The Ambivalent Emergence of Philanthropy in Israel

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Type the Hebrew word *filantropiya* ("philanthropy") in Google, and more than 13,000 entries appear. This is quite an impressive number considering that the word *filantropiya* belongs to the language of 21st-century Israel. This foreign word, which usurped the Hebrew word *nadvanut*, has only recently become part of common parlance, though the phenomenon of philanthropy has existed in connection with Israel for hundreds of years. Enter a Web site on the topic at random, and you discover a world of ambivalence, an ambivalence that has also been around for hundreds of years. A world of for and against—an Israeli public that has yet to make up its mind as to whether it is grateful to philanthropists or feels they are exploiting the philanthropic scene to promote their own personal interests.

The third sector in Israel in this millennium is quite lively and has been growing at an accelerated rate since the 1990s. There are more than 30,000 nonprofit organizations, employing over 360,000 people (approximately 18% of the workforce), with annual combined budgets of more than NIS 75 billion (Sokolov, 2008).

The influences of globalization, the open market, the decline of the welfare state, and an increase in personal wealth have led, over the past two decades, to a sharp rise in the number of philanthropists in Israel and their relative share of charitable contributions. The income of the volunteer sector is dependent largely on public funding (Government of Israel, 2008). About 55% of its budget comes from government sources, about 25% from independent income, and about 20% from donations, and although a majority of contributions still come from world Jewry, the impact of Israeli philanthropists on the local philanthropy scene is steadily expanding. According to data from the Bank of Israel, approximately NIS 5 billion comes from American Jewry, about NIS 1.2 billion more comes from private donors and households in Israel, and about NIS 8–9 billion comes from Israeli foundations and businesses—some in the form of cash and some as measured in volunteer hours (Sinai, 2008).

With all the media attention given to contributions and donors, the Israeli public, while appreciative, is also skeptical and suspicious both of the philanthropists' motives and of the question of the state's responsibility to fund welfare and social services.

This article was translated from the Hebrew by Anne Hartstein Pace.

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A study by Schmidt and Rudich (2008) of the Hebrew University's Center for the Study of Philanthropy in Israel affirms this duality. More than 80% of the Israeli public displays positive attitudes toward philanthropy in Israel, but 67% of that same public believes that philanthropists use their contributions to advance personal and political interests.

Two noteworthy cases in recent years illustrate the intensity of the emotions and the public debate surrounding the issue of philanthropy. In 2005, the Tel Aviv municipality announced the receipt of a $20 million donation from Sami and Aviva Ofer. In return, the couple requested that the city's art museum be renamed for them. A public outcry immediately erupted, and the press was full of reports on the matter. The general uproar and hostile public opinion eventually led the Ofer family to withdraw the donation to the Tel Aviv Museum of Art, as reported in this newspaper article:

The cultural statement embodied by the museum's name change is very worrisome. For a ridiculously low price, Ofer is obtaining the aura of a great patron of the arts in Israel. People who have made much, much larger donations than Ofer's were not given the dubious honor that has been granted to him (Shefi, 2005).

Nor did the Tel Aviv municipality escape the storm of criticism:

Making any financial contribution to any cultural institution contingent upon a megalomaniacal commemoration is a crude and uncivilized act. We blame the authorities that allow, support and justify such a move (Yudilovitch, 2005).

Nochi Dankner, a leader in corporate philanthropy, has also been on the receiving end of the public's wrath. As part of the effort to rebuild the north after the war during summer 2006, Dankner's IDB Group donated more than NIS 220 million to border communities to shore up culture, art, education, and health. This donation was initially greeted with general admiration and numerous positive articles in the press. But in May 2008, at a concert by the Israel Philharmonic, the opening performance in a series to honor Israel's 60th anniversary, the auditorium was filled with boos and jeers. The protest was directed at the orchestra director who had begun his remarks praising the IDB Group for supporting the orchestra and sponsoring the concert. Here is how one blogger felt about the comments of the conductor, Mr. Shoshani:

I, too, was angered by both the words and conduct of Mr. Shoshani, who stood on the stage prior to the start of the concert and made a groveling public service announcement on behalf of IDB and its owners, as if they were lords who had the orchestra eating out of their hands (Hablogiya, June 1, 2008).

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The public appreciates and respects philanthropists, but lashes out when the donation is accompanied by a demand for special treatment or by connotations of subservient behavior on the part of recipients.

The roots of this dual attitude are planted in the history of philanthropy in Eretz Israel and in the fact that Israel is a society in transition, a society that has moved from a welfare state model to a policy of liberal capitalism.

