

More than the Sum of its Parts:

Insights on the Future of European Philanthropy and Social Investment Infrastructure



BEYOND
PHILANTHROPY

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Foreword

By three methods we may learn wisdom: first, by reflection, which is noblest; second, by imitation, which is easiest; and third by experience, which is the bitterest.

Confucius (551-479 BC)

At first sight, it may be an odd choice to refer to the Chinese philosopher Confucius in a study on the European Philanthropy and Social Investment Infrastructure (EPSII). On second sight, this study is the result of an in-depth reflection of the philanthropy and social investment sector in Europe. It is an exploration into what is happening in this field around the world. It is also based on the day to day experiences of a broad spectrum of stakeholders.

We, the six foundations that backed the study, are all supporters of the European Philanthropy and Social Investment Infrastructure. As active participants in the sector we recognise changes driven by overall trends on the European continent. Digitisation is among them, as this study confirms. Others are new forms of collaboration, the increased segmentation of a growing sector and a changing political climate. This study confirms and reflects on the impact of these trends on our work in Europe. It should serve as a basis for an open and constructive discussion on the future of EPSII. We should allow ourselves this valuable time to reflect on the future needs of our sector.

This study is based on an extensive literature review and more than 50 interviews with a broad spectrum of foundation leaders, academic experts, EU officials, and staff of EPSII organizations. The results are like a health check up of our sector. They show that not

everything is perfect in this system, a system that many of us have helped to shape over the last 25 years. We should make sure that the health indicators of the European Philanthropy and Social Investment Infrastructure are in good shape for the next 25 years. We need this infrastructure to represent our sector, to drive innovations and to increase in the impact of our work. The latter is very much connected to tackling some of the most pressing issues of our time.

We want to thank the members of the Steering Committee and especially the three organisations DAFNE, EFC and EVPA for investing precious time in the process of this study. At last we want to thank Filiz Bikmen, Lea Buck and Michael Alberg-Seberich and the Beyond Philanthropy team for the realisation of the study and the preparation of this publication.

We hope that this study can serve as the basis for a debate on the future of the European Philanthropy and Social Investment Infrastructure and that this will help us build collective wisdom to be better prepared for what is ahead.

Adessium Foundation
Calouste Gulbenkian Foundation
Fondation de France
King Baudouin Foundation
Robert Bosch Stiftung
Stiftung Mercator



Executive Summary

There is increasingly greater recognition that Philanthropy and Social Investment Infrastructure (PSII) efforts contribute to increasing the effectiveness of the sector. However, the debate continues on the best way to direct these activities as a lever to increase volume, scale and ultimately, impact. While the quest for a better understanding of infrastructure seems to be part of a Zeitgeist at the global level, publications on this subject are rather limited - as are regional level assessments.

So, why this study¹, and why now? As the European ecosystem continues to grow and diversify, the need for a meta-analysis emerged to examine opportunities and challenges and determine expectations from organisations going forward. The study upon which this publication is based was commissioned by a consortium of six European foundations (listed in acknowledgments), who sought input and perspectives from key stakeholders, with a particular view to understanding the gaps and areas for further development. As a result of this study, the acronym European Philanthropy and Social Investment Infrastructure - in short, EPSII - was born.

The study included two main activities: A review of more than 100 publications and interviews with 51 stakeholders. The literature review revealed that global literature is limited, and Europe-specific literature even more so. There are no studies analysing EPSII's size, structure, membership scope, economic models, budgets, focus topics, funding flows and specific areas of impact. This is an area of research that merits more focus for a better understanding of EPSII and how the sector will further develop in the future. However, this study did reveal insights that serve as a good basis for initial discussions on what EPSII organisations are doing today, and what they could be doing differently in the future.

There are three main themes in the global literature which resonated with the situation in Europe and the key findings of this study. They include the delicate **balancing act** of serving members versus being a thought leader for the sector; trends and approaches to **collaboration among organisations** and PSII's **digital divide** and its impact on **policy advocacy** efforts and **overall effectiveness** of philanthropic and social investments.

¹ Beyond Philanthropy was contracted to conduct this study which took place between August and November 2018.

The key findings from interviews with 51 stakeholders² revealed **six themes** concerning the present and future directions of EPSII organisations and activities.



1. From coming together to acting together

Convening peers in the philanthropy and social investment sector is viewed as one of the most valuable contributions of EPSII organisations. Yet stakeholders sense that leveraging relationships and assets are necessary for the future and express the need to build on 'coming together' and move more toward 'acting together'. In this light, there are two specific actions expected from EPSII organisations: To create a stronger, clearer common agenda for European philanthropy and social investment, and

develop a roadmap toward joint action and more collaboration among EPSII organisations.

2. From building capacity to enhancing competency

EPSII organisations are highly regarded for their contribution to increasing the capacity (professionalism, knowledge and skills) of the sector. The impact of peer learning opportunities were noted to be particularly beneficial. There were expressed needs for greater competency in areas including asset and risk management, techniques and tools for scaling programmes, understanding and applying technology, and communications (internal and external).

3. From analysis to action

Advocacy, lobbying and communicating the sector to external parties (law and policy makers, media, thought leaders, etc.) was by far the most frequently discussed topic in this study. Stakeholders viewed EPSII as a whole being more successful with policy analysis and policy advocacy, yet having more challenges when it comes to lobbying efforts (activities to influence policy). This topic was often linked to that of communications, with an opinion that EPSII needs more outward engagement. EU stakeholders called for 'one voice', whereas leaders of foundations in particular expressed a concern about the onset of a more restrictive public debate (and potentially more restrictive policies) toward philanthropy and foundations.

4. From analog to digital

EPSII stakeholders interviewed for this study share a view that without an immediate and greater emphasis on data, the sector will be significantly weaker and miss out on opportunities to maximise impact. The lack of publicly available data about what foundations and social investors are doing, how much they are spending and other critical data points is a significant and immediate concern. Respondents expressed a call to action for creating and capturing success stories on the intersection between philanthropy, social investment and data, given the critical impact of data on policy, social services, infrastructure and the private lives of citizens. EPSII organisations are being called upon to lead coordinated action in this area.

² Respondents for this study were a diverse group of EPSII stakeholders and were selected together with the Steering Committee of this project and included members, potential members, funders, policy makers, academic experts and other infrastructure actors.

5. From passive to active engagement

A popular indicator of EPSII organisational success is often the size of its membership. Yet EPSII stakeholders are clearly seeking more specific indicators of performance and impact. Many organisations prefer the membership form, however there is increasing recognition that this model may not be the only option. There is a perceived lack of planned and diverse income streams for EPSII organisations. Limited funding opportunities and models are a source of anxiety and skepticism especially as the sector continues to diversify and funds become more scarce. Stakeholders appear ready to undertake a discussion about this issue and explore new approaches.

