

# **Explorations in Contemporary European Jewish Philanthropy**

## **The Italian case in context**

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## **Abstract**

The purpose of this paper is to start exploring the under-researched area of European Jewish philanthropy. Because of the difficulty of thinking of European Jewish philanthropy as a monolithic phenomenon, the paper focuses on one country, Italy, as a starting point to examine challenges and developments of contemporary European Jewish philanthropy, with a vision of further research on Jewish giving in other European countries. This paper explores Italian Jewish giving both diachronically and synchronically. The background on the history of giving by Italian Jews explores the long-term dynamics of Italian Jewish giving and contributes to a better understanding of the contemporary dynamics of Italian Jewish giving. The section on contemporary Jewish giving in Italy presents findings on philanthropic trends within the main Jewish organizations in Italy and examines the profiles of Italian Jewish donors. As data is incomplete, this paper is limited to a qualitative analysis which shows how Jewish philanthropy in Italy exists and is at the beginning of a process of change similar to that which is occurring elsewhere in Europe.

## **Study aims**

The aim of this paper is to show that European Jewish philanthropy exists and to understand whether and how it is changing. To start addressing this theme, the paper focuses on the under-researched area of Italian Jewish giving. To better contextualize its findings, it explores the successive phases of Italian Jewish giving from the nineteenth century to the dawn of the twenty-first. Concerning contemporary Italian Jewry, it aims to explore trends of donation within Jewish institutions that raise money for both local Jewish causes and Israel. The analysis of the profiles of those considered major donors within Jewish Italian institutions aims to understand motivations of giving, whether modalities of giving are changing and the interplay of giving to local Jewish, local non-Jewish and foreign causes. The conclusion attempts to contextualize findings on Italian Jewish giving as a starting point for building a wider picture of European Jewish giving.

## **Main findings**

### **Italian Jewish organizations**

- Absence of professional fundraising and platforms for donors.
- Increasing importance of project-focused donations.
- Competition between organizations, low degree of partnership or collaboration.
- Majority of Jewish giving to Israel through the central organization of Keren Hayesod, but challenged by an increasing number of more focused organizations for Israel and for local Jewish causes

### **Italian Jewish donors<sup>1</sup>**

- 56% of interviewees defined themselves as secular and 28% traditional: for these donors priorities of giving were: 1) Israel, 2) local Jewish causes 3) local non-Jewish causes.
- 16% of interviewees defined themselves as Orthodox: these donors preferred to give to local Jewish causes, while their donations to Israel were decreasing.
- 60% of donors were over 65 years old; 40% between 35 and 65; younger cohort of donors is absent. Of the eldest cohort: 70% give more to Israel; 20% is engaged actively with the institution, while 80% gives without being personally involved in the organization or in how their money is spent.
- All of the donors between 35 and 65 years old were involved directly with their particular project. In most cases these donors were involved with central organizations like Keren Hayesod or Keren Kayemet le Israel in the past, but decided to set up and/or focus on one organization for which they volunteer and to which they give.
- 72% of Italian Jewish donors give to Israel; 61% of these give mainly through Keren Hayesod.
- 56% of Italian Jewish donors give more to Israel, while 44% give more to local Jewish causes, 8% of which give only to local Jewish causes.
- 48% of Italian Jewish donors also give to non-Jewish causes
- Almost all Italian Jewish donors give to non-profit organizations rather than through their own foundation
- Innovative role of secular foundations founded by Jews

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<sup>1</sup> On the basis of our limited sample of donors interviewed in 2009 regarding their donations in 2008.

## **1. Introduction**

The purpose of this paper is to understand if and how European Jewish philanthropy is changing, by examining the under-researched area of Italian Jewish giving, both diachronically and synchronically.

Although European Jewish philanthropy has a long and rich history, academic research on the history of European Jewish philanthropy has developed only in the last decade, mainly with the important scholarly work of Penslar (2001) and Green (2005, 2010). Academic research regarding contemporary Jewish European philanthropy is only starting to be published (Levi D'Ancona, forthcoming a). In order to address the issue of European Jewish philanthropy, a few definitions are necessary. For the purpose of this paper, philanthropy is understood as 'voluntary action for the public good', a definition which includes voluntary giving, voluntary service, and voluntary association (Payton 2008). Jewish philanthropy is intended to mean giving by Jews –including giving to non-Jewish causes. European Jewish philanthropy is therefore understood as voluntary giving by European Jews. However, the very concept of European philanthropy is quite controversial as its multifaceted realities –historical, juridical, fiscal, etc- make it extremely difficult to grasp this concept as whole. In practice, this compels us to begin by focusing on single countries at a time and only afterwards to compare them.

Italian Jewry, the oldest, Jewish European Diaspora, is a small minority within the Italian Catholic population and within European Jewry. Although never representing a demographic center of world Jewry in terms of numbers, Italian Jewry has fascinated scholars due to its richness, the cultural productivity of its historical past and the social, economic and cultural contributions of such a small minority to the majority population. However, no specific study has heretofore focused on Jewish giving either to Jewish or secular causes. This paper explores Jewish philanthropy in Italy both in its historical context and in its contemporary developments.

Although there is growing attention globally to the world of Jewish philanthropy and its role in supporting local Jewish organizations, strengthening Jewish identity and in its relationship to Israel, most research and public attention is focused on US Jewry, often considered as the only relevant actor in

the Diaspora. As the second center of world Jewry after Israel, and specifically because in terms of dollars donated, organizational structure, professionalization, and transparency US Jewish philanthropy is far more mature, the rest of the Jewish world is usually ignored in studies of Jewish philanthropy. This monopoly is starting to be challenged by studies which show how other countries such as Israel (Schmid & Rudich 2009b), or continents, such as Latin America, are important players within the world of Jewish philanthropy (Liwerant, 2010). Within this context European Jewish philanthropy also deserves more research and attention, because of its rich historical past, because Jewish philanthropy is a significant asset for Jewish identity, and because it is increasingly becoming a larger player both within Europe and globally. Furthermore, international Jewish organizations, such as the American Jewish Joint Distribution Committee or groups of Jewish foundations such as the Westbury group, are now looking to find more active philanthropic partners in Europe and to stimulate European Jewish philanthropy (Westbury Group, 2009).

The rising interest in global Jewish philanthropy also reflects new directions in the study of philanthropy worldwide and of European philanthropy in particular. Newly established research centers such as the European Foundation Center and platforms such as the European Research Network on Philanthropy (ERNOP) founded in 2008, are trying to build an infrastructure for research on European philanthropy and to raise its profile globally.

European Jewish philanthropy in Europe is an intrinsic part of the larger system of European philanthropy at large. As for European philanthropy in general, various factors explain the low profile of European Jewish philanthropy in academic research:

- Research on contemporary philanthropy is often based on the US-English model, due to more advanced professionalization and wider transparency, as reflected in the availability of data in those countries. This model often does not fit the 'fascinating and diverse tapestry of European philanthropy' (de Borms, 2008).
- Differences in US-European population's attitudes towards discretion and perceptions of generosity affect the low profile of European donors as

compared to US donors (Wright, 2002). As observed by practitioners who work with both American and European Jewish donors, the latter tend to maintain a lower profile. For most Europeans money is a delicate subject, often a taboo. European Jews in particular may prefer avoiding public exposure for fear of raising anti-Semitic accusations against wealthy Jews. This does not mean that European Jews don't give, but that they may be more careful with regard to publicly exposing their giving.

- The heterogeneity of historical, legal, and economic factors – including different tax deduction regimes, different relations between the state, the voluntary sector, and the role of private philanthropy within it (Anheier, 2001) - renders the comprehensive study of European and European Jewish philanthropy a challenge.
- The impossibility of thinking of European Jewish philanthropy as a monolithic phenomenon makes it a nearly impossible task to picture as a unity. 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).

These factors oblige us to look at one European country at a time in order to create a larger picture of European Jewish philanthropy. As an attempt to start understanding European Jewish philanthropy, this paper focuses on Italy.

Similar to Italians in general, Italian Jews were never known in the past and are not known now to be particularly generous or as innovators in the realm of philanthropy. However, a series of factors makes the Italian-Jewish case interesting as it relates to larger, Western European, Jewish communities.

- Italian Jewry was constituted through the successive overlap of migratory waves of Jewish groups from different geographic regions: the original nucleus of Jews who arrived in the peninsula during the Roman era were followed by groups of German Jews in the 14<sup>th</sup> century, Spanish-Portuguese Jews in the 16<sup>th</sup> and 17<sup>th</sup> centuries, Jews from Eastern Europe in the 1920s and 1930s, and finally groups of Jews from Egypt, Libya and other Arab countries in the 1950s and 1960s (DellaPergola, 1976). This complex mixture of Eastern European Jews, Sephardic Jews from Muslim countries, and a small group of Italian Jews, makes it an interesting



microcosm in which to study if and how the dynamics of integration and the identity of different Jewish ethnicities relate to giving.