ORIGINS OF THE DUALITY: THE HISTORIC REASONS

From the 17th century until the early 19th century, the Jewish *Yishuv* in Palestine relied on *Haluka* money: funds that were collected around the world and transferred as financial aid to the community living in Palestine. The money was collected by special emissaries (*shlihei derabanan*) who fanned out from the Holy Land to pluck the heartstrings of world Jewry. Initially, the fundraising technique relied primarily on describing the poverty and hardship in Palestine—the hunger, epidemics, hostile authorities, and so on. But later, another message was included in the letters of appeal—the expectation of aid as if it were practically a duty, the duty to contribute to the community that is fulfilling, on behalf of the entire Jewish people, the mitzvah of settling the land of Israel.

Sir Moses Montefiore and Baron Edmund de Rothschild, the great 19th-century philanthropists who aimed to build self-sustaining Jewish communities, provoked anger and opposition because of the fear that the Haluka system would suffer as a result of their efforts. However, the activities of Montefiore and especially of Rothschild meshed with the budding Zionist movement. Montefiore, who was active in Jerusalem in the mid-19th century, built workshops and a flour mill and also bought a large orchard near Jaffa, in an effort to promote the idea of working the land. The attempts at agricultural settlement were unsuccessful, but the establishment of the neighborhoods outside the Old City walls in Jerusalem was a milestone in the community's development (Bartal, 1984). Baron Rothschild supported the colonies of the First Aliya (Rishon Letzion, Zichron Yaakov, Rosh Pina, and others) in the late 19th century and saw more success with agricultural settlement. If not for the aid he provided, these colonies surely would not have survived. The activities of these two, as well as the construction of the Mikve Yisrael Agricultural School by the French Alliance Israelite Universelle, were perceived as building the land, whereas the Haluka system was perceived as a type of begging. Thus, the first trace of the dual attitude and the tension between the need for contributions versus the preservation of the recipients' dignity was already apparent more than 150 years ago. This tension was heightened by the attitude of the Baron Rothschild's clerks toward the farmers of the Jewish colonies. The total dependence on the Baron's money, coupled with the lordly attitude of the bureaucrats, led to a rebellion and to criticism from outside the colonies too (Bahur, 2008). Elazar Rokah wrote at the time in the *Hahavatzelet* newspaper:

A general movement cannot be born from the impetus of one man.… And especially if the impetus is material. Regarding the Yishuv and its development, it will be easy for us to believe and hope in its success only if the movement lays down its tracks in the heart of the entire people. For if its pillars and foundations are planted solely on… one man with a great fortune—then there is no hope for the "Hope of Israel," and the entire awakening may drown in the depths of slavery and baseness.… For a national idea is wicked and bitter if its head and body are sunk in slavery (Bahur, 1988).

Only in the first year of the 20th century, when Rothschild transferred the management of his money in the colonies to the Jewish Colonization Association (JCA), founded by the Baron Hirsch, was it possible once more to look upon these contributions as a social investment that aimed to foster a new world, similar to modern-day philanthropy (Frumkin 2003). The JCA managed affairs on a strictly economic basis and the colonies ceased living "at the Baron's expense." Yet, even though the Baron's bureaucrats "ruled" for only about a decade in total, the image of groveling on the one hand, and the wariness of the power of bureaucrats and barons on the other, became deeply etched in the national memory.

During World War I, the source of philanthropic funds for the Jewish communities of Palestine shifted from Europe to the United States. In 1922, Supreme Court Justice Louis Brandeis established the Palestine Endowment Funds through which American Jewish donors could direct donations to selected charitable organizations in Israel. The establishment of the American Jewish Joint Distribution Committee (JDC) in 1914 and the Jewish Agency for Israel (JAFI) in 1929 gave rise to the supremacy of institutional philanthropy in Israel. The formation of the United Jewish Appeal (UJA) in 1939, the ongoing endeavors of the United Israel Appeal (Keren Hayesod) to raise funds for the Jewish Agency, and the activities of the Jewish National Fund (JNF) allowed for an almost monopolistic control via the orderly and planned transfer of philanthropic funds.

This institutional domination ruled in Israel during the first three decades after Independence, but was diminished in the late 1970s. Israel-Diaspora philanthropic relations were altered with the creation of new public foundations like the New Israel Fund in 1981 and with the entrance of hundreds of foreign (mostly Jewish) private foundations. Unlike earlier institutional philanthropy, these new foundations invested in the growing number of diverse organizations, but did not necessarily coordinate this giving with the Israeli government. Today, not only are there a growing number of American Friends of organizations that collect money for Israeli organizations but there are also almost 4,000 active foundations in Israel, approximately 40% of them foreign-based (Gidron, Alon, Schlanger, & Schwartz, 2008).

