

Chapter 1. Overview: How to enhance philanthropy's contribution to Agenda 2030

In order to achieve the Sustainable Development Goals (SDGs), financing for development needs to be optimised, however there is a lack of information surrounding flows from private philanthropic organisations as well as a lack of understanding on how they operate. With rising private wealth and an urgent need to close the funding gap for the SDGs. It is now crucial to understand the impact that philanthropy has, as well as its potential.

This chapter presents the global picture and key findings on private philanthropy garnered through the OECD netFWD and a recent OECD DCD survey on global private philanthropy for development.

1.1. Rationale and objectives

In 2003, the OECD published *Philanthropic Foundations and Development Co-operation* to inform its Development Assistance Committee (DAC) about the origin and nature of philanthropic foundations in development. The study suggested means of enhancing communication between foundations and official aid agencies to improve development results (OECD, 2003_[1]).

Since then, institutional philanthropy and its potential to address social and economic development in the developing world have become even more salient. On the one hand, philanthropic foundations have proliferated in number and expanded their geographic scope. A growing number of foundations are established sources of both funding for developing countries¹ and innovative approaches in support of sustainable development. On the other hand, resources have become particularly scarce in the aftermath of the 2007-08 economic crisis. This has raised expectations of what philanthropy for development can achieve and fund among official aid agencies, as well as among governments and civil society in developing countries (see Box 1.1).

Box 1.1. The increasing role of institutional philanthropy in international development

With rising wealth, philanthropic giving is increasing around the world

With the dramatic growth in wealth over the last 15 years and despite the recent economic downturn, philanthropic giving and the number of foundations contributing to development have been rising around the world. The economic downturn of 2008-09 was the deepest recession since the 1930s. However, the number and the available capital of wealthy individuals, one of the essential actors for philanthropy, have surged around the world. Global high-net-worth individual (HNWI)² wealth ballooned from USD-28.8 trillion to USD 63.5 trillion over 2003-16. Similarly, the number of HNWIs rose from 7.7 million to 16.5 million during the same period (Capgemini, 2016_[2]; Capgemini, 2003_[3]). In accordance with the same pattern, ultra-high-net-worth individuals more than doubled over 2002-16 – from 70 000 to 157 200 (Capgemini, 2016_[2]; Capgemini, 2003_[3]). Asia-Pacific, North America and Europe are the world's largest HNWI markets in 2017. All these numbers bode well for the potential volume of money available for philanthropic activity. Along with the rise in wealth, philanthropic giving and the number of foundations have also been expanding.

In the United States, the country with the most developed philanthropic ecosystem, the total number of American foundations rose by a third in the last 15 years (from 64 845 to 86 726 over 2002-14). Similarly, total giving doubled from USD 30 billion to USD 60 billion during the same period (Foundation Center, 2017_[4]). The boom in philanthropy is not exclusive to the United States; European philanthropy is also flourishing. Although American foundations donate larger sums of capital, Europe has the largest number of philanthropic organisations worldwide with 130 000 in 2015 (Fondation de France, 2015_[5]). Private giving has also flourished outside Europe and North America. In Asia, for example, Chinese foundations have increased from fewer than 200 in 2012 to 5 454 in 2016 (United Nations Development Programme and China Foundation Center, 2017_[6]), despite restrictive regulations. Philanthropy is rising in India as well, supported by its diaspora and the money they send back home, particularly from the United States. In Pakistan, the volume of corporate philanthropy increased from

USD 4.5 million to USD 56.4 million between 2000 and 2014 (WINGS, 2014^[7]).

Not only has the number of foundations increased in the last 15 years, but their visibility has risen considerably. The best example illustrating this tendency is the Giving Pledge commitment. In 2010, Bill and Melinda Gates, with Warren Buffet, launched a campaign to encourage the wealthiest individuals in the United States to donate at least half of their fortunes to charity. Backed up by the first and second wealthiest individuals worldwide, the project started with 40 American billionaires willing to donate at least half of all their wealth within their lifetimes. The initiative quickly resonated among other philanthropists in the world. Currently, the Giving Pledge includes 170 billionaires from 21 different countries. Such initiatives garner significant media attention and put philanthropy in the spotlight.

