and, especially in times of economic crisis, to alleviating primary needs.

These preliminary findings on Jewish philanthropists in Italy reveal that the majority of Italian Jewish donors still give to Israel through the mainstream structures of KH, rather than to local Jewish causes or directly to Israeli no-profits/institutions. The survey reveals also a strong tendency to give to non-Jewish causes even if to a lesser degree than to Jewish causes. Furthermore the survey indicates that the majority of Italian-Jewish donors are not particularly demanding as to where their donation goes and that they trust the organizations. We have however noticed a growing significance given to project-focused donations and a trend among still a minority of Italian Jewish donors who are increasingly slipping away from central organizations to found their own branch or institution for directly giving to Israeli or Jewish local causes.

In general, the survey shows that Italian Jews are still quite traditional when it comes to their philanthropic practices, even if they have begun to change their ways of giving. To better evaluate this process, we will compare it with UK and French Jewish giving.

8. Comparison with UK and French Jewish giving

While this paper is the first to focus on Italian-Jewish giving, from the end of the 1990s in the UK research and public debate has addressed the subject of Jewish giving. The presence of local think-tanks, especially the London-based Institute for Jewish Policy Research, wider professionalization within the organizations and data availability have encouraged publications that are at least a base from which to start understanding the scope and role of local Jewish giving (Goldberg and Kosmin, 1998; Halfpenny, 2000). Research on French philanthropy has started to develop only very recently**,** mostly among practitioners**,** though it is still not considered an accredited academic subject. In the last decade, centers such as Centre d'étude et de recherche sur la philanthropie (CerPhi) and the Centre Français des Fondations, have started to produce interesting data on French generosity and volunteering (CerPhi, 2008-2009). Academic research on French Jewish giving is limited due to the French rejection of all impulse of community and notion of ethnicity rendering all questions on adherence to religious or ethnic groups illegal. Religious and/or community data are still taboo in both academic and public professional centers. For the purpose of our comparison the following pages are based on interviews with professionals within UK and French Jewish charitable sectors and from published and unpublished secondary material available.[3] This part of the report—intended to serve as a point of comparison with Italy—focuses mainly on organizations and modalities of giving, not on philanthropists. This is not an exhaustive study, and it will show just how much more comparative research is needed to better understand local and international dynamics.

In 1997, the UK-Jewish voluntary sector comprised just under 2,000 financially independent organizations (Halfpenny, 2000). This element gives us an indication of the numerical difference compared to the Jewish organizations in Italy, which amount to less than 100 organizations. The UK- and French-Jewish voluntary sectors are quantitatively much wider that the Italian one. This, however, must be contextualized within the relative Jewish population; according to the most recent statistics based on the core definition of Jewish population, there are 485,000 Jews in France and 293,000 in the UK (DellaPergola, forthcoming).

Data on the Jewish voluntary sector in the UK may also be contextualized within a more general comparison between UK and Italian non-profit dimensions. The UK

[3] When a reference is not quoted, the information is gathered from these interviews.

non-profit sector is wider and more mature both in quantitative and qualitative terms: twice the number of organizations, three times the number of employed, four times the number of volunteers (Cima & Buono, 2003:25). Donations in the UK represent 11% of the total income of the non-profit sector, as compared with 3.3% in Italy. This factor may be explained by socio-political and historical factors that impact different cultures of giving (Kendall and Knapp, 1996). Important consideration must also be given to the much more favourable tax relief regime for charitable donations in the UK, both for individual donors and institutions.

The impact of tax deduction on donations is important; however, tax incentives do not automatically translate into higher donations. Since 2000, the French state has been increasing its appeals to private and corporate philanthropists to become partners for funding sectors that previously had been completely under its monopoly, such as universities, culture, research, etc. This explains why the French juridical and fiscal regimes are evolving rapidly in favour of philanthropy, rendering it the most generous European environment for both private and corporate philanthropy (Seghers, 2009). Although France has the highest fiscal detraction per donation in Europe, in 2006 only 5% of non-profit sector funding was procured from private donations (France Generosité, 2007). Though progressing in recent years, private giving is far below the maximum tax deduction permitted and relates to various factors: as argued by Bruder and Vaccaro these include 'a culture of Welfare state (…) that delegates the support of general interest to the state' and 'the social and tax contributions that are among the highest worldwide reinforcing the idea that the state bears responsibility for major social issues' (Bruder &Vaccaro, 2009).

