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# **Rethinking the Social Welfare Regime Model: The Case of Public Policy Toward Israeli Philanthropists**

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Following a study on the changing relations between government and philanthropy in Israel, this study highlights the need to rethink the typology of social welfare regimes proposed by Anheier and Daly (2007). The findings of our study indicate that there has been a rapprochement between government and philanthropy in Israel. This trend has led to formal dialogue and collaborations. This trend has also promoted the development of policies toward philanthropy in various government ministries and agencies. The development and implementation of these policies have been facilitated by changes in the unique contextual factors of Israel's welfare regime. Based on the findings, we propose a conceptualization for understanding governmental policies toward philanthropy in shifting welfare regimes. With regard to the theoretical and practical implications of the study, we propose a model for hybrid welfare regimes that are experiencing ongoing changes.

**Keywords:** Government and Philanthropy, Public Policy, Social Welfare Regimes, Alienation and Suspicion, Cross-Sectoral Collaborations

The past three decades have witnessed far-reaching changes in the interests and activities of philanthropy and philanthropists. These changes have affected many areas of the modern state and society. Philanthropy is defined as private giving of money and time for public goods to the benefit of others, including individuals, families, communities, and public institutions (Bekkers & Wiepking, 2010; Lenkowsky, 1999; Payton, 1988; Sulek, 2010). For the purpose of this article, we focus on elite philanthropists who have been defined as wealthy individual donors who seek to make a long-lasting impact on society (Anheier & Leat, 2002; Berrebi & Yonah, 2017; Frumkin, 2006; Havens, O'Herlihy, & Schervish, 2006). The philanthropy of the elite is rooted in normative values of compassion and contributing to the community (Payton, 1988) as well as in "moral action" that seeks to improve the well-being of others (Daly, 2012; Schervish, 1998). Elite philanthropists in Israel also view themselves as playing an important role in the national effort to create a change in society. Toward that end, they contribute substantial amounts of money, which distinguishes them from other philanthropists (Schmid & Rudich Cohn, 2012).

In recent decades, there has been an increase in the scope of giving in many countries. This increase has been accompanied by changes in the goals and channels of contributions as well

as by changes in the philanthropic sector's relationships with government (Salamon, 2014). By operating through private and public foundations, philanthropists have become involved in initiating, funding, and providing social and human services as well as in supporting health services, education, religion, culture, and the arts. As described by Jung and Harrow (2015), "From Europe to Asia, from Australia to the Americas, philanthropy is acting as agenda setter, public service provider, stakeholder, advocate, supporter and challenger of governments" (p. 47).

Philanthropic foundations have gained access to the state and to state allies in a complex and politically delicate process (Duffy, Binder, & Skrentny, 2010; Newland, Terrazas, & Munster, 2010). These new expressions of philanthropy, which have also been defined as *new philanthropy*, characterize many Western countries that have been experiencing changes in their relationship with the voluntary sector and philanthropy (Harrow & Jung, 2011; Horvath & Powell, 2016; Mills, 2011).

In Israel, the expansion of new philanthropy, the increased scope and volume of giving by wealthy Israelis who have formed philanthropic foundations, and the creation of new channels for giving have all accelerated the changing relationship between government and philanthropists (Katz & Greenspan, 2015). Official data indicate that there has been growth in giving in Israel since the 1990s. In 2015, Israeli donations totaled NIS 5.9 billion (or US \$1.7 billion). This consisted of donations from households (68%), corporations (28%), and estates (4%) (Israel Central Bureau of Statistics, 2017). The share of Israeli charitable contributions out of total income for Israeli nonprofit organizations was 35%, whereas the remainder (65%) derived from overseas charitable contributions. This constitutes an increase of 21% in Israeli contributions compared with previous years (2006–2007) when donations from abroad totaled 70% in comparison to 30% from Israel.

It has been argued that the overall growth of philanthropy represents a new philanthropic movement, which has developed fresh vehicles and approaches to philanthropy. This process has been described as a transformation from the concept of philanthropy as charity to the concept of rational and strategic philanthropy (Cobb, 2002; Katz, 2005; Wagner, 2002). There are those who question whether this really represents a new development, thus, challenging the idea of a new philanthropy (Breeze, 2005). However, new philanthropists behave differently from traditional philanthropists. They have adopted business-like behavior, which is oriented toward goal achievement and measurable objectives that have a positive impact on the well-being of the citizens and clients to whom they contribute (Frumkin, 2006). Toward this end, new philanthropy has become involved in initiatives that have traditionally been the responsibility of government (Jung & Harrow, 2015).