6. From general support to strategic alignment

The beginnings of EPSII were heavily funded by American donors, helping to build many of the institutions that are in place today. In recent years, the trend is shifting more toward European donors. This increased support has allowed existing organisations to grow and helped several new EPSII organisations to emerge. The call to action by EPSII funders is for more donors to contribute beyond member fees and not to view these contributions as an administrative cost but rather as a critical contribution to the sector. Also, with a greater number of EPSII funders there are more opportunities for shared learning, coordination and transparency. In its absence, duplication of efforts and missed opportunities for synergies risk lowering impact. This study revealed that strategic alignment and transparency of EPSII funders is perceived by stakeholders to be as critical for effectiveness as collaboration among EPSII organisations themselves.

midst of rapid social, political, economic and technological changes affecting EPSII, leaders with cognitive flexibility and adaptiveness skills are a must and new approaches to managing relationships within and outside the sector are necessary.

Conclusion

The shift from present to future EPSII will require an investment of time and money, but even more importantly, a paradigm shift that the collective impact of EPSII as a whole matters more today than the individual impact of any one organisation. Or, in the words of Aristotle, the whole is greater than the sum of its parts. This brings a responsibility to each organisations' governing leaders, staff, funders and members alike. EPSII organisations will need to boost competencies in communication and collaboration and pay special attention to intersections. In the



Introduction - An(other) acronym is born

There is increasingly greater recognition that Philanthropy and Social Investment infrastructure (PSII) efforts contribute to Increasing the effectiveness of the sector. However, the debate continues on the best way to direct these activities as a lever to increase volume, scale and ultimately, impact. With this in mind, attempts to map PSII organisations, define roles, and explore realms of impact and effectiveness are increasing. Yet, while the quest for a better understanding of infrastructure seems to be part of a Zeitgeist at the global level, the number of publications on this particular subject are still rather limited.

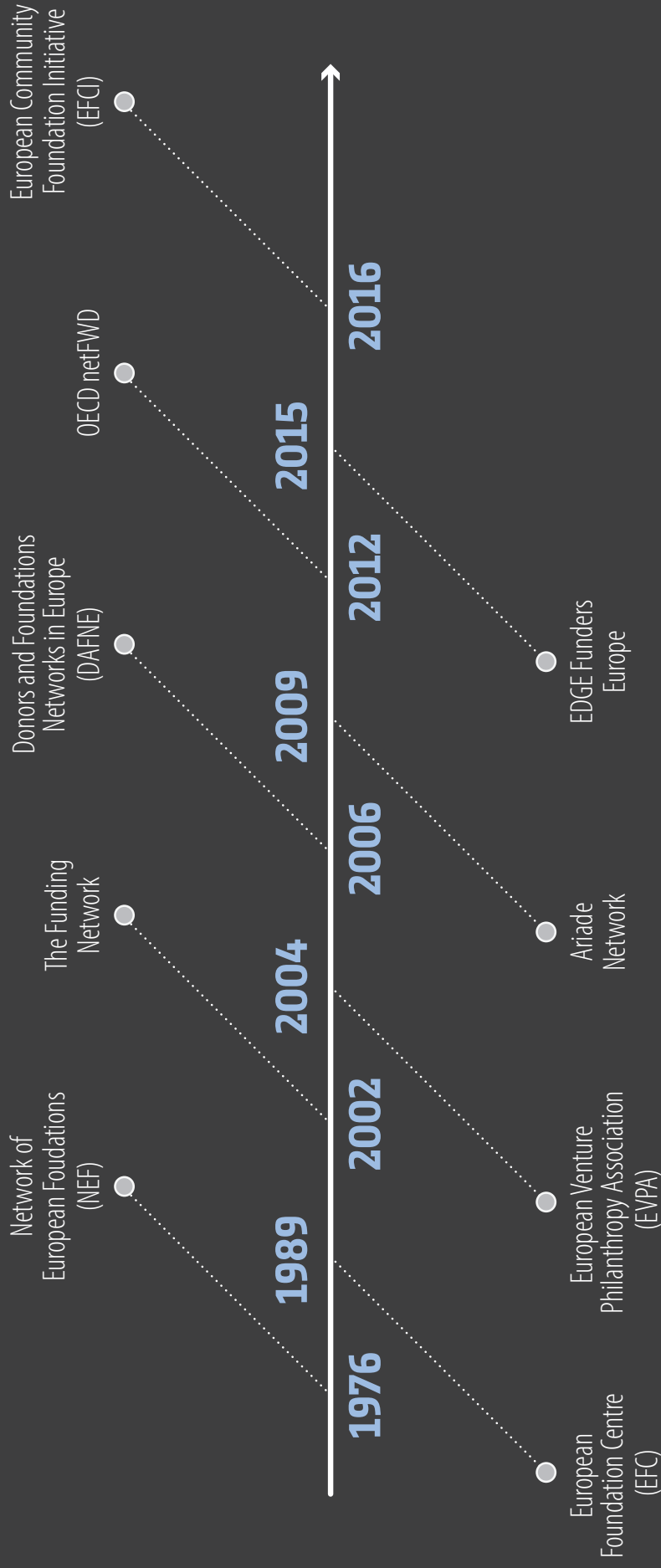
So, why this study, and why now? With origins dating back to the mid-1970s, the EPSII ecosystem today includes a number of networks and organisations, as well as new initiatives within existing organisations, which aim to promote philanthropy and social investment. As the ecosystem continues to grow and diversify, - as can be seen in the timeline on the next page many organisations have been set

up in recent years - the need for a meta-analysis emerged to examine opportunities and challenges and determine expectations from organisations going forward. This study was commissioned by a consortium of six European foundations (listed in acknowledgements), who sought input and perspectives from key stakeholders³, with a particular view to understanding the gaps and areas for further development. As a result of this study, the phrase European Philanthropy and Social Investment Infrastructure - EPSII in short - was born.

So what does the EPSII ecosystem include? At the global level, there are attempts to map and develop typologies and various forms of Philanthropy and Social Investment Infrastructure organisations. In a recent study, WINGS (Worldwide Initiative for Grantmaker Support) published a report describing various forms such as membership associations, academic, institutions and other professional support organisations in the philanthropic and social investment infrastructure ecosystem (Knight, 2018).