The French low propensity to give also relates to the tortuous history of the relationship between the strong French state and the non-profit sector. However, thanks to its expansion over the past three decades, the non-profit sector in France has become quite similar in size to that in other European countries (Archambault, 2001). We have no aggregate number of the French-Jewish voluntary sector. However, we do know that the Fonds Social Juif Unifié (FSJU) - founded with the help of the JDC in 1949 to collect funds for the reconstruction of French Jewry after the Holocaust- in 2009 federated 249 institutions in the domains of welfare, culture, education, and youth. Although FSJU regroups the largest number of Jewish institutions in France, there are many more that are not included within it. Since 1968, the FSJU and the local Keren Hayesod have a federated campaign, called the Appel Unifié Juif de

France. In 2009 the AUJF was still the most important fundraising institution for French Jewish and Israeli causes with €19M. Through the combined Israel-Jewish local fundraising system of the AUJF, donors can decide if they prefer to give to the FSJU or to Israel, towards programs operated through the Keren Hayesod. In general however, donors trust the leaders' decision for the allocation process. In both France and UK the Jewish voluntary sector is much wider and diversified that the Italian one.

Interviews revealed that from 2003 to 2009 the number of donors to the AUJF has diminished but the amount donated has risen and that 80% of donations by French Jews to AUJF are made by only 15 to 20% of donors. As revealed by interviews, this ratio (80% of donations from 20% of donors) also characterises Italian Jewish donations through Keren Hayesod. We have not been able to find recent quantitative data on the number of donors in UK, but practitioners confirmed that the situation has not changed much in this respect from the one delineated by Goldberg and Kosmin in 1998. They showed how British-Jewish giving was pyramidal, with 80% of the total sum donated by only 9% of the donors.

On top of number of donors and of organizations, comparative consideration must be given to the important role played by volunteering; compared to Italy, we find a much larger role played by voluntary contribution in the UK, both in financial terms and in the value given to volunteering as an important community-building strategy.

Volunteering is significant for many Jewish organizations in the UK, which are developing interesting strategies for its growth. For example, there are a series of initiatives in Jewish schools to enhance volunteering and giving among the young, such as the 'Charitable activities' program of the Jewish Free School in London. Also in France there is a growing phenomenon of volunteering within the community as attested by the Reseau Ezra, which coordinates and trains volunteers for many Jewish organizations in the Paris region (www.reseauezra.org). In Italy, there is an increasing number of Jewish volunteers in Milan, but, as confirmed by all practitioners, much more can be done, particularly in Rome. More research should focus on volunteers and ways to enhance it also considering its strategic significance for community building and as a way to strengthen Jewish identity.

In comparing Jewish and non-Jewish giving in the UK, Halfpenny in 2000 found that, regarding income, expenditure, and funds, the UK-Jewish voluntary sector comprises approximately 3% of the income, expenditure, and funds of the entire UK voluntary sector. This is around six times more than might be expected given the size

of the UK Jewish community, as compared with the population as a whole. In terms of the source of income, the Jewish non-profit sector raises more of its total income from individuals (51%) than the UK sector as a whole (35%) and less from government, charities, and business (Ibid.). Considering that British Jews give also to non-Jewish causes, these findings show how British Jews give more than non-Jewish British citizens.

A recent unpublished survey shows that French Jews are more generous than French non-Jews both in terms of amount of annual donations and in number of donations. Cohen found that in 2002, French Jews resembled non-Jews in amounts and frequency of donations to non-Jewish causes. However, considering that French Jews gave more to Jewish or Israeli causes, the author concluded that French Jews were more generous than the French general population (Cohen, 2007). The 2007 survey confirmed this data showing that French Jews give more and more frequently than non-Jews (Panel, 2007).