Developments in philanthropy and its interface with government have yet to be the focus of theory building and empirical research, particularly in Israel. These developments highlight the growing importance of exploring cross-sectoral relations and promoting discussions on the need to formulate official public policy toward philanthropy. The current article responds to this need by exploring the relationship between government and philanthropists in Israel. This exploration is based on a conceptual framework that combines the typology of social welfare regimes proposed by Esping-Andersen (1990, 1999) with those proposed by Anheier and Daly (2007). In doing so, we are able to assess official government policies toward philanthropists in different social welfare regimes. We are also able to assess how the expressions of those policies are analyzed.

### **The Interface between Government and Philanthropy: State of Research**

The changing role of government and the initiation of innovative social, cultural, educational, and other programs have led to a growing interface between government and philanthropists. This situation highlights the need to delineate the boundaries between the parties and to

formulate policy guidelines (Calanni, Siddiki, Weible, & Leach, 2014; Gerlak & Heikkila, 2011). Existing studies relate primarily to changes that have occurred in the social, political, and economic contexts in which these actors operate (Eikenberry, 2006). These studies have focused on the relationships between governmental and nongovernmental organizations, including private and family foundations. It should be noted that these foundations have no legal status but are considered by government to be nonprofit organizations (Schmid & Almog-Bar, 2016).

The developing relationship between government and philanthropy has been explored mainly in the United States, Canada, the United Kingdom, European countries, and Australia. In these countries, efforts have been made to create opportunities for dialogue, joint ventures, and collaborations between the parties (Abramson, Soskis, & Toepler, 2012; Bushouse, 2009; Elson, 2011; Emerson, Nabatchi, & Balogh, 2012; Giddens, 2013; Keast & Brown, 2006, Keast & Mandell, 2014; Macmillan, 2013; Phillips, 2003; Scaife, McDonald, & Smyllie, 2011). Recent research indicates that not only are philanthropists trying to preserve their autonomy from government, but their role is perceived as being either complementary or disruptive to government. Complementary philanthropy aims to increase the provision of public goods and services, whereas disruptive (or adversarial) philanthropy attempts, through their contributions, to alter the public discourse about social issues and create an agenda that represents philanthropic interests and concerns (Horvath & Powell, 2016). Some argue that the disruptive model is central to maintaining philanthropy's autonomy. As argued by Newland, Terrazas, and Munster (2010), "Independence from, and at times competition with government priorities are a trademark of philanthropy and an integral part of what makes it a powerful and effective force of change" (p. 18; see also Reich, 2012).

These types of relations between government and nongovernmental actors (including private and family foundations) are an outcome of the political tradition as well as the unique cultural and social regime in different countries (Nickel, 2018; Salamon, 1995, 1999; Salamon & Anheier, 1998). They reflect the fiscal policy of government toward nongovernmental organizations and foundations (Clotfelter, 2007; Hall, 2006; Peck & Guo, 2014; Reich, 2012; Sealander, 1997). A review of the relationships between governments and philanthropy in its different modes of operation (individuals, foundations, and donor-advised funds) indicates that different governments have different approaches toward philanthropy (De Wit, Neumayr, Handy, & Wiepking, 2018). On the one hand, there are countries that support, subsidize, and foster philanthropy. On the other hand, there are countries that ignore the potential contribution of philanthropy to the state and society at large (Layton, 2015). The countries that support philanthropy have a fiscal policy that aims to increase the role of philanthropy in national efforts to improve the well-being of citizens. This policy is expressed in the granting of fiscal incentives to philanthropy that plays "a central role in the nourishment and regulation of the charitable sector" (Simon, Dale, & Chisolm, 2006, p. 267).

In countries that subsidize the nonprofit sector and grant generous fiscal incentives, the nonprofit sector is larger than in countries that provide limited fiscal support. Fiscal policy is a barometer of government policy toward philanthropy, and fiscal incentives for philanthropy are "a political mechanism that shifts some of the authority and responsibility of allocating public funds from the majority decision-making process to individual donors" (Benshalom, 2008, p. 2). However, fiscal incentives tend to have a marginal, albeit often considered important, effect on high-end donors in most countries and they do not ultimately play a significant role in their philanthropic activity (Hossain & Lamb, 2012; Lin & Lo, 2012; Steinberg, 1990). Establishing a formal policy is also connected with other factors such as espoused ideology, social and economic values, government preferences, and philanthropists' personal motives and areas of interest. Additionally, there are factors related to the prevailing environment and dominant social regime in each country.