³ Respondents in this study represented diverse group of EPSII stakeholders and were selected together with the Steering Committee of this project. They included members, potential members, funders, policy makers, academic experts and other infrastructure actors.

Timeline of Selected EPSII Organisations



Timeline includes founding year of European networks and membership associations hat Beyond Philanthropy identified during the research based on the WINGS definition. Academic institutions and other professional support organisations are not included.

Taking this framework into account the authors examined EPSII organisations and initiatives which share a common vision and have a pan-European perspective. They differ slightly in form (different approaches on membership eligibility, economic models) and function. Most are founded in Europe and some based elsewhere with activities in Europe and/or with European organisations. They can be categorised as such:

- **Membership organisations**

Convening organisations - mainly foundations but increasingly other legal forms and also individuals - with an interest in philanthropy and social investment at a European level such as EFC and EVPA. Some are networks of networks and bring together existing membership organisations such as DAFNE (Donors and Foundations Networks in Europe).

- **Networks**

Collaboration platforms for institutions and individuals who wish to exchange information and/or actively work on projects together. Examples are The Funding Network or the Network of European Foundations (NEF).

- **Academic research**

Frequently established in academic institutions focused on philanthropy and undertaking research on European issues. Also includes expert NGOs and think tanks such as the European Center for Not for Profit Law.

Respondents in this study (n=51) reflected a representation of these organisations, as well as their members and/or funders and external stakeholders such as policy makers. However, this study was not intended to be a comprehensive mapping or analysis of organisations in the EPSII ecosystem. A more expansive study in this direction would be of great value also taking into account some of the fee-based advisors which sometimes take on roles of EPSII organisations and have a notable effect on the ecosystem as a whole.

In addition to understanding the various forms of EPSII organizations, another important contextual basis for this study relates to the institutional, social, political and economic trends affecting the European philanthropy and social investment sector.

To an attentive observer of developments in Europe it may not be a surprise that some issues raised by respondents reflected an energy of more concern than optimism:

- *An increasingly visible debate among the public questioning legitimacy and transparency of wealth holders and their philanthropic activities.*
- *Social welfare policies and fiscal issues affecting relationships between foundations and governments, especially considering the added complexity of national vs. European policy making efforts.*
- *Rapid technological and digitisation advancements, with more debates about how this will affect citizens, private life and society overall.*
- *Political actors from all ends of the spectrum raising new debates about the role of foundations and civil society in Europe, and in some places, this is leading to a shrinking space.*
- *Generation changes taking place in the senior leadership of established foundations in Europe.*
- *Increased number of wealth holders and a new generation of entrepreneurs with different expectations and approaches to philanthropy and social investment, especially with regards to creating financially sustainable models at the intersection between non profit and business.*
- *A diverse set of new institutions entering the market of philanthropy and social investment advisory (companies, banks, advisories, investment funds etc.) with activities similar to EPSII organisations (which are primarily non profit) such as networking and research.*



Literature Review

The philanthropy and social investment sector is growing and changing. Goldseker and Moody (2017) forecast a further increase of philanthropy in the next years with a new generation of philanthropists focused on measurable impact, active engagement in funding and fewer concerns about blurring lines between profits and philanthropy.

This growth directly affects the Philanthropy and Social Investment Infrastructure (PSII). Throughout this report, PSII is used as a term to indicate activities that are undertaken by organisations dedicated to strengthening, promoting and protecting the sector of philanthropy and social investment. However much the sector appears to be expanding (and with it, an increased number of infrastructure support organisations), the literature review conducted for this study reveals limited data and publications.

On a global scale, the median income of philanthropy support organisations increased from 600k USD to 800k USD between 2014 and 2017, with a heavy

emphasis in North America where an estimated 80% of infrastructure spending is allocated (Knight, Ribeiro, 2017). In the United States, total spending on philanthropy and non-profit infrastructure was reported as 0.6% of overall giving⁴, with 191.9m USD reported in 2015 of which 76.9m USD was for philanthropy infrastructure (Foundation Center, 2018). The growth of PSII spending is globally uneven as indicated by the high share of funding within North America. Europe is the second largest market, followed by Asia which is considered the most dynamic and high growth yet has less established infrastructure (Knight, Ribeiro, 2017; Milner, 2018).

Looking to Europe, studies report 154.000 European foundations are allocating an estimated 60bn EUR per year, with 40% having been established this century (McGill, 2016; UBS, 2017). Data on social investment markets in Europe suggests rapid growth: 2015 European impact investments were estimated at 98bn Euro, compared to 20bn in 2013 (Eurosif, 2016).

⁴ Based on giving by 1,000 largest US foundations.

While there are no specific data on the extent and / or distribution of funding for European Philanthropy and Social Investment Infrastructure (EPSII) activities per se, observations and informal data indicate a steady increase in European funding, transitioning from a historically more US donor supported sector. This has led to growth in EPSII with now more than 30 organisations active (includes international organisations active in Europe but excludes commercial players).

A majority of publications on this subject originate in the United States, with some global studies undertaken by WINGS, a leading PSII organisation that includes more than 100 members from 40 countries. Publications specific to Europe tend to focus mainly on topics related to promoting a more enabling environment for philanthropy and social investment (legal and fiscal issues) and are published mainly by the European Foundation Centre and DAFNE, often in collaboration with regional and global NGO expert organisations such as the European Center for Not for Profit Law and academic experts in this field. Another important source of data is EVPA, who are actively publishing studies on trends in venture philanthropy and social investment in Europe. However, there are no studies analysing, EPSII's size, structure, membership scope, economic models, budgets, focus topics, funding flows and specific areas of impact. This is an area of research that merits more focus for a better understanding of EPSII today and how the sector can further develop in the future.

The literature review undertaken formed an important backdrop for analysing the key findings of this study. A majority of challenges and opportunities facing PSII organisations and sectors globally cut across borders and appear to be relevant to Europe. For example, publications such as *"The Nonprofit Quarterly Study on Nonprofit and Philanthropic Infrastructure"* (Brown et al., 2009) and Council on Foundation's *"Effective Collaboration: Recommendations for a Connected Philanthropic Infrastructure"* (2010) mention several similarities as those in this study, yet were written almost 10 years ago. Of the nearly 100 publications reviewed, three main themes relevant to Europe emerged and are described below.

Balancing act: Serving members vs. developing a sector

PSII organisations are often expected first and foremost to represent and serve the sector - in creating a more enabling environment, help to build capacity and promote awareness of actors outside the sector (Gaberman, 2004). However, there is also an expectation of PSII organisations to be thought leader and undertake activities that develop vision and lead the sector toward increasing impact, volume and sustainability.