- Secondly, and in contrast to the compact communities of Eastern Europe or Muslim countries, where Jewish communities were isolated and more harshly discriminated against by the external world, Italian Jewry through the centuries represents a phenomenon of an 'open community' enjoying a close relationship with the surrounding non-Jewish culture. This factor was also manifest in the early phenomenon of Jews giving to non-Jewish causes, making it relevant to contemporary Jewish philanthropy. While often interpreted only as a contemporary phenomenon, exploring how secular philanthropy by Jews worked in the past in one particular context may contribute to a more nuanced analysis and more constructive policies.
- Thirdly, due to its demographic and socio-economic characteristics, Italian Jewry represents an example, perhaps extreme but still representative, of the group of Western European countries that are at the biggest disadvantage regarding future prospects of survival (DellaPergola, 1976). To face the growing challenges of assimilation, new creative solutions have to be thought through and proposed. In this context, a study of Jewish philanthropy in terms of giving and volunteering may play an important role in strengthening Jewish identity.
- Italy's giving towards Israel is worth exploring both in terms of how it has developed and how it is changing. Although a quantitative analysis would better show the changes and directions of philanthropic trends towards Israel, the lack of transparency of the organizations dealing with donations to Israel both in Italy and in Israel does not allow for this type of analysis. However a qualitative analysis may contribute to the understanding of how the modalities of giving are changing. Furthermore, the significance of Italian philanthropic giving to Israel may not be relevant so much in terms of how much is raised for Israel within a relatively small Jewish population, as in terms of the centrality that Jewish giving to Israel assumes in the Jewish identity of Italian Jews.

The Italian Jewish case cannot be considered typical of European Jewish philanthropy. However, as we mentioned, the challenge but also the potential of

studying European Jewish philanthropy is in the atypicality of its components. To better understand this context we will first outline the major historical phases of Jewish philanthropy in Italy.

## **2. Historical background**

Philanthropic institutions and foundations have a lengthy history in Italy, dating back to institutions under the Roman legal system. Through the centuries, the most important factor in the development of charitable institutions in Italy was the Catholic Church, which developed wide networks of institutions that permeated Italian society (Zamagni, 2000). For centuries the Catholic Church dominated the space between state and civil society, influencing – and some scholars argue discouraging – the development of voluntary associations and private giving (Pasquinelli, 1993). The power of the Catholic Church in the peninsula also framed the successive policies of settlement, expulsion and seclusion of Jewish groups in the various states in the Italian peninsula. Within the ghettos, enforced from the middle of the 17<sup>th</sup> century in various Italian cities, internal Jewish charity institutions and confraternities of both men and women provided for public welfare and education (Horowitz, 2001; Siegmund, 2006). Like elsewhere in Europe, the basic assumption of both local authorities and Jewish leaders was that Jewish poor had to be taken care of within the communities. Although there were cases of Jewish giving to non-Jewish causes (Cohen, 1972), most Jewish giving was directed within the Jewish group.

When the walls of the Jewish ghettos in Italy were brought down for the first time under French rule, between 1797 and 1801, debates raged over the continuation of institutions inherited from the ghetto and over the role of philanthropy in turning Italian Jews into citizens just like all other Italians (Capuzzo, 1999). As in other European countries, Jewish political emancipation was linked to the notion of Jews' moral regeneration. Emancipation was understood as a reciprocal process in which the Jews were to refashion themselves in exchange for rights, through occupational restructuring and education. Starting from Germany and France, the discourse on regeneration inspired many different programs of productivization applied to the Jewish poor (Penslar, 2001). In Italy, the notion of Jewish regeneration acquired a further connotation as Jewish political emancipation became linked to the formation of

Italy as a nation. The freedom enjoyed by Italian Jews ended with the Congress of Vienna (1814), which restored the old-regime Italian states and brought back the juridical conditions of Italian Jews, which were again subject to the diversified codes that had regulated them before 1796. For Italian Jews, the battle for Jewish emancipation became profoundly connected with the *Risorgimento*, the progressive and liberal movement of Italian unification and independence (Toscano, 1998). Also, from the 1830s, a number of gentile intellectuals such as Cattaneo and D'Azeglio considered the granting of full civil and political rights to Jews as one of the aims of the *Risorgimento* (Della Peruta, 1997). In the words of D'Azeglio in 1848 'the cause of the *rigenerazione israelitica* is strictly linked to that of the *rigenerazione italiana*.' (D'Azeglio 1848). The nexus between Jewish political emancipation, regeneration, and the building of Italy as a nation, framed Italian Jewish philanthropy in the first half of the nineteenth century. In this phase Jewish philanthropy was still mostly directed to Jewish institutions. Some of the institutions were inherited from the past, while most of the new ones were focused on 'regeneration of the poor'. Between 1848 - when Jews were granted civil and political rights in Piedmont and Tuscany - and 1870, when the walls of the ghetto in Rome finally came down, many of the Jewish philanthropic institutions established were specifically devoted to education and professional training for men, and, to a lesser degree, for women. (Luzzatto Voghera 1998). The mission of helping poor co-religionists become self-sufficient was useful to the elite to show they were worthy of emancipation.

The strong relation between emancipation and the establishment of philanthropic organizations dedicated to the regeneration of the Jewish poor is further demonstrated by the next phase of Jewish giving. Once Roman Jews were finally recognized as citizens identical to all other Italians in 1870, the urgency of regeneration for emancipation faded, and Italian Jews started giving more to non-Jewish causes. Jewish philanthropic institutions continued to exist, but Italian Jewish philanthropists were more focused on secular philanthropy. This phenomenon is also interesting since contemporary studies of Jewish philanthropy often interpret the phenomenon of Jews giving to non-Jewish causes as a specifically recent phenomenon. However, historical evidence shows that in Italy giving by Jews to non-Jewish causes was at various

moments the rule rather than the exception. Various factors explain the phenomenon of Jewish philanthropy towards non-Jewish causes in Liberal Italy.

First of all it needs to be contextualized within the wider picture of the relations between Church and state in Italy. The undisputed control of all types of institutions by the Church, including hospitals, schools, workhouses for the poor, and so on was challenged in the 19<sup>th</sup> century, when the young Italian state shifted the provision of social services from the Church to the state. Between 1866 and 1890, laws were enacted to confiscate the assets of various Catholic orders and charities and force them to adhere to state jurisdiction. Although this was a lengthy and ambiguous process in which many religious affiliated organizations, including Jewish institutions, managed to retain their religious character while functioning formally as public institutions, the participation and identification of Italian Jews as citizens of the new state was reflected in their giving and engagement with non-Jewish philanthropic causes. Through their giving, Italian Jews expressed their identification with the Liberal elites of the country themselves struggling to define the secular values of the new state.

Philanthropy was also an efficacious means of social integration and of demonstrating patriotism. By promoting secular philanthropy and their image as benefactors, Italian Jewish philanthropists enhanced their self-image as integrated citizens and members of the elite. Furthermore, it can be suggested that they perceived the needs of the non-Jewish population as being more urgent. Because of their high level of literacy and urbanization, Italian Jews experienced processes of social mobility and acculturation more rapidly than non-Jewish Italians (Meriggi, 1992). There still were significant numbers of poor Jews, especially in communities such as Rome and Leghorn, but compared to the general population, the Jewish poor had quicker exit routes from poverty. In contrast to other Western countries, Italy was excluded from the waves of Jewish migration which, from the 1880s, brought thousands of poor Jews from Eastern Europe to France, Germany and England on their way to the US. In these countries, Jewish philanthropic institutions were revitalized in face of the challenge to anglicize or germanize the foreign, impoverished Jew, but this did not happen in Italy (Penslar, 2001). During this period, the Italian Jewish elite contributed more to non-Jewish causes, mainly in education, women's welfare, and in introducing ideas of self-help and mutual cooperation in Italy. For

example in Milan, Nina Rignano Sullam was active in the fight against white slavery, in the prevention of prostitution, and in the promotion of women's work. In Rome, men and women of the Nathan family were generous, hands-on philanthropists, involved in working class education, women vocational training and prevention of prostitution (Levi D'Ancona, 2010 b). In Milan the *Societa' Umanitaria* –an important secular institution which exists to this day - was founded in 1892 with the bequest of Prospero Moise Loria, a Jewish man from Mantua. Up until World War I and beyond, many Milanese Jews were actively involved in the *Umanitaria* as donors and activists in the implementation of its innovative activities towards refugees, workers, women and children (Della Campa, 2003). All these examples attest to the particular role a few Italian Jews had in attempting to introduce new ideas of social change through philanthropy in Liberal Italy. As I have demonstrated elsewhere, this role of Italian Jewish philanthropists in non-Jewish philanthropy between 1875 and 1938 was also enhanced by their awareness of innovative philanthropic ideas and methods developed elsewhere in Europe (Levi D'Ancona, 2010 b). This dimension of exposure to European networks and introducing challenging new methods and ideas in Italy is missing from contemporary Jewish philanthropy in Italy.

Italian Jews preferred to give to non-Jewish causes in this phase, but also gave to Jewish causes. Jewish local institutions continued to exist throughout this period and continued to receive donations as also a number of Zionist institutions that started to be created in the beginning of the 20<sup>th</sup> century. A minority of intellectuals and activists saw Zionism as both a way to revitalize Jewish institutions and/or as a 'humanitarian' philanthropic movement for the thousands of poor Jews from Eastern Europe (Carpi, Della Seta, 1997). The majority of Italian Jews, however, opposed Zionism, and apart from some generous donations to Jewish causes, Italian Jews preferred to give to non-Jewish causes. The involvement and commitment of Italian Jews to secular philanthropy intensified during and immediately after World War I, focusing on civil assistance for non-Jewish Italian refugees, soldiers and their families.

