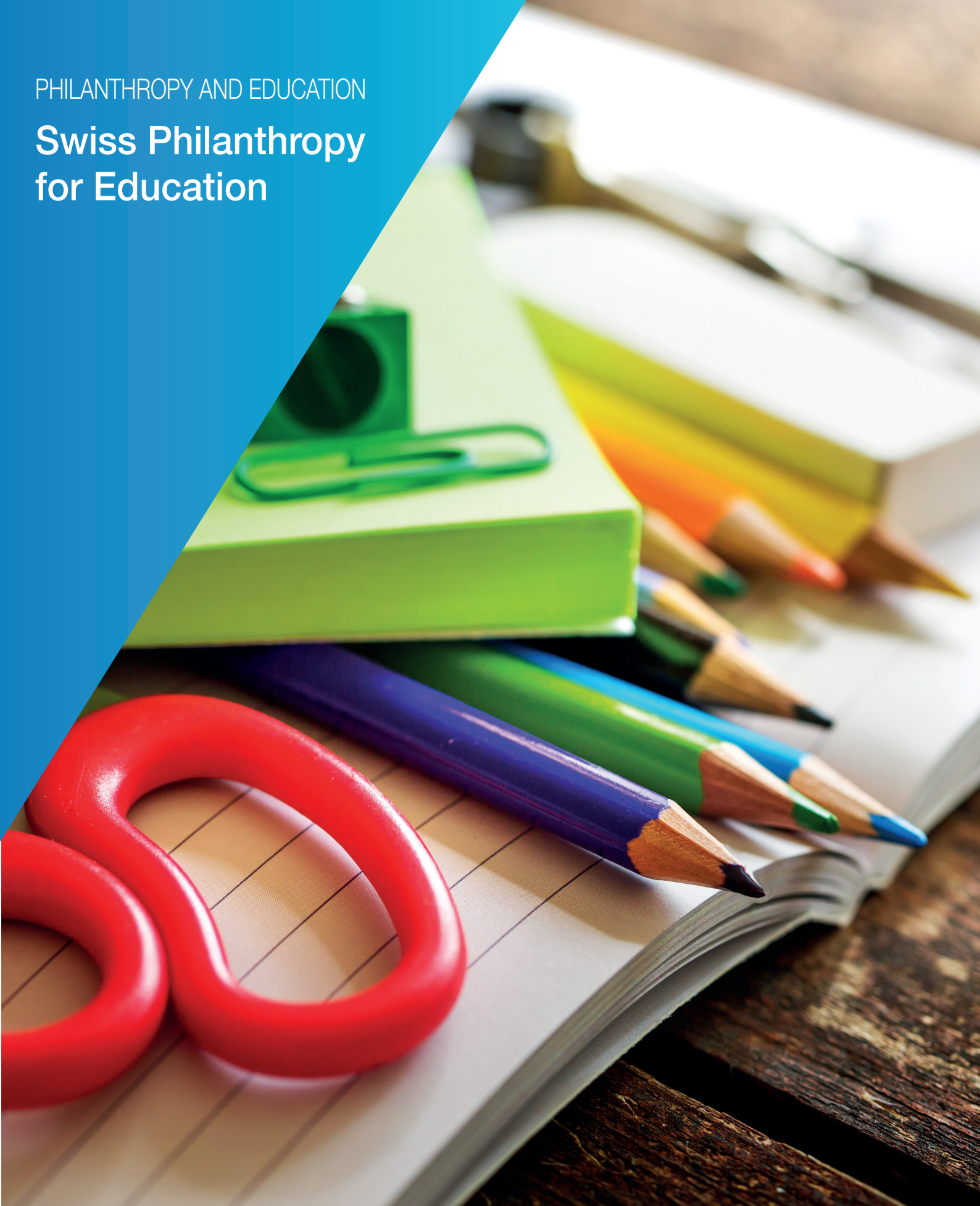


PHILANTHROPY AND EDUCATION

# Swiss Philanthropy for Education



**OECD CENTRE ON PHILANTHROPY**  
Data and analysis for development

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BETTER POLICIES FOR BETTER LIVES

PHILANTHROPY AND EDUCATION

# Swiss Philanthropy for Education

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## Abbreviations and acronyms

<b>CRS</b>	Creditor Reporting System (OECD)
<b>DAC</b>	Development Assistance Committee (OECD)
<b>KPI</b>	Key performance indicator
<b>NGO</b>	Non-governmental organisation
<b>ODA</b>	Official Development Assistance
<b>OECD</b>	Organisation of Economic Co-operation and Development
<b>SDC</b>	Swiss Agency for Development and Cooperation

## Executive summary

**The objective of this note is to provide information needed to explore points of synergies and facilitate collaboration amongst Swiss foundations and official development agencies supporting education.** The note captures previously non-existent quantitative and qualitative data from Swiss foundations active in education in developing countries and developed countries. It provides insight into the educational purposes and geographies supported by Swiss philanthropy and digs deeper into Swiss foundations' collaboration with other private or bi- and multi-lateral funders, foundations' engagement in advocacy, and their approaches to learning. In order to complement these findings, the note sets out data on Swiss official development assistance (ODA) for education to identify common geographical and thematic priorities.

**Information on Swiss philanthropy for education comprises grant-level data from 19 Swiss foundations.** The reference population of this study were Swiss foundations or legally constituted non-profit organisations that are the owners of private resources, and that provide grants or work on projects in the area of education. The note offers a first insight into the philanthropic landscape of education but by no means provides an exhaustive picture of Swiss educational philanthropy.

Over the period of 2016-20, 19 Swiss foundations allocated USD 522 million to education with the majority of funds being directed to countries in Europe and sub-Saharan Africa. While most recipient countries were developing countries (51 countries, representing 30% of total funding), a larger proportion of the funds was directed to high-income countries (16 countries, or 36% of total funding), including Germany, Switzerland and the United States. In terms of funding volume, the main areas of education receiving support were higher education, educational research, and education in early childhood. The bulk of funding for higher education and educational research went to developed countries, whereas the majority of funds for early-childhood education targeted developing countries.

**The note finds communalities between Swiss philanthropy and official development assistance in terms of geographical and thematic focus.** The top recipient countries of Swiss ODA and Swiss philanthropy for education were located in sub-Saharan Africa, Central and South Asia or East Asia. Swiss ODA and Swiss educational philanthropy for developing countries overlap primarily in the areas of vocational training, primary education and education policy and administrative management.

**Swiss foundations working in education collaborate predominantly with other private donors (i.e. private philanthropy), and hardly at all with bi-lateral or multi-lateral donors.** Still, foundations see many advantages in co-financing projects with other funders. These include risk-sharing, the exchange of expertise and ideas, the expansion of the funding base, and the potential to increase the scale of successful projects. Yet barriers persist to funding collaboration: joint project-development often involves lengthy processes, foundations have difficulties in finding partners with aligned interests, and face constraints in terms of staffing and time. In addition, funding collaboration often lacks support of foundations' boards or staff that might feel attached to narrow missions and well-defined strategies.

**Almost half of Swiss foundations in the sample engage in advocacy on topics related to quality, relevant and accessible education.** In the main, they do this indirectly through their partners (networks, donor collaboratives or grantees), rather than through in-house leadership or advocacy teams. The advocacy strategies that they most commonly use include demonstration pilots, capacity building, and research. According to survey respondents, a central goal of their advocacy is to influence social norms and behaviours.

**Finally, although joint learning has not been the norm, Swiss foundations express interest in developing agendas for shared learning.** These might include persisting research gaps in education relevant to foundations' programming or grant-making activities, and priority areas for peer exchange such as ways to ensure that rigorous evidence is used to inform education policy and practice. They may also include channels for collecting and incorporating feedback from partner organisations into foundations' strategies and good practices to measure success of education programmes.

**In order to foster co-operation and collaboration among foundations and ODA providers, Swiss foundations working in education could take a gradual approach.** The first step would be the consolidation of learning groups in specific areas of education. The second stage would be to adapt their funding modalities in order to respond to local needs and priorities, and to help partners to be more effective through longer-term support. In a third step, they could then lay the foundations for stronger collaboration within and beyond the philanthropic sector.

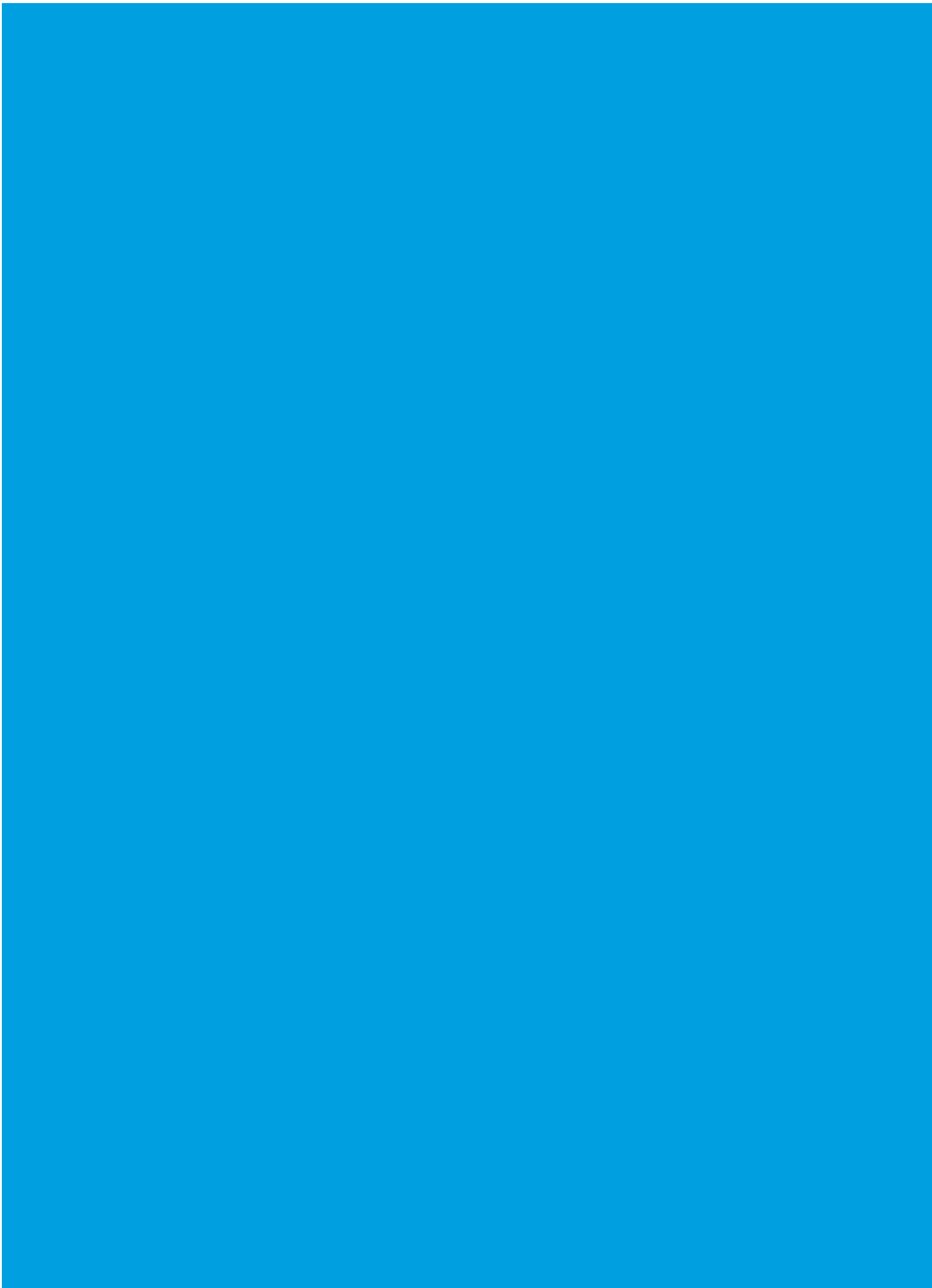
Based on these findings, the present report makes three **main recommendations**:

**Firstly, consolidate funder learning groups in order to develop joint learning agendas in specific areas of education.** These groups help to identify persistent challenges in specific contexts to improve the coverage, quality and relevance of education, to exchange lessons that have been learned both from successful and unsuccessful projects, and to outline further needs for empirical research. While the primary objective of these learning groups is to close knowledge gaps, they can also help to align interests and to build trust, which is important for sharing information and strengthening partnerships.