A key theme in the literature review resonating with Europe is the challenge organisations face, expressed as a 'tension point' between serving members versus serving the sector. A majority of organisations are member based and fees are often perceived as a transaction cost for direct service (e.g. representation, convenings and events, training etc.) rather than to strengthen the sector (research studies, advocacy efforts). Independence is another issue: Thought leadership requires some level of objectivity, yet many organisations find it challenging to achieve balance on the delicate seesaw of members' positions and expectations, which can sometimes fall at odds with issues that need to be addressed (Milner, 2017b).

These tensions cannot be resolved without re-considering the economic models and financial sustainability of infrastructure organisations (Brown et al., 2009). According to WINGS, a majority of PSII organisations (72%) report challenges with sustainable income models due to heavy reliance on grants (Knight, Ribeiro, 2017). They are under constant pressure to grow membership (for increased income and representation), and diversify income with fee based services and activities. Not surprisingly, a significant part of the literature - especially those published by PSII organisations themselves - appear to target potential funders and justify the need for infrastructure, whose value is often perceived as greater in times of crisis. For example, Fine et al. (2018) point out how support for many infrastructure organisations was quickly renewed in the US after the 2016 election. The key findings of this report suggest a similar trend in Europe, given increased right-wing movements and more limitations on civil society.

To collaborate or not to collaborate: That is (not) the question (anymore)

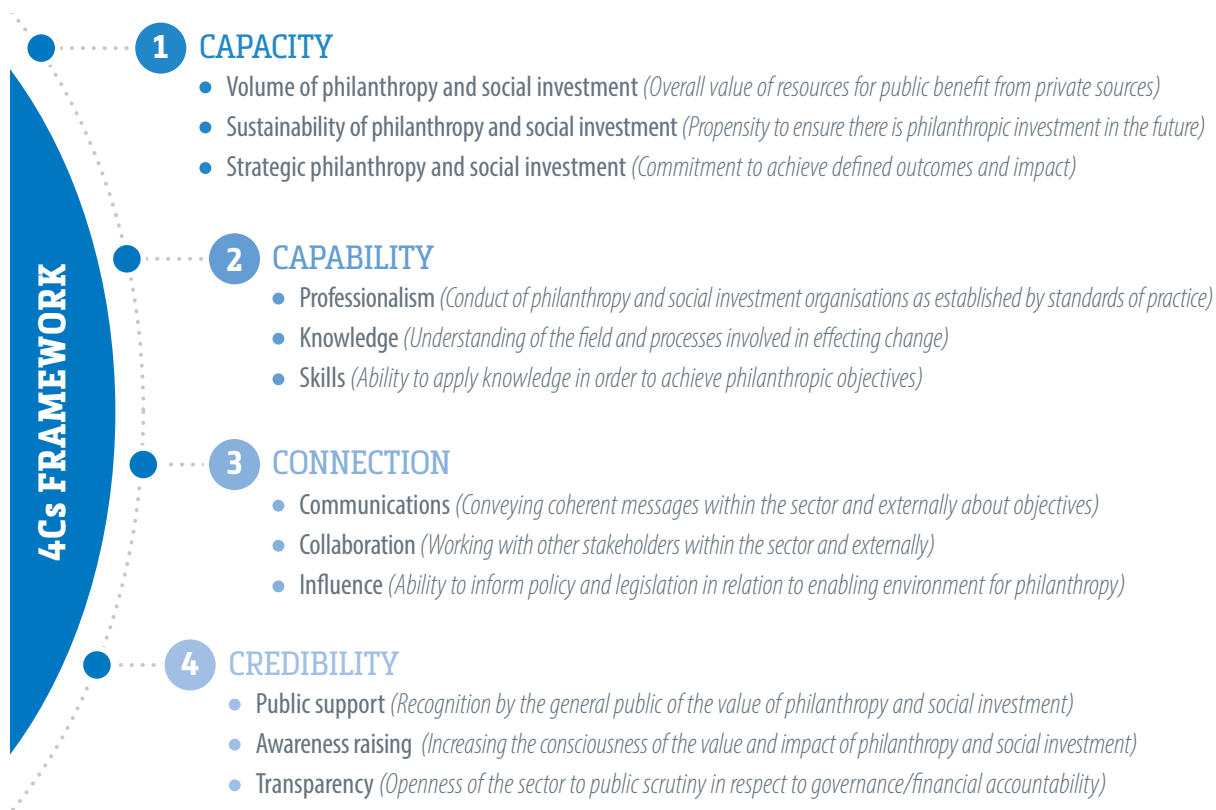
The call for collaboration in philanthropy is increasing. Complex, interconnected challenges of society require collective approaches and coordination for effectiveness, efficiency and greater impact.

Recent trends indicate a greater awareness on the value of collaborations and there are scores of studies on different forms and how they can be successful, highlighting challenges, complexities and varieties (Simonin et al., 2016; Kania, Kramer, 2011; The Bridgespan Group, 2014; Future Agenda, 2017; Ehrlichman et al., 2018).

In practice, there are a number of platforms and organisations formed to support collaborations among donors. Some are thematic such as the global SDG Philanthropy Platform, and others based on specific issues (e.g. Ariadne, EDGE Europe) and/or geographies (Network of European Foundations/ NEF). All are forming an important sub sector of a growing ecosystem - which may be why in recent reports, WINGS proposes shifting the language of this field from 'infrastructure' to 'ecosystem' (Knight, Ribeiro, 2017; WINGS 2018).

With an increasing diversity of PSII organisations, donors could find themselves signing on as a member and/or funder to at least 3 or 4 different groups - and then deal with the question of which one to prioritise. This presents a great opportunity as well as a critical need for clarification and coordination to prevent fragmentation and duplication among PSII. In cooperation with DAFNE, WINGS developed a very useful 4Cs (Capacity, Capability, Connection and Credibility) framework (WINGS, 2017a). Such frameworks valuable as they present a common language and can help clarify and classify PSII activities which can make it easier to explore collaboration areas.

While the number of PSII collaborations globally is not significant, some movement in this area is observed in the United States. For example, in 2014, a collaboration between three Californian grantmakers associations was formalised and continued under the brand "Philanthropy California". In 2017 the United Philanthropy Forum (formerly Forum of Regional Associations of Grantmakers) opened up its membership for national infrastructure organisations. Both cases underscore that collaborations within the PSII sector is not merely discussed but also implemented, and serves as a trend that is likely also to emerge in other parts of the world.