In the early 1920s Italian Jewry was challenged by thousands of Jewish refugees pouring into Italian ports on their way to Palestine and the U.S. The challenge of assisting these refugees was too big for Italian Jewry, which attempted to coordinate assistance. Soon overwhelmed, they called for

international agencies such as the American Jewish Joint Distribution Committee (JDC) to support foreign Jews passing through Italy. A representative of the JDC, sent to evaluate the situation in 1920, reported that Italian Jewry 'was not educated to the giving of charity on a large scale, nor are Italian communities receptive to an appeal for aid to the Jews at large. Each community confines itself to the maintenance of the local institutions and there it ends' (Cooper, 1920 quoted in Levi D'Ancona, forthcoming b). Many would argue that this description applies to contemporary Jewish Italy as well. Two main exceptions to the rather desolate picture of Italian Jewish philanthropy towards Jewish refugees in the 1920s and 1930s were Trieste and Milan, which to this day are the communities where the most generous Jewish philanthropists live. During the 1920s, with the aid of the JDC but also with the involvement of local entrepreneurs, mainly the liqueur magnate Stock, assistance to foreign Jews passing through Trieste to Palestine was guaranteed. The role of Trieste was quite important if we take into account that between 1920 and 1937, 157,000 emigrants, mainly from Poland and Germany, passed through the city. Relations with local emigration authorities were so good, that until June 1927 the local Jewish Committee of Assistance was in charge of medical assistance to all emigrants arriving to the Trieste central station (Catalan, 1991).

In the new social and political system created by Fascism, which rose to power in 1922, important changes occurred within the welfare structure of the country. In theory, the state intervened directly in policies of welfare, based mainly on ideas of prevention and 'regeneration' of the Italian race, while in practice old vices of Italian charity, such as paternalism and unequal coverage, remained and were reinforced (Quine, 2002). This had an impact on Jewish institutions as well. The structure of Italian Jewish communities was framed by a 1930 law which remained in force until 1987: Italian Jews were by law obligated to be part of a local Jewish community affiliated to the *Unione delle Comunità Ebraiche* (UCEI), an organ which to this day struggles to coordinate the various Italian Jewish communities (Capuzzo, 1999). Throughout the fascist era, Italian Jewish philanthropists continued to give to non-Jewish causes, but some donors also gave to Jewish causes, mostly after 1933, when waves of German Jewry poured into Italy (Voigt, 1993). Well before the Racial Laws of 1938,

Italian Jews were torn between a sense of solidarity towards their German brethren in the name of collective responsibility and Jewish values, on the one hand, and the fear that assistance would attract more emigrants and arouse anti-Semitism on the part of the regime, on the other. The most active donors in refugee assistance were foreigners themselves or the 'ideologically involved', antifascist and/or Zionists. Until 1936, when the first contribution by international Jewish organizations arrived and even afterwards, the Milan committee for assisting Jewish refugees from Germany was mainly funded by two major Jewish local industrialists: Sally Mayer, born in Germany, and Carlo Shapira who had immigrated from Romania at the beginning of the 20<sup>th</sup> century. The fact that these two men were foreigners may offer further indication of the resistance that the majority of Italian Jews had towards assisting Jewish refugees.

The increasing anti-Semitic campaigns of the Fascist government had repercussions on Italian Jewish giving. To avoid being in the public eye, the majority refused to engage with Zionism and to express solidarity towards foreign Jews. With the Fascist anti-Semitic laws of 1938, the extraordinary flourishing of initiatives of Italian Jews in non-Jewish philanthropy ended. Italian Jews were expelled from all the institutions they had contributed to and had often created. As a consequence, some Jewish philanthropists decided to focus on Jewish causes (Jewish schools, refugees assistance, Zionism). After 1938 and during the war, between 1939 and 1943, assistance to Italian and foreign Jewish refugees was delivered through the Delasem (Delegazione Assistenza Emigranti) mostly supported by the JDC. During the Nazi occupation from 1943 to 1945, underground assistance continued to be delivered while all Jewish institutions were banned.

Fascism, World War II, Nazi occupation and deportation had weakened Italian Jewry which had to face profound moral and financial burdens (Pavan, 2007). This situation had consequences also in terms of philanthropic behavior. Not only were economic resources drastically reduced, but also ideologically those Jews that could, focused now on giving towards Jewish local causes rather than to secular ones. Secular giving continued among Italian Jews, but the trauma of the Fascist Racial laws and deportation together with the urgency of reconstruction of local Jewish life induced a shift in priorities of giving towards local Jewish causes. (Levi D'Ancona, 2010 a). In the immediate post-war years

Jewish Italian communities schools and synagogues were rebuilt with the assistance of the Jewish Brigades and international Jewish agencies such as the JDC, Oeuvre Secours aux enfants (OSE), Organizzazione Rieducazione Tecnica (ORT) (Milano, 1963; Migliau 2009). However, a very small number of major Italian donors were also very active and generous towards the reconstruction of Italian Jewish communities and towards the thousands of Holocaust survivors passing through Italy on their way to Palestine or the U.S, mainly assisted by the UNRRA and JDC. The role of Italian Jewish philanthropists was particularly significant in the reconstruction of the Jewish community of Milan (Levi D'Ancona, 2010 a). In the rest of Italy the JDC continued to assist Italian Jewish communities and Jewish refugees until the beginning of the 1960s. Up to 1963, the share of income from foreign transfers was the largest single source of income of Jewish organizations meeting local needs in Italy (Kessler, 1967).

According to Kessler, only in 1964 did the share of voluntary contributions equal that of foreign sources in the total income of Jewish organizations in Italy.<sup>2</sup> Kessler estimated that Italy was fourth amongst the six major European countries that contributed to Jewish causes in 1964, after France (\$7.4M), Switzerland (\$3M), and Belgium (\$1.9M). Of the \$1,5M contributed by Italy, \$900.000 were raised for local needs and \$600.000 for Israeli causes. Taking into account the different local Jewish population numbers, per capita donations by Jews in France, Italy and Switzerland in 1964 were estimated as follows:

Table 1. Jewish European per capita donations in US \$, 1964

	Local Jewish causes	Israel
France	12	3
Italy	27	16
Switzerland	60	66
Average Europe	17	8

Source: Kessler, *Study of fundraising in European Jewish communities*, 1967, p.39

This data is interesting as it shows first how, relative to its small Jewish population, per capita donations from Italy were larger than French donations,

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<sup>2</sup> For Kessler, voluntary contributions included not only donations but also members' fees to local Jewish communities. Although until 1987 membership in Jewish communities was compulsory, a person could declare that he was not part of the community and was thus not obliged to pay the fees.

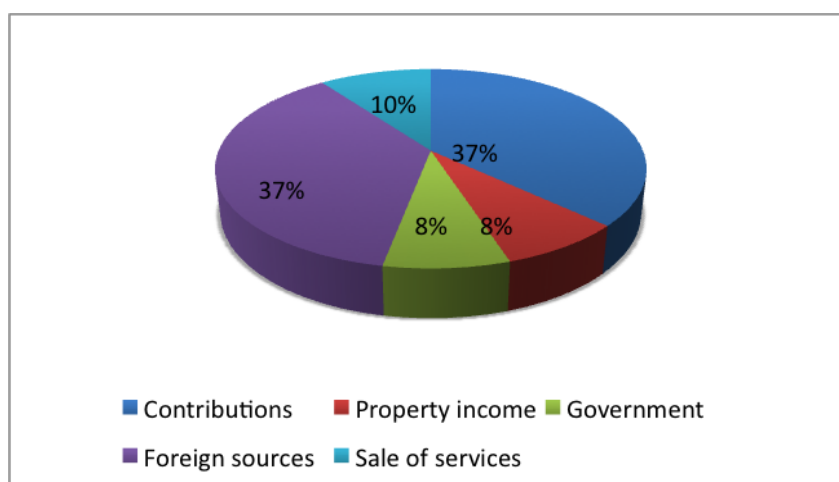


and second how, already in the 1960s, Switzerland, while representing a small to medium sized community (less than 20.000 Jews), was a significant factor in European Jewish philanthropy. Kessler estimated that in 1964 Switzerland gave \$1.6M to Israel and other foreign causes, while France (with a Jewish population of more than 500.000 Jews) gave \$1.3M. The significance of Swiss Jewish giving, which to this day is an important player in continental European Jewish philanthropy, indeed deserves more research.

Other data from Kessler's study are also interesting for our study:

- In 1964 sources of revenue of Italian Jewish communities were calculated as follows: 37% foreign sources and voluntary contributions; 8% property income; 8% public funding; 10% sale of services.

Graph. 1. Sources of revenue of Italian Jewish communities, 1964



Source: Kessler, *Study of fundraising in European Jewish communities*, 1967, p.59

As we shall see, contemporary findings concerning the Jewish community of Milan in 2007 show how the sources of funding have changed: the increase in sales for service and public funding has replaced foreign sources, while the share of donations has decreased.

- Per capita donations in Milan, Rome and other communities differed dramatically as may be seen in table 2.

Table 2. Per capita donations in US\$ per city and per cause, 1964

Italy	Local needs	Israel	total
Milan	54	26	80
Rome	16	8	24
Other	21	16	37

Total	27	16	43
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Source: Kessler, *Study of fundraising in European Jewish communities*, 1967, p.50

This data on the different per capita donations in Rome and Milan is also interesting as interviews confirmed that in the first decade of the 21<sup>st</sup> century Jews in different Italian cities still give differently. Table 2 also shows that in 1964, Italian Jews were giving to Israel less than to Italian Jewish causes.

This balance changed in 1967. As elsewhere in Europe, and globally in the Jewish Diaspora, giving to Israel had its peaks in the emergency campaigns, which coincided with the wars in Israel (DellaPergola, 2000). The 1967 Emergency Campaign in Italy was particularly successful compared to previous donations and to other European countries, especially France. Where previously a mere \$300.000 a year had been contributed to the KH from Italy, in 1967 over US\$ 6M were raised (Stock, 1992). As elsewhere in the Diaspora, for Italian Jews as well, the 1967 Six Day War was a watershed in the relationship with Israel, resulting in a polarization within the community between those for whom the State of Israel was –and still is – crucial for their Jewish identity and those - mainly on the left - who dissociated themselves from Israeli policies (Molinari, 1995). The money raised in 1967 was surpassed only in the following Emergency Campaign of 1973 when more than US\$7.5M were raised (Abrahamson, 1974).