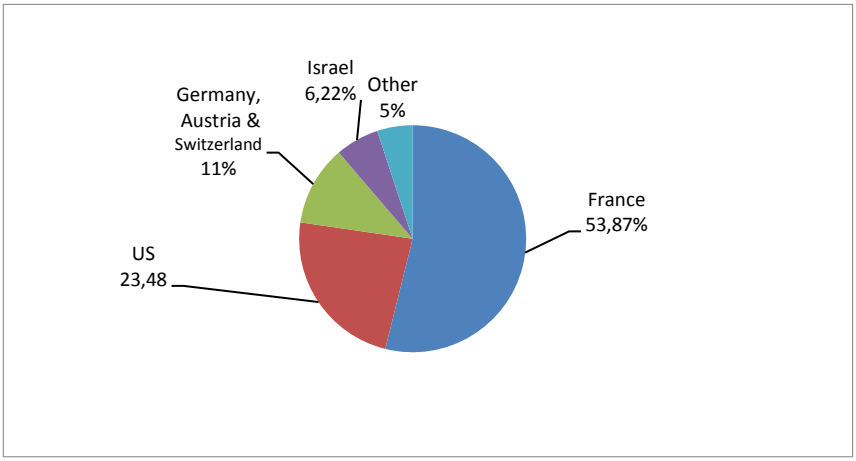
As we said, we do not have information on how Italian Jews compare to non-Jews, but we do see how, in both France and Italy, Jews give also to non-Jewish causes even if less than to Jewish/Israeli causes. It may be interesting to note that French Jews, like Italian and other European Jews have a long history of giving to non-Jewish causes. Since the second half of the 19th century, secular giving has been an important feature of French Jewish socio-political integration. Families and personalities such as Pereire, Camondo, Osiris, David-Weil and many others were major patrons of the arts and donors in the 19th and beginning of the 20th centuries. We do not have aggregate data on contemporary secular giving by French Jews, nor do we know if and to what extent do French Jews give to humanitarian causes. However the survey panel of French Jewish practices of giving offers some interesting indications on these themes. The survey revealed that 40% of French Jews would agree that Jewish organizations allocate part of their funds to larger humanitarian causes such as Darfur or Tsunami. The percentage rose to 48% among those who defined themselves as distant from the community (Panel, 2007). Jewish institutions in France do not yet allocate to larger humanitarian causes as some Jewish institutions do in North America, UK and Israel (Belman, 2009). However the data is interesting because it indicates that also in France, Jewish donors on the margins of the central community may be interested in giving to non-Jewish humanitarian causes through Jewish organizations.

The main difference between Italian-Jewish fundraising on the one hand and that in the UK and France, on the other, is that the latter combine their campaigns between Israel-targeted and local Jewish causes. The shift in the fundraising system towards combining Israeli and local Jewish causes also responds to a change 'in the governing idea in Jewish community' from a 'concern for Israel's survival' to a 'concern for the survival for the Diaspora itself' (Wasserstein, 1996:252). This shift which is also reflected in changing policies of Jewish institutions in Israel and globally, since the 1990s has stimulated a change in focus in various European countries and elsewhere. In the UK, there is no communal centralization of local fundraising and less coordination still for overseas charities. However, the United Jewish Israel Appeal (UJIA), has established a campaign that combines Israeli and local Jewish causes. This is a major difference with Italy, where fundraising for Jewish local and Israeli institutions is kept separate and is always in competition. As confirmed by various interviews, the UJIA's federated campaign focus on Jewish education has been one of the most significant changes in the last ten years of UK-Jewish institutional philanthropy. To face the challenges of Jewish continuity, as highlighted by the 1992 report on Jewish education (Worms, 1992), the UJIA has taken responsibility for Jewish education in Britain so that a proportion of its donations have been devoted to Jewish education in the UK. This change of policy of the UJIA is a sign of a wider shift in the Anglo-Jewish community's awareness of Jewish identity, which is also reflected in the expansion of donations to domestic welfare and Jewish adult education. As it emerged from various interviews, while until twenty years ago, the majority of British Jews gave to Israel as a form of Jewish identification—with internal donations being limited to Jewish Care, Anglo Jewry's largest social services organization —now support is also given to Jewish schools and programs of adult education, such as Limmud, whose successful model is exported to other European countries (www.limmud.org/international). To adapt to this new configuration, the UJIA has changed its policies, strategically reinvesting in education in the UK.