A review of the literature indicates that there is a lack of comprehensive theoretical explanations regarding the relationship between governments and philanthropy. Moreover, existing studies do not account for the increased visibility and engagement of contemporary philanthropy with local governments. Although there has been a great deal of scholarly research on civil society, there is still a need to develop relational models that focus on government and philanthropy and that provide stronger explanations of how these relations are formed as well as their implications. For this reason, the present study focused on policies toward the voluntary sector in different types of political, legal, and fiscal regimes. These regimes (defined by Breeze, Gouwenberg, Schuyt, and Wilkinson [2011] as contextual factors) influence the extent to which a government considers philanthropy to be a partner or collaborator in its efforts to cope with and respond to social, educational, health, and other needs and challenges.

### **Conceptual Framework**

To better understand these factors as well as the relationship between governments and philanthropy (including individuals, private and family foundations, and governmental policy toward these in different social regimes), we have adopted the typology proposed by Anheier and Daly (2007) which follows the model proposed by Esping-Andersen (1990). According to Anheier and Daly, there are different models of social regimes. These have been defined as “liberal,” “social democratic,” “corporatist,” and “statist.” In the “liberal model,” represented by the United States and the United Kingdom, a lower level of government social welfare spending is associated with a relatively large nonprofit sector. There is a relatively limited level of government social welfare spending and a sizeable nonprofit sector. Foundations form largely parallel alternatives to the mainstream and act as a safeguard for non-majoritarian preferences. The boundaries between foundations and government in this model are relatively clear and defined. Loose government control enables philanthropic foundations to operate according to their own discretion and set their own priorities for contributions. Philanthropists are engaged in policy communities and, together with interest groups and government, work to set agendas and formulate policy. Prominent examples include the involvement of philanthropy in developing policy solutions such as school privatization and welfare reform in the United States (Franklin, 2014).

In the “social democratic model,” state-sponsored and state-delivered social welfare protections are extensive, and there is little room left for service-providing nonprofits and philanthropy. In this type of regime, the nonprofit sector performs an advocacy and personal expression role rather than a service-providing role. In Sweden, for example, a substantial network of volunteer-based advocacy, recreational, and hobby organizations exist alongside a highly developed welfare state. Foundations that operate in such an environment tend to offer programs that either complement or supplement state activities. The majority of grantmaking foundations are small, and they are involved to some extent in the provision of social, educational, and health services.

In the “corporatist model,” the state is encouraged to consider common causes with nonprofit institutions. In this model, nonprofit organizations function as one of the long arms of government to support key social elites in the provision of social welfare services. In this context, foundations by and large maintain some form of subsidiary relation with the state. Moreover, in this model operating foundations are part of the social welfare or educational system. Some countries with a corporatist regime, such as Germany and the Netherlands, encourage philanthropy and its contribution to the public and social sphere. These countries implement a fiscal policy of granting tax incentives, whereas others have no official policy toward philanthropic foundations, as is the case in Spain, Italy, and Portugal.

In the “statist model,” the state retains the upper hand in a wide range of social policies, but the state does not serve as the instrument of an organized working class as in the social democratic regime. Rather, it exercises power on its own behalf or on behalf of business and economic elites, but with a fair degree of autonomy sustained by long traditions of religious organizations providing social and human services. In such settings, limited government social welfare protection does not translate into high levels of nonprofit action, as it does in liberal regimes. Rather, both government social welfare protection and nonprofit and philanthropic activity remain highly constrained (e.g., in Ireland and Greece). Philanthropic foundations provide social services and are closely connected with faith-based organizations as well as with other nongovernmental organizations. In these contexts, government maintains complex relations with philanthropic foundations, most of which are grantmaking.

We use the typology described above as a basis for examining the relationship between government and philanthropy in Israel. Using these typologies, we aim to better understand the story of the relationship between government and affluent Israeli philanthropists. These individuals often exhibit their willingness to join forces with government in initiating innovative programs to the benefit of special target populations (both individuals and communities). Finally, we explore to what extent there is an official government policy toward philanthropy in Israel, as reflected in the different vehicles and avenues employed by government in a country where the boundaries between the social regimes, as proposed by Anheier and Daly (2007) not only coexist but are blurred.

