

Opening the Vaults

The Rise of New Philanthropic Actors and their Relationship with International Organizations in Switzerland



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Andi Jacobs
Seyed Mahmoodi
Peter Wetherbee



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Meet the Team



Andi Jacobs

Andi is pursuing an M.A. in Development Studies at the Geneva Graduate Institute of International and Development Studies. Her studies have focused on conflict, climate-related migration, gender issues, philanthropy, and impact investing. While completing her degree Andi works as an Industry Relations & Communications Associate for an environmental services company based in Zurich. Prior to attending the Institute, she completed her B.A. in International Studies & Global Governance at Bishop's University in Sherbrooke, Quebec.



Seyed A. Mahmoodi

Seyed is a Master's student in Development Studies at the Geneva Graduate Institute of International and Development Studies. After having pursued a degree in Architecture and Sustainable Development at California Polytechnic State University, he worked with a sustainable development initiative focused on settlement development in Tanzania. His research interests currently revolve around refugee issues, emergency settlements and crisis management.



Peter Wetherbee

Peter is pursuing his M.A. in International Affairs at the Geneva Graduate Institute of International and Development Studies. His studies focus on international philanthropy, environmental peacebuilding, resource mobilization, and human rights. Outside of class, he works in the Development & Global Initiatives Department at Human Rights Watch, engages with multiple peacebuilding organizations in Geneva, and acts as a fundraising consultant in New York, NY. Prior to arriving in Geneva, he received a B.A. in Human Rights and a B.A. in International Studies from Southern Methodist University in Dallas, Texas, USA.

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1. Executive Summary

As the world grapples with expanding protracted crises, challenging political climates, and uncertain economic welfare, the development of innovative funding mechanisms that centralize the role of the private sector and philanthropy has never been more critical. Crises like the COVID-19 pandemic, the Russian invasion of Ukraine, and numerous refugee crises worldwide highlight just how important traditional and new philanthropic actors can be for the operations of international organizations. New actors in philanthropy are beginning to play a significant role in the funding of international organizations, conveying an urgent need to understand both modern philanthropic trends and the role of organizational engagement.

This research aims to outline these trends in philanthropy over the last five years and indicate how the emergence of new philanthropic actors influences funding mechanisms and programs over the coming decade, specifically in the context of international organizations. We draw our conclusions from a combination of recent literature and interviews with employees in the philanthropic, organizational, and academic sectors in an effort to create robust recommendations for professionals in philanthropy who are looking ahead to see how they can best prepare for the fundraising of the coming years. We aim to answer broad questions concerning the profile, level of engagement, motivations, and overall makeup of the new wave of philanthropists – hopefully, we leave you with more answers than questions.

This report provides an overview of the new actors emerging in the field of Swiss philanthropy, as well as identifying some prevailing trends along the way. With that in mind, the report highlights the potential for Switzerland for UNHCR to develop partnerships primarily through organizational relationships with corporate foundations throughout Switzerland and through cultivating personal relationships with the rising generation of family foundation decision makers. Further, Switzerland for UNHCR is encouraged to find new and innovative ways to incorporate donor engagement at every level of their work and with nearly every type of donor. A few ways that Switzerland for UNHCR can begin to do this are:

- Explore ways for millennials to integrate philanthropy into their businesses
- Develop and share long-term priorities not only for the organization, but for the philanthropic mission as well, including how the organization plans to address global issues in a strategic, efficient, and creative manner
- Craft strategies that use a localized, decentralized, and polycentric approach to engage with individual donors, ensure future sustainability, secure the younger generations as lifelong donors
- Invest in digital fundraising, and the well-designed technological ecosystems that organizations must possess to execute it properly, as a priority in short-term strategy

By recognizing trends, adapting to them quickly, and maintaining constant engagement with an intentionally crafted donor base, Switzerland for UNHCR can utilize this report and create long-term priorities that support their organizational needs while maintaining the flexibility needed to address ever-changing crises.

2. Introduction

Now more than ever before, expanding international humanitarian crises have necessitated the development of innovative funding mechanisms. The growing number of displaced people, totalling over 84 million in December 2021, combined with a consistent underfunding of UNHCR and other international organizations' operations, explains both the severity of the funding disparity and the emergence of new actors in the philanthropic world.

Millennials, women, crypto-billionaires, ultra high net worth individuals, and members of minority groups from all over the world are beginning to play a significant role in the funding of international organizations, conveying an urgent need to understand modern philanthropic giving trends and how organizations will begin to increase their levels of funding from the private and philanthropic sectors - a necessary step if these organizations are to continue responding to the growing needs of people caught in the middle of expanding global humanitarian crises.

Switzerland is host to 45 international organizations and over 750 non-governmental organizations, with the majority of those organizations being concentrated in Geneva and the greater Lemanic region (Swiss UNOG Mission, 2015). Additionally, Switzerland is home to one of the highest foundation densities per capita in the world, indicating that philanthropy has a strong presence in the country, though it may be largely unrecognized due to Swiss law privacy restrictions (von Schnurbein, 2013). According to SwissFoundations, of all foundations in Switzerland, 49% are grantmaking while the remainder are grantseeking, as is Switzerland for UNHCR. Therefore, studying the new actors in the Swiss philanthropic sector serves as a starting point for organizational philanthropic strategy, especially considering Switzerland's vast connection to international organizations, international humanitarian aid, and global civil society.

Little by little, we have witnessed a dramatic shift in the make-up of both the global and Swiss philanthropic sectors that is not only shaping the approaches and strategies of international organizations, but also having an impact on operational and programmatic decision making, particularly on which causes and crises will benefit most from funding opportunities. With this in mind, Switzerland for UNHCR has decided to assess how new actors could be embraced within the frame of its mandate and if this shift in strategy could be seen as legitimate in the eyes of a new generation of individual and organizational philanthropists, both in Switzerland and potentially beyond.