**Secondly, adapt funding and project modalities to respond to local needs and priorities.** To ensure that foundations' efforts respond to needs that have not yet been addressed and match national priorities, foundations need to seek dialogue with national stakeholders, including local education groups. In addition, foundations may consider providing their implementing partners with longer-term, and in some instances core support, in order to give them more financial stability and flexibility in spending. Foundations could also co-ordinate more, and thus be less dispersed among themselves. They could identify shared goals and priorities in order to form strategic partnerships with larger donors, such as official development providers. Finally, foundations could invest more in innovative finance (e.g. development impact bonds or other pay-for-results mechanisms) and in the evaluation thereof, in order to expand the evidence base on the performance of different instruments that blend public and private funds and mobilise additional funding.

**Thirdly, actively promote co-funding and co-creation.** Foundations could promote internal conversations with senior leadership teams about the potential benefits of collaboration and co-operation with other funders and about how these benefits can outweigh any costs that they may associate with joint project development. They could also consider working with a collaboration broker, which can help to identify and match organisations with shared thematic and geographical priorities, and to facilitate administrative procedures. The broker could be a national association of foundations, a network of foundations, or a donor alliance.





# 1\_Introduction



**OECD CENTRE ON PHILANTHROPY**

Data and analysis for development



This note is part of the OECD Centre on Philanthropy's efforts to address the considerable worldwide demand for more and better open data and analysis on global philanthropy. It analyses Swiss foundations' support for education, both in Switzerland and abroad. Based on a sample of Swiss philanthropic organisations, it provides key figures on the size and nature of philanthropic contributions to education; the purposes and geographical locations that these flows of funding support; and the modalities and strategies that the philanthropic foundations use to achieve their goals. Furthermore, this note also provides insight into foundations' strategies to collaborate with other funders, and explores possible synergies that may allow them to increase both their reach and scope for shared learning. To put findings into perspective, the note also analyses preliminary data from the OECD Centre on Philanthropy's flagship survey and report on *Private Philanthropy for Development*, Volume 2 (OECD, 2021d, forthcoming), which covers 99 large foundations, as well as statistics on official development assistance (ODA) from the OECD Development Assistance Committee.

Swiss philanthropic funders place great emphasis on supporting education. Indeed, over a fifth of Swiss foundations focus predominantly on education and research, according to the *Schweizer Stiftungsreport 2020* (Eckhardt, Jakob, and von Schnurbein, 2020). While the present note is by no means an exhaustive picture of Swiss Philanthropy for education, it provides valuable insight into how Swiss foundations in the sample are contributing to education, their collaboration with other foundations and/or bi- or multilateral donors, their engagement in advocacy, and their approaches to learning. These analyses provide an initial and objective basis for exploring further opportunities for co-operation between Swiss funders of education.

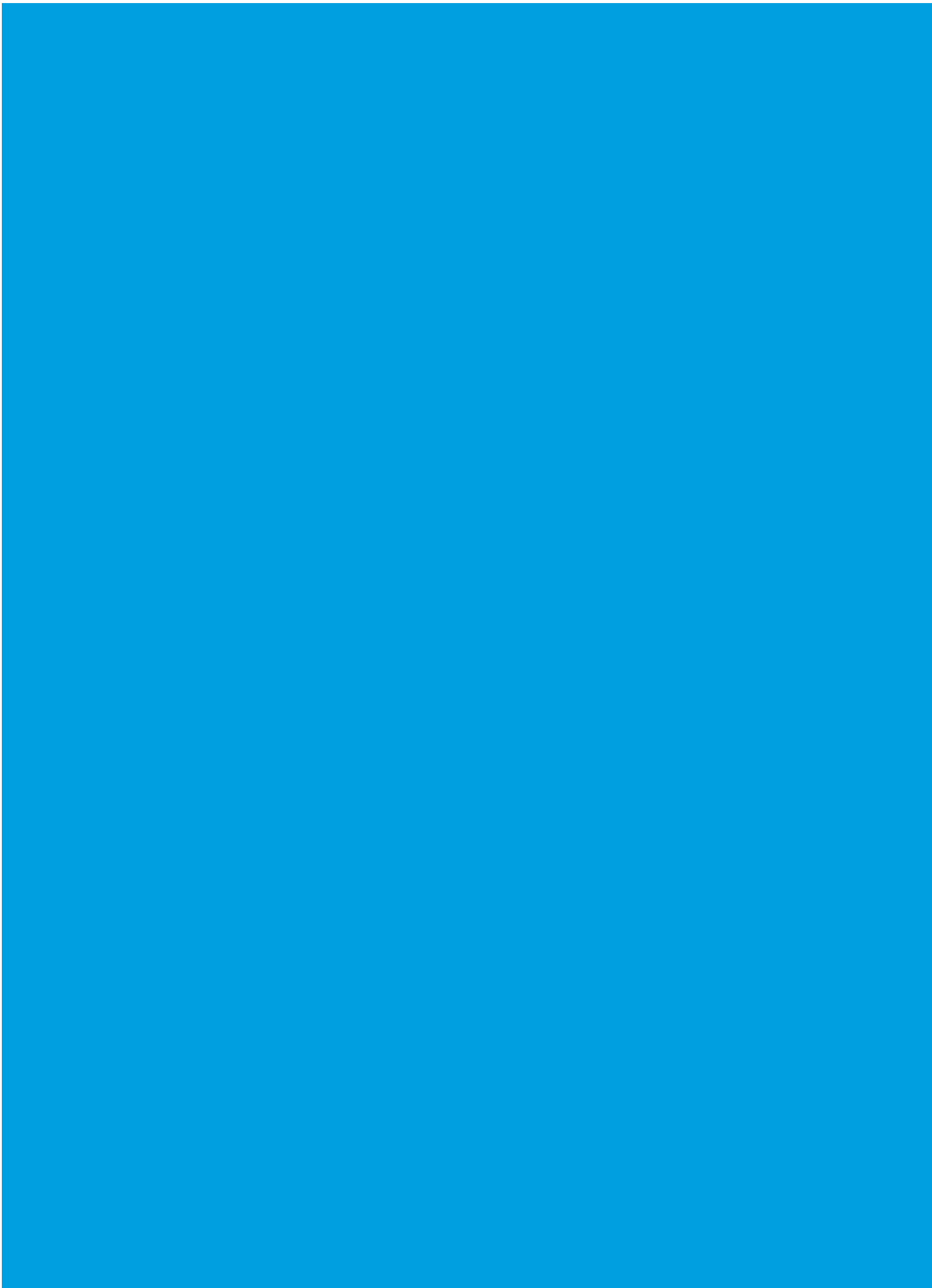
This note comprises information from two surveys of Swiss philanthropic organisations that support education (conducted between March and June 2021), and from interviews with key experts at selected foundations, ODA and providers (conducted in June and July 2021). The surveys comprise two questionnaires, one to collect data on grants and donations as well as projects financed with own funds, profits or loans (OECD, 2018), and another one to gather information on foundations' strategies, namely their collaboration, engagement in advocacy, future funding priorities and approaches to learning. Further information on the methodology is provided in Annex A.

The reference population of this study consists of Swiss foundations or legally constituted non-profit organisations that are the owners of private resources, and that provide grants or work on projects in the area of education. Volunteering and activities financed exclusively by the public sector were excluded from the scope of the study. The survey targeted an initial sample of 167 Swiss foundations that are active in education, identified with the support of Friends of Education,<sup>1</sup> SwissFoundations<sup>2</sup> and the University of Geneva Centre for Philanthropy. A total of 18 Swiss foundations responded to the grant survey and information for an additional organisation, the Oak Foundation, was retrieved from the OECD Creditor Reporting System (OECD, 2021a) and from the foundation's online grant database.<sup>†</sup> In addition, 17 Swiss foundations responded to the organisational survey capturing foundations' strategies.

The data on grants in this note cover the period 2016-20, and are presented in aggregate terms in order to address concerns about confidentiality and to guarantee security for the recipients of the grants.

1. Friends of Education brings together Swiss foundations and shapers of policy such as the Global Partnership for Education. One of its goals is to promote co-investing in programmes and research that have an intentional global policy agenda. It also maps out existing financing and policy instruments and seeks to lead the contribution of philanthropic organisations to the post-2030 dialogue in education.

2. SwissFoundations is a national association of grant-making foundations based in Switzerland and Liechtenstein.



# 2\_Swiss philanthropy for education



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## 2.1. The funding landscape of Swiss philanthropy

### Swiss foundations that are active in the field of education allocated a total of USD 522 million of funding to education in 2016-20

From 2016-20, the combined amount of philanthropic funding from 19 large Swiss foundations amounted to a total of USD 847 million across all of the different sectors that received assistance. The bulk of these funds, or 62%, were allocated to education. This funding represented a total of USD 522 million. Meanwhile, roughly 38% of the overall philanthropic funds, or USD 325 million, targeted other sectors. This included USD 108 million of funding for health, USD 53 million for other social infrastructure or services, and a further USD 36 million of funding for multi-sector projects.<sup>ii</sup>