## **Methodology**

The research was conducted using a qualitative-interpretative paradigm. Two lists of the research population were created using purposive sampling. The first list containing the population of philanthropists was obtained from a database of local affluent donors developed by the authors. The database was created during their years of researching Israeli philanthropy. This database is annually updated by searching online research and media publications. Additional names of potential interviewees were added along the way as part of a snowball sampling technique (Panacek & Thompson, 2007). The list of philanthropists contained the names of 63 major, well-known Israeli philanthropists who engage in organized charitable activities and who have had previous experience in joint ventures with governmental agencies. We contacted these philanthropists by email and phone and requested their participation in the study. Nine philanthropists did not respond to our invitation, and 24 declined to participate due to lack of interest, lack of time, or conflicting schedules. The second list included 31 government officials from a range of governmental agencies. These individuals were selected based on their ongoing working relations with Israeli philanthropists. Twelve of them declined to participate in the study.

The final sample population included a total of 48 interviewees: 30 philanthropists (18 men, and 12 women) and 18 senior government officials (12 men, and six women). The philanthropists who comprised the final sample shared similar attributes. All of them were Jewish, and almost all of them were descendants of families that immigrated to Israel from Europe. They all resided in metropolitan areas in central Israel, and they defined themselves as nonobservant or mildly observant in terms of religiosity. They were also all “self-made,” first-generation wealthy residents. For most, their fortune originated from business, high-tech, and industry. They all operated a private foundation. The sample did not include non-Jewish philanthropists or Jewish philanthropists from other countries.

We conducted in-depth, semistructured face-to-face interviews in Hebrew with participants. The interviews were then transcribed. These included five preliminary interviews aimed at testing the research tool, which was used as part of the data analysis. The interview related to the following topics:

- Socio-demographic characteristics (e.g., age, sex, education);
- Their motives for, and areas of, giving;
- Formative events inspiring their philanthropic activities;
- Their perceived meaning of philanthropy;
- Their ideas about the scope of giving and its impact on relations with government agencies and officials;
- Their perceptions of the extent of philanthropic cooperation versus confrontation with government agencies;
- Their perception of government machinery and functioning;
- The extent to which they are involved in government decision-making;
- Their perceptions of the changing relations of government and philanthropy through the years;
- Their philanthropic achievements; and
- Their thoughts about barriers and dilemmas in developing philanthropic relations with government.

Another source of data was a variety of documents, which included minutes of meetings held by formal governmental forums and committees of the Israeli parliament, as well as position papers, government decisions, op-eds, reports, and other formal and informal publications and correspondence.

Although we identified a conceptual framework for this study, our data analysis was inductive and reflective (Pratt, 2009). It consisted of several stages. These stages, which included an initial analysis using category construction and an open coding technique. This was followed by content analysis of the transcribed interviews (Araujo, 1995; Corbin & Strauss, 1990). Seventeen categories were identified, mapped, and linked to five main categories. After this, coding was performed again based on the five main categories, and the data were classified accordingly.

In addition, several activities were performed to establish the credibility of the research findings (Silverman, 2000; Whitemore, Chase, & Mandle, 2001). First, data analysis was performed in a spiral process and it was repeatedly reviewed by both researchers. Second, the findings were explored using multiple analyses by both researchers, a research assistant, four of the research participants, and a scholar who was external to the study. Finally, the main themes from the interviews and the documents were triangulated in order to complement the categories and check for gaps in the findings.

## **Findings**

### *Trust and Alienation in Relations between Government and Philanthropy*

For many decades, philanthropists in Israel have engaged informally with government in initiating nonstrategic, sporadic, and ad hoc programs. As one philanthropist put it “[These are] two parallel lines that will never meet.”

Interactions often formed as a result of a common interest between government and philanthropy to respond to a particular need and as a result of a desire of philanthropists to ensure government’s collaboration and support. Philanthropists also aspired to gain formal and informal legitimacy for their initiatives in areas where government played a major role as service provider. These relations were not prolonged, and there was no overarching policy on the part of government (Haski-Leventhal & Kabalo, 2009). Lack of continuity and the absence of formal arrangements have motivated philanthropists to operate according to their own

personal motives and goals, which do not always correspond with a government's policies and priorities. However, this relationship has changed with the appearance of new philanthropy.

New Israeli philanthropists are highly involved in their initiatives. They promote a proactive strategy for giving and volunteering. They are goal-oriented and results-oriented while striving to make an impact on their beneficiaries (Katz & Greenspan, 2015; Silber, 2012). These philanthropists have entered into public arenas traditionally controlled by government while demonstrating superiority to government officials. In fact, they consider themselves to be a role model for government; as suggested by one philanthropist, "The only way to encourage government to take action is to show them how things get done."