From this research, Switzerland for UNHCR is looking to gain insights into the new landscape of philanthropy, recognizing that the most important factor in conducting philanthropy in Switzerland remains the relationships that organizations cultivate with leaders in the community. Knowing who these people are and how to best engage with them in the coming years will allow Switzerland for UNHCR to expand their reach, solidify their contribution to the operation of UNHCR globally, and develop further as a leader in philanthropy in Switzerland.

3. Methodology

3.1. Research Questions and Objectives

Most international organizations, including UNHCR, receive their funding from multiple sources: the United Nations operational budget, contributions from member states, private companies, philanthropic foundations, and even individuals. Each of these funding sources is crucial to ensuring the success of these organizations' programming and operational goals. However, an increasing reliance on funding from the philanthropic sector necessitates an understanding of who these individual and organizational philanthropic actors are, what influences their decision making, and how they might cause international organizations to adapt their operations to maximize philanthropic funding opportunities. Through extensive collaboration with Switzerland for UNHCR and discussions with the IHEID academic team, the following research questions were identified:

1. Who are the new philanthropic actors in Switzerland?
2. How do they allocate their donations?
3. What is the impact of their arrival on the agendas of international organizations?

3.2. Research Design

Interviews

Our primary research method will be collecting primary data through interviews in three sectors: academic researchers, philanthropic professionals, and international organization professionals. Interviews were selected as the main means of sourcing information due to the ability to gather in-depth data on the topic from the targeted interviewees. Veal and Darcy (2014) define qualitative information as data in words, images, and sound formats. The reasoning for selecting a qualitative approach was because, "qualitative method is used to understand people's beliefs, experiences, attitudes, behavior, and interactions" (Pathak, 2013, p192). As philanthropy, specifically in Switzerland, is an incredibly niche topic, interviews provide the opportunity to allow for greater knowledge sharing from the participants. Potential drawbacks to interviews that we are keeping in mind include their highly time-consuming nature, chances for faulty information, and likelihood of subject unavailability.

In order to have demonstrated a thorough saturation of the topic through a qualitative approach (Hennink, 2022), the team will conduct a sample of approximately 15 interviews throughout the duration of this project. According to Hennink (2022), a saturation of empirical data is typically achieved through the completion of between 9-17 interviews, making the team's target of 15 interviews a reasonable figure that leaves enough space for adaptation on either end if deemed necessary at a later stage. This research will primarily include "convenience sampling", a method used based on the availability of subjects, which are readily available to the researcher (Suen, 2014). In addition to research done online, we will contact these people through connections built with the partner, recommendations from the partner, and the snowball sampling method common in highly specialized research.

Initial framing interviews (approximately 3-5) are being conducted with industry professionals and academics for the purpose of gauging our direction of further study and gaining recommendations in the early stages for further areas which may be useful to explore. Subsequently, additional interviews which will be more formal in nature will take place at a later date. The individuals interviewed in this process will include academics, philanthropy actors, and industry professionals. These will comprise approximately 8-10 interviews. In pertinence to ethical considerations and this project, all interviewees will be asked to provide verbal consent for their personal information (name and organization) to be included within this report. Furthermore, interviewees have the possibility to have their responses remain anonymous should they request it.

Given that this study will gather information from a range of professional fields, each interview will be partially tailored to the sector of the interviewee. That being said, all participants will be asked the following set questions, unless irrelevant for their sector:

1. Who do you view as a "new actor" in philanthropy in 2022?
2. Have you noticed a rise in specific types of high-level individuals that might not have existed in the last five years?
3. In your opinion, what is the best way for large organizations to engage with new actors in philanthropy?
4. How do you compare the role of a social media influencer versus a "traditional celebrity" (actor, singer, politician, athlete, etc)?
5. Do you operate differently when interacting with a global audience versus when compared to a Swiss audience? And if so, how?

Content Analysis

For our content analysis and literature review, the team will utilize academic research focusing on studies done by the Geneva Center for Philanthropy at the

University of Geneva and at the Center for Philanthropic Studies at the University of Basel. These two institutions have created a number of reports and articles that provide data and analysis on the state of philanthropy within Switzerland and the Lemanic region.

The literature review also consists of additional sources of academic articles on philanthropic behavior, humanitarian giving, and the operations of foundations in Switzerland dating no earlier than 2012. Finally, we will utilize data provided by the Swiss register of commerce, where all foundations in Switzerland are listed, and by the cantonal authorities who are responsible for charitable foundations within the cantons. While foundations with a national or international purpose are under federal jurisdiction, cantonal data will aid in providing local and regional philanthropic context.

Each of these sources of information provides a different piece of the puzzle needed to construct a full picture of philanthropy, new actors, and their effects in Switzerland. However, we will prioritize local sources, like the reports produced at Swiss universities, over more general academic articles purely based on their relevance. The Swiss philanthropic sector is a unique space, making any studies that are centered on it or created within it of the utmost importance.

4. Literature Review

This literature review serves to explore the relevant research on the field of philanthropy. To better engage with the material the literature has been divided into the following sections; an overview of philanthropy, women as philanthropic actors, philanthropy and international organizations, and lastly philanthropy in Switzerland. Through the analysis of this literature, common themes and trends have become evident, as well as areas requiring further research.

4.1. Overview of Philanthropy

In our initial research on the philanthropic landscape, we found that authors such as Degen, Vogel, Eichenberger, Kurak, Ugazio, Amaya, and others provide a rich and succinct analysis of modern philanthropy, exploring the waves of philanthropy and showing how philanthropy's evolution has influenced current trends in civil society. According to the literature, there have been three distinct waves of philanthropy over the last 500 years, beginning with the development of charitable traditions by religious institutions and monarchs in the medieval and Renaissance periods. As most religious traditions had incorporated charitable elements into their structures and institutions, most charitable activities were conducted exclusively under the oversight of religion (Degen, 2010). Rooted in the idea that sharing wealth of any form or size "out of a spirit of benevolence [or] civic duty," charity during this period sustained local populations while simultaneously keeping them subjugated and maintaining the power status quo (Vogel, Eichenberger, & Kurak, 2020: 7).

