

Giving in Europe

The state of research on giving in 20 European countries

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Research on Giving in Italy

The state of research on giving by households, corporations, foundations and charity lotteries to charitable organisations in Italy



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Research on Giving in Italy

Lucia Boccacin and Linda Lombi⁷⁰

Introduction on Giving Research in Italy

'What drives people to help others? What are the underlying motivations for altruistic behaviour? Do transactions of this nature have a mainly economic value or do aspects of generosity and the absence of exploitation prevail?' (Parker, 1981, p. 30).

Long the focus of sociological thought regarding the prosocial aspect of donation behaviour, these questions continue to guide empirical research on the topic. A necessary step towards a response would seem to be a discussion of some of the symbolic codes that underlie the act of giving. These regard altruism/the gift, trust and solidarity (Boccacin, 2005). The altruistic dimension is critical to understanding the phenomenon of donations and its social dimension. Altruism, in fact, seen as a concern for others that becomes the principle of action (Bulmer, 1986), implies an intentional behaviour that has the improved welfare of other as its objective, without personal interests or expectations of rewards (Eisenberg, 1982).

Sociological theory has repeatedly clarified the multidimensionality of altruism at a social level (Anheier, Rossi & Boccacin, 2008). A lowest common denominator emerges from among the various interpretations and meanings of the concept and its practice - a person's awareness of the existence of a need and the voluntary and intentional desire which stimulates altruistic behaviour and an act of donation in order to change this situation of distress and difficulty. The social implications of this behaviour which emerge through this dynamic were clearly identified by Titmuss almost fifty years ago and are still valid today: '...the grant, or the gift of unilateral transfer – whether it takes the form of cash, time, energy, satisfaction, blood or even life itself – is the distinguishing mark of the social...' (Titmuss, 1968, p. 22). At the end of his famous study on blood donation, he writes 'Freedom from disability is inseparable from altruism' (Titmuss, 1970, p. 246). Altruistic and donative behaviour is further characterized by its objective relational weight, because the self-sacrificing action, as such, cannot be disinterested in the condition of others. (Donati, 2011).

A second symbolic code underlying giving, in addition to the altruistic-donative aspect of donations, is the understanding of trust as a fundamental and qualifying trait of social ties. This trust implies a reliability on a person or system in connection with a particular set of results or events (Giddens, 1990). The altruistic, donative and trust momentum implicit in donations is embodied in the symbolic code of solidarity (Donati, 2003), understood in particular as a propensity towards helping others.

The term solidarity, etymologically, identifies the existence of a solid bond: it involves the acceptance of a moral commitment, a 'concrete' responsibility which refers to a sense of belonging to the same human community. The concept of solidarity implies joint action and, consequently, the refusal of individual solutions, both in free rider form as well as more simply as a rejection of the individual

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dimension as exclusive (Evers-Laville, 2004). It is related to that of subsidiarity, which allows a dynamic relational that respects and enriches the different social subjectivities (Boccacin, 2014).

In summary, altruism, trust and solidarity are the symbolic and cultural roots that give rise to the specific and tangible action of cash donations. It is through these observable specific and tangible actions that we can also detect traces of intangible and symbolic elements critical to the subjective and inter-subjective processes which affect the actions of the donor.

The sources⁷¹

Donation and succession data from ISTAT (Italian National Statistics Institute) 2000 to 2009 (<http://www.istat.it/it/archivio/21343>) provided the basis for the Italian scenario, but no official nor specific national survey currently exists that could outline the overall picture. Similarly, data relating to income from charity lotteries are not available and are therefore not discussed in this report.