Israeli philanthropists have been trying to influence government officials to change their conservative and traditional attitudes and behavior. Their activities are often taken with a grain of salt by many government officials, who have doubts regarding their motives. As one official remarked, "The rich always think 'what will I gain, how will it promote my image, and how can it help me associate with the political echelon?' There is no real altruistic spirit."

The attitudes expressed by the philanthropists have resulted in increased alienation and tension with government, which senior government officials perceive as threatening Israeli democracy. According to these officials, the threat lies in the desire they believe philanthropists have to impose their ideas on government without exploring the extent to which those ideas meet national priorities. As this government official remarked, "Who decided that an executive of a big firm has the ability to teach a school principal how to be a better manager? This is the kind of philanthropy that I fear." This approach has been further enhanced by the autonomy that characterizes the activities of these philanthropists, as one of them described, "The state needs to take care of everyone, but I, as a philanthropist, have a choice. For example, I can choose to take care only of those who play the violin. That is my prerogative."

Some government officials were deterred by the antagonistic attitude of philanthropists, which they saw as condescending and disrespectful of their working methods and of their professional skills and abilities. A government official captured that perception. "Ultimately, philanthropy brings in relatively little money but wants to run the whole show. Sorry, but someone here is confused."

At the same time, there have been several philanthropic-led initiatives that have attracted government participation to the point where government has played a major role in their implementation after which the philanthropists moved on to other initiatives. This is also known as "impregnating the government" (Shimoni, 2017).

For their part, philanthropists have often been critical of the working policies and methods of government officials. As suggested by one philanthropist, "Government officials are engaged in damage control. They create endless rules and regulations so that nothing bad will happen." These are perceived as limiting a government's ability to make systemic changes or introduce organizational and structural reforms, contrary to the working methods and guidelines of philanthropists. As a philanthropist described it: "The government is a complex system, and to produce one change requires 8,000 regulatory approvals. Public taxes are the funds that finance this process and ultimately only a third of the projects are fulfilled. Consequently, the philanthropist's cent is equal to three times more than that of the government."

Another philanthropist described the challenges of working with government officials. "They are experts in creating plans that can never be executed and forming divisions that are solely dedicated to placing barriers and hardships for philanthropists. This requires funding a part-time employee whose job is communicating with the government." One philanthropist described his previous experience promoting a joint initiative with government "...I go to the

Ministry of Communications, and they say one thing, the Ministry of Justice another, the Ministry of Finance another, and so on—the right hand doesn't know what the left hand is doing.” Finally, philanthropists also complained about lack of experience, skills, and expertise needed to work with government.

### *Changes in the Welfare Regime and Government-Philanthropy Relations*

The changing relationship between government and philanthropy in Israel has been influenced by a shift away from a socialist economic welfare regime and the adoption of a quasi-neoliberal regime. In this process, government has focused on promoting and implementing state social regulation, legislation, supervision, contract management, and evaluation (Lahat & Talit, 2015). This shift has facilitated a path for non-state actors to assume leading roles in providing social services. The movement of the Israeli welfare regime toward a liberal or hybrid model created a regulatory role for the state (Gal, 1998, 2004; Haber, 2011; Levi-Faur, 2014). Thus, the state was defined as navigator rather than rower, and it focused on planning social and educational initiatives. The state assumed the role of policymaker and engaged in initiating and designing social and other programs as well as in determining standards and guidelines for nongovernmental organizations in charge of providing services.

These changes have led to ambiguity in the working relations between government and philanthropy in Israel, as one philanthropist remarked, “A triangle was formed, which was characterized by unclear boundaries. The situation where no one knew what to give and what to receive led to an erosion in the functioning of all parties.” Therefore, the need to determine organizational boundaries and division of roles among government, nongovernmental organizations, and philanthropy became evident.

In the early 2000s, the growth of civil society organizations in Israel prompted a public discourse on the roles and mission of these organizations. Public committees such as the Galnor Committee (2003) and the Aridor Committee (2004) examined government's approach toward civil society in Israel and recommended the formulation of an official policy aimed at regulating relations between the parties and at encouraging transparency and accountability. Despite these recommendations, these committees did not address the relationship between government and philanthropy. Ultimately, they ignored the need to propose an overall policy.