Unlike in the UK, no particular focus is placed on education in France, since schools there are financed by the state. Through the federated campaign of the Appel Unifié Juif de France, donors can decide if they prefer to give locally or to Israel, but in general they trust the leaders' decision for the allocation process. The allocation is usually 50% between France and Israel, except during emergency campaigns, when more is given to Israel.

The federated system does not prevent singular institutions from doing separate fundraising. Similarly, not all donations to Israel have to pass through the Appel. France is a particularly major player compared to the rest of the world in the bequests to Israel through the Apotropus, which is the sole body authorized by the Government of Israel to represent the State of Israel in all transactions where any property is bestowed on the State of Israel by a way of gift, bequest, or trust. As may be seen in graph n.4, in the year ending in 2008, out of a total of NIS 145M received by the Apotropus, NIS 78M came from France (53.87%), NIS 34M (23.48%) from the US, NIS 16.5M (11%) from Germany, Austria, and Switzerland, NIS 9M (6.22%) from Israel, and the rest from other countries.

Graph 4. Israel Apotropus, donations per country, 2008

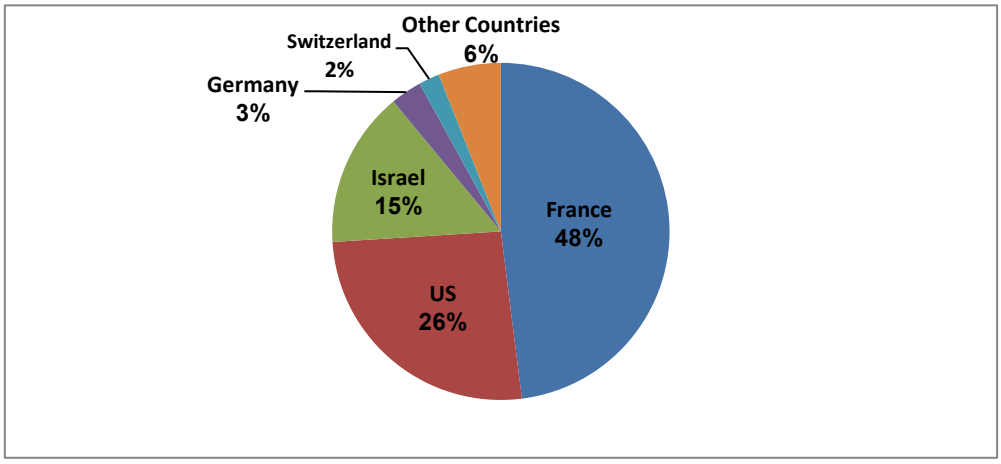


Source: Apotropus, Annual Report, 2008

France was a major player also in 2009 when NIS 53M arrived from France (50.8% of total) while the share of Israel (NIS 18M, 16.9%) over passed that of other European countries (16M, 15%) and the US (12.6%) (Apotropus, 2009).

As may be seen in graph n.5, the significant role played by France in giving to Israel through the Apotropus is documented for the last ten years.

Graph 5. Israel, Apotropus, Income per country of donations, 1996-2007



Source: Apotropus, Presentation, 2007

Interviews revealed that this large part played by France may be explained by a series of factors:

– The particularly successful fundraising in the country.

– The 1995 Bilateral Commercial Treaty between France and Israel enabled reciprocal total tax exoneration for bequests. This exoneration is now applied to all French organizations that receive donations both for local and foreign causes.

– The centrality of the state and nation-centred ideology in French political culture which may still have an impact on the mentality of French Jews who leave bequests to the state directly. This has a historical precedence as well, if we think for example of the quantity and quality of donations of entire art collections left by French Jews to the French state, as in the case of the Nissim de Camondo Museum of 18th century French decorative art in Paris, left to the state in 1924 (Rodrigue, 1990).