The data presented in this report are therefore derived from the following sources:

- 1 The ISTAT 2011 census of industry, public and non-profit institutions: a survey conducted to provide information concerning the main characteristics of enterprises, non-profit organisations and public institutions. The census date of reference was 31 December 2011. Specifically, data on donations and bequests are included in the census of a total of 301,191 non-profit organisations (see ISTAT, 2014).
- 2 'Italian Solidarity': an annual survey conducted with CAPI (Computer-Assisted Personal Interviewing) methods and edited by the Doxa Research Institute. The survey investigates the behaviour of Italians relative to charitable donations. The data referred to in this report relate to the year 2012. The sample consisted of 1 000 persons representative of the population over 15 years of age and identified through a three-stage stratified sampling process (Doxa, 2013).
- 3 'The social commitment of companies in Italy': a study conducted biennially by SWG [Italian market research group] for the Osservatorio Socialis di Errepi Comunicazione through online interviews (CAWI - Computer Assisted Web Interviewing). The scope of the references is made up of companies with over 100 employees. The sample representative of this range is based on the parameters 'field of membership' and 'macro area'. The results for the years 2011 (sample consisting of 823 companies) and 2013 (400 companies) (Osservatorio Socialis, 2012, 2014) were examined for this report.
- 4 Research on donations by the Osservatorio Socialis in 2014 in partnership with Ixè Ltd., a quantitative survey involving 1 000 subjects representative of the Italian adult population and conducted with CATI (Computer-Assisted Telephone Interviewing) and CAMI (Computer-Assisted Mobile Interviews) methods (Osservatorio Socialis, 2014b).

⁷¹ The authors wish to thank Alice Zanchettin for the valuable support offered during the data retrieval and statistical information.

- 5 The ACRI Report (Association of Foundations and Savings Banks) containing information on 88 banking foundations. For economic and financial management data, budgets for the year ending December 31, 2013 were examined (Acre, 2014).
- 6 Data collected by the Italian Taxation and Revenue Office and released by the Ministry of Labour and Social Policy on the donation of the so-called 'five thousandth' for the year 2012.

Giving by Individuals

Descriptive statistics of giving by individuals in vivo

According to Doxa (2013), 29.6 % of the Italian population over the age of 15 made a donation during 2012, down 5 percentage points from the previous year. An analysis of the data reveals that women donate more than men (34 % vs 25 %), as do those who belong to the more mature age group (15-34 years: 12 %; 35-54 years: 34 %; over 54 years: 38 %). Territorially, those who live in the north give more frequently (north-west: 34 %; north-east: 39 %) than those who reside in the centre, south and islands (24 % for both regions). The level of education, according to the study commented here, has a negligible influence on giving (university degree: 30 %; high school graduation: 31 %; compulsory school years only: 28 %). The percentage of donors increases among those who do voluntary work (41 %) and those who are dedicated to religious activism (44 %).

This study shows that the main recipients of the donations are medical research (58 %), provision of emergency humanitarian aid (41 %), the long-distance adoption of a child (12 %), initiatives to combat poverty in Italy (12 %), animal protection (9 %), protection of the artistic heritage (4 %), environmental protection (2 %), support of the Catholic Church (2 %), and aid for children (1 %).

The average amount donated was € 43, an increase from the 2011 survey results (€ 37), but still lower than the previous decade (weighted average from 2001 to 2012: € 54). The total monetary donations was € 640 million, equal to € 10.66 per capita. Although men give less frequently than women, as seen above, the amounts are on average higher (males: € 51; females: € 38). Adults give more than the younger groups (15-34 years: € 22; 35-54 years: € 35; over 54: € 54), and the inhabitants of central Italy give more compared to other regions (centre: € 48; north, south and the islands: € 29).

Most donations are made directly (49 %). The following methods of transfer are used: SMS (40 %), post office payments (33 %), bank transfers (9%), credit cards (2 %), bank direct debit (1 %), and the Internet (1 %).

However, the collection methodology of the Doxa data has been criticised because, in the opinion of some scholars, it underestimates the average figure paid since it does not include relevant sources such as parish donations and the five thousandths (a 'percentage philanthropy', whereby individuals may nominate to transfer a percentage of their income tax to a public benefit organisation) (Aa. Vv 2014). The article 'Quanto donano gli Italiani' in the journal Vita in March 2015 suggests a far higher number (€ 7 200 million), € 116 (Aa. Vv., 2015)⁷². This wide difference between the Doxa survey estimates and that of the above article is caused mainly by parish donations, an amount equal to €

⁷² The article 'Quanto donano gli Italiani', published in the journal Vita in March 2015, adds to this amount 4.5 billion euro defined, in a generic way, as "other donations". This data is based on ISTAT 2011 census of non-profit institutions. Whereas this entry has not been further specified, we decided not to include it in our estimate.