However, further changes in Israeli society since the 1980s have resulted in the growth of existing needs as well as in the emergence of new needs that government has struggled to meet. As a result, government has reached the conclusion that philanthropy could and should become a substantial partner in efforts to promote national initiatives, despite the ambivalent relations between them. As noted by one government representative, “There has been a change in attitude towards philanthropy...they know what they're talking about, so, instead of clashing with them try to listen to them.” There was also growing recognition that philanthropy can play the role of a catalyst, as claimed by a senior government ministry official. “It is very important that philanthropic capital be dedicated to expanding the boundaries of government activities through a gradual process and not be constrained by them.” In fact, one of the sentences we have often heard repeated by government officials when stressing the importance of philanthropy is, “It takes a long time to change the direction of an aircraft carrier.” This referred to the belief that government moved slowly and ponderously, and that it needed philanthropy because philanthropy was more flexible and nimbler.

The growing predisposition toward collaborating with philanthropy has led to the creation of several partnerships and initiatives, specifically in the areas of children and youth at risk; integrating adults with disabilities into Israeli society; enhancing the quality of human resources in the education system by creating high-quality training institutions; and reinforcing civil responses to emergencies, trauma, and emotional stress (Almog-Bar &

Zychlinski, 2012). In addition, the Second Lebanon War in 2006 emphasized the central role that philanthropists played—often preceding government in responding efficiently and effectively to the emergency situation created by the war. As a result, there has been growing acknowledgment of the mission and role of nonstate actors on the part of government as well as an understanding of the need to establish ongoing dialogue and cooperation (Shimoni, 2017). As a government official remarked, “The prevailing opinion is that there is more to gain from cooperation than there is from operating independently with no connection.”

*An Emerging Public Policy toward Philanthropy: Initiating a Dialogue*

The evolving relationship between government and philanthropy in Israel has led to the creation of a formal mechanism in the form of round tables, which serve as platforms for tri-sector discourse, action planning, and dialogue among the parties. A central round table was established in the Prime Minister’s Office following Government Decision No. 3190 in February 2008, which included representation of central ministries that were part of the round table (Prime Minister’s Office, 2008, 2011). The purpose of the round table was to create a direct channel of communication between government and philanthropy across various areas of activity—thereby enabling government to be more attuned to the expectations, desires, and capabilities of philanthropists. The creation and operation of the round table was a direct outcome of pressure from the political echelon, which often imposed its perceptions about what the role of philanthropy should be. According to one government official, “Everything starts with pressure from senior politicians, prime ministers, and the like...and then the ultimatum.”

This often resulted in differences in the working experience of philanthropists with the political and professional officials in government agencies; as discussed by another philanthropist, “Finding the right person in the ministry who is dedicated to promoting our initiative is always a challenge, as not every political decision is translated into the hard work and motivation of the professional you end up working with.” Nevertheless, many government officials interviewed felt that, despite being forced to participate in this round table dialogue, the experience turned out to be rewarding. As one official remarked, “Since we were pressured into the dialogue, it could have been perceived as meaningless and even humiliating. Instead we developed a feeling of true discourse and the beginning of something new.”

Additional round tables were formed within the Ministries of Education, Social Services, Justice, Finance, and others. The creation and proliferation of the round tables symbolized a shift in government’s perception of philanthropy and a growing desire to find an effective mechanism that endorsed collaborative action oriented toward the creation of social and economic value. As expressed by one of the philanthropists, “When there is such support, it is a strong bolster, and is worth much more than financial support.” Ultimately, these round tables served as a platform for enhancing legislation, legitimacy for philanthropic activity, and regulation.

Our findings indicate that the round tables, as their name suggests, helped to set the stage for a reciprocal interaction, thus promoting cooperation between the parties. Previous communications had been characterized by a structural hierarchy that preserved government control over the measures, programs, and initiatives it undertook with philanthropists. As one government official remarked, “We have to be careful that the tail does not rattle the dog...you need to know how to lead and not be led.”

The round tables represented a new underlying rationale adopted by many government officials who believed that there was a need to work together with philanthropy, as expressed by the following interviewee: “...No one has enough resources, and if they do, they need the legislation. If they have the legislation, they are short of money. If they have the legislation and

the money, they lack the operational capabilities. Power has its limitations, and today no one can say ‘I can do it alone.’”

The round tables indicated government’s recognition of philanthropy’s contribution to the creation of new initiatives, its ability to think out of the box, introduce new administrative techniques, and complement and supplement existing programs as well as enhance the scale and scope of services. To date, the round tables have facilitated comprehensive policy steps and actions while promoting a policy agenda regarding philanthropy and philanthropists in Israel. The flexibility of the round tables has provided an outlet for philanthropy to be heard, express critical views of government, and engage in meaningful dialogue with government and civil society. This dialogue has encouraged government to set a clear stance toward philanthropy and stipulate its policy agenda based on a productive and fruitful discourse. Finally, the round tables highlighted the institutionalization and regulation of the relations between government and philanthropy through what has become a formal dialogue that encourages a collaborative relationship and the formulation of a policy agenda backed by various steps and actions.