The relatively large amounts of money raised by Italian Jews for Israel had implications for their relations with the JDC, which was still financially supporting Jewish refugees in Italy. In 1967, JDC with the help of Hias (Hebrew Immigrant Aid Society) assisted 2300 Libyan Jews - more than half of those who had arrived in Italy in flight from Tripoli and other Libyan cities after the Gheddafi' coup. The Jewish charity board (Deputazione Ebraica di Assistenza) of the community of Rome took care of the Libyan refugees in the capital, while the JDC cared for all other Libyan refugees in need of assistance in the rest of Italy (De Felice, 1985). The 'new' Libyan refugees were only part of the 6200 refugees assisted by JDC in Italy in 1967 (JDC, 1967). In 1968, after negotiations with the Jewish communities of Rome and Milan, responsibility for the caseload of 'veteran' refugees, who had been living in Italy for decades and were Italian citizens, was transferred to Italian communities. 'New refugees' and

trans-migrants continued to be assisted by the JDC, as in 1974-5 when around 7000 Jewish refugees from the USRR passed through Ladispoli outside Rome until they could obtain visas to proceed to other Western countries (JDC, 1975).

The 1956, 1967 and 1973 Israeli wars coincided with successive waves of Jewish immigration to Italy from Arab and North-African countries. The quantitative significance of these waves of immigration may be assessed by the fact that in 1965, of the 8500 members of the Milan community, 48% were born in Italy, 15% in other European countries and 37% in North Africa and the Middle East (DellaPergola, 1976). In most cases, groups of Jewish immigrants from Egypt, Libya, Persia and Lebanon were more religious than Italian Jews and often more generous. As we will see, interviews for this project revealed how in both Rome and Milan, these new immigrants groups influenced and stimulated practices of giving of Italian Jews.

The presence of different Jewish communities more religious than native Italian Jews, often speaking Hebrew, extraneous to the intellectual and political debates within the native Italian Jewries presented a cultural challenge to Italian Jewry. According to Luzzatto, the presence of these different groups together with groups of Lubavich in large and small Italian Jewish communities, may partly explain the recent religious revival occurring mainly among the young and especially in Rome and Milan (Luzzatto, 1997). This phenomenon must however be contextualized within the wider trend of increasing assimilation, low birth rate, high mixed-marriages rate and distance from Jewish institutions in the ageing and decreasing Italian Jewish population (DellaPergola, 2010). All these aspects affect practices of giving and lead us to the analysis of contemporary Italian Jewish giving.

This section has shown how Italian Jewish giving has a long and rich history. Focusing on each phase has enabled us to better understand the long-term dynamics of Jewish giving in Italy: an important tradition of secular giving, the presence of a small number of major donors mostly located in Milan and Trieste, the impact of Fascism, the Holocaust and the birth of Israel on changes in priorities of giving. We also have noted the significance of foreign sources of funding for Italian communities after World War II, and how, from 1967, Italian Jews started to give substantially to Israel. Finally we have noted the challenges in terms of philanthropic behavior posed by groups of Jewish immigrants to

native Italian Jews. This leads us to analyze the context of contemporary Italian giving.

### **3. Giving in Contemporary Italy**

The Italian non-profit is a relatively young sector whose development has been accelerated by the crumbling of the welfare state and the progressive withdrawal of the public sector from a broad spectrum of services, especially welfare, education, and health (Barbetta, 1997). Since the beginning of the 1990s, these services have been increasingly provided by non-profit organizations, while the main financial responsibility remains within the public sector. Because of the growing significance of the Italian non-profit sector, studies have started to focus on its institutional, historical context and to evaluate it economically. Beginning in 2001, with the publication of a statistical enquiry into the Italian non-profit sector, information has been gathered 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).

The scarcity of donations in absolute terms is evident in that in 2006, annual donations were only 6 Billion Euros as compared to the US, where donations for 2006 amounted to 295 Billion dollars (Barbetta, 2008), an order of magnitude less, even taking into consideration the higher population of the US.

Scholars have tried to analyze the factors that may have influenced the Italians' reluctance to give:

- the substantial reliance on the state for social welfare provision;
- confusion at the juridical level concerning definitions of associations, foundations, 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 starting to change as demonstrated by the birth of Assif in 2000 ([www.assif.it](http://www.assif.it)) an association of professional fundraisers in Italy based on the values of transparency, trust, and accountability (Barbetta, 2008). The culture of professionalization in the sector, however, is still far behind that of other European countries.

The reluctance of the Italians to give is also influenced by the low level of tax relief for charitable donations and considerable variation in the types of organizations eligible for tax breaks: there are nine different tax regimes for individual donors and ten for companies (Gandullia, 2003; Dehne 2008). Tax deductions for donations to institutions for charity, medical assistance, education, art, and research were established only in 1997. In 2005 two laws were introduced to further stimulate donations: the so called 'the more you give, the less you pay in taxes' ('Più dai, meno versi'), and the "5‰ law" (Legge 5 per mille). The latter introduced a free option for the contributor to give 0.5% of his personal income tax to a specific non-profit organization. This law has been criticized on many grounds (the low ceiling of deductibility, the long bureaucratic procedure for applying, etc.), but it does have a significant share in the budget of many non-profit organizations. Furthermore, as argued by Barbetta, the debates around it have finally stimulated policy-makers and public opinion to raise questions and discuss the non-profit sector in Italy (Barbetta 2008). Another law, which has a particular significance for Jewish and other religious institutions, is the "8‰ law" (Legge 8 per mille). First accorded in 1985 to the Catholic Church, and from 1996 to Jewish communities and other religious minorities, it establishes state support for religious institutions through distributing 0.8% 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. Coherently with Borlogh's argument for Germany (Borlogh, 2008), our interviews revealed how also in Italy for some taxpayers using the 5‰ and 8‰ contribution, is perceived as a substitute for donations.

In comparison to other European countries, the Italian non-profit sector is still relatively small, but it is growing (Borzaga, 2004). However, the role of private philanthropy in this growth is minimal. Fees and charges per service are the largest source of income in civil society organizations in Italy (60.7%),

outdistancing government support (36%) and private philanthropy (3.3%) (Cima & Buono, 2003). If, however, the value of volunteering is included, the 'philanthropy' 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, 2004). Yet, even with the value of voluntary time included, the share of philanthropic donations in Italy is lower than that in other developed countries. Scholars have also noted the scarcity of grant-making foundations in Italy, though these have recently developed with the phenomenon of banking foundations. For historical reasons, a number of Italian banks combine banking with philanthropic activity. At the beginning of the 1990s, a series of laws introduced high fiscal incentives for these banks to separate their banking and philanthropic activity (Gemelli, 2006). While still amounting to only 2% of all foundations in Italy, the banking foundations are growing in importance as providers of grants for an increasing number of non-profit organizations in Italy, especially in the sectors of art, welfare, education, and research (Barbetta, 2008). Among the many projects supported, there are also a few Jewish ones such as restoration of ancient synagogues, museums, and Holocaust historical research.

The growing importance of foundations in Italy is shown by the statistical survey published in 2007 (Istat, 2007). The number of foundations in Italy was found to be around 4,720, an increase of nearly 57% compared to the 2001 survey. Family foundations are growing in Italy as well, and like other foundations there they often have a double, sometimes triple character as operating, grant-making, and grant-seeking bodies all at the same time, thereby fitting the definition of 'mixed' foundations (Pharaoh, 2009). Like foundations in general, family foundations are not distributed homogeneously in Italy. Interestingly, this uneven geographical distribution is also reflected in the distribution of Italian Jewish institutions in Italy, with Lombardy leading. Although Milan has only half the Jewish population of Rome, it has more Jewish institutions.

The slow but steady growth of the non-profit sector in Italy has been challenged by the 2008-2009 economic crisis, which has had an impact on donations, though weaker than in other countries. Surveys of the *Istituto*

*Italiano della donazione* (IID) have found that in 2008, the budget of 43% of Italian nonprofits increased and that of 23% of NPOs diminished, compared to 2007 (IID, 2009). In 2009, 37% of the nonprofits surveyed had reduced their budget. The sector that was affected the most was "health and scientific research", in which 41% of the organizations registered a decrease in donations. This decrease, according to those who conducted the survey, may also be attributable to the special donations for humanitarian relief of the Abruzzo earthquake in April 2009, made by the usual donors in the health sector. By December 2009 more than €85M were raised for Abruzzo (IID, 2010). Jewish institutions also raised funds for the Abruzzo victims, mainly through the initiative and generosity of a Canadian-Italian Jewish philanthropist of Libyan origin, who coordinated a significant in-kind donation of medicines (valued at more than half a million euro) through the UJA Federation of Greater Toronto, the Canadian Jewish Congress Charities Committee, the Abruzzo Earthquake Relief Fund, and the Jewish community of Rome (Abruzzo Earthquake Relief Fund, 2009). In the words of Walter Arbib, the philanthropist behind this generous donation: 'This is a special occasion to express my gratitude for the help that Italy gave me and the Libyan Jewish community (...) in 1967' (Efrati, 2009a). The cycle of generosity unfolds from the past to meet current challenges, leading us to the discussion of contemporary Italian Jewish philanthropy by looking at trends of donations in Jewish organizations and at a survey of Italian Jewish donors.

#### **4. Contemporary Italian Jewish giving Methodology**

Data for the section on trends of donations within Jewish organizations was obtained through sources such as annual reports, budgets, reviews of organizations websites, surveys of the local Italian Jewish press from 1990-2009, 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 from Jewish organizations working locally and for Israel, and then through chain referral sampling, a method widely used in qualitative sociological research and 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 started from the Jewish

organizations themselves. The survey may therefore serve only as a first indication of the trends of giving of those recognized as donors within Italian Jewish population. I identified 35 donors of whom 25 from Milan, Rome, Florence, Bologna, Trieste and Turin were interviewed between February and November 2009.