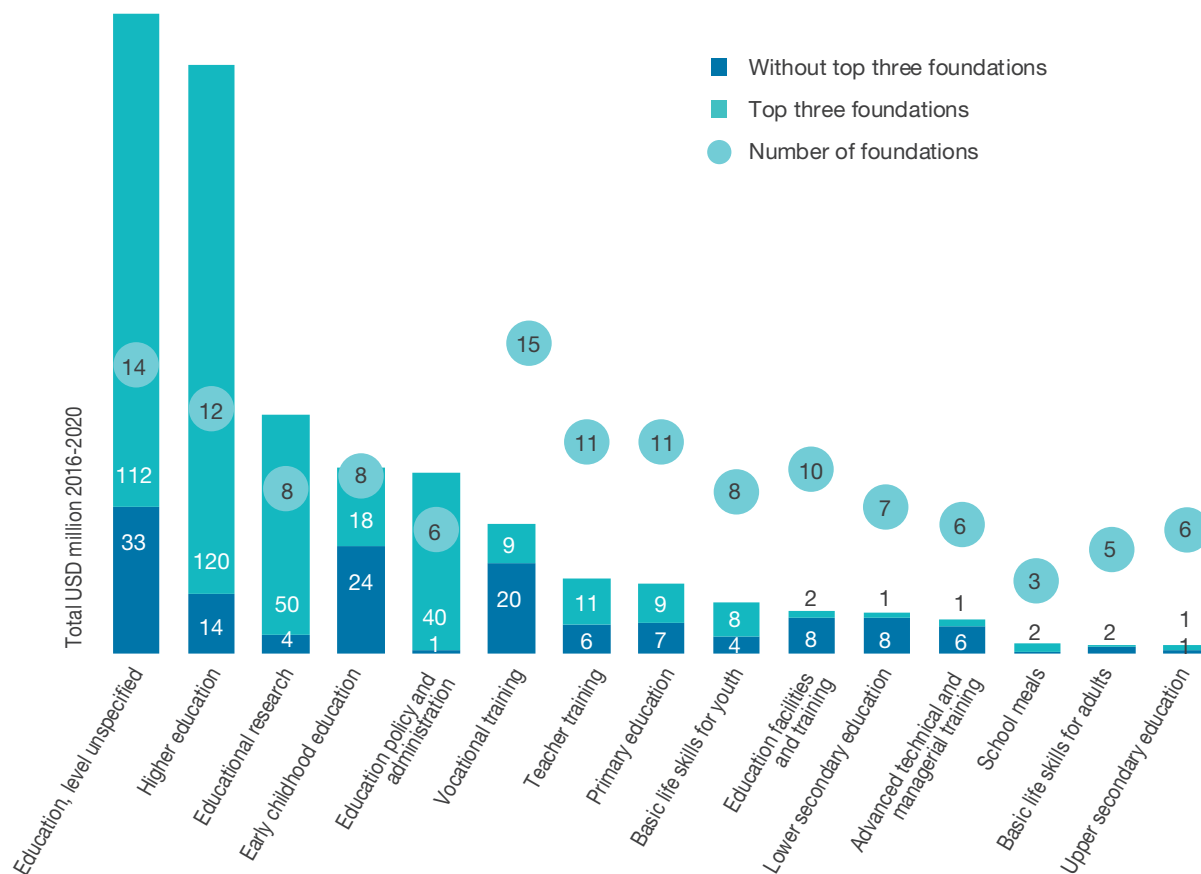
The provision of philanthropic funding for education was highly concentrated among a few foundations, with the top ten foundations providing 97% of the total education-related funding in the sample, or USD 505 million. The three largest funders of education in the sample were the Jacobs Foundation, the Oak Foundation, and the UBS Optimus Foundation. Together, these three foundations provided 74% of the funding for education in 2016-20, amounting to a total of USD 384 million.

### Most Swiss philanthropic funding for education supports higher education, educational research and early-childhood education

A significant share of philanthropic funding for education did not target a specific level of education or single purpose. Still, among the funds that were provided for a specific purpose within education, the majority went to higher education (USD 134 million, 36%), educational research (USD 54 million, 14%), and early-childhood education (USD 42 million, 11%) (Figure 2.1). The top three foundations accounted for 90% of total funding for higher education, and 93% of the total amount that flowed into educational research.

Setting to one side the results of the three largest funders of education in the sample, the top supported education purposes among the other providers of funding were early-childhood education (USD 24 million), vocational training (USD 20 million), and higher education (USD 14 million).

Figure 2.1. Swiss philanthropy for education by sector, 2016-20



### Vocational training and higher education attracted the highest number of supporting foundations

The educational purposes that attracted the highest number of foundations were vocational training (15 foundations), followed by higher education (12 foundations), teacher training (11 foundations), and primary education (11 foundations). By contrast, the least supported areas using this measure, were upper-secondary education (USD 2 million, 6 foundations), basic life skills for adults (USD 2 million, 5 foundations), and school meals (USD 2 million, 3 foundations).

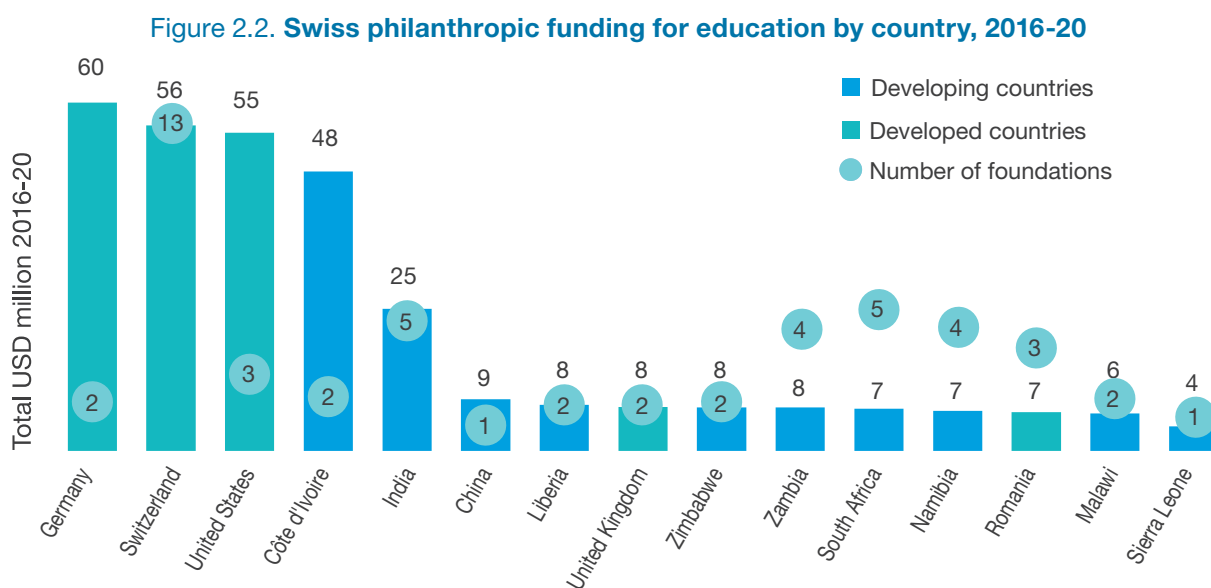
### Europe and sub-Saharan Africa received the bulk of Swiss philanthropy for education

About a fifth of Swiss funding for education (19%, USD 102 million) took the form either of global flows of funding that were not allocated to a specific region, or of funding allocated to multiple regions. Meanwhile, over a third (37%) of Swiss philanthropic funding for education went to Europe, representing USD 191 million over 2016-20. Africa was the second-largest recipient region in terms of volume of education-related philanthropy. The continent received almost a quarter (23%) of Swiss philanthropy for education, amounting to USD 118 million. Most of these funds targeted countries in sub-Saharan Africa. The third-largest recipient region was the Americas, which received a combined total of USD 64 million, the majority of which went to North America. Finally, 9% of Swiss philanthropy for education went to Asia (USD 47 million), with the bulk of these funds going to India and China. The combined total that flowed to these two countries came to USD 34 million, or 71% of the overall funding for Asia.

### While Swiss philanthropy targets a large number of developing countries, most of the funding that was allocated to individual countries went to high-income ones

A large proportion of philanthropic flows (35% of total education-related flows, or USD 181 million) were not allocated to a specific country.<sup>iii</sup> Over a third (36%, USD 186 million) of Swiss funding for education was directed to high-income countries (Figure 2.2). By contrast, 30% of Swiss philanthropic funding for education, or USD 155 million, was directed to developing countries. Approximately 5% went to low-income countries (USD 24 million), 18% to lower middle-income countries (USD 94 million), and 7% to upper middle-income countries (USD 37 million).<sup>iv</sup> Therefore, less than half of the funding allocated to individual countries (45%) targeted developing countries. Interestingly, however, there were 51 developing countries among those that received funds, more than three times the number of developed countries that received funding, which came to just 16. The top recipient countries were Germany (USD 60 million, from two foundations), Switzerland (USD 56 million, from 13 foundations), and the United States (USD 55 million, from three foundations). Among developing countries, Côte d'Ivoire (USD 48 million, from two foundations), India (USD 25 million, from five foundations) and the People's Republic of China (USD 9 million, from one foundation) received most of the Swiss philanthropic funding for education.

The countries with the highest number of Swiss foundations supporting education are Switzerland (13 foundations), India and South Africa, with five supporting foundations respectively, and Namibia and Zambia, which each attracted the support of four foundations.



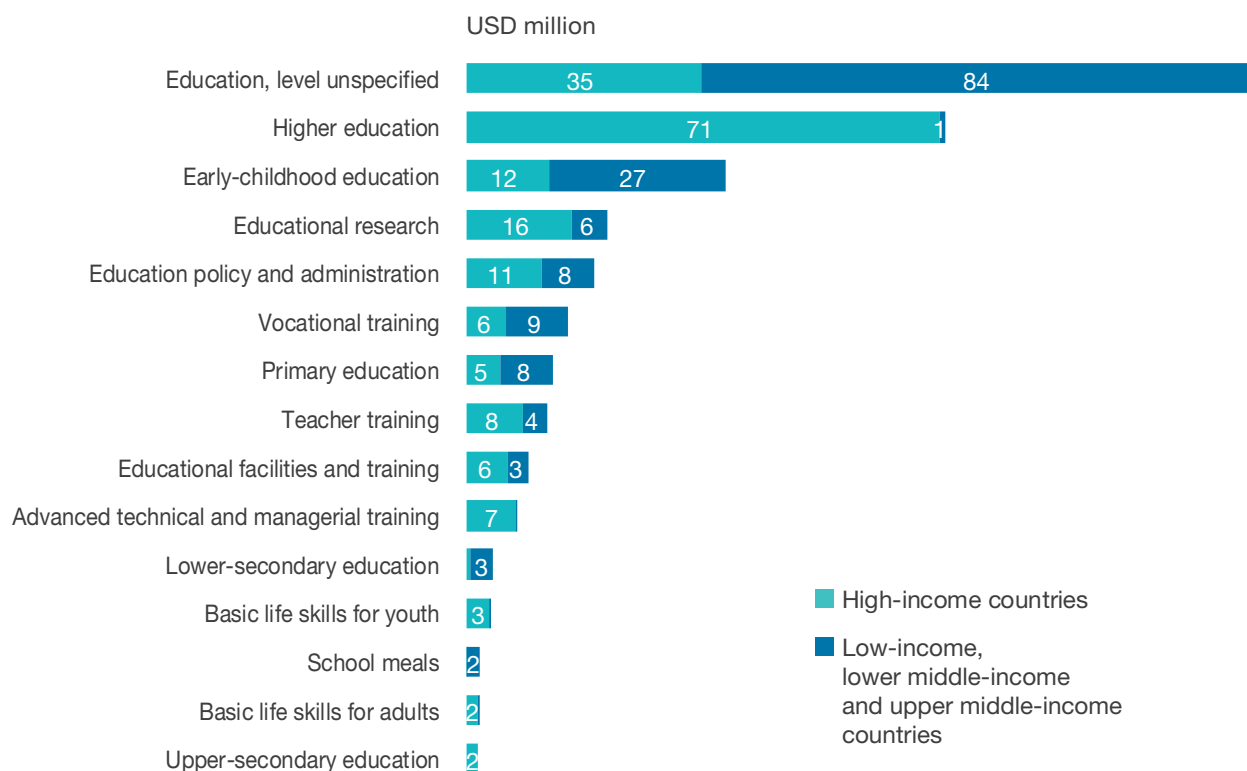


## Swiss foundations prioritise different educational purposes in high-income vs. developing countries

Higher education and educational research were the educational purposes that attracted the most support in high-income countries (Figure 2.3). In aggregate, nine foundations allocated a total of USD 71 million to higher education in six high-income countries. The top recipients were Germany (USD 55 million), the United States (USD 7 million) and Switzerland (USD 6 million). Taken together, five foundations provided an aggregate amount of USD 16 million in funding for educational research to five high-income countries. The top recipients of this money were the United States (USD 10 million), Switzerland (USD 4 million) and Germany (USD 2 million).