The demand for, and expectations of, philanthropy have grown considerably among different actors

The 2007 financial crisis, which later translated into a deep global economic recession, shook the development community from the sudden decrease of financial flows. The effect of the crisis, however, differed across types of actors. For instance, while official development assistance (ODA) reached a plateau from 2008 to 2012, private flows and private grants continued to increase (OECD, 2017^[8]). As a result, the interest in philanthropy's role in support of development became even more prominent.

Under these circumstances, philanthropic funding emerged as particularly vital for two different types of countries. For low income and least developed countries, where basic human needs are not met, foreign aid is one of few available revenue sources. Philanthropic funding is also critical for several upper middle-income countries approaching the established threshold to receive ODA (per capita gross national income of USD 12 745). Countries like Brazil, Mexico or South Africa might soon no longer classify as recipients of ODA, and are therefore eager to start mobilising resources from other sources. These emerging economies, as well as low-income countries, see philanthropy as an alternative source of development finance.

In this context, civil society around the globe has also turned to foundations for funding. Indeed, NGOs worldwide reported significant funding cuts from donors and national governments due to a worsening financial situation in the aftermath of the crisis (Hanfstaengl, 2010^[9]). In response, NGOs like Save the Children or Oxfam have sought and received funding from philanthropic foundations to support a number of projects. These range from providing emergency aid to alleviate populations damaged by natural disasters to evaluating the impact of medical treatments to manage childhood pneumonia (Bill & Melinda Gates Foundation, 2015^[10]).

The wave of interest around foundations' role in support of development continues to gather momentum. However, two major bottlenecks – highlighted in *Philanthropic Foundations and Development Co-operation* (OECD, 2003^[11]) – have prevented foundations from fulfilling their development potential in closer co-operation with other development actors:

- The dearth of reliable and publicly available data about philanthropic resources in support of development: in most countries, neither governments nor private philanthropic organisations collect and share data on philanthropic giving. In addition, definitions, legal status and regulations underpinning philanthropic

giving vary dramatically from country to country. This hampers the ability of researchers, donors, governments and the philanthropic community itself to compare or aggregate data to map the sector accurately (see Box 1.2).

- The limited understanding by development agencies of foundations' priorities, practices and partnering behaviours: traditional aid providers have not transformed a growing interest in foundations into their own architecture, goals, principles and practices.

Box 1.2. The dearth of reliable and publicly available data about philanthropic resources in support of development

Before the OECD survey (OECD, 2018_[11]), global, comparable and publicly available data on philanthropic giving in support of development were virtually non-existent. There are several key reasons for this dearth of data.

Foundations have limited obligations for public disclosure

Foundations differ from official development agencies in their lines of accountability. Rather than being accountable to taxpayers, foundations answer to their boards and/or to their funder (often an individual, family or private company). As a result, in most countries, foundations are not registered at the national level. They often have limited obligations to disclose financial data to the public.

This level of transparency is the norm in Europe for foundations, while the more established foundation sector in the United States has more stringent regulations. US regulations, set out in the Tax Reform Act of 1969, exempt grantmaking foundations from paying most types of taxes on their income from endowments. The act also requires foundations to file annual returns that are publicly available with detailed financial and programmatic information, and to list every grant made.

Some governments encourage their domestic foundations to participate in global efforts such as the International Aid Transparency Initiative (IATI). However, only 31 foundations provided information on their grants on the IATI website as of 2018.

The existing sources of data on foundations are largely private and not comparable

Despite these challenges, several organisations have made significant efforts to collect data on the scale of engagement of private foundations in support of development co-operation. These groups include:

- The **US Foundation Center's** data coverage is mostly of American foundations (due to the stringent financial reporting obligations for foundations in the United States). It is attempting to collect data from other countries on a voluntary basis (mainly through the recently established SDG Philanthropy Platform). To date, these data have not been made compatible or fully comparable with ODA figures collected by the OECD Development Co-operation Directorate (DCD).