#### **4.1 Giving to local Jewish causes.**

While in other European countries scholarly and professional attention to Jewish giving has increased in recent years, to date, no scholarly work has focused on Italian Jewish giving. The following survey presents the findings of a study focused on both Jewish organizations and private donors, with the aim of discovering whether Jewish philanthropy in Italy is changing, and, if so, in what ways.

According to the concept of a core Jewish population, there are in Italy 28,500 Jews (DellaPergola, forthcoming), the majority of whom live in Rome (around 15,000) and Milan (around 7,000). The rest of Italian Jewry is scattered in small to very small Jewish communities concentrated in the northern and central part of the country. The Jewish community of Florence - the third largest Italian Jewish community in 2009 - counts 907 members. Italian Jews belong to twenty-one Jewish Italian communities, which are federated in the Unione delle Comunità Ebraiche (UCEI), the official representative of Italian Jewry vis-à-vis the Italian state. The UCEI – which is not a fundraising institution and does not generally receive donations, though it did so in the past - provides for the cultural and religious needs of the communities and supports smaller communities that cannot sustain themselves. Since 1996, the UCEI distributes the income from the “8‰ law” among all the Jewish communities and to individual projects of different institutions specifically dedicated to Jewish culture, conservation of heritage, and welfare. Interestingly, UCEI income from the “8‰ law” is much higher than the number of Jewish tax payers in Italy would indicate, suggesting that, in addition to those openly identified as Jews, there may be ‘hidden’ or ‘distant’ Jews who do not identify with the main institutions (Canarutto, 2009). The quantitative significance of the “8‰ law” revenue for the budget of Italian Jewish communities is great. In 2007, for example, the “8‰ law” revenue in the Jewish community of Milan (€554.455) was larger than the sum of private donations received in the same year (€403.572). The revenue



from the 8‰ and 5‰ laws is even more significant for the budget of smaller communities such as Florence where, in 2009, it amounted to 11% more than the revenue from donations. Since 2005 (law 2005/175) the UCEI also mediates funding from the state for special projects of restoration and Jewish heritage. In 2009, 25% of this source of funding was cut, freezing various projects (Efrati, 2009b).

Each Jewish community is an independent juridical entity and provides services such as welfare for the needy, schools and old age homes, according to the number of its members and its financial means. For example, only the communities of Rome and Milan can afford a secondary Jewish school, as private secondary schools are not entitled to public funding. Jewish secondary schools in Italy rely on fees, contributions from the communities, and private donations (in Milan these include donations from a private foundation set up in 1998 especially to support the school). Schools heavily impact the community budget. In some cases this has caused schools to be closed down; everywhere it provokes debates over the future of the community.

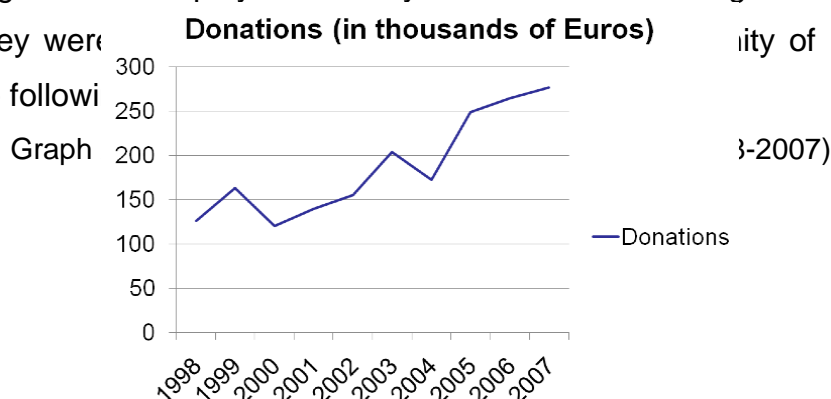
In addition to the twenty-one Jewish communities, there are more than seventy Jewish institutions in Italy that can receive donations. All these organizations raise funds separately from the same, relatively small, pool of donors. It was impossible to estimate the amount of private philanthropy in Italian Jewish organizations in an aggregate form, as most organizations refused to provide information about their budget. However, we can explore the situation in the two main communities of Rome and Milan by analyzing the budgets of the Jewish community of Milan and of the Jewish Charity Board (Deputazione Ebraica di Assistenza) in Rome, as well as in the Jewish community of Florence.

Within the general budget of the Jewish community of Milan, which does not include the Jewish school and the old age home, members' fees in 2007 made up 70% of the income, while private philanthropy covered only 5%. In the school budget, the largest source of income was tuition fees - 55%, while private donations were only 2%, and grants from two internal foundations contributed 4% of the annual budget. Comparing this data to Kessler's findings from 1964 (see page 16) we note the absence of foreign sources of revenue, the drastic reduction in the share of donations, and the impressive increase of revenue

from "sales for service/fees". Consistently with the wider picture of non-profit funding in Italy, in 2007, public funding revenue was particularly significant (40%) for the welfare department - which includes the revenues of the old age home; 44% of the annual revenue of the welfare department funding came from sales for service while the share of donations reached only 4% (Comunità ebraica di Milano, 2007).

To be part of the local Jewish community, members are asked to pay an annual fee, the amount of which is set by an internal committee on the basis of estimated revenues declared by the member. Mirroring the wider picture of the Italian attitude towards state provision, once paid their fees to the community, the majority of Italian Jews expect the community to provide services. As pointed out by many donors interviewed for this project, and confirmed by professionals within the communities, many Italian Jews regard giving to the community as payment of a tax, while only giving to Israel is perceived as a proper donation.

Although donations play a relatively small role within the general budget, until 2007 they were shown by the following

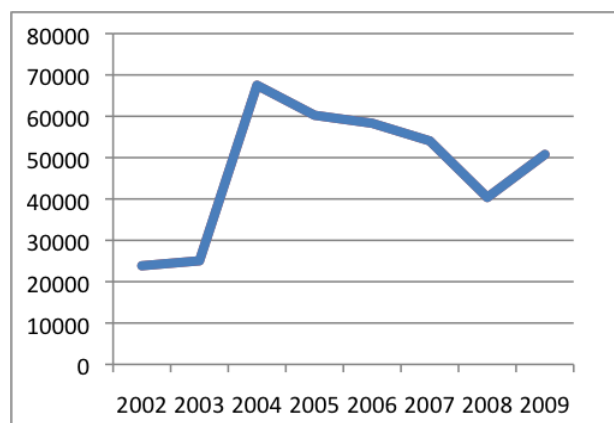


Source: Jewish community of Milan, Budget, 2007

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 the new Jewish old-age home in 2007. As confirmed by interviews with community professionals, project-focus is now an essential condition for donations.

In Florence, between 2002 and 2009, voluntary donations never exceeded 7.4% of total ordinary revenues. As may be seen in the following graph, donations to the community have been decreasing since 2004, but resumed growth in 2009. This data does not include bequests and extraordinary donations –for example, for the renovation of the synagogue.

Graph 3. Donations to the Jewish community of Florence (2002-2009)



Source: Jewish community of Florence, Budget 2009

In Milan the allocation for the welfare sector is included within the budget of the community. The welfare sector includes the old age home and provides support for families and young people at risk. To face the current crisis and the diminishing revenues from internal and external foundations, special fundraising efforts were made to increase private donations (Bollettino, I nuovi poveri October 2009). Up to the third trimester of 2009, donations to the community had decreased 39% from 2008, also due to the impact of the financial crisis (Consuntivo, 2009).

While donations diminish, volunteering is increasing in the Milan Jewish community. This may be seen by the success of the volunteer organization Volontariato “Federica Sharon Biazzi Onlus” whose work is becoming essential to many community services. This association of volunteers, founded in 2001, is the only one of its kind among Italian Jewry, and it is interesting not only because it provides important services to the community, but also because it strengthens the ties between different groups within the community. Most of the funding of the institution comes from small, private donations, followed by revenues from the “5 %o law” income and grants from bank-origin foundations for specific projects. As we mentioned, volunteering is the most important form

of philanthropy in Italy, (Barbetta, 2004) but attempts to emulate the model of the Volontariato Biazzi in other Jewish communities have not succeeded.

Regarding the trends of donations among Jews in Milan, specific attention must be given to the groups of Jewish immigrants from Egypt, Persia and Lebanon, which arrived between the 1950s and 1970s. In most cases these immigrant populations are more religious than Italian Jews and display different philanthropic practices. Interviews revealed that after their arrival in Milan in the 1960s, the Persian Jews gave generously to the local community, to their own institutions but mostly to Israel through the Keren Hayesod (KH). Persian Jews in Milan were considered generous compared to Italian Jews. Since 2005, their philanthropic practices have, however, changed – mainly as a consequence of the emigration of the wealthiest representatives of the community. It is estimated that 25% of the community, mostly its wealthiest members, have left, primarily because of the current economic crisis. As a consequence, donations have declined significantly and are restricted to helping Persian Jews both locally or directly in Israel and not through central organizations such as the local Jewish community or the KH, which are perceived as the establishment and unresponsive 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 initially they were active donors to the main Jewish community of Milan and KH, Lebanese Jews have recently shifted their giving towards their own organizations, especially a school and other organizations of religious education. This shift towards 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 a waste 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 traditional mainstream Jewish institutions.

Finally, 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. Interviews revealed that until recently Italian Jews preferred to give through bequests rather than *inter vivos*.