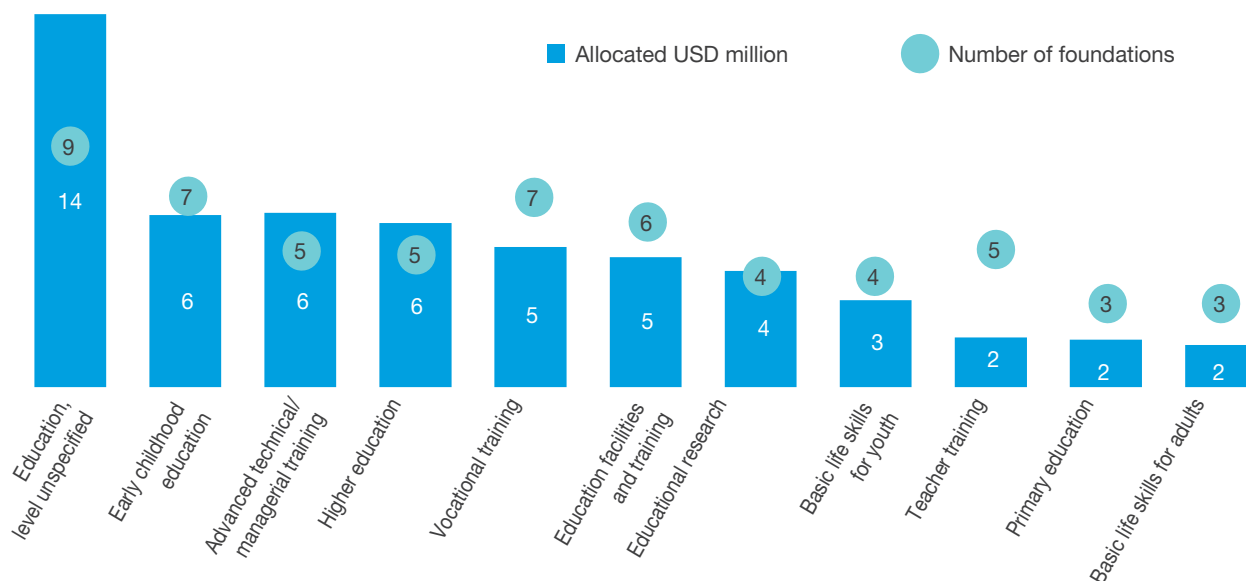
For low-income, lower middle-income and upper middle-income countries, which together make up the over-arching category of developing countries, early-childhood education and vocational training were the most supported purposes in education. Six foundations allocated a total of USD 27 million to early-childhood education, benefiting 12 developing countries. The highest shares were directed to Namibia (USD 6 million), Malawi (USD 6 million), and Côte d'Ivoire (USD 4 million). Nine foundations provided a total of USD 9 million to vocational training in 25 developing countries. The main recipients were Viet Nam (USD 2 million), India (USD 2 million), and Zambia (USD 1 million).

Figure 2.3. Supported educational purposes in high-income vs. low-income, lower middle-income, and upper middle-income countries, 2016-20



Within Switzerland, Swiss foundations directed most of their educational funding towards advanced technical and managerial training, early-childhood education, and higher education (Figure 2.4). Each of these areas received USD 6 million over the period 2016-20.

Figure 2.4. Supported educational purposes in Switzerland, 2016-20



### Almost all of Swiss philanthropic funding for education is provided through grants

Most funding for education (94%, USD 489 million) was provided in the form of grants. This means that it took the form of transfers in cash or in kind, for which the recipient incurred no legal debt. All Swiss foundations that participated in this survey provided support for education in the form of grants.

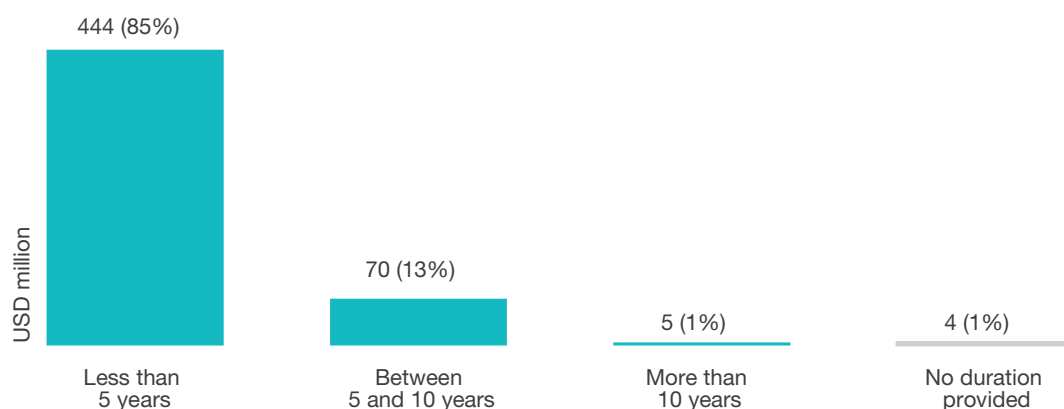
### The majority of Swiss philanthropic funding for education provides short- to medium-term, earmarked support

Most Swiss philanthropic funding supporting education provided short- to medium-term support for less than five years (USD 444 million, 85% of total funding) (Figure 2.5). Less than a fifth of education-related funding (USD 75 million) was used for longer-term support, i.e. five years or more.

Furthermore, almost two-thirds of total funding for education (64%, USD 336 million) was channelled as earmarked contributions for specific projects, or as funds that had a clearly defined thematic or geographical focus. The majority of these flows supported project-type interventions implemented by a foundation itself, or by other organisations including non-governmental organisations (NGOs) and multi-lateral organisations. A smaller share (3%) of earmarked funds was used to provide scholarships and cover student costs, including tuition fees and traineeships. This contrasts with findings on foundations' giving in other contexts, which show that scholarships have traditionally been a staple of philanthropy (OECD, 2021c; OECD, 2021b; OECD, 2018).

Core allocations of funding, which are otherwise referred to as un-earmarked contributions, made up 31% of the total funding for education (USD 163 million). Predominantly, these allocations supported civil society organisations, public-private partnerships, or research institutions. Only a marginal share of core contributions (0.2%) targeted multi-lateral institutions.

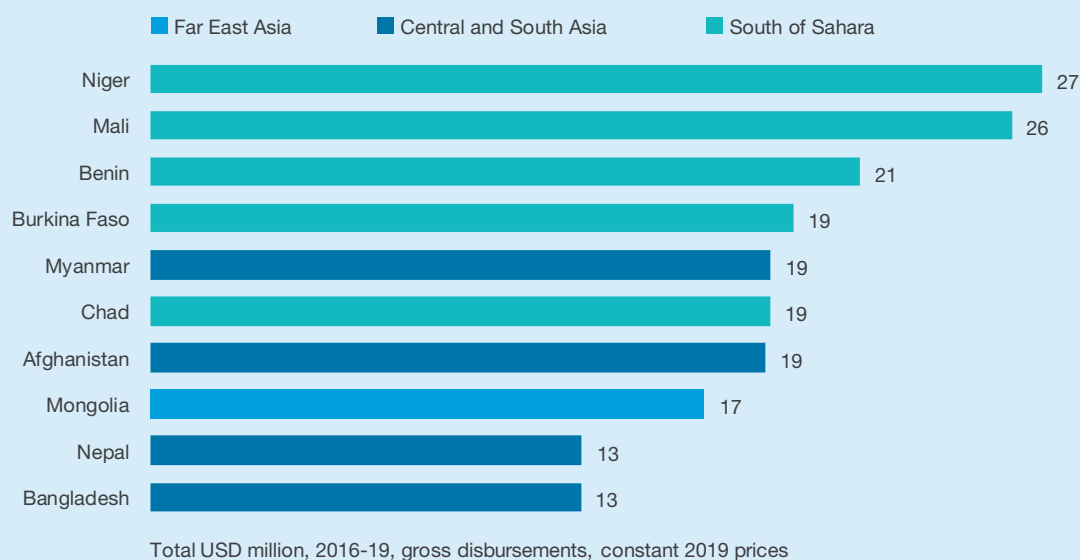
Figure 2.5. Funding invested by project duration, 2016-20



### Box 2.1. Swiss official development assistance for education

At constant 2019 prices, Switzerland provided bilateral ODA equal to USD 515 million for education in 2016-19. The largest institutions to provide these funds were the Swiss Agency for Development and Cooperation (SDC), which gave USD 449 million, the country's cantons and municipalities, which gave USD 32 million, and several departments of Switzerland's Federal administration, which provided USD 28 million. The top ten recipient countries of education-related funding were in sub-Saharan Africa and Asia (Figure 2.6). Together, the top ten recipients received USD 193 million (2016-19), which equates to 37% of total bilateral Swiss ODA for education over the four-year period.

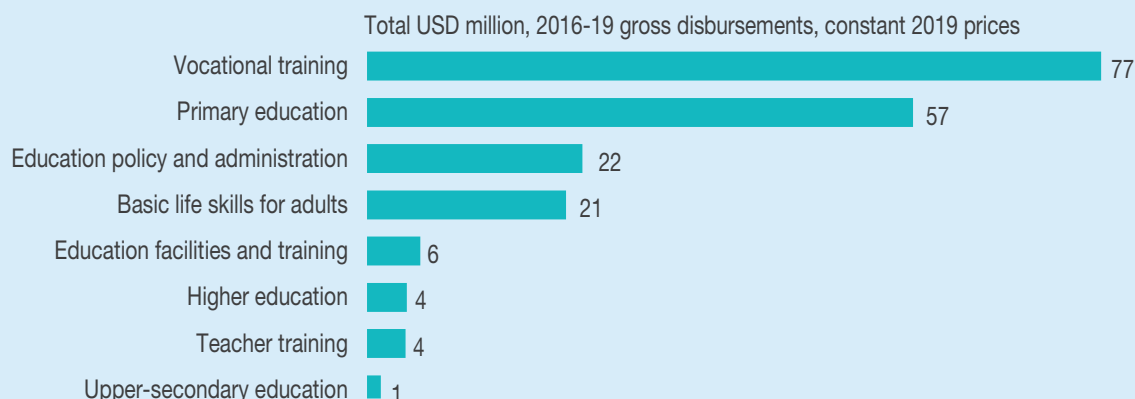
Figure 2.6. Top ten recipient countries of Swiss ODA for education, 2016-19



Source: (OECD, 2021a).

Swiss ODA for education was mainly dedicated to vocational training (USD 186 million), primary education (USD 97 million), and the broad category of education policy and administrative management (USD 94 million). These three purposes were also Swiss ODA's funding priorities for education in the top ten recipient countries over 2016-19 (Figure 2.7). According to the SDC's education strategy, basic education, which comprises primary and secondary education, and the development of vocational skills will continue to be a key priority (SDC, n.d.). Education facilities and teacher training are core to SDC's investments in basic education.

Figure 2.7. Funding to the top ten recipients by educational purposes, 2016-19



Source: (OECD, 2021a).