Based on WINGS, 2017a

Advocacy without data: Infrastructure's digital divide

In the book *"The Givers: Wealth, Power and Philanthropy in a New Gilded Age"* (2017), David Callahan analyses how philanthropists are increasingly active to shape government policy. While Callahan focuses on the US, a similar development can be observed in Europe⁵. An analysis by Perez (2017) sees the number of foundations registered in the EU transparency register sharply rising in recent years. In fact, striving for systemic and collaborative solutions via advocacy is of great relevance for PSII organisations who often serve as a platform to advocate for policies affecting the sector and other critical social issues (Fine et al., 2018; Brown et al., 2009).

In the case of Europe, there is the continent itself which shares some traditions and similarities in its socio economic development. Yet there is also the European Union, which has actual regulative power for its 28 members. Although there is no single market for philanthropy in Europe, EU legislation is increasingly influencing national legislation (e.g. General Data Protection Regulation (GDPR)) and hence there is a need for an enabling environment at the EU level as well⁶. Also, there is a shrinking space for civil society in some European countries and stakeholders often look to EPSII organisations for support (Lilly Family School of Philanthropy, 2018). As such, EPSII organisations for certain face a particularly challenging scenario when it comes to advocacy efforts.

In line with these findings a recent WINGS survey revealed advocacy as a top priority of EPSII organisations. In contrast, PSII in North America reported developing technological capacity as a first priority. While they may seem like two different issues, in practice they are closely linked - as data is a critical component of high impact advocacy. The availability and accessibility of data on funding allocations of philanthropy and social investment organisations directly affects its **transparency** which in turn affects its **credibility**. And without these the sector faces great challenges in undertaking successful advocacy initiatives (Knight, Ribeiro, 2017).

This challenge is particularly prevalent in Europe. According to Carnie (2017): *"...Uncovering philanthropy in Europe can be a frustrating process. Especially if you are used to the openness of a sophisticated philanthropic market such as the USA."* Limited transparency, which can also vary due to different national requirements⁷ makes it difficult to strengthen data-led initiatives, which leaves the sector an easy target for criticism. The existing literature on this topic clearly conveys the price of choosing not to be transparent as high and bearing risk: *"if you have a public purpose, and foundations certainly do, the public wants to know: What are you doing?"* (Smith, 2010).

⁵ In some countries, e.g. Germany, there is a tradition of "operating" foundations and many have had a policy focus for several years.

⁶ In May 2018 DAFNE, EFC and EVPA co-hosted the first Philanthropy Scrum, an event to discuss opportunities of a single market for philanthropy with European policy makers. Another overview on the legal situation and context is Breen (2018).

⁷ According to Carnie (2017) as of 2015 there were no requirement to make public the annual reports of foundations in 8 European countries.



Key Findings

This section summarises the key findings and conclusions of interviews with 51 key stakeholders identified by the Steering Committee of the EPSII study, all of which represented different actors in the EPSII ecosystem. Questions were asked about views on present offerings and value added of EPSII organisations, and future needs and gaps regarding the future of Philanthropy and Social Investment Infrastructure in Europe. The following six key findings are expressed in a ‘from - to’ paradigm, indicative of where EPSII is now and where its stakeholders wish to see it the future.

- 1 From coming together to acting together
- 2 From building capacity to enhancing competency
- 3 From analysis to action
- 4 From analog to digital
- 5 From passive to active engagement
- 6 From general support to strategic alignment

1. From coming together to acting together

Convening peers in the philanthropy and social investment sector is viewed as one of the most valuable contributions of EPSII organisations. Their value in *'creating and fostering a community'* was repeatedly expressed throughout this study. EPSII stakeholders greatly value face to face interactions to share knowledge, connect, support and trust one another. Yet, they are also feeling increasingly overwhelmed with multiple events that have a high degree of overlap and express a desire for more diverse attendees and topics/meeting design approaches.

“There is some level of coordination - for knowledge sharing - but NOT for action.”

EPSII organisations themselves also view convening as a key function and express great pride and satisfaction with the value added to the sector. Yet, they do question how the traditional role of brokering relationships is changing given technology and open sources of information allowing for direct access without needing a personal introduction. Organisations - whether or not they are members of an EPSII organisation - can find and connect with one another much easier as compared to 20 years ago. Also, the European and global meeting space is much more robust today, making it easier to network with peers.

Both EPSII stakeholders and organisation leaders share the view that leveraging relationships and assets are necessary for the future. They express the need to build on 'coming together' and move more toward 'acting together'. In this light, there are two specific actions expected from EPSII organisations: **To create a stronger, clearer common agenda for European philanthropy and social investment, and develop a roadmap toward joint action and more collaboration among EPSII organisations.**

“There is a change in the way people want to be philanthropic and its changing the functions and definitions of philanthropy.”

There are of course opportunities and threats raised with regards to realising these outcomes. While EPSII organisations may have specific types of members, the sector is also attracting a more diverse array of actors (nonprofit and commercial) engaging on

topics such as venture philanthropy, participatory grant making, human rights funding as well as creating platforms for joint programme funding.

As such, the diversity of organisations in EPSII is perceived as a strength and an opportunity for the sector to increase impact - particularly the volume and sustainability of philanthropy and social investment and promoting a more enabling environment. However, a commonly perceived threat is the **lack of a common agenda and plan for collaboration among EPSII organisations**. In fact, many referred to the growth of the EPSII ecosystem as *'fragmentation'*. There is a very high - and rather urgent - expectation for EPSII organisations to develop a common agenda and pursue concerted action together. Stakeholders express this under three headings: **Boosting organisational efficiency** (leveraging human, financial, logistical, technological assets), **increasing effectiveness** (joint event and programmes, bundling fees and services) and **engaging in joint action** for social and systems change and policy impact (joint action in advocacy, encouraging more operational collaboration among members).

Stakeholders also strongly express the need for more clarity of roles and greater collaboration among EPSII organisations. Without prompt action, some organisations may start to lose relevance and their base of membership and funding, and weaken the EPSII sector overall.

2. From building capacity to enhancing competency

EPSII organisations are highly regarded for their contribution to increasing the capacity (professionalism, knowledge and skills) of the sector. This study revealed a significant appreciation for the quality of publications and formal training opportunities offered for new comers as well as more experienced professionals. The value of both formal training (EVPA) as well as more non-formal peer-to-peer learning (DAFNE, EFC and others) opportunities presented by EPSII organisations was noted as critical for building capacity of professionals, with a clear request for more in the future.

“Capacity /kə'pasiti/: The amount that something can produce
Competency /'kɒmpit(ə)n/: The ability to do something successfully or efficiently.”