### *Toward an Overarching Governmental Policy*

Our findings also indicate that in the absence of an overarching policy, most governmental agencies developed their own independent policy toward philanthropy (Schmid & Shaul Bar Nissim, 2016). The lack of defined goals and targets regarding a relationship with philanthropists prompted governmental agencies and ministries to adopt adhoc and short-term approaches. These approaches led to fluctuations in attitudes toward philanthropic initiatives. A government official captured the dilemmas stemming from the dispersed policies of governmental ministries toward philanthropy. “The more government officials concentrate on achieving their goals and on implementing working policies, the easier it is to facilitate their relationship with philanthropy. When ministries zigzag, the relationship with philanthropy is complex.”

A change in this structure occurred, as mentioned, with the formation of the round tables and the understanding that there is a need to formulate an overarching policy toward philanthropy by setting a formal policy agenda and exploring alternatives for policymaking. This has led to deliberations on the role of philanthropy in the modern democratic state as well as to shared areas of activity and areas in which government has a stake in promoting philanthropic involvement given lack of resources.

In this context, the dialogue between government and philanthropy has created an opportunity to bridge ideological and cultural gaps, initiate new programs, and share resources and professional experience. Furthermore, the various round tables have promoted the creation of legal and fiscal platforms that have encouraged philanthropic behavior while also regulating philanthropic activities. The round tables served as a platform for developing policies and actions in a coordinated and planned way. In previous years, there was an absence of leadership and guidance, which resulted in a lack of coordination and communication between ministries, clerical foot dragging, and copious red tape on the part of government.

An analysis of official documents published in recent years attests to the efforts of various governmental and nongovernmental agencies to formulate policies for the voluntary sector in general and philanthropy in particular. These efforts aimed primarily to promote a policy that encourages giving and volunteering on the part of Israeli philanthropists and households (Prime Minister’s Office, 2011). Some of the outcomes of these deliberations include attempts to broaden the definition of tax-exemptions for efforts to encourage giving, cancellation of the employers’ tax for nonprofits, lowering the floor and raising the ceiling for tax-deductible contributions, and approval of tax exemptions on donations through an individual’s payroll (Prime Minister's Office, 2015). These responses correspond to a government policy toward

philanthropy and shed light on government's desire to promote a spirit of giving in Israeli society in order to create social and economic value for the benefit of clients–citizens.

## **Discussion**

The rise and growth of philanthropic activity in Israel, along with changes in its role and mission in the public sphere, raise questions and dilemmas regarding relationships between philanthropy and government as well as questions about the issue of public policy toward philanthropy in Israel (Anheier & Daly, 2007; Franklin, 2014; Reich, 2006, 2012). Our findings suggest that the development of public policy toward philanthropy can be influenced by changes in contextual factors of a state's welfare regime (Anheier & Daly, 2007; Esping-Andersen, 1990). In this study, specifically, public policy toward philanthropy in Israel was shown to be influenced by the establishment of a hybrid, amorphous social welfare regime consisting of social democratic and neoliberal ideological elements (Gal, 2004; Haber, 2011; Lahat & Talit, 2015). Israel is undergoing a transformation from the social-democratic welfare regime that characterized it for many years and is moving fast toward a neoliberal welfare regime that encourages entrepreneurship and a free market.

These changes have led to the growth of nonprofit organizations and the privatization of social and human services in Israel (Gidron et al., 2003). These changes have also led to the diminishing role of government and the growing involvement of new philanthropy in funding national and social initiatives (Shimoni, 2017; Silber, 2012). This, in turn, has led to the transfer of power and responsibility to the private sector and for-profits, who had been the main providers of services that government had given responsibility to until recently. At the same time, the role of philanthropists and their relations with government have changed. As long as the social democratic regime remained dominant in Israel (nearly four decades), the role of philanthropists was limited with regard to the provision of social, educational, and cultural services. In the early 1980s, as Israel shifted toward a neoliberal regime, the relationship between philanthropists and government changed as well. In that process, there was a need to overcome accumulated mistrust, tensions, and alienation that characterized these relations in earlier years. The ongoing shift toward a neoliberal welfare system has required government and nongovernmental organizations to rethink their relationship and the relative advantages of each party. It has also required them to strengthen collaboration and cooperation and remove barriers that restrain new initiatives. The proliferation of round tables and the expansion of multisector dialogues are further indications of government's increasingly positive view of cooperation and cross-sectoral partnerships (Schmid & Almog-Bar, 2016).