– Another explanation of French preference to bequeath to the state rather than to non-profit organizations may be related to the 1996-7 scandal of fraud and overhead of one France's largest charities, the Association for Cancer Research (ARC). As suggested by various professionals interviewed for this project, the scandal may have induced a number of donors to direct their giving to the state, rather than to non-profit organizations.

The significant role of France, and of other European countries, in donations to Israel through the Apotropus may also contribute to re-question and re-evaluate the scarce consideration and visibility of European-Jewish philanthropy to Israel.

Although Jewish Care and UJIA are still the largest recipients in the UK (receiving £18.8M and £15.5M, respectively, in 2007–2008), and the Apotropus and Appel Unifié in France (€19M in 2009), their monopoly is increasingly being challenged, particularly in the UK but also in France, by a series of phenomena:

As elsewhere in the Jewish Diaspora, also in the UK and France there has been a shift from a perception of 'Israel needs us' to one where concerns about the future of Jewish continuity and safety locally (education, fighting anti-Semitism), are more urgent. While in the past support to Israel was fuelled by images of an economically needy society surrounded by enemies, this image has changed as Israel is less evidently poor and the struggle for peace is seen as a complex phenomenon that divides Israelis themselves.

Although AUJF is still the major recipient of donations from France, there is a growing competition from other institutions that fundraise for Israel. The growing competition and changing perception of priorities among Israeli causes is also enhanced by the technological revolution. Through the web, smaller institutions can reach a wide audience and solicit donations from them. In recent years direct giving to Israeli no profits such as Libi Tzahal, Meir Panim (which in 2007-2008 had a particularly strong campaign in France) has raised, in parallel to increased donations to universities such as the Hebrew University and the Weizman Institute.

Within UK Jewry, reflecting a general trend in UK philanthropy, and parallel trends in US general and Jewish philanthropy, there is a growing disillusionment with large organizations resulting in bypassing of the central organization towards smaller ones and more project-focused giving (Tobin, 2001). In what concerns donations to Israel, interviews revealed an increase in the competition to the UJIA, from other Israeli causes which appeal more directly to the donors. Some may question the priority of mainstream Keren Hayesod/Jewish Agency programs; others may oppose them on political grounds both from the left and from the right, perceiving them as agents of Israel's political establishment. Others may distrust the allocation processes, resenting the bureaucratic procedures and overhead expenditures of large organizations. For other donors bypassing mainstream organizations is connected to their strategic giving. While for the old generation of donors, giving was about personal contact and had a deep emotional tie especially towards Israel, now both younger donors and foundations professionals think more strategically. As 'new philanthropists' elsewhere, the new generation of donors apply their business strategy

to their giving, are much more diligent, and expect higher effectiveness, value for money, and accountability in their philanthropy. Jewish donors in the UK are discovering that there are many different and more direct ways to give to Israel. This is particularly the case for young donors who are finding their own ways of becoming involved. This may occur in various forms: foundations that give directly to projects in Israel or giving through organizations such as MyIsrael (www.myisraelcharity.org), which fundraises directly for grassroots organizations in Israel. By enhancing a more direct way of giving, complete transparency, no overhead from the donations raised to the projects in Israel, and building a strong relationship of mutual trust with the project directors, MyIsrael is one example of an organization that is increasing its appeal among British donors, particularly young, small-to-medium donors who want to be sure where their donation goes and that it is making an impact.