Frequent reference was made regarding the increase and value of special interest groups, such as those focusing on different **forms of philanthropy** (participatory grant making, venture philanthropy etc.) **issue areas** (human rights, migration etc.) and **professional topics** (communication experts, endowment managers etc.).

There were also some topics in which stakeholders expressed the need for greater competency going forward, including:

- **Asset and risk management**

Acquire insights and skills needed to manage new risks (programmatic and financial) brought on by the onset of impact investing and other programme/mission related investment activities. Tools and techniques for impact measurement was noted as a critical topic.

- **Techniques and tools for scaling programmes**

Increasing need for skills and tools to successfully scale programmes, nationally and across Europe.

- **Understanding and applying technology**

More learning opportunities to help effectively utilise technological tools to increase efficiency and impact.

- **Communications**

More effective management of competency in internal and external communications, with a call for more PR, social media and community engagement skills and tools.

In building greater competency, it was suggested that EPSII organisations make efforts to utilise the human resource assets of actors in the field (e.g. members of EPSII organisations) and increase connections with academic and other subject matter experts.

3. From analysis to action

Advocacy, lobbying and communicating the sector to external parties (law and policy makers, media, thought leaders, etc.) was by far the most frequently discussed topic in this study.

EPSII organisations are perceived to have expertise, voice and influence and increasingly called to the table by EU and other actors. They are viewed to have some degree of success in undertaking **policy analysis** (studies to analyse and present discussions on policy issues) often in cooperation with academics and other subject matter experts and **policy advocacy** (efforts to actively **inform** policy/law makers and other opinion/decision makers) with regards to both the sector itself as well as issues such as climate, education, migration, disability.

However, a majority of the study informants express limitations of efforts to **lobby (organised attempt to influence politicians on a particular issue⁸)**. Some members of EPSII organisations (foundations in particular) are often less keen to be visible in such efforts and in some cases, are legally prohibited. This can delay and sometimes prevent existing advocacy efforts to move to the next level of active lobbying. In cases where EPSII organisations were recipients of EU grants, conflicts of interest were noted as another tension point.

“

We do not explain ourselves well.

”

The weakness in external **communications** was also cited frequently as a competency directly related to EPSII's ability to effectively pursue **policy advocacy** (informing and communicating proposed changes) and **lobbying** (actually influencing decisions). For some, EPSII's inward focus was raised as source of this concern. Looking to the origins of EPSII, efforts have been focused on constructing a solid and strong European sector. Much to the merit of EPSII efforts, stakeholders now see the sector being well-established but needing to engage more with external actors - from law makers to the public - to *'articulate the value of philanthropy', 'de-mystify philanthropy for the public'* and *'be more open about experiments, successes and failures'*. To this end, EPSII is being called upon to adapt a *'future focus'* and assume the role of **thought leader**.

“

EU level policies are coming to play - Tax evasion, corruption, FATF, counter terrorism... we need to be ready to address this and be clear, and work with other key stakeholders.

”

“

Whatever (EPSII) does and does not do, we are out there doing our thing; if they don't evolve and understand and remain very inward looking then they can't do a service; miss the forest for the trees.

”

With regards to external communication, stakeholders express that EPSII organisations could be doing more to increase transparency. In their view, this is critical for safeguarding the public's trust in the sector. There is a sense that EPSII organisations are not prepared to respond to current (and anticipated future) negative public debates about *'why private money for public good is better than public money for public good.'*

“The EU says: You are not big enough as a sector, we don't understand who and what you are - you are too horizontal to challenge the constitution.”

Stakeholders have serious concerns about an imminent political attack, particularly on foundations. The increasing unequal distribution of wealth, Brexit, political and social extremism and possible destabilising outcomes of upcoming EU elections are trends which many fear could have negative implications and threaten an already shrinking space for foundations and civil society. Sector specific policy concerns also include cross border philanthropy taxation, VAT, single market, counter terrorism and money laundering legislation that can pose great limitations on philanthropy in Europe.

There is a concern about lack of coordination among various EPSII organisations when it comes to advocacy and / or lobbying. EU policy makers and experts that contributed to this study are seeking what they refer to as *'one voice'*. Stakeholders within the EPSII space agree that a lack of unity could divide and lessen overall impact. The challenge of facilitating one voice for philanthropy in Europe was also acknowledged, given the immense diversity of the sector, legal forms and activities, especially across member states.

A tension point of representation versus influence when it comes to advocacy and lobbying was acknowledged. EPSII organisations have several different forms, as stated in the Introduction section. Some have a broader membership base and some smaller, albeit perhaps highly influential members. This wide range of diversity presents challenges for EPSII organisations in aligning advocacy, lobbying and communication efforts - especially if some members are concerned about working on topics which are important for the sector but not necessarily in their members' direct interest.

There is a recognition of promising joint initiatives pursued by EPSII organisations (Breen, 2018; DAFNE,

EFC, EVPA, 2018; Lilly Family School of Philanthropy, 2018) with the goal of leveraging legal expertise and relationships. A particularly valuable opportunity for collaboration among EPSII organisations is the increasing number of national philanthropy support organisations and/or national foundation networks that serve as critical connectors to national policy makers to influence legislation at the European level.

4. From analog to digital

With a great deal of market interest in all things data related, philanthropy and social investment actors have a unique opportunity to use and apply data for public good. The future of EPSII will also depend highly on data. EPSII stakeholders share a common view that without an immediate and greater emphasis on data, the sector will be significantly weaker and miss out on opportunities to maximise impact.

“We know what EU is spending but what are other foundations doing?”

This observation is revealed in two dimensions; one is **internal**, on collecting and sharing data about the foundation and social investment sector to increase transparency and communicate the role and activities of the sector. The other is **external**, regarding on how aggregated and comparative data can be used to further social impact in areas of housing, education, migration and other core topics.

Internally, the lack of itemised and publicly available data about what foundations and social investors are doing, how much they are spending and other critical data points is a significant and immediate concern. Without this information, it is much more challenging to communicate EPSII's societal impact to external actors in policy and media. A majority of respondents express the need for a model /service similar to the US-based Foundation Center.

Externally, efforts to use data to assess and fine tune the particular areas foundations are investing in and further explore meta trends such as the influence of data privacy, AI and other developments are currently very limited. Greater application of digital technologies and data presents an opportunity to increase the impact of philanthropy and social investment, in terms of how problems are selected, how resources are allocated, whom to partner with for greater scale, and most importantly, measuring impact and

meaningful conclusions on interventions. This is particularly important as new and more sophisticated financial instruments (social impact bonds etc.) are being applied. Data is needed to understand impact so that better services and infrastructure solutions can be co-created and scaled.