### Box 2.1. Swiss official development assistance for education (Cont.)

#### Swiss ODA and private philanthropy share common regional and thematic priorities

As was the case for Swiss ODA, the top developing countries that received Swiss private philanthropy for education in 2016-19 were located in sub-Saharan Africa, South Asia and Far East Asia. The top recipient countries in sub-Saharan Africa include Côte d'Ivoire, Liberia, South Africa, Zimbabwe, Namibia and Zambia. In Asia, they include India and the People's Republic of China. In 2016-19, the priority areas in education for flows of Swiss philanthropic funding to these top recipients were early-childhood education (USD 15 million), primary education (USD 7 million) and education policy and administrative management (USD 3 million). Total Swiss bilateral ODA and philanthropic funding towards developing countries primarily overlap in the areas of vocational training, primary education, and education policy and administrative management. As a result, there are similarities in Swiss ODA and Swiss philanthropic funding in terms both of regional focus and thematic priorities. It might be worth exploring these similarities further, in order to unlock synergies between different Swiss donors that are active in education. More information and analysis is provided in Annex D.

## 2.2. Collaboration amongst funders

### While most Swiss foundations co-fund with other foundations, collaborations with bi-lateral or multi-lateral funders are still rare

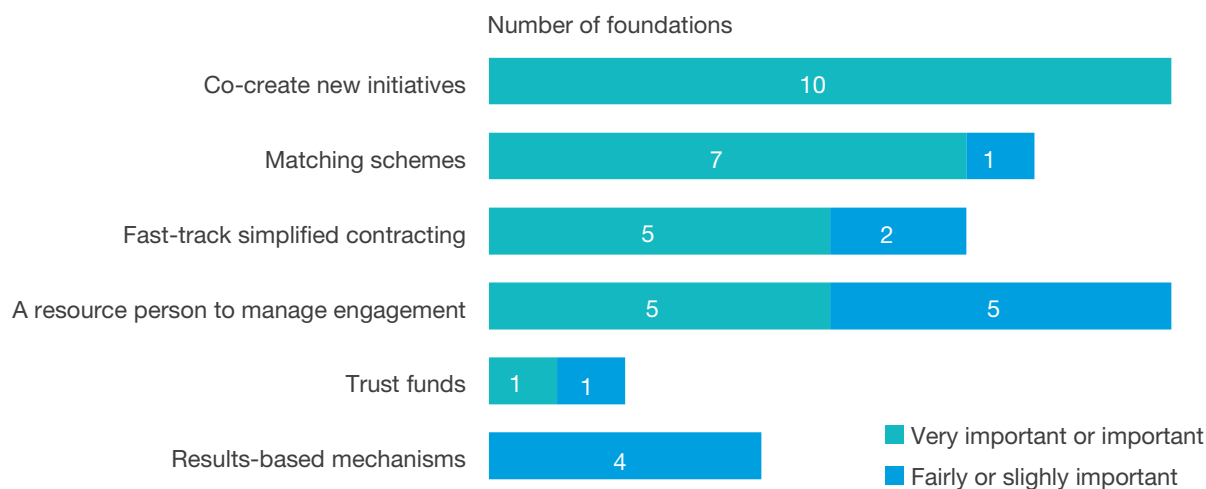
Traditionally, foundations have worked primarily with NGOs and civil society organisations. In recent years, however, they have increasingly joined forces with other donors and formed coalitions for collective action among a broader set of stakeholders (OECD, 2018).

The majority of Swiss foundations (15 out of 17) included in the survey have financed initiatives together with other donors, either directly or through a donor collaborative. While most respondents have funded projects jointly with other private donors (i.e. philanthropic foundations), only five have co-financed projects with bi-lateral or multi-lateral funders, such as development agencies, international organisations, or other global financing mechanisms.

The main drivers of co-funding for Swiss foundations include the chance to create new initiatives together, to mobilise more funds, and to simplify contracting (Figure 2.8). According to foundation leaders, the core benefits of co-creation with other donors, including ODA providers, include risk sharing, which encourages innovation and the piloting of new ideas. Core benefits also include the coming together of diverse perspectives, which feed through into project development. Still, this convergence of diverse perspectives renders the co-creation of new initiatives both attractive and challenging at the same time. On the one hand, taking into account a broader range of expertise and mindsets may facilitate cross-sector work and generate more holistic approaches to solving social issues. At the same time, however, aligning diverse perspectives and expectations can be challenging and time-consuming.

According to foundation leaders surveyed for this project, less complex forms of collaboration include the co-financing of projects that already exist. They also include providing financial support to initiatives that are run by another organisation. In these cases, collaboration can boost funding, make longer-term projects more viable, and reduce red tape by simplifying contracting and/or by avoiding multiple reporting requirements for grantees. One form of collaboration to expand funding for initiatives comes in the form of so-called matching schemes, whereby funders agree to add to an amount of funding that has been allocated by another organisation.

Figure 2.8. “Important” or “very important” drivers of collaboration between funders



Note: Out of 17 Swiss foundations, ten reported having engaged in co-financing with other private donors (e.g. philanthropy), two reported co-financing with multi-lateral or bi-lateral donors, and three reported co-financing with both private and bi-lateral or multi-lateral donors.

### Although Swiss foundations recognise the potential of working together with other funders, there are still barriers that hinder co-financing on a broader scale

One of the most common barriers that Swiss foundations reported with regard to collaborating with other funders was the difficulty in **identifying funding partners with aligned interests**. This result is similar to that of the OECD’s global survey, which features the participation of 99 foundations that are active in development (OECD, 2021d, forthcoming).<sup>v</sup> In practice, a scant level of interaction between funders, plus a lack of transparency about who funds what and where, mean that finding co-financing partners with shared priorities is a challenging endeavour.

In line with this reasoning, foundations expressed an interest in better understanding what other funders are doing, and how their work could be mutually complementary. They were concerned that foundations focus too often on individual solutions, with little co-ordination across organisations. Sharing information on philanthropic activities in order to map out the bigger picture is a first step towards overcoming piecemeal solutions. However, data collection on giving by Swiss foundations remains challenging. Only 11% of Swiss foundations in the sample shared grant-level information and gave insight into their strategies, which is a very low response rate compared to other similar OECD studies on domestic philanthropy. Indeed, the response rates for such studies were above 60% for Colombia and South Africa (OECD, 2021b; OECD, 2021c). Given the discrepancy between the need for more data to identify partners whose interests are aligned, and the reluctance to share information, it is critical to understand the specific factors that prevent Swiss foundations from sharing information, and to identify strategies to overcome these obstacles.

Beyond the need for a better understanding of the funding landscape, joint assessments of needs could facilitate alignment with other organisations. A shared understanding of the political economy and root causes of persisting problems in a given context may also create a solid basis for developing a common vision, and for building partnerships that may lead to co-funding or co-creation.

In addition, foundations expressed the need to explore partnerships with organisations working across different sectors, such as health or financial inclusion, in a more systematic manner. Collaborating with diverse teams may help to develop holistic approaches to education, and to mobilise additional funding from other well-financed sectors.

Additional barriers to foundations’ collaboration with other funders are **constraints in time and resources**. Forming and managing a donor collaborative group can be staff-intensive and costly. Exploring ways to reduce foundations’ contractual procedures is, therefore, critical to making donor collaboration attractive and cost-effective.

Finally, interviews with leaders at Swiss foundations revealed that the **organisational and board-level** culture of foundations can limit collaboration. Some boards tend to focus on a narrow mission, to prefer to fund projects

with direct and tangible results, and to avoid the lengthy processes that are associated with building new partnerships. Meanwhile, the broader staff at the foundations may also be strongly attached to a clearly-defined strategy and to key performance indicators, potentially considering collaboration to be a threat or a deviation from their “storyline” or portfolio. Collaboration may require compromise, for which greater flexibility both in reporting requirements and in terms of thematic or geographical focus can be critical.

Government agencies and ODA providers can offer incentives for greater collaboration among different types of funders. They can create open spaces to share their strategic priorities in education, and can highlight areas that would benefit from piloting new initiatives and from the gathering of further evidence. In addition, they can provide opportunities for co-creation with foundations. Moreover, they can also design funding mechanisms to blend philanthropic and public funding. This calls for a solid understanding on the part of foundations and ODA providers of the different funding modalities (such as matching funds, results-based finance mechanisms, and other innovative financial instruments), and their respective performance. This, in turn, requires not just trained staff, but also more investment in evaluating the performance of innovative financial mechanisms to expand the evidence base and identify the most effective mechanisms. A recent example of blended finance supported by the Swiss Agency for Development and Co-operation are the social impact incentives that have been provided to social enterprises focused on skills, employment and income in Latin America and the Caribbean. These incentives mean that these enterprises receive a time-limited payment for the social impact that they create, which enables them both to increase their profitability, and to grow (Roots of Impact, n.d.). Similarly, the Swiss Agency for Development and Co-operation, in partnership with the Jacobs Foundation, recently launched an initiative on impact-linked financing for education, in order to accelerate inclusive quality basic education through private-sector engagement.

## 2.3. Foundations’ engagement in advocacy

### **Most Swiss foundations that engage in advocacy do so indirectly through grantees, networks or collaboratives**

Almost half of the Swiss foundations that participated in the survey reported engaging in advocacy.<sup>vi</sup> Among these, all have engaged in advocacy through their grantees, with two-thirds of them reporting having done so through networks or collaboratives. Just two foundations reported using their own advocacy teams or leaders to inform policy or to engage in efforts to change social norms and practices. Insights from interviews confirm that Swiss foundations tend to opt for a more hands-off approach whereby they simply provide the means for grantees to perform advocacy work. Preliminary results from the OECD’s forthcoming global survey on Private Philanthropy for Development show that a larger share of foundations engage in advocacy in this broader sample than appears to be the case among Swiss foundations. Most foundations in the global sample also advocate through networks, collaborative platforms, or grantees, but about two-thirds of them also use their own leadership or advocacy teams (OECD, 2021d, forthcoming).

### **Demonstration pilots, capacity building and research are among the most common advocacy strategies**

Swiss foundations use a variety of tools to educate the public and to inform policy and practice in a wider sense. The most frequently used advocacy tactic of the Swiss foundations that feature in this survey is the demonstration pilot. This is when programmes are implemented on a small scale in order to generate knowledge about policy, or indeed about alternative programmes, which can then be implemented at scale at a later stage if they prove successful in the pilot. Other common strategies include capacity building to support and strengthen the advocacy work of partner organisations and supporting research in order to expand the evidence base on relevant topics, which can then be used by stakeholders to advocate further. According to Swiss foundation leaders who took part in the survey, foundations also support advocacy by organising local meetings at the country or regional level. At such meetings, implementing partners can share lessons about programmes, disseminate research, or have discussions with policy-related, technical and financial partners. Furthermore, most Swiss foundations support grassroots organisations<sup>vii</sup> either often or occasionally in order to promote a cause.

A less frequently used tactic by Swiss foundations is the use of media outlets to share evidence and advocate for change. Indeed, similar results were found in the global survey of large foundations working for development.

These preliminary results show demonstration pilots to be the most frequently used strategy, followed by research and dissemination, and capacity building (OECD, 2021d, forthcoming). Media outreach also represented a common strategy. Grassroots support, however, was less frequently used.