Another important element in the analysis of new trends in Jewish philanthropy and in the challenges towards giving through central organizations is the rising significance of Jewish family foundations. Definitional problems together with reliable data and a paucity of statistics create problems in understanding the issue in a single national context (Solomon, 2008), let alone in a comparative perspective. Research on foundations in Europe generally is only starting to develop (Anheier and Daly, 2006). Only very recently has scholarly attention started to focus on family foundations in Europe, showing their strength and demonstrating that, notwithstanding different environments, they have a significant role in 'innovation, change, and advocacy' (Pharoah, 2009). No study has hereto focused on Jewish family foundations in Europe, an issue that goes beyond the scope of this project but that indeed promises to be an interesting research direction. The quantitative and qualitative significance of Jewish family foundations in the UK, as compared to the rest of Europe, may be gathered by the fact that there are 22 foundations founded by Jews among the largest 100 charitable family foundations in the UK. This is significant when compared to the rest of Europe, where there are only 2 Jewish family foundations, both based in the Netherlands, among the 100 largest European ones (Pharoah, 2008). One of the most interesting and innovative Jewish family foundations in the UK is the Pears Foundation (www.pearsfoundation.org.uk), which, inspired by Jewish values, is working in many philanthropic directions. It is pioneering a combination of giving to local Jewish causes, to projects in Israel for both Jewish and Arab populations, to secular causes in the UK, and to humanitarian

work on a global scale. The Pears Foundation is still unique in the panorama of UK and European foundations in the variety and strategic philanthropic projects it is undertaking. Although engagement with humanitarian work, based on Jewish values of *tikkun olam*—'repairing of the world'— has become in the last decade the buzzword of US Jewish philanthropy (Belman, 2009), it is a relatively new direction of UK Jewish philanthropy. More than ever before, British Jews are engaged in the wider world, not only in the sense that they give to secular causes, but interestingly in the way some are trying to expose young Jews to the wider world through the work of Jewish organizations as in the case of Tzedek, Jewish Action for a Just World, another project funded by the previously mentioned Pears Foundation. Tzedek aims to 'raise awareness, educate and encourage Jews to recognise, understand and act on to their Jewish responsibilities concerning extreme poverty around the world' (www.tzedek.org.uk). As is happening in the US, Canada, and elsewhere, also in Britain, the first in Europe, a new direction of Jewish philanthropy is beginning to engage in humanitarian aid. It is too early to call it a trend of British, yet alone European, Jewish philanthropy, but it is potentially an interesting new development that may allow Jewish organizations to reach out to Jewish donors 'on the margins' to give to humanitarian causes through Jewish organizations and to engage uninvolved Jewish youth through volunteering (Belman, 2009).

The French system of foundations has historically been characterized by a strong public presence both in terms of income and oversight of public authorities. Many reasons hampered the development of foundations in France and, only in recent years, have a number of legislative, fiscal, and administrative measures begun to stimulate the creation and extend the scopes of French foundations. In 2007 32% of all French foundations were created since 2000 (Fondation de France, 2008) and in 2009, a new foundation was created in France every three days (Seghers, 2009) Within this context the number and activity of French Jewish foundations, both public and private, is also growing. Amongst these most prominently there are Fondation pour la Mémoire de la Shoah, founded in 2000, which we discussed previously[4] and the Fondation du Judaïsme Français based on the model of the Fondation de France with the juridical capacity to shelter ('abriter') a number of foundations within it. Although created in 1974, the Fondation du Judaïsme Français has recently gained more importance in

[4] See pages 20-21 of this paper.

France as a result of changing tax laws encouraging an increasing number of small private foundations and organizations to be 'sheltered' within the Fondation.

Larger Jewish family foundations exist outside the frame of the Fondation du Judaïsme Français, the most important of which are the Rashi Foundation and the network of foundations of the French branch of the Rothschild family. The Rothschild family is an important French Jewish philanthropic player in France and elsewhere. Continuing a long and important history of philanthropic involvement in French local Jewish and non-Jewish causes and Israel, representatives of the French branch of the Rothschild family run a network of foundations centred on medical research, environment, arts and culture and intercultural dialogue. Although heirs to a strong tradition of family philanthropy, the current generation of French Rothschild is considered the 'incarnation of a new generation of philanthropists', important players in the '*nouvelle philanthropie'* - the French version of 'new philanthropy' or philanthro-capitalism – which is starting to grow in France (Seghers, 2009).