Respondents suggest EPSII organisations should promote greater reflection, dialogue and action on these topics, with a call to action for creating and capturing success stories on the intersection between philanthropy, social investment and data.

5. From passive to active engagement

A popular indicator of EPSII organisational success (on behalf of both members and leadership) has been the size of membership. Yet EPSII stakeholders are clearly seeking more specific indicators of performance and impact.

“Infrastructure helps us look beyond the edge of our nose- policy and programme issues - in the sector.”

Membership trends are a reflection of many variables. While there may be opportunities for increased recruitment, it is also plausible to consider that the market of existing actors interested in Pan-European philanthropy and social investment is in fact not so extensive. There may also be other actors interested in a dialogue on Europe which do not align with EPSII values of democracy and open societies. Even less prevalent are actors actively interested in working in the international realm and discussing topics related to Europe in the world.

“By and large people coming into philanthropy don't see themselves as part of a sector and don't see themselves as responsible to the sector.”

Furthermore, there is increasing awareness and frustration with regards to passive membership. To use a comparison from social media impact assessment, this is akin to having 'followers' (passively reading content) versus 'engagement' (liking, sharing, commenting, etc.). Yet engagement requires stimulus to spark interest, which requires a purposeful and strategic approach.

Membership has a direct effect on EPSII organisations' financial sustainability. Many prefer the membership form, while there is increasing recognition that this

may not always be relevant, for achieving the ultimate purpose of the organisation. If an organisation is not necessarily representing a topic or issue (engaging in active lobbying for example), alternative models can be an option.

6. From general support to strategic alignment

Approaches to funding EPSII organisations was another key discussion point in this study. The beginnings of EPSII were heavily funded by American donors, which helped to build many of the institutions and programmes in place today. **In recent years, the trend is shifting toward European donors and indicates increased funder engagement for strengthening the sector of European philanthropy and social investment.** This support has allowed existing organisations to grow and helped several new EPSII organisations to emerge.

“We want to make a programme support grant; on an annual basis in a fund that can be used for these expenses; and that it does not appear on the admin side but rather from grant making. We should accept that member fees will not (be enough) to cover the costs.”

Funding for EPSII organisations (outside of membership and event fees, and often referred to as 'member fees plus') can come in two forms: Loosely defined **general purpose grants or project specific grants**. Both are extremely valuable for organisations, which often do not have quantifiable programmatic results many funders often seek. Ford Foundation President Darren Walker (2019) touches on the importance of funder support stating: *“...we must trust those we fund, and fund them adequately to do what they believe is best, not what we think is best. This means putting ourselves in the shoes of prospective grantees and communities, treating them like partners rather than contractors, and entrusting organisations with long-term general support funding and project grants that provide adequate overhead. It means acknowledging the power imbalance that often makes our grantees reluctant to engage honestly and authentically.”*

“If there is a need to move away from grants, it should not limit intellectual freedom, boards and governance. There is no need to create more strings with grants, as grants keep EPSII in a patronage relationship.”

With a greater number of EPSII funders coming on board, there are more opportunities for dialogue on practices and approaches to funding as well as coordination and transparency. Duplication of activities and missed opportunities for synergies risk lowering impact of otherwise quite valuable initiatives. **This study reveals that strategic alignment and transparency of EPSII funders is perceived by stakeholders to be as critical for effectiveness as collaboration among EPSII organisations themselves.**

The call to action of EPSII funders is for more donors to contribute beyond member fees and not to view these contributions as an administrative cost, but rather as a critical contribution to the sector. Respondents in this study call for more engagement, stating that *"free riding is an issue!"*. Enlightened foundations (those aware of the importance of funding EPSII not only as a member but as a contribution to the sector) express that they should be more active in convincing their peers to contribute.

A final and quite critical point raised in the interviews was the increase in managing multiple EPSII organisation member fees and funding requests. Stakeholders reported greater challenges in convincing their Boards of increased engagement. As such, both members and active EPSII funders alike were particularly keen for EPSII organisations to communicate impact more effectively and where possible, increase collaborations with other EPSII organisations, where and when possible.



Conclusion:

The whole is greater than the sum of its parts

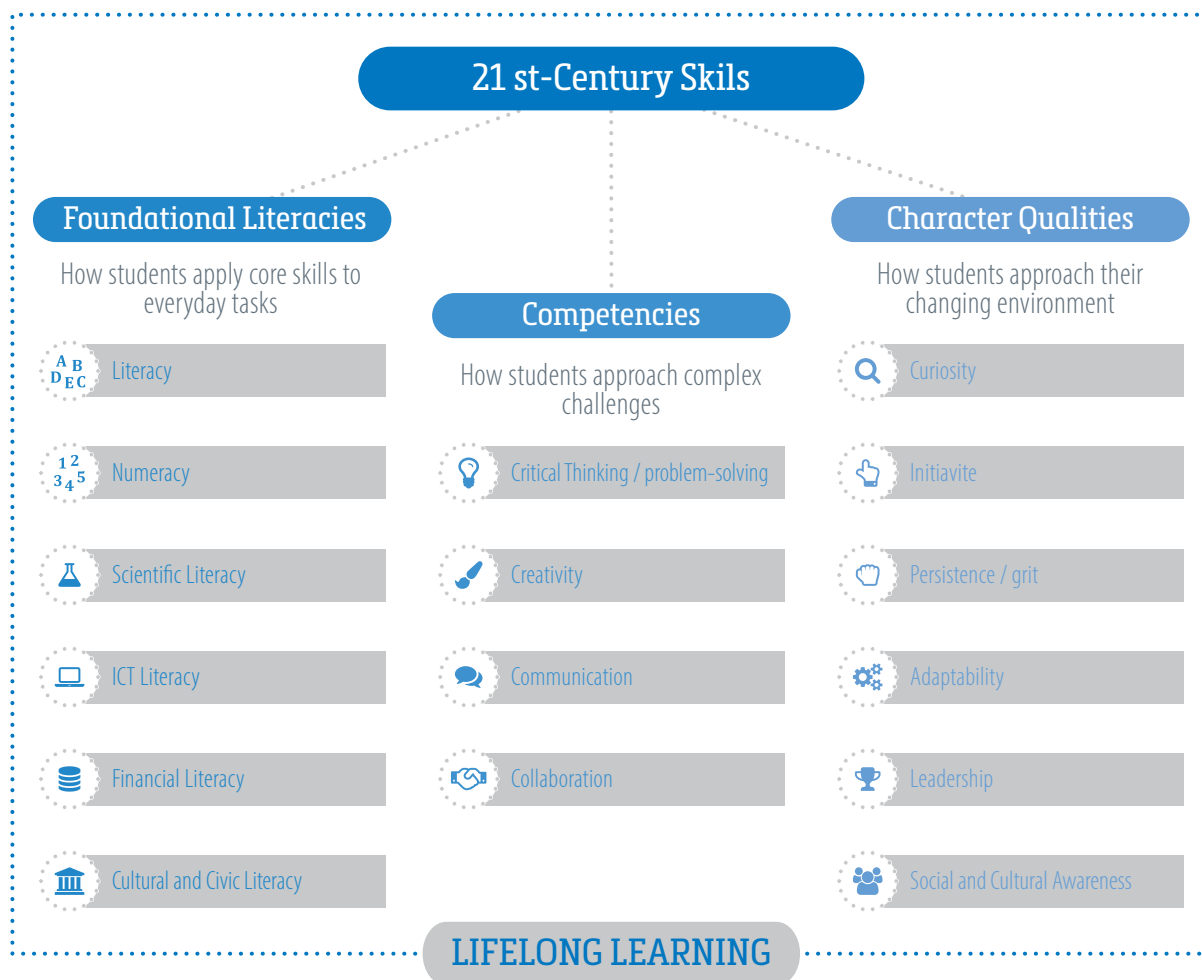
There was one comment mentioned consistently by nearly all of the study respondents: The timeliness of this study and its urgency for building the present and future strength of EPSII. Now that there is a collection of issues to be considered going forward, what next? How can the EPSII ecosystem evolve for the future?