Since the pre-state Jewish institutions and the founding of the state itself relied on Jewish donations, the Israel-Diaspora relationship could be construed as a dependent relationship between the needy and the giver. But the Zionist narrative portrays this as a partnership, one in which Jewish philanthropy was an equal partner in the founding and subsequently the building of the state. "We are fighting from here and you are helping from there. We are all working for the sake of the same goal" is a concept still in effect on either side of the ocean, as illustrated from this excerpt from a 2008 interview with Nancy Falchuk, international president of Hadassah:

We don't call it ***philanthropy****, we call it nation building. The Hadassah organization is the owner of its properties in Israel. We feel that we have a role, that we have a partnership with the nation in Israel (Balmaker, 2008).*

Nevertheless, cracks have occasionally been in evidence, as occurred among North American Jewry after MK Dr. Yossi Beilin's remarks in 1993 at a World Zionist Organization Women's conference. Beilin called on world Jewry to invest in Israel rather than make charitable donations to it, thereby raising the question once again, in Israel as well, of the legitimacy of accepting donations. The dual attitude toward donations remains valid despite the partnership narrative.

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ORIGINS OF THE DUALITY: A SOCIETY IN TRANSITION

The Jewish Yishuv in Palestine was run entirely by nongovernmental organizations (Kabalo, 2008), but after the founding of the state, many of the institutions that had previously operated as volunteer organizations were nationalized. The most outstanding example was the subordination of the various educational organizations to the state education system (apart from exceptions such as the Haredi education system). In addition, the state adopted a welfare state policy. Researchers Lissak and Horowitz (1990) note,

The factor that contributed (until the 1990s) to the moderation of the class conflicts was the role played by the Israeli welfare state as a mechanism of reallocation of resources. Though this mechanism was not able to match the growth rate in the income of the prosperous classes, it did play a role in reducing extreme manifestations of poverty in Israeli society. Moreover, the mechanisms of the welfare state also ensured a minimum of services for all in the fields of health, education and income supplementation by means of various National Insurance Institute allowances.… In addition, the local authorities worked with local welfare authorities to ensure individual assistance, whether by the direct transfer of resources to the needy or by assistance in solving family and personal problems (p. 128).

The Israeli Baby Boom generation grew up, therefore, with the belief that an enlightened and democratic state cares for all the needs of its citizens who, for their part, are prepared to assist it in every way and even give their lives in its defense. But in 21st-century Israel, a different reality prevails. The world has changed, and the age of "the end of ideology" has been translated into capitalist philosophies based on an open market and limited government involvement, not only in the individual's business but also in concern for his fate.

The poverty data from the National Insurance Institute (NII) show that the poverty rate is steadily increasing while the economic gap is expanding (see the article by Shalgi in this issue). Volunteer organizations that in the past were perceived as supplementing the government's responsibilities are now at the center of such activity, and it appears that responsibility for the weak and needy has shifted from the government to civil society.

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National Insurance Institute data for 2007 indicate that there are 404,400 families in Israel living below the poverty line. That amounts to 1,649,800 individuals, including 796,100 children. The Gini Index of inequality in income distribution declined by 2.4% from 2006–2007, but saw an increase of about 4% overall for the period from 2002–2007. The report also finds that working poor families make up about 46% of impoverished families. Top Welfare Ministry officials, headed by Minister Isaac Herzog, express concern about the high poverty rate and the widening income gap:

Between the 1980s and 2003, per capita output rose by 40%, but income inequality rose by 22%. The poverty rate, before transfer payments and taxes, rose by 20%. Even though, since 2003, the general unemployment rate has declined and an effort is being made by the outgoing government to switch direction, the same cannot be said in regard to the various socio-demographic sectors, such as single working mothers, the Arab population and groups with limited higher education (Herzog & Nathanson, 2008).

Then there is the latest data regarding wealth in Israel. In November 2008, the business section of the *Ma'ariv* newspaper provided the following statistics: 8,200 people living in Israel are defined as millionaires who possess at least one million dollars in liquid assets. Israel's wealthy own 1,500 private yachts costing anywhere from $30,000 to $35,000,000 each, about 20 private planes costing between $14 million and $27 million, and homes with an average value of $3 million.

The Israeli Baby Boomer generation reads the data regarding the two extremes of the social spectrum and has difficulty accepting it. And so, along with its appreciation for wealthy donors, it is infuriated when it feels that their demands are too high. At the same time, it is critical of governmental policy that is retreating from providing education, welfare, and health services. The search for a model of "the free economy in a just society" is gaining greater urgency, particularly in light of the world financial crisis as well as Israel's own political turmoil in the aftermath of elections in February 2009.