The Israeli case is an example of regimes that go beyond the typology proposed by Anheier and Daly (2007). It raises questions and reservations about policies toward philanthropy in countries characterized by a combination of social democratic foundations and neoliberal ideology. In these types of regimes, the importance of philanthropy and its interaction with government (as well as the division of labor between government and philanthropy) requires a new conceptualization that is not reflected in current theoretical models. As welfare regimes change to amorphous hybrid structures, perceptions of the roles and missions of philanthropists have altered, and a unique niche has been created for philanthropic engagement.

These shifts toward hybrid social welfare regimes raise questions about broader processes of blurring boundaries between welfare regime types and about the implications of those processes for the roles and responsibilities assumed by new philanthropists. The fluidity of welfare regimes also highlights the need to formulate a public policy toward philanthropists, who often define the respective areas and domains of engagement. Recognizing the particular advantages of philanthropic organizations allows a government to think outside the box and

be more creative and innovative in its own operations. Nevertheless, government has adopted an ambivalent approach, which expresses dilemmas and challenges and hinders the formulation of a policy agenda toward philanthropy that extends beyond fiscal regulations. This ambivalence provides the basis for a twofold perception of philanthropists as both independent funders and as partners of government. As independent funders, philanthropists generate a tension between contributory and disruptive behavior in negotiating with government (Horvath & Powell, 2016; Reich, 2006). As partners, collaborations lead to innovations and productive joint ventures and initiatives (Schmid & Almog-Bar, 2016).

This duality has posed obstacles to the formulation of a public policy toward philanthropy in Israel leading to a process that can be described as a delicate dance (Phillips, 2003) in which both sides work together to find the appropriate balance in the institutionalization of their relations. This includes a process of trial and error regarding different policy alternatives and forms of collaborations, while seeking to create a formal policy that is aligned with the local welfare regime and governmental priorities.

It is important to note that these insights should be understood within the methodological context in which they were developed. There was an inevitable selection bias in this research due to the fact that the authors examined a group of high-capacity donors who already are probably disproportionately active in philanthropic activity and more preemptive about defining their relations with government.

### **Implications for Theory and Practice**

The Israeli case study presented in this paper contributes to enhancing our understanding of policies toward philanthropy in different regimes and their implications for the relations between government and philanthropy. A central question relates to the need for a public policy toward organized philanthropy. Different approaches can be taken in the attempt to answer this question. The first approach supports philanthropy's independence and attaches little importance to the nature of its relations with government, thus relinquishing the need for a formal policy. According to this approach, philanthropy's independence should be maintained through the development of innovative initiatives and prototypes to be emulated, absorbed, and diffused through a government's bureaucratic system and mechanisms. A second approach highlights the importance of philanthropic activity as a significant actor that collaborates with government. This approach maintains that it is desirable to formulate a clear policy toward philanthropy based on a mutual discourse in which the parties negotiate an agreed-upon definition of roles and missions.

Our research suggests that Anheier and Daly's (2007) theoretical model of government-philanthropy relations may need to be refined and adjusted to account for ongoing changes in the social and political systems of many countries. It could, for example, include multiple models representing new, integrated forms of social welfare regimes. The above-mentioned changes affect the relationship between government and philanthropy, and highlight the need for discourse regarding public policy on philanthropy. Toward that end, the sectors may benefit by redefining each other's roles and division of labor in order to maximize the economic and social value of efforts on behalf of potential beneficiaries.

No matter what approach is chosen, the process of formulating a policy toward organized philanthropy needs to be considered carefully. A strong regulatory component or a rigid definition of roles and division of labor may lead to a loss of philanthropy's relative advantages. These advantages include flexibility, risk taking, the ability to develop groundbreaking and innovative programs, adaptability, and proximity to beneficiaries. Regulation should also remain moderate because over-regulation deters philanthropy from cooperating with government. Policymakers in Israel understand this principle, as demonstrated by the 2018

decision that provides incentives to ministries that reduce regulation by 30%. Ministries with excessive regulatory procedures and guidelines are now fined.

These developments highlight the need for future research on the interest of new philanthropy in collaborating with government and on the circumstances under which such collaborations should exist. Research should also probe the significance and centrality of philanthropy to governments in different welfare regimes, which operate either in favorable or limiting environments. Finally, as the attributes and activities of philanthropists are constantly changing, research should aim to develop conceptualizations of different types of philanthropists who have differing interests, activities, and strategies.

## Disclosure Statement

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