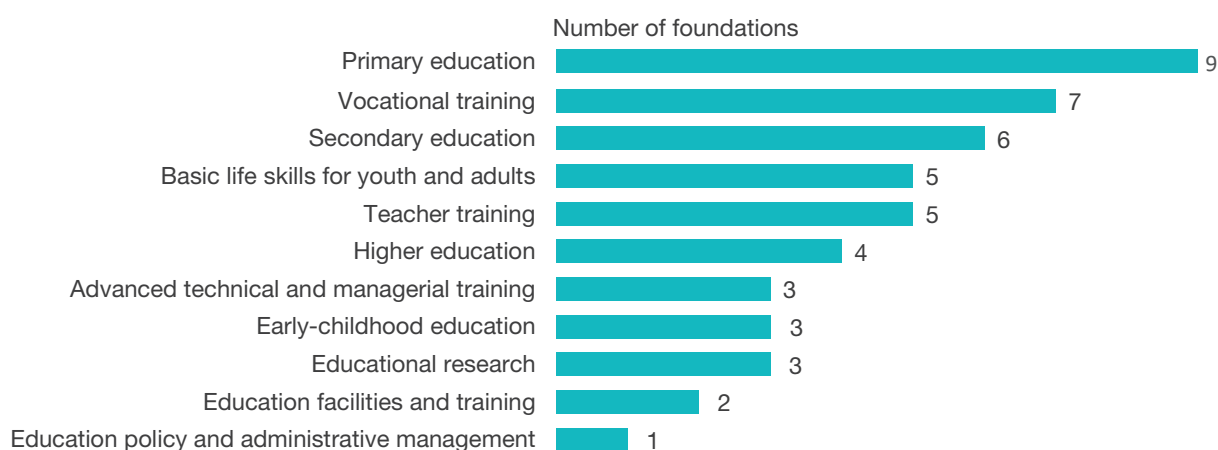
### **A central goal of Swiss foundations' engagement in advocacy is influencing social norms and behaviours**

Swiss foundations that are involved in advocacy consider changes in norms and behaviour as an important objective of their advocacy work. In contrast, agenda-setting and policy change were less frequently mentioned as key drivers of advocacy. This contrasts with findings from the global OECD survey, where the majority cited both social norms and behavioural change, as well as agenda-setting and policy change, among the main objectives of their foundations' advocacy. The reasons why some Swiss foundations said that they were not looking to influence policy are diverse. Interviews with key experts revealed that some foundations do not see the need for policy change when relevant policies are already in place. Moreover, they see effective implementation on the ground as the real challenge. Others said that they lacked expertise or legitimacy to influence the design of policy.

## **2.4. Future priorities of Swiss philanthropic giving**

Over the next five years, Swiss foundations that are active in education plan to dedicate their largest contributions to primary and secondary education, and to vocational training. Half of the foundations that participated in the survey said that they expect primary education to account for their largest contributions through to 2026. A third of the respondents said that they will prioritise secondary education, while slightly more than a third of them said that they will focus mainly on vocational training (Figure 2.9).

**Figure 2.9. Swiss foundations' priorities in education over the next five years, by sector**

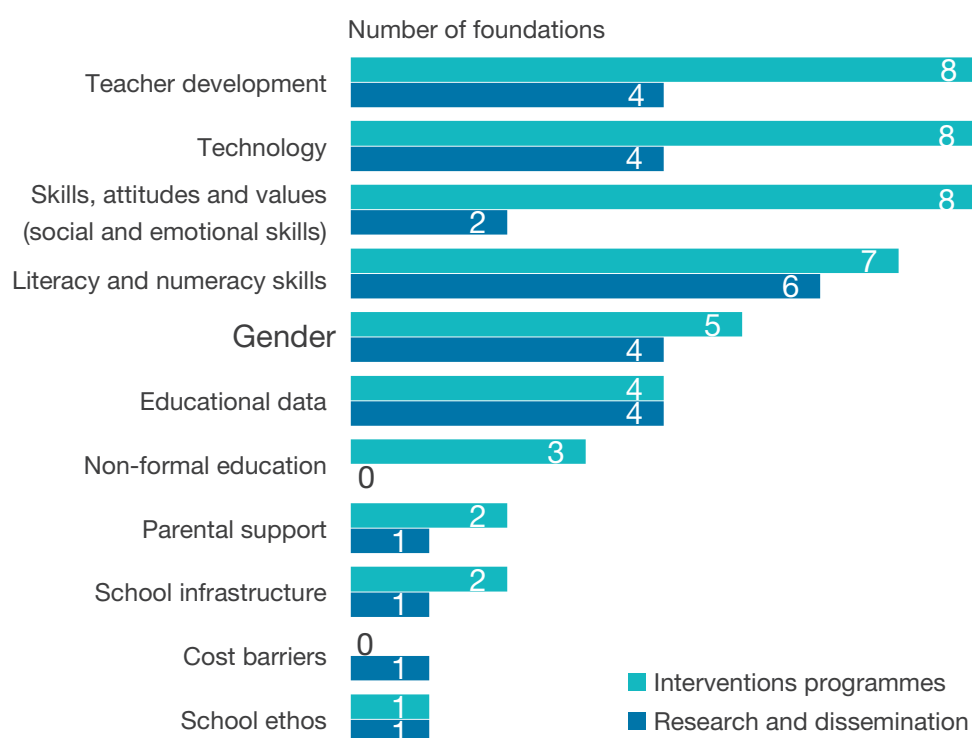


### **Swiss foundations share common thematic priorities to support research and intervention programmes over the next five years**

The Swiss foundations that took part in the survey expect their largest contributions over the next five years to be in support of teacher development, education technology, and skills – including literacy, numeracy and social and emotional skills (Figure 2.10). Indeed, their intervention programmes and research will prioritise teacher development and education technology. As for the development of skills, intervention programmes will focus on social and emotional skills and literacy and numeracy skills, while research-based intervention in this area will prioritise literacy and numeracy skills. Similarly, in a 2020 OECD survey of 30 foundations and ODA donors in education, respondents highlighted that investments in blended learning, in teacher capacity, and also in developing students' social and emotional skills were particularly important for the post-pandemic era (OECD, 2020).

Since research funding from some foundations overlaps with programme funding from their peers in areas such as teacher development, technology, and skill development, foundations could explore ways to share their research and programme-funding pipeline. They could also look at ways to link up more effectively researchers with implementing partners, and to embed empirical research into intervention programmes. In order to overcome knowledge gaps and build upon common areas of interest, foundations may also consider developing shared-learning agendas. These can help to address, in a systematic manner, critical questions that are relevant to foundations' missions. Below, Box 2.2 presents ideas for a common learning agenda in education based on content suggested by Swiss foundation leaders, while Box 2.3 provides examples of recent efforts to promote shared learning and co-ordinated research in education.

Figure 2.10. Largest financial contribution over the next five years



### Box 2.2. Ideas for a common learning agenda in education

#### Swiss foundations that are active in education are interested in developing shared learning agendas

Swiss philanthropic leaders emphasise the importance of feedback from the field, seeking different perspectives to inform the ways in which they award grants or develop their projects, and identifying knowledge gaps in areas that are relevant to their work. The majority of foundations interviewed for this note have not yet formally established a learning agenda outlining the main questions that they wish to address. Foundation leaders who agreed to an interview said that they consider their organisations to be learning organisations. However, they stated that learning has consisted predominantly of informal feedback from implementing partners, and *ad hoc* discussions with other funders, rather than structured approaches to peer learning.

Swiss foundation leaders see benefits in establishing common learning agendas in order to fill existing knowledge gaps and to share experiences and key lessons in a systematic way. Suggested content for a common learning agenda include analysing research gaps that are relevant to foundations' programmatic approaches. They also include questions about best practices for promoting the uptake of rigorous evidence, collecting actionable feedback from partners, and measuring success in education.



### Box 2.2. Ideas for a common learning agenda in education *(Cont.)*

#### Priority areas for empirical research

In light of the current Covid-19 crisis, foundations have been expressing the need to expand the evidence base on effective learning in emergencies and crises. School closures during the pandemic demanded fast adaptation to remote learning and new forms of instruction. More research on what works best to improve children's learning amid intermittent school closures in a local context including in fragile settings, is needed in order to support vulnerable children adequately in the future. More advocacy in this field may also help to mobilise a broader funding base for projects that seek to expand the body of evidence in this field.

Further research is needed to identify the types of skills that are relevant for the 21st century, along with effective tools to help children to acquire critical competencies. Foundation leaders agree that, beyond foundational cognitive skills, education needs to focus on developing a broad set of non-cognitive skills, attitudes and values. However, defining these relevant skills and competencies is a less evident prospect. Therefore, this requires further investigation, which should also incorporate children's perspectives and perceived wellbeing. More evidence is also needed on how these skills can best be taught and acquired, and on what role foundations can play in facilitating the holistic development of skills. The OECD will soon publish a report on social and emotional learning, and will explore how foundations are contributing to the development of these skills (OECD, 2022, forthcoming).

#### Priority areas for peer learning

Foundation leaders who were interviewed for this note are concerned about the uptake of rigorous evidence to inform policy and programming in education. Furthermore, they expressed the need to share best practices on how to get this evidence out into the field, and to translate research findings into actionable programmatic decisions.

Foundations seek to collect actionable feedback from the recipients of their grants. Indeed, they intend to incorporate experiences and perspectives from beneficiaries into the ways in which they award grants and design and implement programmes. One of the key lines of enquiry in this regard is to identify best practices so as to ensure that lessons learned in the field percolate up to the funders themselves. Another key line of enquiry is to ascertain what donors are doing in order to facilitate exchanges with implementing partners on an equal footing, and to minimise unequal power dynamics between themselves and the recipients of their grants.

Another common point of interest is how best to measure the success on the ground of their investments in education. A key line of enquiry here is to establish the most adequate tools for foundations to provide a comprehensive picture of success. It is still common in education to look at measures of outcomes, such as test scores or years of schooling. However, these measures conceal a lot of important information. As a result, foundation leaders emphasised in the need to consider broader measures of success that include children's relational well-being, and skills such as teamwork.

Furthermore, foundations emphasise the need to learn from failures as lessons from unsuccessful approaches are largely unavailable but very informative. To overcome this gap, foundation leaders propose to create safe spaces that allow honest conversations about failures.

Given the broad thematic spectrum of education and the diverse geographical focus of donor organisations, it might be useful to build shared learning agendas with organisations working on similar areas of focus, such as early-childhood education, primary education, teacher training etc., in order to identify research questions that are specifically tailored to their needs.