Emerging as early as the 1750s as the Industrial Revolution transformed the fortunes of many families and economies and as upper classes and newly affluent individuals sought to organize their wealth into more effective processes creating social change, the second wave of philanthropy focused on organized secular philanthropy. A major development of this wave is the creation and maximization of the utility of grantmaking, an evolution spearheaded by notable philanthropic figures such as George Peabody, Andrew Carnegie, and John D. Rockefeller – people whose philanthropic foundations continue to have international influence (Vogel, Eichenberger, & Kurak, 2020; Muehleman, Bruker, & Ingram, 1976).

Following the popularization and regularization of the internet in the late 1990s, a major transformation in philanthropy took hold. Innovations in digital technology mixed with hyper successful entrepreneurs and the need to collaborate across multiple stakeholder groups has pushed philanthropy to become more organized, transparent, professionalized, and often, more international (Amaya, 2019; Vogel, Eichenberger, & Kurak, 2020).

More than ever before, philanthropy is an industry in and of itself, with its own dynamics, methods of interaction, and trends. The cumulative research on philanthropy has indicated that there have been major evolutions in modern philanthropy that have a profound impact on the development and actions of new actors in philanthropy.

1. **Evolutions in technology have rapidly democratized the ability to give**, allowing anyone to give through mass collaboration efforts, online marketplaces, and aggregated funds (Bekkers & Wiepking, 2010; Vogel, Eichenberger, & Kurak, 2020).
2. Technology has also allowed for **real-time global awareness** and **a focus on issues rather than places**, meaning that it is easier for donors to connect with causes directly and combat issues on a global scale with a focus on the UN SDGs 2030 (Souccar, 2015; Ugazio, 2019).
3. With professionalization of the sector on the rise, philanthropy has seen both the **rise of multi-stakeholder efforts** and the **rise of effective and impact-driven giving**, with a particular emphasis on bringing actors together to create measurable and sustainable impact (Amaya, 2019; Neri-Castracane, 2019).
4. Over the past two decades, the world has experienced increases in wealth inequality unseen since the early 20th century, resulting in the **rise of megadonors** and an **alignment of business activities with giving** (Souccar, 2015; Bottge, 2021; Neri-Castracane, 2019).
5. Individuals who, much like John D. Rockefeller or Andrew Carnegie, have accumulated their wealth in a matter of years rather than generations, are deciding to **use their vast business wealth to establish philanthropic foundations**.

6. Finally, the **transfer of wealth between generations** (from Baby Boomers to Millennials and digital natives) is resulting in fresh mindsets, new ideas, and a massive sense of responsibility to actually spend down funds instead of giving marginal rates in the interest of making change while they are still alive (Souccar, 2015; Vogel, Eichenberger, & Kurak, 2020).

These evolutions and trends come together to create the philanthropic landscape of the 21st century, dictating the actions of new actors and international organizations alike.

Recognizing trends, adapting to them quickly, and making them relevant to a specific mission serves as the primary challenge for organizations in the next decade as new philanthropic actors take on more ownership of funding mechanisms.

4.2. Women in Philanthropy

The past few decades have witnessed huge strides made toward women's equality, with women gaining more access to education, influence over household finances, and increased wealth accumulation (Loehr, 2018). All of this progress toward gender equality has indicated that women are increasingly important agents in philanthropic spheres. For example, **women now oversee a vast amount of foundations worldwide**. Public figures such as Melinda Gates, Susan Buffet, Patricia Harris, and Pam Omidyar, have either founded or oversee philanthropic endeavors which have given billions to propel global development.¹

Not unsurprisingly, the manner in which women engage in philanthropy differs greatly from their male counterparts, making their giving trends an important area of study for organizations looking to harness the power of women in philanthropy.

The generalizations and notable trends of women in philanthropy are as follows:

- Single women are more likely to give more frequently and in greater amounts than their male counterparts (Mesch, 2015).
- However, women tend to disperse their giving across more sectors with donations of smaller amounts, whereas men are more concentrated givers (Andreoni, 2003).
- Additionally, women usually take more time to decide to give, yet once they do they typically prove to be more loyal givers (Loehr, 2018) and generally throw themselves into the cause they donate to by educating themselves and even volunteering for the organization (Mesch, 2015).

¹ More information on influential women in philanthropic spheres can be found at: https://www.huffpost.com/entry/meet-the-15-most-powerful_b_4903801

- Another notable feature of women in philanthropy is that they often utilize their social circles to create impact (Einolf, 2011) and engage in giving circles (Mesch, 2015).
- Trends indicating that women are more engaged in philanthropy often hint at the fact of this being attributed to women's empathetic nature and goodheartedness, however, this is not universally accepted.


There is some debate about whether women's giving trends are based on their personality. Some scholars, such as Bekkers (2006), state that willingness to give is more strongly related to human and social capital than to personality. Contrastingly, Ben-Ner (2004), suggests that giving, notably for women, can be largely explained by personality differences and cognitive ability. Ultimately, the motivations for why particular people give more than others are more discreet than could be expected.

A comprehensive understanding of the role women play is crucial when exploring the emerging trends in philanthropy, as women's economic success and financial freedom will continue to have an effect on the field of philanthropy and the success of international organizations.