2.6 billion with an average of € 100 thousand per the parish (ibid). According to the survey conducted by the Osservatorio Socialis (2014), which also includes five thousandths payments (more details below), the percentage of Italians over 18 who have donated stands at 49 %, higher among women and among those who are aged 45 years or more. This study also differs from the Doxa study mentioned above in that it shows a greater propensity to donate by persons who have a higher level of education.

As mentioned above, another important source for the examination of individual donations in Italy is made up of data on the so-called five thousandths, i.e. that part of their taxes that every citizen-taxpayer may annually decide to allocate, when completing their tax returns, to entities carrying out activities with a social objective. According to the financial statements of the first 20 associations in receipt of the five thousandths, € 380 million was received during 2013 (Aa. Vv., 2015).

An analysis of the data submitted each year from the Italian Taxation and Revenue Office to the Ministry of Labour and Social Policy reveals that in 2012 approximately € 395 million was transferred, of which approximately € 265 million was destined to groups involved in voluntary work, € 56 million to scientific research, € 52 million to medical research, € 13 million in social activities carried out by the municipalities and € 8 million to amateur sports associations (Ministry of Labour, 2012).

Giving by Corporations

Descriptive statistics of giving by corporations

Specific attention should be given to the contribution offered by companies through donations that express, from a sociological perspective, social responsibility on the part of businesses. According to estimates from an Osservatorio Socialis report on the social involvement of companies, Italian companies with more than 100 employees invested over € 1.05 billion in Corporate Social Responsibility (CSR) in 2011 (€ 100 million more than 2009) in support of humanitarian, environment, art and culture, corporate welfare (Osservatorio Socialis, 2012). In 2011, there was a slight decline in the number of companies investing in CSR in Italy; 64 % invested in CSR compared to 69 % of the previous survey in 2009. However, overall, the total amount donated increased. The average value of the investment also increased, from € 161 (2009) to € 210 (2011). The major investors were located mainly in the north-west and in the south/islands. They were also mainly businesses with a turnover of over € 100 million.

Later data show a recovery in CSR investment: according to the 2014 study, 73 % of companies invested in social responsibility initiatives and/or environmental sustainability during 2013 (Osservatorio Socialis, 2014). However, the average investment fell to € 158 in 2013, for an investment total of about € 1 billion. Nevertheless, not all the payments were destined for philanthropic causes. The areas of greatest investment, as declared in the latest survey were, in order, energy saving and reduction of waste (65 %), projects for the benefit of employees (55 %), pollution and waste disposal (53 %), humanitarian support solidarity (38 %), payments in favour of sports (31 %) and of the arts and culture sector (24 %).

According to a secondary analysis carried out by Cesare Rizzi for the Food Bank on 'Raccolta fondi dalle Aziende – Corporate fundraising' (2013), only 2.5 % of Italian companies are 'donors', that is to say, they donated to the third sector, while overall donations (excluding sponsorship and causes

related to marketing) amounted to approximately € 300 million a year, 0.022 % of the GDP (Rizzi, 2013).

Giving by Foundations

Descriptive statistics of giving by foundations

Giving by foundations of banking origin⁷³

An analysis of the XIX report edited by Acri on foundations of banking origin (Acri 2014) shows that the foundations transferred € 884.8 million, a decrease of 8.4 % over the previous year (2012: € 956.8 million). The number of interventions or actions was 22,334, a slight increase over the previous year (2012: 22 204, see table 15.1).

The seven principal recipient sectors of the disbursements made in 2013 received 95.5 % of the total transferred. These sectors are, in order, those connected with art and cultural activities (30.4 %), research and development (14.5 %), social welfare assistance (13.5 %), education and training (11.9 %), volunteering, philanthropy and charity (11.8 %), public health (7.7 %) and local development (5.6 %). In five cases in 2013 there was a decrease from the previous year (education, education and training: -27.3 %; art, cultural activities and heritage: -11.8 %; volunteering, philanthropy and charity: -10.9 %; local development: -10.2 % and social welfare assistance: -3.7 %). Two cases present increases compared to 2012 (+25.3 % for public health and +8.2 % for research and development).