THE NEW PHILANTHROPY IN ISRAEL

Whether the present economic policy continues, Israeli philanthropists' role as a significant source of funding for third sector organizations is assured.

Mega-philanthropists who invest large sums in public causes are the ones taking a leading role. Studies by Ilana Silver (2008), and by Baruch Shimoni (2008) seek to sketch a profile of mega-philanthropy in Israel. These studies are part of a new trend in the Israeli academic world. Alongside the birth, in the past decade, of organizations that have made it their goal to encourage and develop Israeli philanthropy, academic bodies have begun to display an interest in third sector organizations and the phenomenon of Israeli philanthropy. Several universities have inaugurated master's degree programs in nonprofit management and developed centers for the study of philanthropy. The first such institution was the Ben-Gurion University's Israeli Center for Third Sector Research (ICTR), and the newest is the Center for the Study of Philanthropy, run by the Hebrew University in conjunction with JDC.

A review of Silver and Shimoni's studies indicates that the new philanthropists are a new breed of donors who are not satisfied with only offering donations and assistance to existing organizations, but frequently establish new organizations or form coalitions and partnerships for the sake of philanthropic projects that are broader in scope. For example, businessman Roni Duek founded Zionism 2000, and former high-tech executive Avi Naor founded the Green Light organization to combat road accidents. In keeping with trends in world philanthropy, Israeli philanthropists also see themselves more as social entrepreneurs. Most of these philanthropic entrepreneurs are people who built their fortunes through business activity, with the mid-30s to mid-40s age group being the most active in this way. Their approach is characterized by an insistence on applying sound business principles. Baruch Shimoni describes this group as follows:

These are relatively young businesspeople, with money and business tools, who've begun to run philanthropic activity…. They think in terms of vision, aims, goals, measurements and results. As they see it, there are large sums of money in the Third Sector, and they mustn't be dispersed incorrectly. They have been active for some years already, but received greater media exposure during the Second Lebanon War, when it became apparent that the establishment was incapable of coping with the events and required help (2008).

Another point that arises from these studies is the trend of networking among philanthropists. These coalitions of donors create a broad ability to influence and also serve as an incentive for others to give. The most prominent example is the Israel Venture Network (IVN). The name itself embodies the profile of the new philanthropists.

Ilana Silver (2008) notes that, although a majority of the interviewees in her study did not come from especially wealthy families, there was one common trait among them—family precedent. That is, someone in their family set an example of generosity, and giving *tzedakah* may have been a family tradition. However, it is surprising to discover that, even though most of those interviewed in the study are not only donors but also engage in fundraising themselves, this group considers requests for donations a nuisance:

Most of the subjects described a besieged feeling as a result of the relentless stream of appeals for a donation, and have also developed methods of defending against it. Some of the subjects expressed particularly strong hostility towards mail-based fundraising appeals (Silver 2008, p. 22).

The quest for meaningful giving and activity is another typical characteristic found by the studies. The new philanthropists see the empowerment of the weaker populations and their removal from the cycle of poverty as an ultimate goal that derives from a patriotic commitment to the general well-being and future of Israel. They contribute out of a quest for meaning and note that philanthropic activity gives them great satisfaction and a sense of achievement. These sentiments, however, are combined with harsh criticism of the state and anger at its inefficiency and shirking of responsibility in the fields of health, education, and welfare. Thus, the new philanthropists see their role in a way that parallels the Israeli public's dual attitude toward them: a positive conception of philanthropy, but only when it does not appear as a substitute for services the state is supposed to provide.

Corporate philanthropy is another component of the new philanthropy in Israel. Maala, founded 10 years ago, was the first to dedicate itself to encouraging businesses in Israel to donate to social causes. The development of social responsibility by corporations in Israel was influenced by their exposure to international corporations and by the possibility of combining this activity with financial profits.

Maala data from 2005 that rank Israeli companies' level of social responsibility show that businesses are developing greater social awareness and that their rate of contributions is also on the rise: the average donation by companies included in the ranking was NIS 3.1 million, an 80% increase over the 2004 average. The corporate ratio of donations grew to an average of 0.69% of profits, a 68% increase. Ninety percent of the companies listed in the ranking have an employee whose job it is to deal with the company's social responsibilities or its ties with the community, compared with 84% in the 2004 ranking and 75% in the 2003 ranking.