4.3. Philanthropy and International Organizations

Philanthropy is becoming more significant in the realm of social change (Rath, & Schuyt, T. N., 2015). However, an understanding of how non-governmental organizations respond to this phenomenon has received very minimal academic research, especially outside of the United States (Ibid). In the past few decades, non-state actors such as NGOs and multinational firms have become key players in funding for the development sector. More recently, celebrities, former politicians, and social entrepreneurs have joined these actors, using their profiles to raise awareness and attract donations for international humanitarian aid in developing countries (Moran, M., 2009). For example, high-profile individuals such as Angelina Jolie, Cate Blanchett, and Swiss President Ignazio Cassis are all active in the humanitarian sector. Although international giving by foundations is at an all-time high, based on a recent report, only 12 percent of international grants were given to organizations based in the countries receiving the fund directly, with the rest flowing to organizations based in the Global North (The Foundation Center and The Council on Foundations, 2018). Studies show that globally-oriented philanthropy sometimes perpetuates the dominant position of NGOs from the Global North and undermines local accountability (Schmidt et al., 2021).

A new generation of philanthropreneurs is responding to societal issues by using their expertise, capital, and network assets. At the same time, international organizations want to respond to the shifting balance of civil society, but are not always familiar with newer forms of financing. This unfamiliarity may lead to confusion in the early stages of project development, which may result in suspending or even canceling projects. Moreover, international organizations lack many of the market forces that keep these new philanthropic actors disciplined, willing to make the tough decisions needed to survive and prosper, and focused on success (Rath & Schuyt, 2015). In early 2022, the Gates Foundation published a research paper suggesting that the powerful combination of compliance and agility in the distribution of philanthropic funds must be leveraged in order to support the most vulnerable in society (Bates, G. & Denysschen, L., 2020).



With the rise of inequality after the global pandemic, a high number of displaced people due to climate change, and conflicts around the world, it has become clear that an understanding of the impact of new philanthropic actors, the way they allocate their donations, and their impact on the agendas of international organizations is more crucial than ever.

4.4. Philanthropy in Switzerland

Due to Switzerland's importance to international civil society, it comes as no surprise that philanthropy in Switzerland is part of a larger evolution of philanthropy. Beginning with the 1354 founding of Inselspital in Berne, the development of philanthropy was closely related to the development of the Confederation in the 19th century (Degen, 2010). The establishment of the Swiss Confederation in 1848 was dominated by strong liberal politics, which favored a weak state and encouraged private social services.

The 20th century saw an increase in the welfare state, causing many nonprofits to lose their initial meaning (von Schnurbein, 2009). Post-World War II, a loosening of social ties led to a decrease in the membership of large nonprofits (churches, unions, sports, etc) and an increase in the economic prosperity of Swiss society, resulting in the continuous growth of individual-led philanthropy (von Schnurbein & Bethmann, 2010). As of the 21st century, Switzerland has over 13,000 philanthropic foundations, with roughly 2/3rds of them being grantmaking institutions (Eckhardt, Jakob, & von Schnurbein, 2012; von Schnurbein, 2009; Helmig, et al., 2010).

Among grantmaking foundations in Switzerland, the largest few provide the majority of public perception of philanthropy as a whole within the country, establishing their own association, increasing transparency and communication, and funding an entire research center on the subject of philanthropy (Eckhardt et al., 2017).

These foundations tend to be more business-oriented rather than state-oriented due both to their board members' connections with the private sector and the Swiss tradition of weak relations between the public sector and philanthropic foundations (Arrivillaga & von Schnurbein, 2014). An example of this phenomenon is that foundations are only required to report financials to the state supervisory authority, which means that much of the financial information surrounding Swiss foundations is not public. Regardless, reports done by researchers at the Center for Philanthropic Studies in Basel show that Swiss foundations have an estimated fortune of CHF 70 billion and annual payouts of CHF 2 billion (von Schnurbein, 2013). Further, the main causes that Swiss foundations support are culture & leisure (22.4%), research & training (20.8%), social action (21.8%), and public health (10.1%), with international activities only being supported by 4.6% of Swiss foundations (SwissFoundations, 2022).

Many foundations in Switzerland follow the global tenets of corporate philanthropy, including shared value and impact investing (Porter & Kramer, 2011). However, **in the realm of interconnected global humanitarian problems such as migration or climate change, the Swiss philanthropic sector struggles to create impact due to an apprehension of collaboration with state authorities** (von Schnurbein, 2010). This fundamental mismatch between the private, public, and philanthropic sectors is what makes Switzerland such an important place to study the emergence of new actors. How these new actors navigate, and subsequently recreate, these relationships will be crucial not only for international organizations, but all nonprofit organizations in Switzerland.

In tandem with the evolutions mentioned in the first part of the literature review, **fundraising is becoming more professionalized in Switzerland**, despite the difficult nature of prospect development due to the placement of philanthropy as part of the private sphere in Switzerland, closely following the motto "You give, but you do not talk about it" (Shavchuk, 2016; Scorpio, 2007). Due to Switzerland having the one of the highest densities of millionaire individuals and millionaire households in the world, Switzerland is a prime fundraising market for international organizations (BCG, 2012).

Understanding the evolutions of modern philanthropy in conjunction with the particular nuances of Swiss philanthropy is a necessary level of understanding that organizations must have in order to find success in acquiring philanthropic funds.

The well-developed finance industry in Switzerland leads to many specialized organizations in philanthropy consulting. These organizations, including WISE Consulting, StiftungSchweiz, and the Swiss Philanthropy Foundation, offer their services globally and profit from being so close to international organizations. One of the main results of this combination was the creation of the “G-foundations” – The Global Fund, Global Alliance for Vaccines and Immunization², and the Global Alliance for Improved Nutrition –powerful global health actors funded by private and state donors (von Schnurbein & Bethmann, 2015). Further, 81% of the Swiss public gives every year, with the median donation amount equating to CHF 350 (Fondation ZEWO, 2021). **These traits and international private public partnerships, mixed with a strong sense of civic duty due to an enduring liberal tradition, provide evidence for the generally supportive and constructive legal and social environment for philanthropic activities in Switzerland.**

Conclusion

The literature referenced throughout this review has covered a variety of subjects related to the study of philanthropy. The overview of philanthropy demonstrated that the historical evolution of philanthropy, from its religious roots to the robust machine that we know today, gives context to the nine modern trends found throughout newer literature on philanthropy.