For this reason, income from real estate, most of which was left in bequests, provides a significant proportion of the revenues of the communities: 31% in the Deputazione in Rome in 2007, 38% in Florence in 2009. Preference for bequests may be explained by a basic distrust towards the state, as people do not want the state to know about their personal assets. In particular, concerning donations to Israel, until a few years ago it was very complicated to donate to an organization that dealt with foreign countries, so people preferred to give in the form of bequests. Although still representing an important source of income, bequests to the communities are diminishing in Milan, Rome and smaller communities such as Florence.

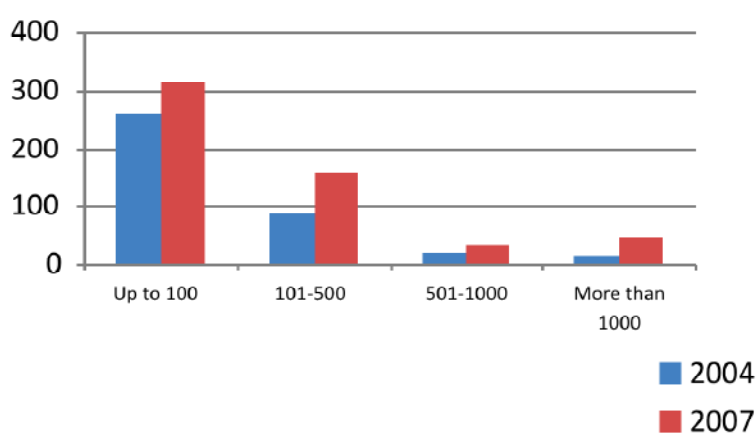
In analyzing how the pattern of donation has changed in Rome in recent years, interviews revealed that there are still differences in giving between the veteran Roman and immigrant Libyan communities. Upon their arrival in 1967, Libyan Jews - while accepted formally in the local Jewish community - constituted and financed their own institutions, which to this day survive solely due to the donations of local Libyan Jews. Interviews also emphasized how Libyan Jews are more generous than Roman Jews especially in giving to Israel, while Roman Jews give more to the local Deputazione Ebraica di Assistenza e Servizio Sociale, the welfare institution of the community.

Constituted through the unification of a number of old confraternities, the Deputazione is independent from the local Jewish community, which, however, appoints three out of the eleven board members. Professionally run, it provides legal, economic and health assistance to 10% of the 15,000 members of the Roman community. In 2007, private donations represented 41% of its sources of income (tot. €1.107.131). While percentages of donations inter vivos vary annually, the relatively high percentage of revenue deriving from real estate assets (31%) is a stable element in the budget of the Deputazione (Deputazione Ebraica di Assistenza, *Bilancio*, 2007)

The Deputazione is the Jewish organization that receives most of the donations in Rome and has seen an increase in donations in recent years. As may be seen in graph n.4, the number of donors has doubled from 2004 to 2007, but donors who give more than €1000 remain a minority. In 2007, there were 541 individual donors, only 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. From 2004 to 2007, donations to the Deputazione increased both in numbers of donors and in amount. Moreover, the Deputazione is the most transparent Jewish organization in Italy, publishing its sources of income and expenditure on its website and providing extensive information upon request, which appears to demonstrate that transparency encourages giving.

Graph 4. Donors to Deputazione per amount of donations (in euro)



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

While donations to the Deputazione saw an increase up to 2007, in the last decade the central community of Rome has seen a constant decrease both in donations and bequests. To remedy this situation, the community has begun presenting specific projects for sponsorship. For example, in the newly opened Jewish Museum of Rome a special project –project Bezalel- is offering to ‘adopt a piece of your own history’ by sponsoring the restoration of pieces of Judaica for display. (<http://www.museoebraico.roma.it>). Since 2000 the few donations that are given are directed not generally to the community but focused on a specific cause.

In addition to donations through the community institutions, other forms of donations occur informally but are even more difficult to assess quantitatively. However, as argued by Payton, even if we do not have adequate measures to assess the impact of this kind of work, ‘the pervasive (...) immediate, direct or personal, the domain of traditional benevolence’ may not be neglected in

measuring the scale and scope of philanthropy (Payton, 2008). Interviews attested that informal donations through rabbis both in Rome and Milan have increased in recent years: these donations are often specifically targeted to the poor, from people that mistrust the structure of the community and delegate the rabbi to distribute their donation.

The combination of more focused giving, mistrust of the central institutions, and the perception of increasing needs has recently caused the creation of parallel independent organizations. In Rome, Masbia Le Kol Hai Razon ONLUS was established in 2009. The association distributes food and new clothes on a monthly basis to an increasing, needy population in Rome and elsewhere, with the help of young volunteers from the local Jewish school. Targeting mainly the Roman Jewish population, it does not exclude non-Jews; furthermore, in times of emergency as in the case of the earthquake of April 2009 in Abruzzo, it distributed clothes to the local non-Jewish population. While it is starting to receive donations in cash, it is mainly based on in-kind gifts.

In Milan, as we said, distrust of the central community structure, coupled with an increase in the religious population, has induced some sectors of the Jewish population to shift their donations to their own school and religious institutions. This trend of creating independent institutions both in Rome and Milan is also interesting because it relates to the global phenomenon of preferring focused projects rather than central organizations. In Italy this phenomenon is evident in two ways: in 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, in the dissipation of organizational and financial resources.

#### **4.2 Giving to Israel**

Similar to other Diaspora Jewries and in accordance with the past, 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. For all the main institutions that raise funds for Israel - Keren Hayesod, Keren Kayemet and WiZO) - we attempted to elicit a general picture of donations in Europe in general and Italy in particular, but no quantitative data was provided. In the Italian branches, fundraising is not carried out by professionals and transparency is not

mandatory. The issue of transparency is not a problem limited to Italy, as professionals in the central offices in Israel confirmed that the information exists, but that organization 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 from other organizations. These factors have contributed and/or are used as excuses for non-transparency both on the local level and in Israel. However, from interviews with representatives of organizations that channel donations from Italy to Israel, we have gathered some qualitative information that may assist in assessing recent changes in Italian Jewish philanthropy to Israel.

Most of Italian Jewish giving to Israel is still sent through Keren Hayesod (KH). As in other countries, one of its most important challenges in fundraising is the shrinking number of 'big donors'. Like elsewhere in the Jewish Diaspora, the generation of Holocaust survivors and those who had witnessed the birth of the State of Israel and its wars had a visceral relationship with Israel, which often translated into unquestioned giving to Israel. The number of big donors in Italy, is shrinking because of retirement, generational change, emigration and the drifting away of a number of donors, who are choosing to give directly to Israeli non-profits. To face the diminishing donations from these donors, KH Italy is trying to expand its donor base by transforming its image from an elite philanthropic organization to a more inclusive one, which includes younger and medium-range donors. Also, the modalities of giving are changing: while 'old donors' did not question how their donation was spent and gave most of their money without specific directions, now the significance of donations to specific projects is growing, especially among the young. However, in Italy differently from other European countries such as UK and Holland for example, the majority of donors, old and young, still show trust towards the institution and are not particularly interested in knowing where the money they give goes. This may explain why KH is still the main recipient of donations for Israel in Italy. However things are slowly changing, as a still minor but increasing number of donors are drifting away from KH to other, more direct projects in Israel. Another important change of KH policy in Italy, as in the rest of the Jewish Diaspora, is its reinvestment in the local Jewish community. In this context, Italian KH is only starting to change its attitude, and compared to other



countries such as the UK or France (Wasserstein, 1996), its involvement with local Jewish causes is still minimal.

Keren Kayemet Lelsrael (KKL) is another institution that raises funds 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 has the most paid employees of any organization that deals with donations to Israel in Italy. Representatives in Italy claimed that there have been no 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 (giving €10-50-100 annually), 95% of whom are Jewish. Most of the income however is from bequests, though these are decreasing. Like KH, in response to the increasing demand for project-focused giving, KKL re-markets its products by assigning specific projects to each country. However, our interviews show that lack of transparency, overhead expenditure and recent scandals 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 defense 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. Other than these national organizations, which have branches in many Jewish communities, there are also different organizations of the 'Friends of...' type which raise money for universities, museums and the like. All of these raise funds separately, on their own, targeting mainly Jewish but also non-Jewish donors. Among these are: the Milan based Friends of the Hebrew University (founded in 1977), the Venice-Trieste based Friends of Alyn hospital (founded in 1984), the Torino based Friends of Tel Aviv Art Museum (founded in 2001), the Rome based Friends of the Technion of Haifa (founded in 2004), Friends of Machscha Tova (2006) of Tzad Kadima (2006) and Ezer Mizion (founded in 2009). Most of them have tax exemption status for donations and bequests, which in at least one case account for more than 75% of the donations. Since 2000 there has been an increase of more direct fundraising organizations, in most cases because activists and main donors have drifted away from central organizations and begun to focus their philanthropy on more specific project-focused giving. Our research shows that bypassing of central organizations in favor of more direct giving to Israel is also beginning in Italy, but at a slower pace than in other countries.

#### **4.3 Foundations**

So far we have analyzed local Jewish organizations in Italy and the main vehicles of donations towards Israel. In addition to these, there are a number of foundations, which, as is the case in Italy in general, are growing in number and variety.