Other donation areas account for a residual amount of less than 5 % of the total. A comparison with the 2012 data shows contrasting trends, with net increases for sport and recreation (+39.7 %), civil rights (+41.7 %), for religion and spiritual development (+22.8 %), and downturns in the fields of environmental protection and quality (-11.9 %), the protection of the family and the values associated with it (-39.9 %), and crime prevention and public safety (-59.5 %). However, as the report says, the low values of these amounts should be treated with caution when assessing the magnitude of the deviations in the residual areas mentioned.

⁷³ These make up a group different from those referred to as pro-social foundations as included in the census on non-profit institutions referred to above in paragraph 4.

Table 15.1 Distribution of disbursements by the banking foundations per beneficiary sector. The years 2012 and 2013 compared

<i>Distribution of disbursements per beneficiary sector (2013-2012)</i>								
SECTORS	2013				2012			
	Number Interventions	%	Amount million EUR	%	Number Interventions	%	Amount million EUR	%
Art, cultural activities and heritage	7 681	34.4	269.2	30.4	7 872	35.5	305.3	31.6
Research and development	1 222	5.5	128.3	14.5	1 244	5.6	118.5	12.3
Social welfare assistance (1)	2 495	11.2	119.8	13.5	2 712	12.2	124.5	12.9
Education and training	3 759	16.8	105.3	11.9	3 427	15.4	144.8	15.0
Volunteering, philanthropy and charity	2 790	12.5	104.6	11.8	2 682	12.1	117.3	12.1
Public health	1 121	5.0	68.4	7.7	1 129	5.1	54.6	5.7
Local development ⁽¹⁾	1 464	6.6	49.7	5.6	1 379	6.2	55.4	5.7
Environmental protection and quality	336	1.5	16.2	1.8	354	1.6	18.4	1.9
Sports and Recreation	1 138	5.1	12.1	1.4	1 117	4.9	8.6	0.9
Family and related values	234	1.0	10.5	1.2	218	1.0	17.4	1.8
Civil and political rights	47	0.2	0.5	0.1	35	0.2	0.3	0.0
Religion and spiritual development	33	0.1	0.2	0.0	18	0.1	0.2	0.0
Crime prevention and public safety	14	0.1	0.2	0.0	17	0.1	0.4	0.1
Total	22 334	100.0	884.8	100.0	22 204	100.0	965.8	100.0

⁽¹⁾ In the 2013 survey the interventions in the field of social housing (equal to € 6.1 million) were registered in the local development sector rather than social assistance.

Source: Acri (2014, p. 240).

Individual and private contributions destined for third sector organisations

The ISTAT census of non-profit institutions in 2011 collected information on 301 191 organisations (see ISTAT 2014). These included voluntary organisations, associations for social advancement, non-governmental organisations (NGOs), social solidarity cooperatives, non-profit organisations, and prosocial foundations. This study is an important source for the examination of relevant data on the recipients of payments.

The data reveal that these bodies distributed funds in the form of gifts, donations, and bequests amounting, in total, to € 4 584 545 733. This represents an average of 7.2 % of the revenue of these institutions (ISTAT 2014). € 4.3 billion, classified as 'other revenue from private sources' must be added to this figure. Overall, therefore, private donations received in 2011 from the third sector amounted to about € 9 billion, of which half was from individuals. For the latter, it should be emphasized that there is a strong heterogenic link to the sector of main activity: the entities that collect more contributions, offerings, donations, and bequests are those working in the field of philanthropy/promotion of volunteerism, cooperation, and international solidarity. More than 50 % of the budget revenues of these types of entities came from donations of the type described above. It follows, then, that the sectors deriving a greater percentage of their income from these resources are those concerned with the protection of rights and political activity (11.9 %), culture, sport, and recreation (9.2 %), and the environment (9.1 %, see table 15.2).