### Box 2.3. Expanding research and joint learning in education

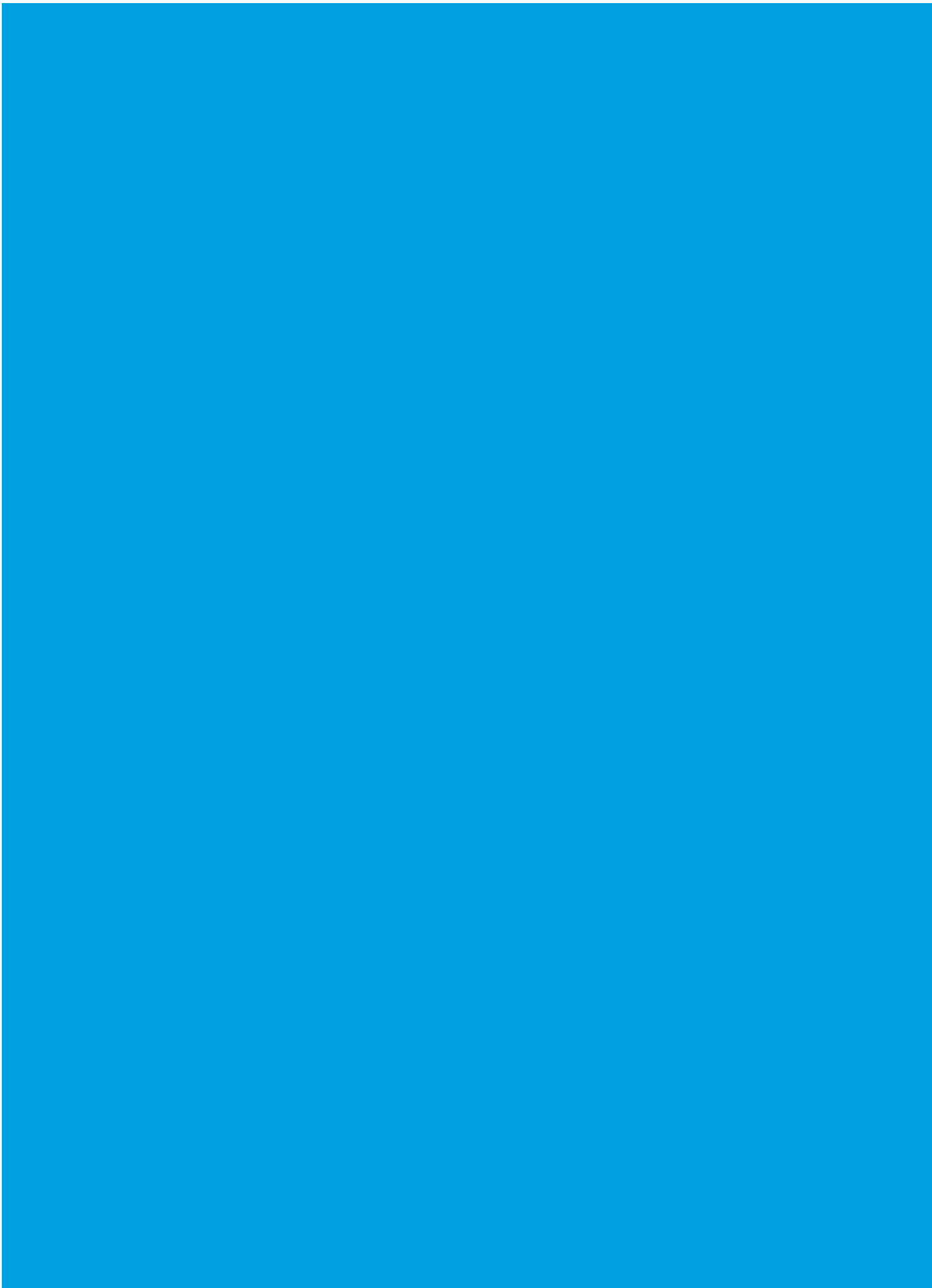
Education in Emergencies (EiE) is one of the most neglected sectors in emergencies and protracted crises, even though such situations deprive millions of children of their right to education. In order to bolster children's education in crisis contexts, Switzerland launched the Geneva Global Hub for Education in Emergencies. With the aim of promoting joint action and transformation, this platform brings together actors in education and other relevant sectors such as child protection, human rights, peace-building, healthcare and migration (FDFA, 2021). The Geneva Global EiE Hub aims to influence political priorities, and to foster financial and operational commitments to bolstering children's education in crisis contexts. Through its convening power, it engages in advocacy and awareness-raising, seeking to influence policy and set agendas. It also seeks to provide more evidence through improved data and innovative research in order to inform programming and crisis-resilient education systems (FDFA, 2021). One of the intended outcomes is a strengthened commitment by governments, donors, foundations, and the private sector that will lead to a substantial increase in additional, predictable funds for education in emergencies.

A recent attempt to systematise learning through a shared learning agenda in a particular area of education was made by the Inter-agency Network for Education in Emergencies (INEE), a global network for education in emergencies. Since 2018, INEE has organised consultations and workshops with different stakeholders (including researchers, policy makers, practitioners and funders) in order to create a shared learning agenda, and to develop an online evidence platform that can serve as a key resource for the education-in-emergencies sector (INEE, n.d.).

The core driver of this project was developing a strategic approach to the generation of knowledge and the dissemination of research. In order to strengthen the evidence base in the education-in-emergencies sector, INEE's efforts will map out current research projects. Moreover, they will identify evidence gaps in order to prevent duplication and maximise the impact of new research. They will also work to increase collaboration among academics and practitioners, and to include a diverse set of perspectives in debates on education in emergencies (INEE, n.d.).

Another initiative to strengthen global research in education is Building Evidence in Education (BE2). This is a donor working group that aims to engage bi-lateral and multi-lateral organisations and foundations working in the education sector in order to foster donor collaboration on research, ensure high-quality educational research, and promote the use of evidence in education-related programming (World Bank, 2020). To reach these objectives, the group will co-ordinate research agendas, set high standards for research, and engage with policy makers to promote evidence-based decision making (World Bank, 2020).

Swiss foundations in the sample expect to make their largest contributions over the next decade to countries in sub-Saharan Africa, South America, South Asia, East Asia, and Europe. However, most priority countries for Swiss philanthropy for education are located in sub-Saharan Africa. In East Africa, these include Kenya, Malawi, Tanzania and Zambia. In West Africa they include Côte d'Ivoire and Ghana, while South Africa is expected to be the main recipient in the southern part of the continent. In addition, Swiss foundations plan to prioritise China, India and Lao PDR in Asia, as well as Brazil and Peru in South America. In Europe, Switzerland, France and Turkey are expected to receive the largest financial contributions over the next decade.



# 3\_ Lessons and the way forward



**OECD CENTRE ON PHILANTHROPY**  
Data and analysis for development

To foster co-operation and collaboration among funders, foundations working in education in Switzerland could take a gradual approach. This would begin with the consolidation of learning groups in specific areas of education. A second step would be to adapt their funding modalities. Thirdly, they could build the basis for stronger co-funding and co-creation within and beyond the philanthropic sector. Learning groups may serve to discuss research, data and peer-learning needs, and to develop a structured approach to address them. In a systematic manner, this will expand the evidence base needed to design effective interventions. At the same time, it will strengthen partnerships, align interests and build trust.

As already noted, Swiss foundations admit that joint learning has not been the norm but say that they are interested in creating shared learning agendas in order to close knowledge gaps in a systematic manner, and to facilitate exchanges on key lessons from successful initiatives, and indeed from less successful ones. Efforts to establish a joint learning agenda may include a range of different components.

The first of these is a joint needs assessment. Foundations could work together to analyse the root causes of existing problems in specific contexts. They could also join forces to study the incentives behind existing systems, examining what keeps them in place and what they fail to achieve. A shared understanding of how systems work and what challenges persist has the potential to create a good basis for developing shared visions and building strong partnerships that may eventually lead to other joint philanthropic activities such as co-creation and co-funding.

Another potential component of establishing a joint learning agenda would be the joint identification of evidence gaps. Foundations working in the same area of education could come together in order to disseminate their learning from the field. This could, for example, stem from process and impact evaluations. They could also work together with academic institutions in order to identify persisting research needs, as well as ways in which to address them. Furthermore, since research funding from some foundations overlaps with programmatic funding from others in areas such as teacher development, technology and skill development, foundations could explore ways to share their research and programmatic funding pipeline, and to join up their efforts to embed empirical research into their intervention programmes.

A further step would be to share data on philanthropic activities. Information about existing philanthropic activities is critical for exploring communalities and synergies with other organisations. Therefore, foundations might encourage each other to share strategic priorities, funding pipelines and grant-level data with a third party, such as an association of foundations (e.g. SwissFoundations), that can then consolidate, analyse and share this information. Such initiatives could provide insight into the projects and activities that foundations are supporting, as well as where and with whom. Likewise, it has the scope to provide insight into their future funding priorities, as well as forthcoming funding opportunities.

There are already a number of learning groups for funders at the national, regional and global levels. These include foundations, ODA providers, academic institutions, and NGOs. Finding synergies between different venues of co-operation in order to build complementary and mutually reinforcing learning agendas will be an important step.

Beyond creating alignment with other funders through joint learning, foundations could also invest in broadening and adapting their funding modalities in order to provide adequate support to implementing partners. This may entail a number of actions.

First of all, it could entail seeking alignment with national priorities and existing co-ordination structures. In this connection, dialogue with national stakeholders is critical when seeking to align philanthropic activities with unaddressed needs. National or local education groups that bring together public officials, donors and actors from civil society represent important contact points when seeking to adapt funding priorities to local needs. Foundations can also move beyond funding isolated education projects by supporting initiatives that can feed into and strengthen education systems.

Foundations could also consider providing funding over multiple years, and helping partners with their core costs and overheads. Many objectives such as change in social norms and practices call for longer-term strategies and funding horizons. However, most funding from foundations provides short-to-medium term support, while longer-term funding has remained rare. Again, this leaves NGOs in a constant battle to sustain their financial viability, taking energy away from achieving their mission.

A further step would be to provide more core support to implementing partners. In practice, most funding is earmarked for specific projects. Core support, on the other hand, can improve NGOs' capacity to cover essential

operating costs such as office space or management time. Many NGOs struggle to cover these overhead costs, and are forced to cut expenses in areas that make them more vulnerable and adversely affect their productivity and sustainability.

Furthermore, foundations could provide early-stage funding to develop and test promising innovative financial mechanisms. The use of innovative finance has remained rather limited, as foundations often lack the capacity, experience and time to search for investees and conduct due diligence. Some pioneering foundations have used innovative mechanisms to mobilise additional resources from other donors. However, more investment is needed to evaluate the performance of mechanisms that blend public and private funds such as results-based financing models (e.g. development impact bonds<sup>viii</sup>). Foundations could, therefore, increase their efforts to develop and test innovative financial mechanisms to identify the most successful approaches, and to increase the funding base.

Finally, foundations could take measures to promote co-funding and co-creation. Swiss foundations co-fund projects with other donors – predominantly with private philanthropic actors – and recognise many advantages of collaboration, including risk diversification, greater financial stability for implementing partners, and the diversity in perspectives and expertise that can be brought to bear in joint project development. However, Swiss foundations in the sample rarely co-fund with bi-lateral or multi-lateral donors, and they continue to face obstacles to co-creation. Among these, as we have seen, are staff and time constraints, as well as foundations' organisational or board-level culture. There is a range of things that foundations could do to address some of these obstacles.

Firstly, they could promote internal conversations with senior leadership. Raising awareness of the advantages of donor collaboration (including with public actors, and bilateral and multilateral ODA providers) and the importance of systematic approaches to existing challenges in education may help to overcome reluctance or scepticism regarding co-creation among foundations' staff and board members.

Secondly, they may consider working with a collaboration broker. Such organisations, which may include national associations of foundations such as SwissFoundations, networks of foundations, or donor alliances such as the recently established Friends of Education in Switzerland, can help to identify organisations with shared thematic and geographical priorities. They can also facilitate dialogue between funders and, in some instances, can support administrative procedures.

## ANNEX A

### Sample and methodology

This note comprises information from a survey of Swiss philanthropic organisations that support education, and from interviews with key experts at selected foundations, ODA providers. The OECD conducted this survey between March and June 2021, with interviews taking place in June and July 2021.

#### Survey and sampling frame

The OECD did two surveys to collect information on philanthropic activities. First, it carried out an organisational survey in order to study the different dimensions of foundations' structures and strategies. Secondly, it also carried out a survey to gather information on grants and donations, as well as projects financed with own funds, profits or loans (OECD, 2018). The grant survey used the methodology of functional classification of allocations from the OECD Development Assistance Committee's Creditor Reporting System (OECD, 2019). This allows for comparisons with other forms of financing for development, such as ODA.