Furthermore, the exploration of women in philanthropy displayed that women have distinct giving trends which make them unique in comparison to their male counterparts. Notably, women are likely to give more money, often to a wider variety of organizations, and frequently become very involved with the organizational mission, often educating themselves and volunteering for the cause.

The literature on philanthropy in international organizations revealed that a new generation of philanthropreneurs is responding to societal problems with their capital and expertise. However, international organizations are often unfamiliar with these alternative forms of financing and may sometimes find it confusing, which may lead to canceling, suspending or unsuccessful implementation of projects. International organizations also often lack many of the market forces that keep these new philanthropic actors disciplined and willing to make necessary decisions in tough times.

Lastly, the final section demonstrated that philanthropy in Switzerland can be very particular and has its own influences, trends, and ways of operating that are different from philanthropy in places like the United States and Germany. It is with this understanding of the philanthropic landscape in Switzerland that we can analyze the existence and impact of new actors and their engagement with international organizations.

Gaps in the Literature

This literature review has indicated the following gaps in the literature, which may require further study and exploration:

1. The impact of new non-state philanthropic actors on international organizations agenda;
2. An understanding of how non-governmental and international organizations respond to philanthropy and vice versa (especially outside of the United States), and lastly;
3. International organizations' biased decision making process, due to their organizational models, and its impact on philanthropic actors' business values;
4. Clarity on what motivates philanthropic actors in Switzerland.

5. Findings

This study conducted primary research via interviews with 15 professionals in the field of academia, philanthropic foundations, and international organizations. Each interviewee provided unique insights into the field of philanthropic giving and how international organizations adapt and interact to this phenomenon. Our research revealed the following recurring findings categorized per sector:

1. Academia

- In line with global trends, Switzerland is experiencing a transfer of wealth to younger generations, impacting the make-up of the philanthropic field.
- There is a huge giving culture in Switzerland (Basel in particular, with 46.3 foundations per 10,000 inhabitants compared to the Swiss average of 15.5), but it is not advertised, public, and serves as a very important part of people's personal lives for those who chose to participate, especially at higher giving levels (CEPS, 2022).
- In recent years, philanthropy has started to take less of a top-down approach, with philanthropic entities choosing to build programs with high levels of local involvement and vast impact studies on the communities they are choosing to work in. In essence, a "decolonization" of the field, while still marginal and not happening within the majority of entities, has begun.

2. Family Foundations

- Those in the family and private foundation sector prefer long-term involvement in causes they decide to contribute to.
- It is important for individuals involved in such foundations to feel engaged and inspired by the cause - no two people are alike and are motivated to give for very personal reasons. With this, foundations expect a high level of specialization from organizations wishing to solicit their funds. They want to know how exactly an organization's mission and programs fit into the vision that the foundation has for how its resources are used.

3. Corporate Foundations

- Similar to family foundations, the corporate foundations can be, but are not always, inspired to give to a particular cause for personal reasons. Corporation's employees can play an important role in pushing their company to give to a particular cause that is close to their heart. Alternatively, corporate foundations are also influenced to give to certain organizations due to alignment with business activities or geographical significance.
- Corporate foundations are unique in that they may also donate or offer their business services for the benefit of an organization.

4. International Organizations

- There is an increasing opportunity for international organizations to engage with social media influencers and other digital actors on the regional and global level.
- Similar to individual gift solicitation, engaging with corporations requires that international organizations find common interests that are shared between the two entities - this can be tricky, as the two entities are often driven by vastly different motivations.
- It is important for international and nonprofit organizations to show the impact of donations. Consistent, specific reporting is essential.
- There is a rise in democratization of philanthropy, thinking about new models that integrate beneficiaries into decision-making.

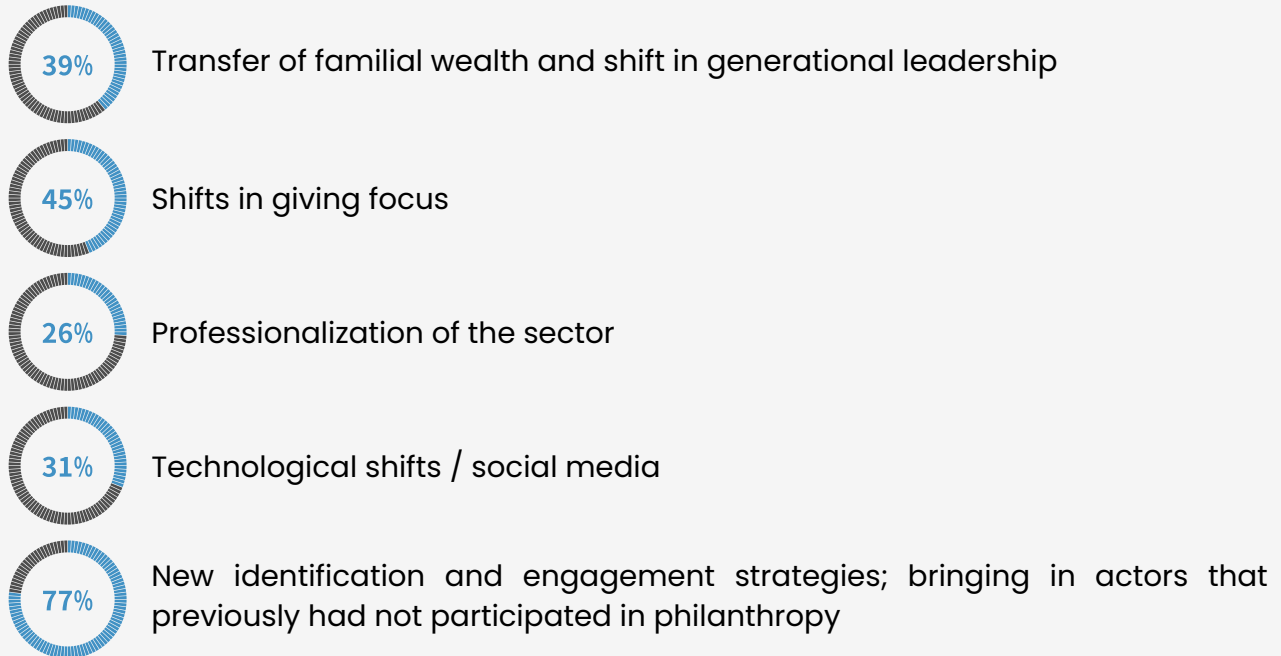
Overall, every interviewee recognizes the extensive shift that philanthropy has been going through over the last five years and is actively working on new methods of engagement, analysis, solicitation, and adaptation in order to bring their respective organizations and research in line with the emerging trends that we discuss in this report. Many interviewees either explicitly or implicitly acknowledged the emerging professionalization of the philanthropic sector, noting that while finding employees who are trained in fundraising, grantwriting, international philanthropic mechanisms, and other crucial skills can be difficult, skill-building programs on philanthropy, especially those focused on international philanthropy, are proving successful. Generally, there is a consensus that Switzerland is quickly catching up to trends in the professionalization and methods of philanthropy, all while adapting global trends to match the complex cultural context of the Swiss market.