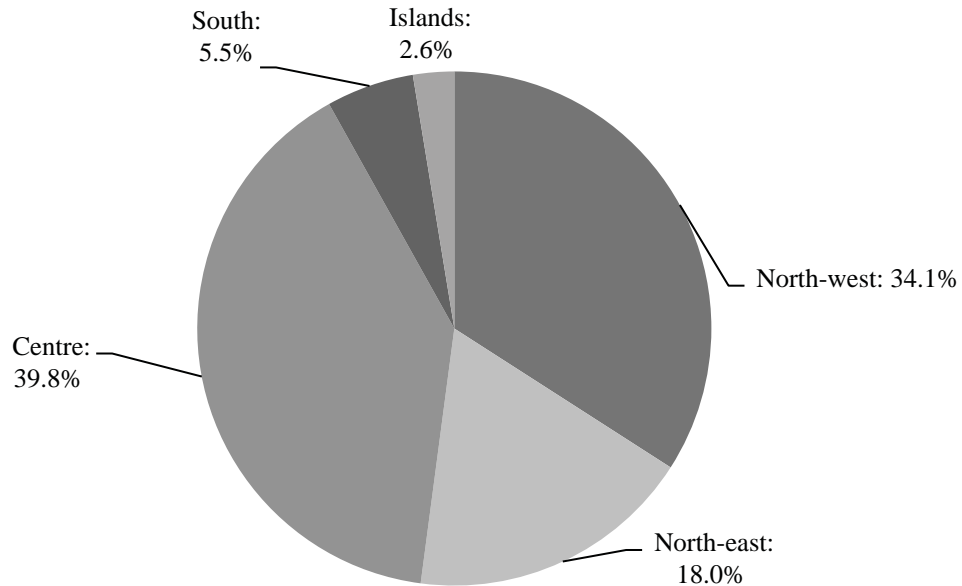
Table 15.2 Contributions, offerings, donations, and bequests in the budgets of non-profit organisations according to the sector of prevailing activity. Year 2011 Value in %

	percentage
Culture, sports, and recreation	9.2 %
Science and research	6.8 %
Health	3.5 %
Social aid and civil protection	6.6 %
Environment	9.1 %
Economic development and social cohesion	3.1 %
Protection of rights and political activity	11.9 %
Philanthropy and promotion of volunteering	6.7 %
International co-operation	53.8 %
Religion	51.3 %
Labour relations and representation of interests	4.6 %
Other activities	0.8 %
Total	7.2 %

Source: ISTAT (2014).

Geographically, non-profit organisations in central Italy attract the highest amounts of contributions in the form of gifts, donations, and bequests (39.8 % for a total of € 1,824,956,080). The north-west is next highest (34.1 % for a total of € 1 562 664 830) and the north-east (18 %, € 825 537 723), while the south and the islands collect only 8.1 % of the total (€ 371 387 100).

Figure 15-1 Contributions from offerings, bequests, and donations earmarked for non-profit institutions. Distribution % for macro-region



Third sector organisations involved in fund raising

The ISTAT census of non-profit organisations in Italy (ISTAT 2014) shows that 19.7 % (59 413 of the total number) of the institutions promote fund raising in order to finance their own operations.⁷⁴ Divided according to sector of prevailing activity, institutions involved in international cooperation and international solidarity are more likely to have declared an involvement in fund raising (80.5 %). After these, but at some distance, are institutions dealing with philanthropy and the promotion of volunteering (36.0 %), health (34.9 %), social assistance and civil protection (33.6 %; see table 15.3).

⁷⁴ The ISTAT survey questionnaire collected two distinct variables regarding donations from individuals and revenues from fund raising, and these variables were not subsequently crossed and re-aggregated. This makes it unfortunately not possible to assume more information from an aggregate of the two sources.

Table 15.3 Fund raising among non-profit institutions for the sector of prevailing activity. Year 2011 Absolute values

MAIN ACTIVITY SECTOR	Fundraising		No funds raised		Total	
	Absolute values	%	Absolute values	%	Absolute values	%
Culture sports and recreation	33 092	16.9	162 749	83.1	195 841	100
Education and research	3 138	20.2	12 381	79.8	15 519	100
Health	3 832	34.9	7 137	65.1	10 969	100
Social aid and civil protection	8 424	33.6	16 620	66.4	25 044	100
Environment	1 559	24.8	4 734	75.2	6 293	100
Economic development and social cohesion	1 010	13.5	6 448	86.5	7 458	100
Protection of rights and political activity	1 500	22.0	5 322	78.0	6 822	100
Philanthropy and promotion of volunteering	1 745	36.0	3 102	64.0	4 847	100
International co-operation	2 870	80.5	695	19.5	3 565	100
Religion	1 640	24.2	5 142	75.8	6 782	100
Labour relations and representation of interests	504	3.1	15 910	96.9	16 414	100
Other activities	99	6.0	1 538	94.0	1 637	100
Total	59 413	19.7	241 778	80.3	301 191	100