The reference population of this study consists of Swiss foundations or legally constituted non-profit organisations that are the owners of private resources, and that provide grants or work on projects in the area of education. Volunteering, and activities financed exclusively by the public sector, were excluded from the scope of the study. The survey targeted an initial sample of 167 Swiss foundations that are active in education. With the support of Friends of Education<sup>3</sup> and SwissFoundations<sup>4</sup>, a total of 112 foundations that are active in education were identified, irrespective of size or geographic focus. In addition, 55 foundations were added based on research from the University of Geneva Centre for Philanthropy. Eight foundations in the initial sample either lay outside of the sampling frame, or declined to participate. In total, 18 Swiss foundations responded to the grant survey, representing an effective response rate of 11%. Information for an additional organisation, the Oak Foundation, was retrieved from the OECD Creditor Reporting System (OECD, 2021a), and from the foundation's online grant database.<sup>x</sup> In addition, 17 Swiss foundations responded to the organisational survey.

The data on grants in this note cover 2016-20, and are presented in aggregate terms in order to address concerns about confidentiality, and to guarantee security for the recipients of the grants.

#### Interviews with experts

In-depth phone interviews were organised to complement survey data with insights from key experts from selected foundations and education-sector leaders at ODA agencies. The topics covered in these interviews included collaboration with donors, advocacy priorities in education, and organisations' learning strategies.

3. Friends of Education brings together Swiss foundations and shapers of policy such as the Global Partnership for Education. One of its goals is to promote co-investing in programmes and research that have an intentional global policy agenda. Another of its aims is to map out existing financing and policy instruments. It also seeks to lead the contribution of philanthropic organisations to the post-2030 dialogue in education.

4. SwissFoundations is a national association of grant-making foundations based in Switzerland and Liechtenstein.

## ANNEX B

### List of respondents participating in the surveys and interviews

Organisation name	Grant survey	Organisational survey	Interview	Period of coverage
Addax & Oryx Foundation	Yes	Yes	No	2016-19
Adecco Group Foundation	Yes	Yes	No	2017-20
Credit Suisse Foundation	Yes	Yes	Yes	2016-19
Dalyan Foundation	Yes	Yes	No	2016-19
Foundation Botnar	Yes	Yes	Yes	2017-19
Fondation Novandi	Yes	Yes	No	2016-20
Gebert RUF Stiftung	Yes	Yes	Yes	2019
Green Leaves Education Foundation	Yes	Yes	No	2016-19
Happel Foundation	Yes	Yes	No	2016-19
Hirschmann Foundation	Yes	No	No	2016-19
Jacobs Foundation	Yes	Yes	No	2016-20
Julius Baer Foundation	Yes	Yes	No	2017-19
Kristian Gerhard Jebesen Foundation	No	Yes	No	
Leopold Bachmann Stiftung	Yes	Yes	Yes	2016-18
LGT Venture Philanthropy Foundation	Yes	Yes	Yes	2016-19
Oak Foundation*	No	No	No	2016-20
Roger Federer Foundation	Yes	Yes	Yes	2016-19
Stiftung Mercator Schweiz	Yes	Yes	Yes	2016-20
Swiss Agency for Development and Cooperation**	No	No	Yes	2016-19
UBS Foundation for Social Issues and Education	Yes	No	No	2016-20
UBS Optimus Foundation	Yes	Yes	No	2016-19

\*Data was collected from the OECD Creditor Reporting System, and the Oak Foundation's online grants database.

\*\*Data was collected from the OECD Creditor Reporting System and included in Box 2.1 and Annex D of this note.



## ANNEX C

### Definitions and classifications

**Private philanthropy (OECD DAC Definition):** “Private philanthropic flows for development” refer to transactions from the private sector that aim primarily to promote the economic development and welfare of developing countries. They originate from foundations’ own sources, notably endowments, donations from companies and individuals (including high net worth individuals and crowdfunding) and legacies, as well as income from royalties, investments (including government securities), dividends, lotteries and the like. Following this definition, philanthropic activities funded by other philanthropic foundations or governments were out of scope for this study. Furthermore, charitable giving from religious institutions was only included if it aimed to support development and improve welfare. For more information, see <https://www.oecd.org/dac/financing-sustainable-development/development-finance-standards/beyond-oda.htm>.

**Educational purposes:** For further information on the classification of education-related projects into different educational purposes, see the OECD DAC purpose definitions: [www.oecd.org/dac/stats/purposecodessectorclassification.htm](http://www.oecd.org/dac/stats/purposecodessectorclassification.htm).

**Country classifications:** Developing countries comprise low-income countries, lower middle-income countries and upper middle-income countries. These income groups are based on the following World Bank classifications:

Low-income countries: economies with a gross national income (GNI) per capita of USD 1 045 or less in 2020.

Lower middle-income countries: economies with a GNI per capita of between USD 1 046 and USD 4 095 in 2020.

Upper middle-income countries: economies with a GNI per capita between USD 4 095 and USD 12 695 in 2020.

High-income countries: economies with a GNI per capita of USD 12 695 or more in 2020.

For more information, see: <https://datahelpdesk.worldbank.org/knowledgebase/articles/906519-world-bank-country-and-lending-groups>.

**Official development assistance (ODA):** The DAC defines ODA as flows to countries and territories on the DAC List of ODA recipients, and to multilateral institutions, which are:

1. provided by official agencies, including state and local governments, or by their executive agencies; and
2. each transaction of which:
  - is administered with the promotion of the economic development and welfare of developing countries as its main objective; and
  - is concessional in character. In DAC statistics, this implies a grant element of at least
    - 45% in the case of bilateral loans to the official sector of Least Developed Countries (LDCs) and other Low Income Countries (LICs) (calculated at a rate of discount of 9%).
    - 15% in the case of bilateral loans to the official sector of Lower Middle Income Countries and Territories (LMICs) (calculated at a rate of discount of 7%).
    - 10% in the case of bilateral loans to the official sector of Upper Middle Income Countries and Territories (UMICs) (calculated at a rate of discount of 6%).
    - 10% in the case of loans to multilateral institutions (calculated at a rate of discount of 5% for global institutions and multilateral development banks, and 6% for other organisations, including sub-regional organisations).

Loans whose terms are not consistent with the International Monetary Fund’s (IMF) Debt Limits Policy and/or the World Bank’s Non-Concessional Borrowing Policy, are not reportable as ODA.

**ODA grant equivalent measure:** The ODA grant equivalent measure is calculated for ODA flows, as per their definition above. For loans to the official sector, which pass the tests for ODA scoring (thus meeting conditions i) and ii) in the list above), the grant equivalent that is recorded as ODA is obtained by multiplying the annual disbursements on the loan by the loan’s grant element, as calculated at the time of the commitment. For more information on this, and on the definition of ODA itself, see <https://www.oecd.org/dac/financing-sustainable-development/development-finance-standards/officialdevelopmentassistancedefinitionandcoverage.htm>.

## ANNEX D

### Further analyses on ODA vs. philanthropic flows

Over the period 2016-19, approximately USD 54 billion (2019 constant prices) in ODA was allocated for education in developing countries (OECD, 2021a). Of this, USD 37 billion (70% of the total) was provided by DAC countries. Switzerland is the twelfth largest DAC member in terms of volume of ODA funding for education. Swiss ODA for education amounted to USD 515 million over 2016-19. The sectors supported the most by Swiss ODA are primary education (USD 96 million), education policy and administrative management (USD 94 million), and higher education (USD 56 million).

As shown in this note, Côte d'Ivoire, India and China have received the largest portions of Swiss philanthropy for education in developing countries. India and South Africa had the largest number of supporting Swiss foundations. Swiss ODA for education also targets these countries, and supports some educational purposes that are also supported by Swiss foundations (see table below).

Priority countries for Swiss philanthropy for education (2016-20)	Educational purposes most supported by Swiss foundations and Swiss ODA (2016-19) (descending order)	Other top ODA funders supporting education (2016-19) (descending order)	Other top international foundations supporting education (2016-19) (descending order)
<b>Côte d'Ivoire</b> (USD 48 million, from two foundations)	Higher education Primary education Education policy and administrative management	International Development Association France United States EU Institutions Germany	MasterCard Foundation Bernard van Leer Foundation
<b>India</b> (USD 25 million, from five foundations)	Vocational training Education policy and administrative management Education facilities and training Basic life skills for adults Primary education Early-childhood education Teacher training	International Development Association Germany Japan France EU Institutions	Michael & Susan Dell Foundation IKEA Foundation Children's Investment Fund. Foundation
<b>China</b> (USD 9 million, from one foundation)	Higher education Vocational training	Germany France Kuwait Saudi Arabia Austria	Ford Foundation LEGO Foundation Citi Foundation
<b>South Africa</b> (USD 7 million, from five foundations)	Higher education Early-childhood education	Germany EU Institutions United States United Kingdom Japan	Michael & Susan Dell Foundations MasterCard Foundation LEGO Foundation

Note: Côte d'Ivoire, India and China were the top recipient countries of Swiss philanthropy over 2016-19. India and South Africa were the countries with the largest number of supporting Swiss foundations.

When it comes to international philanthropy, and in addition to Swiss foundations, the MasterCard Foundation and the Bernard van Leer Foundation support education in Côte d'Ivoire (OECD, 2021a). Other private funders of education in India include the Michael & Susan Dell Foundation, the IKEA Foundation and the Children's Investment Fund Foundation. In the case of China, other major philanthropic actors supporting education are the Ford Foundation, the LEGO Foundation and the Citi Foundation. For South Africa, the main international philanthropic funders of education are the Michael & Susan Dell Foundations, the MasterCard Foundation, and the LEGO Foundation.

In a recent study, the OECD provided insight into domestic philanthropy in South Africa over the period 2013-18. Education was the sector most funded by domestic philanthropy in South Africa, receiving USD 266 million over

the period 2013-18 (58% of total funding). The most supported education purposes in terms of funding volume were higher education (USD 70 million), education policy and administrative management (USD 40 million), and education facilities and training (USD 34 million). According to this study, the five largest domestic philanthropic funders of education in South Africa were DGMT, the SIOC Community Development Trust, the Moshal Scholarship Program, the Zenex Foundation, and the HCI Foundation (OECD, 2021c). For more information see <https://www.oecd.org/development/philanthropy-centre/researchprojects>.

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## Further reading

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## Endnotes

- i. See <https://oakfnd.org/grants>.
- ii. This review will focus exclusively on Swiss philanthropy for education. Additional information collected from other sectors may be analysed in future publications.
- iii. These include global unallocated funds (USD 92 million, 18% of total education-related flows) and flows directed to multiple countries or broader regions (USD 89 million, 17% of total education-related flows).
- iv. Developing countries comprise low-income countries, lower middle-income countries, and upper middle-income countries. Income groups are based on World Bank classifications. For more information, see <https://datahelpdesk.worldbank.org/knowledgebase/articles/906519-world-bank-country-and-lending-groups>.
- v. The OECD Centre on Philanthropy is currently analysing these data. The findings presented in this note are, therefore, only preliminary results. The upcoming report *Private Philanthropy for Development 2* will feature them in greater detail.
- vi. The survey questionnaire defined advocacy as an organised attempt to change policy, practice and/or attitudes, by presenting evidence and arguments for why and how change should happen.
- vii. Grassroots organisations or movements are defined as “self-organized groups of individuals pursuing common interests through volunteer-based, non-profit organizations, that usually have a low degree of formality but a broader purpose than issue-based self-help groups, community-based organizations or neighborhood associations” (Radu & Radisic, 2012, 7).
- viii. Development impact bonds are a results-based financial instrument, whereby private investors provide funding for the implementation of a programme and an outcome funder repays the investor with an added return if a pre-defined target is achieved.
- ix. See <https://oakfnd.org/grants>.



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Data and analysis  
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