Jewish foundations in Italy are mostly concerned with Jewish artistic and historical heritage and Holocaust memory. The *Fondazione per i beni culturali ebraici in Italia* was created in 1986 by the UCEI for the preservation and restoration of Jewish culture in Italy. The *Fondazione Centro di*

*Documentazione Ebraica Contemporanea (CDEC)* in Milan focuses on historical research and documentation of the Shoah. As for European Jewry in general (Gergely, 2006), the 'culture of memory' is a fundamental part of Jewish identity (Luzzatto, 1997). History of the Shoah in Italy is also the focus of the *Fondazione Memoriale per la Shoah* in Milan opened in 2010 and two new foundations scheduled to open in 2011: the *Museo Nazionale dell'Ebraismo Italiano e della Shoah* in Ferrara, and the *Museo della Shoah* in Rome. The mission of these new operating foundations focuses on 'memory and education of the Shoah'. Although mostly publicly funded – from the state and local municipalities - the assets of these foundations in Italy are not based on recovered money from the property expropriated from Italian Jews after the anti-Semitic Fascist laws of and during World War II. This differs from other European cases such as the Dutch Jewish Humanitarian Fund and the French Shoah Foundation instituted in 2000 in part as a result of public acceptance of responsibility by the French government of its actions during the Holocaust (Eiszenstat, 2003; Freedman Weisberg, 2006). In Italy such a process of public assumption of responsibility for the state and civil society's role during the Holocaust is yet to be completed (Schwarz, 2004).

In addition to these publicly funded foundations, several private foundations have been founded by Italian Jews. Some of these are more than a century old, as for example the *Fondazione Istituto Franchetti* in Mantua, founded in 1903. Although conceived as a grant-making institution for Jewish and non-Jewish students, because of the decline of the local Jewish population it now distributes scholarships to local non-Jewish students, especially in the fields of medicine and engineering. Recently the institution has also sponsored courses in Jewish studies at the local university. By statute, the board of this foundation must include two members of the local Jewish community. This type of official connection between the local Jewish community and private foundations founded by Jews is unique in Italy. Other foundations founded by Jews during the 20<sup>th</sup> century, such as the Marco Besso foundation in Rome (1918) or the Olga and Ugo Levi foundation in Venice (1962) are mixed foundations completely dedicated to secular causes, mostly focusing on culture.

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 Fondazione Levi Montalcini, 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 Fondazione Montalcini, together with the Zevi foundation – not in the aforementioned list - is the only Italian organization linked to Jewish Italian funders that collaborates with the JDC in some of its secular projects in Africa. This is the only indication we have found of Jewish Italian involvement in cross-border philanthropy, other than with 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 (Rosen, 2010; 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.

## **5. Survey of Italian Jewish donors**

The research population of the survey consisted of 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 concerning 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 of Italian Jewish giving.

Our sample included a small number of women (25%), half of whom were born outside Italy. This relatively low occurrence of women as philanthropists is consistent with information from interviews with organizations such as Adei-Wizo and KH Women's division that revealed 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, UK, and in Israel (Schmid & Rudich, 2009; UK Giving, 2009).

Our sample includes 36% foreign-born donors. This finding may contribute to show how the predominance of foreign-born givers is changing: first of all, Italian Jews are now taking on a wider role, particularly towards local Jewish causes. Secondly, the ageing and emigration of 'big donors' is causing a changing of the guards, even if there are still differences related to origin, especially concerning 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'.

A rich literature exists on religion and philanthropy, arguing that religious affiliation and attendance at religious services have historically been and still are positively correlated with charitable giving (Bekkers, 2007). In our limited sample 56% 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 to 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 lower degree also give to local non-Jewish causes. It is interesting to note how 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, in the sense of 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% of donors are over 65 years old, born before the end of World War II; 40% 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 that indicate lengthy studies, late entrance into the job market, especially for highly qualified jobs, and late marriage. While literature and practitioners in the US, UK and Israel have recently focused on the new generation of philanthropists consisting of young entrepreneurs, between 30 and 40 years old, coming especially from the world of high-tech, this group is still very rare in Italy. Interestingly, all the donors in the 35-65 years old cohort are philanthropists involved directly with their particular project. In most cases these donors were previously involved with central organizations 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 that have decided to change their way of giving. In looking at the causes they give to within this cohort, we notice that while Orthodox Jews have shifted towards giving locally to more religious causes, the traditional and secular give more 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, 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 strong role models for giving. This is consistent with the literature, which recognizes giving as a form of pro-social behavior, and that parental background affects giving by their children. Most of the interviewees, however, expressed concern over their children continuing in their path of dedication to others.

It is not possible to learn about the financial level of giving by Jewish donors since the majority of the donors I interviewed refused to answer questions regarding the levels of their philanthropic giving. 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 max of €150.000.

When asked to what causes they give, the majority responded that they give to Israel (72%); 56% give more or only to Israel. 61% of the respondents that said they give to Israel, give mainly through Keren Hayesod. The donors to Israel that do not give through Keren Hayesod, give mainly to higher education. Donors that give more to local Jewish causes were 44%, 8% of which give only to local Jewish causes.

48% of our donors answered 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 to 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 to but smaller than towards Jewish-Israeli causes with the same philanthropists giving 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.' However, these findings on secular giving must be considered with caution, as by the

nature of the pool of donors interviewed, which started from indication of 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 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 that mediates the connection with the organization, is the most important factor in giving. Only a small minority of Italian Jewish donors is consciously calling upon non-profit organizations to exhibit performance and effectiveness measures 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 from being involved and disillusioned by central organizations to more focused ones in which they could see more direct results of their impact. For this purpose they set up independent organizations, mostly branches of international "Friends of...", or voluntary organizations aimed 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, that 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 to exchange opinions and information. 12% answered that their network was at the Jewish international level, while only one respondent is part of non- Jewish networks of Italian philanthropists. All interviewees answered that no networks of Jewish philanthropists exists in Italy.



When asked the open question ‘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 emphasized the significance of solidarity ‘as a way to participate and feel Jewish’, a sense of responsibility – ‘higher for Jews because it’s part of their culture’- 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 Jewish continuity’. 28% said that giving was also a pleasure, a passion.

For 16% of the respondents, motivation to give changes according to the direction of giving: while giving to local Jewish causes is perceived as a tax, giving to Israel is felt as more of a ‘real’ donation. Donations to Israel are still justified by the perception of Israel as a country in need – particularly during emergency campaigns - Israel as the home of the Jew, who is always a potential refugee, and also as a way to compensate psychologically for the frustration of not having the courage of making Aliyah. As one interviewee put it ‘I give to Israel out of the Diaspora complex of not having succeeded myself in making Aliyah.’

In contrast to other countries, for Italian Jewish donors the perception that domestic Jewish needs are a priority is still minor but slowly growing. A minority of Italian Jewish donors perceives assimilation as being the most significant, long-term threat and they believe that the situation can be changed through investment in key assets of Jewish continuity such as Jewish education. The majority of money that is given to Italian Jewish causes is directed not to education but rather to 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 a persisting preference to give to Israel rather than to local Jewish causes, and a strong tendency to give to non-Jewish causes even if to a lesser degree than to Jewish causes. The survey also shows how the majority of Italian Jewish donors are not particularly demanding as to where their donation goes and how much they trust the organization, even though we did notice a growing significance given to project-focused donations. In general, this survey shows how Italian Jews are still quite traditional when it comes to their philanthropic practices, even if they are starting to change their ways of giving.



## **6. Conclusions**

Contrary to general assumptions on the absence or irrelevance of European Jewish philanthropy in general and of Italian Jewish philanthropy in particular, this paper has shown that Jewish philanthropy in Italy exists. Based mostly on a qualitative analysis, this paper also shows how Jewish philanthropy is changing in Italy and is becoming more focused-oriented, even if the pace of change is still slow. It also contributes to show how Jewish philanthropy must be understood as an interplay between Jewish 'sensibilities' - values, tradition, history - and the wider Italian and European context. To better elaborate on this nexus, we will conclude with a discussion of the influence of Italian philanthropy and of Italian Jewish history on contemporary Italian Jewish giving. We will then see how developments in Italian Jewry fit into wider trends of European Jewish contemporary philanthropy.

As argued by Anheier, Italy together with Germany, Austria and France are civil law countries that developed a state-oriented, non-profit sector. In these countries, organizations tend to resemble state agencies more than for-profit firms (Anheier & Seibel, 1990). This differs - according to Anheier - from common law countries, where the third sector is more market-oriented, putting more emphasis on voluntarism than on public service and with non-profit firms resembling for-profit companies more than state agencies. Our research shows how this character of general Italian non-profits influences the approach of Jewish organizations: more than one interviewee for this project pointed out the resemblance between approaching the bureaucracy of national Jewish organizations such as the UCEI and that of ministerial offices and state agencies. Furthermore this paper shows how the majority of Italian Jewish donors - like Italian donors in general and differently from other Western countries such as US, UK and other European countries - are still far from applying business strategies to their philanthropy in search for maximum impact. The majority of Italian Jewish donors still give through organizations such as Keren Hayesod without asking too many questions about how their money is spent or its impact. However, in accordance with general European and European Jewish philanthropic trends, in Italy too, a still small but growing number of Jewish donors are starting to challenge this picture through the

foundations or non-profits they fund or manage. A minority of Italian Jewish donors has started to practice their philanthropy according to more impact-focused strategies, refusing to give to organizations that don't meet the standards of transparency and efficiency they expect.

Another important characteristic of the Italian non-profit sector is its heavy reliance on fees and charges more than on government and private philanthropic support (Barbetta, 2004). Our paper shows how this is also reflected in Italian, local Jewish organizations in which the share of philanthropic giving is similar, if somewhat higher, to the share of private philanthropy in Italian civil society organizations.

A recent development in Italian Jewry is the rise of public and private philanthropic foundations. This trend is in line with the recent expansion of foundations in Italy and elsewhere in Europe (Pharoah, 2009). Our findings indicate that in Italy private foundations founded by Jews are mostly dedicated to secular philanthropy. Amongst these private foundations, the few that are also concerned with Jewish causes are amongst the most innovative organizations within Italian Jewry. Their collaboration with international Jewish agencies such as the JDC, their awareness of philanthropic trends such as venture philanthropy at the local and European level, and their transparency will hopefully be a model for further developments. Until now, reflecting the general situation in Italy, the growing number and variety of family foundations has not affected the general patterns of Italian Jewry, which prefers to give to central fundraising organization for Israel or the local Jewish community rather than support new and more focused initiatives and organizations.