Source: ISTAT (2014, p. 13)

Once more a strong national gap emerges: non-profit organisations engaged in fund raising are located mainly in the north-west (33.0 %) and north-east (32.2 %), while the lowest recorded distributions are seen in central Italy (26.7 %) and, especially, in the south (19.2 %) and the islands (15.8 %).

Giving by charity lotteries

Not existing

Conclusion

While in Italy there is no official national survey to precisely measure the overall flow of donations in any recent year such that the total amount donated and the distribution by geographic area may be calculated, an analysis of the different sources consulted in this report allows an estimation of the phenomenon and the outlining of several trends.

The data show, in fact, some convergences. More women and members of the older population group donate than of the youngest group (although men donate higher amounts). The north of Italy registers more donations, but the highest total amount donated in a geographical area is recorded in the centre of Italy, as evidenced by both the data on individual donations as well as those relating to revenue for charitable institutions of the third sector. However, it is currently difficult to estimate the amount per capita of individual donations due to the differences in the financial flows examined. Vita, in the article already mentioned, estimated the annual flow of donations in Italy to be € 11.5 billion. The sum is derived from the sum of individual donations (€ 4.6 billion), offers to parishes (€ 2.6 billion) and other private donations (€ 4.4 billion). The total figure, recalculated on the basis of inflation rates for the last three years, may be currently estimated at € 12 billion (Aa. Vv., 2015). However, it is worth pointing out that this is an estimate and is not supported by any single official survey. As we are unable to distinguish the different sources of 'other private donors', we cannot include the figure in the overall number of Giving in Italy (€ 9.1 billion). Giving in Italy is thus based on giving by individuals (€ 7.2 billion), foundations of banking origin (€ 0.9 billion) and giving by corporations (€ 1.0 billion).

Another important element that emerges from the analysis is the presence of a greater propensity to donate by persons engaged in voluntary activities and in solidarity actions carried out in the religious sphere. This, as noted by other researchers (Principles, Jensen & Lamura, 2014; Boccacin, Rossi & Bramanti, 2011), demonstrates how generosity is expressed in concrete actions of an altruistic nature, aimed at providing support not only on the economic front, but also on the social and relational ones. The 'virtuous cycle of giving', then, begins by which those engaged in solidarity activities donate economically and support different prosocial activities in various ways, thus contributing actively to the development of a civil culture (Donati & Colozzi, 2004).

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A stylized map of Europe is shown in the background, with landmasses in white and surrounding waters in blue. The map is centered on the Atlantic Ocean, showing the British Isles, Scandinavia, and the Mediterranean region.

About Giving in Europe

Philanthropy is not an American, but a European invention. 'Giving in Europe' shows: European philanthropy takes itself seriously.

This study is an initial attempt by members of the European Research Network On Philanthropy (ERNOP) to map philanthropy in Europe and presents a first overall estimation of the European philanthropic sector. Containing an overview of what we know about research on the philanthropy sector, it provides data and an assessment of the data on giving by households, bequests, foundations, corporations and charity lotteries in 20 European countries.

Despite the promising signs of an emerging philanthropy sector in Europe, it is still a phenomenon and a sector that is not very well understood. As a matter of fact, besides the anecdotal glimpses from national researchers and the great work that has been carried out on the subdomains of philanthropy, we know little about its actual scope, size and forms in Europe. For a better discussion and assessment of the (potential) role that philanthropy can play in solving societal problems, we need a clear picture of the size and scope of philanthropy. What amounts are donated by households, through bequests, corporations, foundations and charity lotteries, and to what goals? To what extent can we draw a picture of the philanthropy sector in Europe, what is the quality of the data involved?

In answering these questions, this publication aims to stimulate researchers, policy makers and philanthropy professionals in fostering research on philanthropy and to inspire to exchange knowledge and information. For more information visit www.ernop.eu.