Also working to promote corporate philanthropy are organizations like Matan, which was founded on the model of the United Way; Zionism 2000, which, among its other activities, helps create links between businesses and nonprofits; and Shitufim, which has as its mission the development of the Israeli philanthropic sector, both corporate and family. Shitufim was founded by businessman Roni Duek, a veteran in the Israeli philanthropic world; the Rashi Foundation, which draws on French philanthropy funds; the Gandir Foundation founded by the Yuval-Recanati family; and United Jewish Communities. There is no question that these organizations, which Silver calls "philanthropic mediation organizations," play a significant role in promoting philanthropy in Israel in general and in the business world in particular.

TAXATION, LEGISLATION, AND THE TRISECTOR PARTNERSHIP

Up to now, Israel's policy toward the third sector in general and toward philanthropy in particular has been characterized primarily by the absence of a clear, declared policy. Government ministries and local authorities handle their ties with the sector's organizations and with philanthropy on a temporary ad hoc basis. Decision making in regard to partnerships between the sector's organizations and/or philanthropists is dependent on a particular project and on the individual making the decision in the name of the administration.

In 2003, an independent committee headed by Professor Yitzhak Gal-Noor pointed out a number of problems deriving from the poorly defined relationship between the government and the third sector. The committee's main recommendation was to regulate the reciprocal relations between the government authorities and the third sector on the basis of a clearly outlined, transparent, and consistent policy, a policy that does not infringe in any way on the independence of the third sector organizations (Limor, 2004). In 2008, the government raised the gauntlet and announced the "establishment of 'roundtables' as a platform for exchanges of knowledge, information, and consultation among the sectors for defined purposes and on the basis of agreed-upon principles" (Government of Israel, 2008). This trisector encounter is to address the government's policy of support for volunteer organizations, the oversight of the third sector, the transparency of civil society, and the promotion of giving in Israel.

The Israeli Nonprofit Law requires that each organization have an internal oversight mechanism that includes both its executive committee and an independent internal oversight committee. In addition, the law ensures oversight by the state via the Registrar of Non-Profit Organizations and the tax authorities. Organizations that enjoy government support are subject to oversight by the government ministry that provides funding according to its needs and rules. Government support and oversight, as well as tax laws and regulations, are unrelated to the type of organization, since Israeli law does not distinguish between foundations and nonprofit organizations.

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However, there are tax benefits for charitable donations. Under Section 46 of the law, nonprofit institutions can issue certification that a donation made to them is considered a tax-deductible expense for the donor. The eligibility conditions allow for a deduction of 35% of the amount of a donation that exceeds NIS 380 but does not exceed 30% of the donor's taxable income for that year, or NIS 4 million (this benefit ceiling was raised from NIS 480,000 in 2000), provided it was given to recognized organizations for charitable purposes (Section 46a). Currently only 4,600 nonprofits can issue certification for a donation (Limor, 2008a).

The general feeling in the third sector is that these tax benefits do not fully realize the potential for donations in Israel, but it is important to remember that significant tax benefits to donors means a reduction of income for the state. Thus, the right balance needs to be struck between the two.

WHERE TO FROM HERE?

Lately there have been increasing calls upon the government to introduce regulation, to create a distinction among different kinds of nonprofit organizations, and to institute a policy that encourages giving and offers official recognition of the economic and moral value of civil society (Limor, 2008b; Mor, 2003). At the same time, especially in light of the economic crisis that has exposed the weaknesses of the free market, demand has been growing for the government to retake responsibility and fulfill its role in creating social safety nets.

Even if there seems to be a call for the return of the welfare state, the need for philanthropic funds will remain and, with it, the public's dual attitude toward philanthropists. As stated earlier, one of the main reasons for this ambivalence is the fact that Israel is a society in transition, a period known to be accompanied by much ambiguity, confusion, and uncoordinated expectations between government and the public.

However, roundtable platforms and trisector discourse may provide an opportunity for third sector organizations and philanthropists to demand that the government define very clearly its duty, roles, and obligations to its citizens and to back its policy with adequate government funding, to create "a policy based on principles of equality alongside the existence of a free market economy…that is anchored in a philosophy in which social solidarity has value" (Herzog & Nathanson, 2008). A clearly defined policy will allow the third sector to fulfill its role by identifying what the government is financing and by clarifying when suitable sources for support could come from the philanthropy.

The government on the other hand should expect the third sector to commit to increased transparency and mandatory reporting (by both donors and recipients) while maintaining its independence. If trisector discourse will also encourage philanthropists to avoid arrogance while internalizing the notion that even the needy are able to play a significant role in solving their own problems and that people should be treated with dignity and respect, then Israeli society will be able to enjoy the best of both worlds.

In conclusion, a responsible public sector combined with a philanthropic sector that makes possible, through civil society, civic involvement and the values of participatory democracy will enable philanthropy to fulfill its designated role in preserving democracy.

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