The management of change requires a **paradigm shift** and new combinations of **organisational competencies and individual character qualities**. The main paradigm shift is that **the collective impact of EPSII matters more today than the individual impact of any one organisation**. Or, in the words of Aristotle, the whole is greater than the sum of its parts.

Efforts to create, strengthen, sustain and increase impact of individual EPSII organisations over the years must now include intentional strategies

for **strengthening the EPSII ecosystem and its collective impact**. This brings a responsibility to each organisations' governing leaders, staff, funders and members to ask themselves, *'what can we do with and for the sector, not just our own organisation'* in every decision that is taken.

Paradigm shifts in and of themselves will not suffice - they must quickly and effectively be put into action. The World Economic Forum (WEF) proposed new skills required for the 21st century (Soffel, 2016), and among them are critical competencies and character qualities. While they are often referred to in the context of necessary revisions to educational agendas, they are also essential for individuals in the workforce. EPSII organisations will need to boost competencies in **communication and collaboration**, and pay special attention also to the space in which these two intersect.



Based on World Economic Forum, *New Vision for Education 2015*

With regards to character qualities, all stakeholders in the EPSII ecosystem and particularly those working directly in/with EPSII organisations will benefit from increasing their **adaptability**. Adaptability is often referred to and closely related to **cognitive flexibility** (Schöning, Witcomb, 2017), defined as *'a critical executive function that can be broadly defined as the ability to adapt behaviors in response to changes in the environment'* (Pletnikov,

Waddington, 2016). In the midst of rapid social, political, economic and technological changes affecting EPSII, cognitive flexibility and adaptiveness is even more necessary today. EPSII organisations will require very new and different ways of working together, and as such, these skills and qualities are fundamental for paradigm shifts to truly take place. Only then can EPSII move effectively from the present to the future.



Definitions and Methodology

Definitions and Limitations

The term Philanthropy and Social Investment Infrastructure (PSII) developed for and used in this study and is based on WINGS' definition of philanthropy support organizations: “**organizations that provide a necessary support system for amplifying philanthropy's effectiveness**” (Knight, 2018). For the purpose of this project the definition was expanded to **include social investment**. Yet the focus lies on philanthropy (including venture philanthropy) and social investment infrastructure that is at the intersection to philanthropy infrastructure. The totality of the social investment market, especially more commercial, financial-first approaches, were beyond the scope of this study.

European Philanthropy and Social Investment Infrastructure is abbreviated as **EPSII**.

While working with the term infrastructure to stay in line with the specific focus of the assignment, the **ecosystem perspective** was acknowledged. Not simply the sum of individual infrastructure organisations was considered but their interconnectedness.

The study **focus was on infrastructure and not the philanthropy and social investment sector** as a whole, yet these are closely **interlinked**, e.g. the volume of philanthropic capital in the sector is relevant to understand the infrastructure and the effectiveness of the infrastructure influences the effectiveness of the sector overall.

Methodology

The Terms of Reference that were co-developed by the Steering Committee and Funders provided the basis for Beyond Philanthropy's approach to the project. A research framework and five key guiding questions were derived:

1. What is the view on the **current state** of the EPSII as a whole?
2. What **trends** can be observed in regards to the philanthropic and social investment support infrastructure sector?
3. What is the view on **future needs**, expectations of the EPSII?

4. How are *EPSII organisations currently structured* to meet needs/trends and expectations of the sector?
5. What are *critical success factors* and competencies needed for a high impact and sustainable EPSII?

The analyses were structured along the outcome areas of the 4Cs framework developed by WINGS and DAFNE (WINGS, 2017a) to evaluate philanthropy infrastructure organisations. The use of an existing framework helped to position the study in a wider context and provides a basis for comparability with other infrastructure research.

This research study included three main activities:

- Qualitative semi-structured *interviews* (1 hour) with 51 stakeholders. Interview partners were determined and prioritised together with the Steering Committee and comprised of staff and board members, members, potential members and key funders from the three involved infrastructure organisations (DAFNE, EFC and EVPA) as well as other PSII organisations and funders, experts (e.g. academia) as well as public sector stakeholders (esp. from the European Commission). Many interview partners members and funders were identified to be involved in more than one organisation.
- All interviewed persons were invited to an *online survey* in which 39 took part. The survey comprised of 9 questions and focused on the perceived difference between the general benefits of infrastructure and the actual effectiveness of the current infrastructure.
- As part of the literature review, a total of 100 publications and reports were screened and around 70 were analysed more deeply. A strong focus was on *collaboration, cooperation, and collective action* among both foundations and non profit organisations (lesser specific publications on this vis-à-vis PSII). This contradicts what we say in the report! A significant share of this is published by Alliance Magazine and WINGS.

All sources were clustered and analysed along the guiding research questions, 4Cs framework and overall structure of report. Interview findings and online surveys were in analysed and clustered in subgroups (e.g. funders views; organisational

affiliation). The focus of the study was qualitative and given the non-randomised selection of interview partners the statistical validity is limited. Findings and recommendations are based on a combination of the analysed data inputs.

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