- The **Hudson Institute** has attempted to determine the scale of development co-operation by private foundations outside the United States based on available national documents, annual reports of foundations, and interviews (Hudson Institute, 2013^[12]; Hudson Institute, 2011^[13]; Hudson Institute, 2010^[14]). However, for most of these countries studied, only aggregated figures of philanthropic giving are provided. Such figures include outflows of private philanthropic foundations or other non-governmental organisations (NGOs), as well as remittances (donations by individuals outside of philanthropic structures), and non-monetary contributions (e.g. in-kind donations and volunteering). This makes the final amounts recorded much higher than those collected by the OECD. As of 2017, this research developed at the Hudson Institute will be carried out by the IU Lilly Family School of Philanthropy.
- The **European Foundation Centre** conducted surveys in 2003-05 and 2006-08 in 14 European countries. However, at the time, data on international spending were only available for six countries (EFC, 2007^[15]).

However, funding made “overseas” or “internationally” by philanthropic organisations is hard to compare to financial flows like ODA. This is especially true for overseas funding, which might include grants not aimed at supporting “development”. For example, grants might support countries not included on the DAC List of ODA-recipients³ or focus on causes that fall beyond the definition of development used by the OECD DAC.

Voluntary reporting is still limited

As philanthropy continues to grow worldwide, numerous factors are driving the sector to collect, share, and use more and better data. First, communities, governments and donors are increasingly trying to understand the aim of philanthropic giving and its impact. Second, the recent drive towards impact measurement has led some foundations to focus on producing and using evidence and data to track their own progress and footprint. Third, as philanthropists and foundations become more invested in dialogue and partnerships with other development actors, data are needed to underpin collaboration and measure collective progress.

In some cases, foundations themselves have led the call to action to produce more and better data, including standards on data and accountability. The Global Philanthropy Data Charter, developed by the Worldwide Initiatives for Grantmaking Support, encourages and helps guide foundations’ efforts on transparency (see below).

While these are positive developments, none of these standards are binding; they have not been widely adopted by the philanthropic sector. The degree of transparency and the extent of reporting practices remain heterogeneous among foundations.

Global Philanthropy Data Charter

WINGS⁴ and the Foundation Center have worked with more than 40 practitioners from over 20 countries to develop a Global Philanthropy Data Charter⁵ that

includes the following:

- a statement of values and principles that can serve as a guiding framework for the collection and use of philanthropic data
- a better idea of the identification of stakeholders in the data ecosystem and their needs
- a series of steps designed to achieve the goal of “good data for greater impact”.

The Charter helps balance the need for transparency with data security. It makes sure stakeholders are working through mutually beneficial data-sharing partnerships. It also helps stakeholders understand the need for strong local, national and international systems to produce, standardise, collect and use the data.

By creating a common language on philanthropic data, the Charter hopes to provide incentives for funders to invest in efficient data systems that can help the sector solve complex societal issues. These incentives include strengthening the data capacity of philanthropy networks and associations, supporting academic centres, and setting up or reinforcing data dashboards at national and international levels. These ambitions call for philanthropic actors and their partners to come together and develop collective data strategies.

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To address these gaps and enhance philanthropy's contribution to Agenda 2030, the OECD has stepped up its engagement with philanthropic foundations on two fronts:

- In 2012, the OECD Development Centre launched the **Network of Foundations Working for Development (netFWD)**. Over the last five years, the network has supported the crucial role foundations play in the development space. It has also provided an effective platform for dialogue and co-operation between foundations and other development actors. In addition, the network has produced thematic studies and practical guidance on foundations' experiences and innovative approaches. These highlight foundations' distinctive comparative advantage to inform the wider public discourse on sustainable development.
- In 2016, the **OECD Development Co-operation Directorate (DCD)**, in co-operation with the OECD Development Centre's netFWD, undertook a large-scale survey on global private philanthropy for development to collect data from major philanthropic foundations active in developing countries. The results of the survey are unique: they provide reliable and globally comparable activity-level data. Moreover, as the survey applied OECD-DAC statistical reporting standards, the data collected on philanthropic flows are fully comparable to ODA flows (see Section 1.2 for more details). In addition, to date, four private philanthropic foundations report on a regular basis to the OECD on their development activities: the Bill & Melinda Gates Foundation (BMGF), the Dutch Postcode Lottery, Swedish Postcode Lottery and People's Postcode Lottery (the United Postcode Lotteries).

This report draws on both unique OECD data gathered through the survey and insights on private philanthropy's engagement in developing countries, generated through netFWD.