Responses from interviewees in academia also included criticisms of the current systems, highlighting that many philanthropic actors do not wholeheartedly trust international organizations in their modern composition. With this, these interviewees pointed out that for international organizations to properly secure new actors in philanthropy as partners in fulfilling their missions they must view them as precisely that – partners. Long gone are the days of relying exclusively on member state governments to complete the funding mandate of organizations. The quicker that international organizations develop private sector partnerships, solicitation mechanisms, and cultures of philanthropic giving within their organizations, the quicker they will be able to start completing their mandate.

Many interviewees that work in international organizations recognized that there has been a radical change in the level of interest of corporations and foundations to give to their work following major crisis moments, at least in Europe. Notable examples include the 2015 refugee crisis and the 2022 Russian invasion of Ukraine, both of which spurred unprecedented support for the work of international organizations working in the humanitarian aid and refugee sector.

Additionally, each interviewee in this category identified their own organization's need for the development of new engagement strategies. While some organizations with already established private sector engagement departments have been able to adapt semi-quickly, some interviewees stated that their organizations are starting from the ground-up, building programs based on both successful models in other organizations and organization-specific constraints, especially from leadership and member states.

Major factors in the creation of new actors in philanthropy, with the percentage indicating how many of the interviewees mentioned the factor:



6. Conclusions & Recommendations

6.1 Future of Philanthropic Actors

Digital & Social Media Influencers

This research demonstrated overwhelming evidence that digital and social media influencers are playing an increasingly important role in philanthropy. The internet and rise of social media has created new spaces for fans and followers to engage with philanthropic causes promoted by influencers and celebrities (Jeffreys & Xu 2017). Unlike their “traditional celebrity” counterparts influencers and content creators bring different strengths to international organizations. Specifically, digital influencers are seen to bring greater community engagement to the issues which they amplify on their platforms. While the traditional celebrity is seen as an awareness spreader that brings attention to current issues, digital influencers provide greater financial support and encourage their communities (followers) to donate. Contrastingly, digital influencers may be more volatile in their commitments to a particular issue as they are newer to this philanthropy industry, whereas traditional celebrities tend to have more long term commitments.

A recurring theme from our experts suggested that though there are noticeable differences between digital influencers and celebrities the manner in which they engage with the organization is of more importance than the title they bring with them. **Thus, just because one influencer or celebrity has more followers does not suggest that they should be viewed as more valuable to the organization than others.**

Stakeholder Population

Often organization’s fundraising departments are located in headquarters– typically at a great geographical distance from the population being served by the organization. Nevertheless, there is increasing pressure for philanthropic ventures to incorporate program stakeholders as they represent authentic voices of the organization. By applying a stakeholder management approach, philanthropy and fundraising efforts can more closely align with the mission and long-term strategy of organizations (Hansen, 2021). **Engaging the voices of key stakeholders from your mission is a new and growing practice.** The key stakeholders of each organization will differ depending on the organizations goals and programming. For Switzerland for UNHCR refugee voices have and will continue to play an important role in communicating the needs of the organization to those who provide funds.

Cryptocurrency/Blockchain Companies

The rise in new technology and digital financial services has prompted some organizations to consider how they can partner with cryptocurrency platforms.

Blockchain-based approaches are suggested to improve international and nonprofit organizational transparency, while simultaneously automating contractual processes which will improve social impact, and reduce intermediation costs (Novak, 2018). Yet despite the potential that blockchain and crypto companies can bring to organizations, their role in philanthropy is somewhat contested amongst respondents. On one side of the spectrum there is the need to enlist the help of private sector companies in the crypto industry as they can bring new ideas on the manner and methods in which funds can be generated. It will likely be smaller organizations who have more freedom to explore new technologies and trends that will partner with crypto companies to innovate in the philanthropic spheres. As there is no established system at this point in time it is unlikely that large IOs will be at the forefront of this development as they are known to be slow to adapt, implement new practices, and must justify expenses.

On the other side of the spectrum there is the thought that there is not a large need to engage with blockchain companies as there is no perceived need from the organizational side. The suggestion being that it would be better to focus on establishing relationships with companies who can offer solutions and services in addition to philanthropic funding, in the short term rather than in the long term.