As is the case within the larger Italian non-profit landscape, our findings demonstrate that foundations founded by Jews and other Italian Jewish organizations are concentrated in the Northern and Central regions of the country. This uneven distribution reflects the logistics of Italian Jewish communities but not only as shown by the fact that Milan has more Jewish organizations than Rome, while having half the Jewish population. The relative dynamism of Milan, which is the city where more Italian Jewish philanthropists live and give, has a century old history in and of itself. From the end of the 19th century, we have seen how the rise of Milan as the financial and commercial capital of Italy attracted Italian Jews from smaller communities. Not only in

Milan, but more intensely there than in other places, Italian Jewish philanthropists were particularly devoted to giving to non-Jewish causes. While between 1875 and World War II, giving to non-Jewish causes was a priority for Italian Jews, after the Holocaust and the birth of the State of Israel, priorities changed, and Jewish Italian giving focused more on Jewish causes. Giving to non-Jewish causes is still significant for Italian Jews, particularly those who, in doing so, are following a long-term family tradition. Not surprisingly, it is less important for recent Jewish immigrants groups to Italy such as Lebanese or Libyan Jews who are, instead, amongst the most generous philanthropists to Jewish causes in Italy and/or to Israel.

These factors also show the many ways in which the historical context helps understand current Italian Jewish giving: the significance of giving to local non-Jewish causes, the challenges set by Jewish immigrants groups with different traditions and practices of giving; the impact of World War II both on the economic possibilities of giving and on the choices of priorities of giving, and the existence of the welfare state, which did not favor the interference of private philanthropy.

Having summed up the influence of the Italian context and of Jewish Italian history on contemporary Jewish Italian philanthropy, we will conclude with some comparative notes, examining how Italian Jewish philanthropy fits into wider trends of European Jewish giving.

The most striking difference between Italian and other European cases of Jewish giving is the absence in Italy of a federated campaign between local Jewish and Israeli causes and the level of professional fundraising. As interviews with key personalities in the British and French Jewish philanthropic world revealed, in the UK and in France, professionals are aware of the juridical and fiscal regimes and actively promote change within their own structures in order to take advantage of these regimes as much as possible, for the benefit of both the donors and the institutions themselves. In Italy no real investment is put in professionalizing fundraising within the institutions and no specialized figure or structure exist to which a potential Jewish donor may turn to for advice concerning his giving. Furthermore, the absence of any form of federated campaigns in Italy causes fierce competition in raising funds for Israel or for

local Jewish causes, while targeting the same and decreasing number of donors.

Competition between organizations also exists in France and the UK where, however, forms of federated campaigns between Israeli and local Jewish causes exist. 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). In the UK this has resulted in a further shift in the federated campaign of the United Jewish Israel Appeal (UJIA) whose focus on Jewish education has been one of the most significant changes of UK Jewish institutional philanthropy (Finestein, 1999). As has been the case within American Jewry since the mid 1990s (Tobin, 2001), also in the UK to face the challenges of Jewish continuity, the UJIA has taken responsibility for Jewish education in Britain so that a proportion of its donations are devoted to Jewish education in the UK. This change of policy of the UJIA is a sign of a wider shift in Anglo-Jewish community's awareness of Jewish identity and continuity, reflected in the expansion of donations to domestic welfare and Jewish adult education. Central institutions and private foundations try and collaborate on these new projects for Jewish education. These forms of cooperation and responses in facing the new challenges of local Jewish needs could also inspire Italian Jewish institutions and donors who still give mainly to Israel.

In contrast to what is slowly but surely emerging among Jewish foundations in Europe and mainly in the UK, overseas Jewish giving by Italian Jews is mostly focused on Israel. The pan-European scope of an increasing number of foundations both private and public (the UK based Rothschild Foundation, the Dutch Humanitarian Fund in Holland, or the Shoah Memorial in Paris) is still unfamiliar to most Italian Jews. This paper shows how in Italy, donations to Israel are still mainly raised through Keren Hayesod and distributed to mainstream organizations and programs connected to the Jewish Agency. On top of its scope, this is the main difference which distinguishes Italian Jewish philanthropy for Israel from those of the US and UK. In the US, and at a slower pace in the UK, Jewish philanthropy in recent years has been facing several interrelated trends: increased wealth, concentration of giving in

fewer hands, the shift to venture philanthropy, the shrinking share of Jewish philanthropy received by Jewish institutions, the shift in philanthropic culture from communitarianism to individualism (Charendoff & Prager, 2010). Attuned to these challenges in the Jewish and general philanthropic worlds, and to better inspire donors with specific programs, Jewish philanthropy in the US and UK is changing by designating money for specific programs and creating structures and platforms for donors (Rosen, 2010). Furthermore, new typologies of partnerships and collaborations between federations and foundations in the US are proposed and envisioned (Solomon, 2008). Also in the UK and in France forms of cooperation between central community Jewish institutions and Jewish foundations are nurtured and professionals are creating new opportunities for donors to give within the main institutions.

International examples should not be taken as unquestioned models for global Jewish philanthropy, as structures, history and contexts are profoundly different globally. 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 (Rosen, 2010) and how leaders and professionals have the courage to refocus direction of communal giving targeted more to local needs and to more direct giving, may be of strategic significance for other countries dealing with similar albeit slower paces of change.

This paper has shown how, in Italy, these processes are still very much at their beginning due also to the fact that donors are not yet demanding change from the institutions to which they give in the same way North American and UK donors are. 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. While a minority of devoted donors are increasingly slipping away to found their own branch or institution, the majority of Italian Jewish donors is not aware of the possibility of directly giving to Israeli causes, or that they can (or should) demand full transparency of their donations in order to better measure their impact. The largest donations still come from 'old generation' donors who give without asking how and where their money is spent. Their number is, however, shrinking while those donors who want to be more involved distance themselves from central organizations and create their

own organization or establish a branch of an existing one. Italian Jews still prefer to give to Israel, rather than to local Jewish causes. When they do give to local Jewish causes, conservation of the Jewish past seems to take precedence over causes connected to the Jewish future such as education and schooling, which are critical for Jewish survival.

Slowly but surely changes are occurring among donors in Italy. In order to attract and inspire new donors and strengthen belonging, changes need to be made within the structures of Italian Jewish giving. This is important not only to raise the level of donations, but also to strengthen Jewish identity. As we said, with its demographic and socio-economic characteristics, Italian Jewry is among the group of Western European countries that are at the biggest disadvantage regarding future prospects of survival. Finding new ways to stimulate and cultivate Jewish philanthropy in terms of giving as well as volunteering may play an important role in strengthening Jewish identity. Surveys and debates in the US and UK are showing how programs and causes inspired by 'social justice' targeted to both Jewish and non-Jewish beneficiaries are growing and constitute 'an untapped potential for mobilization', particularly amongst the younger generation and Jews who define themselves as secular and are on the margins of the institutional community (Cohen and Fein, 2001; Belman 2009). Awareness of these debates and collaboration with international/European projects and platforms of exchange are essential for the growth of Jewish philanthropy and the strengthening of Jewish identity.

In conclusion, this paper has shown that Jewish philanthropy in Italy exists and is at the beginning of processes of change that are occurring elsewhere in Europe and beyond. In this context, higher awareness of the changing dynamics of global Jewish philanthropy, a more active involvement in Jewish European and international initiatives, increased investment in professional fundraising, and more transparency towards the general public and to donors could be of strategic significance for the growth of Jewish philanthropy in Italy.



## **Data availability and limitations**

Lack of transparency of most organizations raising funds for Jewish Italian causes and for Israel strongly impacts the availability of quantitative data on donations, constituting a substantial limit to the current analysis. The unavailability of data may be one of the main reasons why the subject has not been studied until now and surely contributes to the invisibility of European Jewish philanthropy.

Within Europe, reflecting and possibly nurturing the different maturation of the non-profit sector as a whole and philanthropic practice in particular, data availability is different per country. As in the US, British charitable organizations are obliged by the 1993 Charities Act and the Charities Accounts and Reports Regulations 1995 to publish data on accounts, donations and expenditures for each year in order to obtain fiscal deductibility (Siederer, 2001). In France, while not of public domain like in UK, data is available through professionals. In Italy quantitative data on donations, sources of revenues of non-profit organizations are not available to the general public. Each organization had to be approached singularly and while most Jewish communities released quantitative data, organizations that fundraise for Israel refused to deliver this type of information. Organizations such as Keren Hayesod (KH), Keren Kayemet le Israel (KKL) and Women's International Zionist Organization (WIZO) were approached singularly 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 leaders within the organizations themselves, their refusal to give this type of information, complied with precise policy rules, thereby indicating a deeper issue of transparency. Although 'National institutions' such as KH and KKL — should make their documentation available to the public through the Central Zionist Archives with a lapse of no more than twenty years, KH has not transferred its documentation since 1967 and KKL since 1982.

Another important limitation to this analysis is the restricted number of interviewees. As noted in the Methodology section the small sample does not enable us to generalize to a wider population. The survey may therefore serve only as preliminary findings on trends of giving of those recognized as donors within Italian Jewish population. Notwithstanding these limitations to the research here proposed, the growing role European Jewish philanthropy is called to play at a global scale, together with the qualitative information we have gathered will hopefully enhance wider research on and awareness of Italian and European Jewish philanthropy.

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