The report thus explores three facets of foundations' engagement in support of international development:

- Foundations as **funders**: Which are the key philanthropic foundations engaged in funding developing countries? Does philanthropy make a targeted, concerted contribution to the Sustainable Development Goals (SDGs)? What is the scale and nature of philanthropic foundations' engagement across regions? Which development issues, regions and countries are they particularly supporting? (Chapter 2).
- Foundations as **innovators**: What are the innovations in the way philanthropic foundations support sustainable development? (Chapter 3).
- Foundations as **partners** of international development: How do philanthropic foundations engage with other development actors? (Chapter 4).

Finally, the report provides **policy recommendations**. On the one hand, they address opportunities for foundations to further leverage their contribution to Agenda 2030. On the other, they examine emerging risks from increased engagement of the philanthropic sector (Chapter 5).

This report is particularly directed to several key audiences:

- foundations working for development
- official donors
- governments of developing countries willing to partner with foundations
- NGOs and social enterprises working to implement philanthropy programmes
- development practitioners at large.

1.2. Methodology

This report, in particular Chapter 2, draws on the results of the large-scale survey conducted by the OECD DCD and through which data were gathered on more than 140 philanthropic foundations' activities. It also draws on an OECD experts' meeting and insights on private philanthropy's engagement in developing countries generated through netFWD and a literature review.

1.2.1. OECD survey

The survey was based on an extensive literature review, as well as research analyses of financial statements of a multitude of philanthropic organisations. OECD invited more than 200 private philanthropic foundations active in development to share information – under a strict confidentiality agreement⁶ – on their contribution to global development through:

- A **qualitative questionnaire** with 24 multiple choice questions on foundations' activities, transparency and accountability practices and co-operation with other development actors.
- A **data questionnaire**, to collect activity-level (or project-level) data. These included data on geographic and sectoral allocation, financial instrument used, channels of delivery and modality of giving. The format and definitions used in the questionnaire were compliant with the OECD-DAC statistical standards. This ensured that data collected would be comparable to ODA flows.

Having collected inputs on 143 foundations, coverage of the information collected through the data questionnaire was considered good in comparison to the targeted sample:

- 77 foundations responded to both the qualitative and data questionnaires. The survey data for the BMGF and 12 foundations based in the United Arab Emirates were derived from their regular reporting on private grants to the OECD DCD.
- For the 53 other foundations, activity-level data were gathered from publicly available sources, such as the Internal Revenue Service Form 990 PF⁷, foundations' own websites and annual reports, and through datasets available through the International Aid Transparency Initiative (IATI).
- Four foundations filled in only the qualitative questionnaire due to capacity constraints or confidentiality concerns.

The China Charity Alliance facilitated responses from three Chinese foundations.⁸ However, in general, the survey results may underrepresent the development efforts of private foundations in some Arab countries, the People's Republic of China ("China") and other countries beyond the OECD membership.

1.2.2. OECD experts' meeting

In October 2017, representatives of foundations, associations of foundations, governments and research institutes took part in an OECD experts' meeting. They discussed and ultimately validated the preliminary assumptions emerging from data collection. They also reviewed and provided feedback to the first draft of the report shared in February 2018.

1.2.3. Insights from OECD netFWD

The report draws on qualitative inputs collected over the last five years by the OECD netFWD through its members and associates. As part of its programme of work, the network has produced a series of case studies that examines how foundations and governments in India, Mexico, Myanmar and Kenya interact and how they can deepen their engagement. The diverse experiences of these four countries in implementing the *OECD Guidelines for Effective Philanthropic Engagement* (OECD netFWD et al., 2014_[16]) have also fed into this report.

1.3. Key concepts and definitions

1.3.1. Scope of the data questionnaire: Private philanthropy for development

A working definition of private philanthropic flows for development was developed for the data questionnaire. This aimed to ensure comparability with OECD DAC statistics on development finance such as ODA, as well as to avoid double counting at the international level:

Private philanthropic flows for development refer to transactions from the private sector having the promotion of the economic development and welfare of developing countries as their main objective, and which originate from foundations' own sources, notably endowment, donations from companies and individuals (including high net worth individuals and crowdfunding), legacies, as well as income from royalties, investments (including government securities), dividends, lotteries and similar.

Following this definition, philanthropic activities funded by other philanthropic foundations or governments were out of scope.⁹ Furthermore, charitable giving from religious institutions was only included if aimed at supporting development and improving welfare.