Ultimately, fintech and crypto industries will continue to grow. **There needs to be further research conducted on how to engage with these actors on the organizational level.** Moreover, these crypto actors do not know the best way to transfer funds as they are dealing in a digital currency or tokenization method. This will be a challenge for the coming years.

Corporate Sectors

There has been a recent surge in philanthropic giving, outside of corporate social responsibility efforts, from high net worth individuals in corporate spheres. Corporate engagement on this level is often due to employee encouragement or recent events with touched those in leadership roles. For example, research indicated that following the Russian invasion of Ukraine there was an unprecedented outpouring of corporate philanthropic engagement and support. Younger companies, specifically within the EU, have increasingly recognized the importance of engaging in social issues– this may also be reflective of a generational shift in cultural values.

Nevertheless, engaging with corporate sector companies requires finding common ground on particular issues– whether that be current events or longstanding engagement on a particular interest. In this sense organizations need to be very strategic with the types of corporate companies they engage with to ensure that mission and values align appropriately.

Crowdfunding

Though crowdfunding platforms are not a new concept, research suggests they may **play an increasingly important role in company and employee engagement**. Some experts suggesting that there will be a revival of this form of giving which will incorporate the largest innovation within the fundraising and philanthropy field. Experts pointed to platforms which promote corporate employee engagement, such as **Alaya**, as well as **Founders Pledge**, which incorporates tech and data-driven solutions for philanthropy.

6.2 Organizational Engagement

This section is intended to highlight the opportunities and challenges international organizations are facing in order to facilitate their engagement with philanthropists. Large corporations, celebrities, influencers, and any powerful individuals who have the power to influence global agendas through personal relationships, celebrity status, or business do realize their philanthropic operations are not independent of their stakeholders, similar to their businesses (Sawhill, J. C., & Williamson, 2001). The concerns of these stakeholders certainly cannot be ignored. For organizations to engage with philanthropists it is important to address their interests. **Organizations need to have long-term goals with their philanthropic endeavors**, which is very rare. There is always pressure to fundraise for short-term goals but this needs to be changed. Many philanthropists, especially **the younger generation, are more willing to get involved in projects with long-term goals**, rather than making a one-time payment. Therefore, there is a rise in the **democratization of philanthropy**, moving towards new models that integrate beneficiaries into decision-making.

Governance Organization

Attributes

Communication

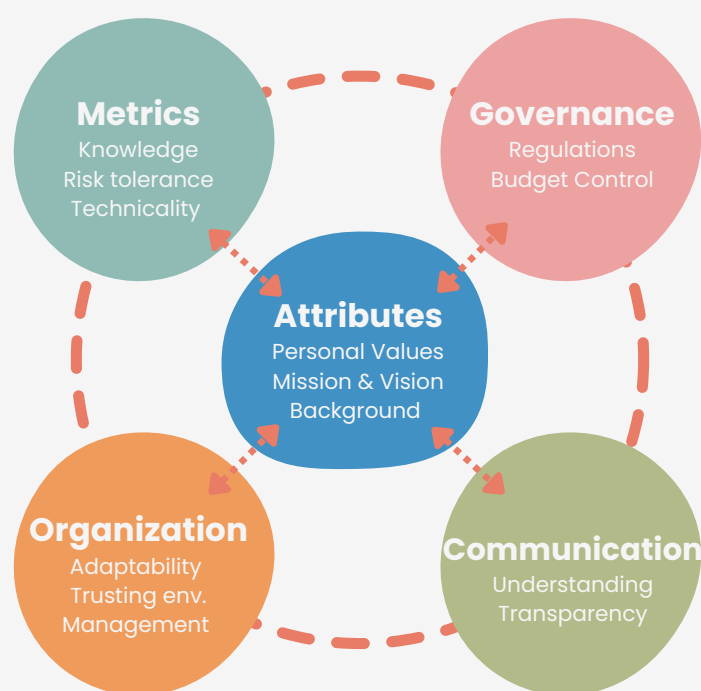
Metrics

Beyond involvement, it is necessary for donors to get inspired by the cause, no two people are alike and often philanthropists are motivated to give for very personal reasons. For philanthropy projects to succeed, it will most likely be due to philanthropists taking social impacts seriously, and the organization picks the right approach and succeeds in building trust (Bishop & Green, 2008). Here is where organizations are facing the crucial task of building and enhancing trust. There are several ways in which organizations can establish trust. For instance, **a clear introduction of the project and the people involved** can help build and maintain trust, **involving private parties** in different parts of the project could help with bringing different perspectives to the table, **conducting events** as an important way to make philanthropists feel like the organization is credible is another way to ensure trust between parties. Moreover, a clear and genuine relationship between all the people involved in a project is also necessary when it comes to determining which organizations philanthropists want to give to.

We are observing a rise of a new generation of philanthropists who want to respond to social issues through investing in non-profit organizations using their capital, expertise, and network assets (Rath & Schuyt, 2015).