The Rashi Foundation was created by the Leven family in 1984 (www.rashi.org.il). Continuing a long history of commitment to the French-Jewish community and to Israel, the Rashi Foundation is an important player in both Jewish local causes and Israel, to which 90% of its resources are allocated. Indeed, in Israel, it is among the largest foreign foundations and among the most advanced in promoting social change and innovation (Bensimhon-Peleg, 2008:21). Focused on education and welfare, particularly for children and at-risk youth, the Rashi Foundation is a strategic player in promoting innovation, sustainability, and partnership building, mainly in Israel. In France, the Rashi Foundation collaborates with the FSJU in a series of initiatives, in addition to contributing substantially to its annual budget together with the Fondation pour la Mémoire de la Shoah. The innovative and open to partnership strategy of the Rashi foundation and the Fondation pour la Mémoire de la Shoah together with the international scope of their programs may also be understood by the fact that they are the only two French representatives in the afore-mentioned Westbury group.

In the UK, innovative private foundations such as the Pears Foundation nurture partnership and collaboration as may be seen by their support to centralised Jewish organizations such as the UJIA. In this sense, too, the Pears Foundation is seen as a pioneer in its strategy of collaboration with local and international organizations. These two family foundations, the Pears Foundation in the UK and the Rashi

Foundation in France, are also leading the way in their opening towards larger international horizons of Jewish philanthropy, as their presence in the Westbury Group attests.

As has been argued for the US, 'a strategic approach to synergy' between Jewish family foundations and federations may be one of the most important challenges of the next decade in the philanthropic scene. Attuned to new challenges in the Jewish and general philanthropic worlds, and to better inspire donors with specific programs, Jewish philanthropy in the US is changing by designating money for specific programs and creating structures and platforms for donors (Solomon, 2008). Also in the UK and in France professionals are creating new opportunities for donors to give within the main institutions. Professionals are aware of fiscal and juridical changes and actively promote innovation within their own structures to take maximum advantage for both donors and institutions themselves. In Italy no real investment is put in professionalizing fundraising within the institutions and no specialised figure or structure exist to which a potential Jewish donor may turn to for advice for his giving.

International examples should not be taken as unquestioned models for global Jewish philanthropy, as structures, history and contexts are profoundly different. However, awareness of what is happening elsewhere, looking into debates and modes of cooperation between centralized institutions and independent foundations, understanding successful strategies to attract and cultivate new donors and how leaders and professionals refocus direction of communal giving targeted more to local needs and to more direct giving, may be of strategic significance for other countries like Italy dealing with similar albeit slower paces of change.

9. Conclusion and implications for further research

This paper has shown how Italian-Jewish philanthropy is at the beginning of processes of change that are already occurring in other European countries. In this context, higher awareness of what is happening at a European level may be of strategic significance for Italian Jewry and other small European-Jewish communities.

More generally, this paper has shown how Jewish philanthropy in Europe exists, is growing, and is changing. As it is the first study on the subject, this exploratory work mostly shows how much more research is needed in the field. To better understand trends in European-Jewish philanthropy and to raise awareness of it, more has to be discovered through research and public debate. We would like to conclude suggesting a few research directions that may contribute to a better understanding of European-Jewish philanthropy and to raising its profile globally. Among these, focus should be put on:

- Survey on general Jewish giving per household in various European countries; update on British-Jewish general giving; and comparison within each country.
- Exploring Jewish philanthropy in other European countries: especially Switzerland, Belgium, The Netherlands, and Germany.
- European comparative research on Jewish foundations; major Jewish donors; volunteering and policies to implement it; giving to Israel; historical and contemporary Jewish giving to non-Jewish causes.
- Comparative qualitative research on philanthropy and Jewish identity.

In order to develop research and public debate, it is crucial that organizations that deal with donations within their own respective countries as well as to Israel, adopt or improve their present transparency policies. Transparency and availability of data are essential tools and signs of a healthy donor-institution relationship and of organizations' good practice, and ultimately contribute to a more competitive and clear environment for growth and impact. We therefore suggest that this paper may become part of a more systematic project for enhancing transparency in Jewish philanthropic organizations because only when more will be known about European-Jewish philanthropy as a whole and in single countries, through research enabled by policies of better transparency, will European-Jewish philanthropy finally raise its awareness and visibility on a global scale.

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