ODA eligibility of countries, territories and core contributions to multilateral organisations

Developing countries and territories were defined according to the DAC List of ODA Recipients.¹⁰ The DAC List of ODA-eligible international organisations¹¹ was used to identify the extent to which core contributions to multilateral organisations could be considered as support for development.

Cross-border flows vs. domestic activities

In principle, the DAC statistical system measures cross-border flows. In some cases, it also measures expenditure in donor countries (e.g. development awareness, in-donor refugee and administrative costs).

The data survey on private philanthropy also focused primarily on cross-border flows. However, the survey sought to be as inclusive as possible and to provide a better picture of global philanthropy. To that end, it also collected data from some foundations based in developing countries and operating domestically (e.g. India, Mexico, China and Brazil). Still, the survey allowed for distinguishing cross border flows from domestic giving (see Section 2.1 on the Analysis of philanthropic giving).

The geographic origins of philanthropic flows

The geographic origin of private philanthropy flows followed the residence principle¹² of foundations' headquarters. As an example, outflows from a foundation operating from a local office in a developing country, but with the main office in London, are considered as originating from the United Kingdom.

1.4. Key findings

1.4.1. Philanthropic flows are still modest in volume compared to ODA, but in key sectors such as health and reproductive health private foundations appear to be significant players

Private foundations provided USD 23.9 billion for development over 2013-15, i.e. USD 7.96 billion per year on average. While philanthropic giving remains relatively modest compared to ODA (5% of the three-year total) and financing for development more broadly, foundations have already become major partners in some specific key areas. For example, in the health and reproductive health sectors in 2013-15, foundations' support was the third largest source of financing for developing countries, following that of the United States and of the Global Fund to Fight AIDS, Tuberculosis and Malaria. Focusing on the health sector only, private philanthropic foundations were still the most significant source of development finance.

1.4.2. The sources of philanthropic giving for developing countries are highly concentrated

Of the 143 foundations included in the survey sample, the BMGF was by far the most significant philanthropic actor, having provided almost half of total giving (49%). In addition, 81% of the total philanthropic giving during 2013-15 was provided by only 20 foundations.

1.4.3. Philanthropists favour investing in stable, middle-income countries and implement through large, established partners, such as international organisations and NGOs

The report shows that 67% of country-allocable philanthropic giving was targeted to middle-income countries, such as India (7% of the total), Nigeria, Mexico, China, Ethiopia and South Africa. Only a third of it benefited the least developed countries (28%). In addition, almost all philanthropic giving (97%) was implemented through intermediary institutions, also referred to as “channels of delivery”. The report shows that a substantial amount of philanthropic funding, especially in the health sector, is channelled through international organisations and large international NGOs, such as Gavi, the Vaccine Alliance; the World Health Organization (WHO); PATH International; the United Nations Children’s Fund (UNICEF); or Rotary International.

1.4.4. In some developing countries, domestic philanthropic giving plays an important role

Philanthropic foundations based in developing countries operate to a large extent domestically. As a result, in some countries, domestic philanthropic flows represent a significant part of total philanthropic flows (83% in Turkey, 60% in Mexico and 35% in China). Cross-border giving from emerging countries to developing countries was limited and mainly provided by foundations in the United Arab Emirates, Panama, Nigeria or Hong Kong, China.

1.4.5. Philanthropies value partnerships because of their potential to engage in coalitions with government, donors, social entrepreneurs and NGOs

The data refute the stereotype that foundations always shy away from working with other development partners at the country level. In fact, most of the foundations assessed in the survey mention that they systematically engage with governments and donors – 67% and 45%, respectively – when designing or implementing their programmes and projects.

1.5. Key policy recommendations

1.5.1. Foundations could improve knowledge sharing with governments and the donor community, especially in middle-income countries and sectors such as health and education

With little evidence of direct co-ordination and collaboration between foundations and ODA providers, one can assume a degree of overlapping initiatives between philanthropic and ODA-supported initiatives. Thus, closer collaboration in middle-income countries and in key sectors supported by philanthropy would ensure that foundations’ efforts are mutually reinforcing, mindful of national development strategies and complementary to other existing initiatives rather than duplicative. Dedicated philanthropic dialogue

platforms, especially at the sectoral level, could provide a stable base for dialogue and partnerships.

1.5.2. Governments in developing countries could further strengthen the enabling environment for philanthropy

This could be done by adopting or adapting existing regulation, from establishing a legal status clearly distinguishing foundations from CSOs to possible tax incentives. Unintended consequences should also be looked into: some anti-terrorist laws and anti-money laundering regulations may have disastrous effects on the ability for foundations to support partner NGOs on the ground.

1.5.3. The donor community could adopt more systematic approaches to engagement with foundations

These approaches could include the development of strategies for engagement acknowledging foundations' financial and non-financial contribution to development (disconnected from the objective to fundraise), appointment of focal points responsible for developing and maintaining relations and working with foundations, staff exchange programmes between foundations and donor institutions, and more flexible partnership models taking into account the constraints of smaller foundations.

1.5.4. Foundations could make better use of existing platforms at the global, regional and local levels to improve the transparency and availability of data on philanthropic giving in support of development

There are already many country-level and international reporting initiatives, such as the OECD DAC statistics on development finance (to which the BMGF and the United Postcode Lotteries already report), 360giving, Glasspockets and IATI. In addition, networks like netFWD together with the Foundation Center, WINGS and others should encourage the philanthropic sector to further share information and help make data a global public good.

Notes

1. The terms “developing countries” and “developing economies” refer to all countries and territories on the *DAC List of Official Development Assistance (ODA) Recipients* and consists of all low and middle income countries based on gross national income per capita as published by the World Bank, with the exception of G8 members, European Union members, and countries with a firm date for entry into the EU. The list also includes all of the least developed countries as defined by the United Nations (UN).
2. High-net-worth individuals (HNWI) are defined as investors that have at least USD 1 million to a maximum of USD 30 million in financial assets. Those who exceed that limit are considered ultra-high-net-worth individuals (UHNWI).
3. www.oecd.org/dac/stats/daclist.htm.
4. See www.wingsweb.org/.
5. See www.issuelab.org/resource/global-philanthropy-data-charter-2017-second-edition.html.
6. However, it was agreed that the collected data may be presented at an aggregated level.

7. Form 990-PF is used to calculate the tax based on investment income, and report charitable distributions and activities to the Internal Revenue Service of the United States. It also serves as a substitute for the section 4947(a)(1) non-exempt charitable trust's income tax return, Form 1041, U.S. Income Tax Return for Estates and Trusts, when the trust has no taxable income. In general, reporting through form 990-PF is obligatory for exempt private foundations, taxable private foundations and organisations that are becoming legally private foundations <https://www.irs.gov/forms-pubs/about-form-990pf%20>.

8. Chengmei Charity Foundation and Huanmin Charity Foundation responded to both the qualitative and data questionnaires. Dunhe Foundation responded to the qualitative questionnaire <http://www.charityalliance.org.cn/>.

9. Donations by “rulers” (members of ruling families in relevant Arab countries) are considered official, e.g. Khalifa Bin Zayed Al Nahyan Foundation (United Arab Emirates), Zayed Bin Sultan Al Nahyan Charitable and Humanitarian Foundation (United Arab Emirates), Mohamed Bin Zayed Species Conservation Fund (United Arab Emirates) and Alwaleed Philanthropies (Saudi Arabia). Only the privately funded share of their outflows, if applicable, was included.

10. <http://www.oecd.org/dac/stats/daclist.htm>.

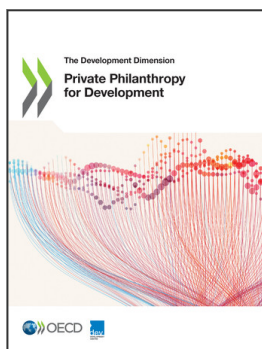
11. <http://www.oecd.org/dac/stats/annex2.htm>.

12. The concept of “residence” is not based on nationality or legal criteria, but on the transactor’s centre of economic interest: an institutional unit has a centre of economic interest and is a resident unit of a country when, from some location (dwelling, place of production or other premises) within the economic territory of the country, the unit engages and intends to continue engaging (indefinitely or for a finite period) in economic activities and transactions on a significant scale. (One year or more may be used as a guideline, but not as an inflexible rule).

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