Often international organizations are not familiar with this expertise or their needs are not completely aligned with the solutions they are being offered. It is critical for international organizations and philanthropists to understand the attitude and knowledge of one another rather than moving straight into an unknowable future partnership. As mentioned earlier, organizations often lack many of the market forces that keep philanthropists focused on success, disciplined, and willing to make tough decisions. Organizations are well known to be slow to evolve, therefore, donors are bypassing such partnerships in favor of direct giving opportunities. Therefore, **a more flexible and adaptable approach could ensure successful cooperation with the new generation of philanthropists.**

Based on the information gathered from the interviews we can apply this **theoretical framework** from the literature that demonstrates characteristics and their variables that may affect a partnership. There are five characteristics that outline a successful engagement between philanthropists and partner organizations (Rath & Schuyt, 2015). These characteristics are as follows:

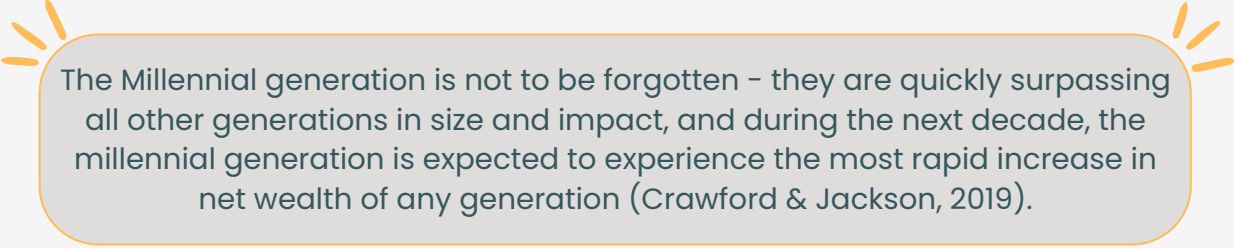


1. **Attributes:** The behavior and personal background of the philanthropists and what drives them to be interested in contributing to the organization’s cause.
 2. **Metrics:** An acceptance and understanding of the competency that demonstrates the contribution of partners and philanthropists.
 3. **Governance:** Organizational structure, policies, and procedures.
 4. **Organization:** Management style, adaptability, and ability to leverage new ideas.
 5. **Communication:** The exchange of knowledge and ideas, the way to approach.
- Whether philanthropists or organizations are the drivers for the tailored financial strategies, only when these characteristics play in harmony a partnership can be expected to succeed.

6.3 The Importance of Generations

There is a common misconception that philanthropy is exclusively for the older generations with money, experience, and plenty of time to commit to their favorite causes. However, many of our interviewees emphasized the importance of generation in determining philanthropic behavior both in Switzerland and in other contexts. The younger generations (Millennials and Gen Z) are engaging with philanthropy at rates previously unseen in other generations during their youth, preferring to not only get involved, but to have a hands-on approach to their engagement. **Modern philanthropy, as seen by many interviewees who work at international organizations, is being shaped by the values of the first generation to be formed by participation in the global digital social world and these changes have become ultra-clear following the onslaught of multiple global crises** (Crawford & Jackson, 2019: 551).

While many people of the generations born 1940–1980 in Switzerland would prefer to give money quietly or semi-quietly and leave it at that, the younger generations beginning with the Millennials want to be far more involved, desiring participation in programming and receiving reports on what their money is being used for.



The Millennial generation is not to be forgotten – they are quickly surpassing all other generations in size and impact, and during the next decade, the millennial generation is expected to experience the most rapid increase in net wealth of any generation (Crawford & Jackson, 2019).

Additionally, they are slowly shifting the primary issues that the philanthropic sector funds, from arts & culture and education dominating foundation funding to global poverty, the environment, and social services taking on new importance.

Older generations may give because they enjoy a particular organization's mission or programs, but younger generations see their giving as both financial and as a long-term commitment to the welfare of an organization's mission. Younger generations often engage with organizations in non-monetary ways before giving them money as a way to establish deeper connection and decide whether an organization truly aligns with their personal values (Gorczyca & Hartman, 2017). They expect extensive reporting and collaborative action (Souccar, 2015). Younger donors also hold transparency in high regard due to the value they put on donating to a cause/mission, rather than a specific organization. They expect certain standards that organizations must adhere to and are more unwilling to compromise in these than older generations (Gorczyca & Hartman, 2017).

Engaging with younger generations while delivering a hyper-personal experience is a difficult task for organizations, particularly for large, bureaucratic international organizations that are trying to connect with a much broader audience than their local or regional counterparts (Crawford & Jackson, 2019).

It will be paramount for international organizations to recognize that a localized, decentralized, and polycentric approach to engaging with individual donors is the best way to ensure future sustainability and secure the younger generations as lifelong donors (Gorczyca & Hartman, 2017; Crawford & Jackson, 2019).

As mentioned by a couple of interviewees, crowdfunding is a great opportunity to engage younger generations, as it is technology-based, interactive solicitation often based on storytelling and network sharing. Further, it matches the evidence in the literature for a millennial desire to balance low cost gifts and high engagement (Lehman, 2013; Scheresberg et al, 2014).

Just as broad philanthropy is shifting along generational lines, foundations in Switzerland are beginning to experience a radical shift in management, mission, and organization. As the new generation begins to take over foundational philanthropic endeavors, particularly within family foundations, many opportunities exist in altering the often long-standing missions of many well-established organizations. Realignment and reconfiguration are becoming commonplace in many of the largest philanthropic foundations due to the shift in generations from old to young.

This shift is not only present in the family and nonprofit spheres. Private companies that are being founded or taken over by the younger generation are increasingly engaging more in philanthropy. Following the 2016 Syrian refugee crisis, there has been an increase in engagement from both older European companies and new companies, with all actors realizing that refugees are an important part of society that must be supported and ultimately integrated into the workforce. Much of this reflects not only the ongoing global crises that the younger generations are being faced with, but also younger generations' desire to be a part of community (Morgan & Allen, 2017).

Finding ways for millennials to integrate philanthropy into their businesses will be an important aspect of engagement for international organizations.

6.4 Changes in Swiss Philanthropy

Concurrent with the modern situation of global philanthropy, Swiss philanthropy is going through major transformation – albeit in a distinctly Swiss way. Similar to that of trends seen in other countries, there is a transfer of wealth to younger generations currently happening. With that, there has been a major shift in giving foci, with giving to the arts, education, and social services decreasing and giving to environmental programs increasing significantly from previous years. According to the Foundation Report produced by the Center for Philanthropy Studies (CEPS) at the University of Basel, education made up 20.8%, environmental protection 9.6%, and international projects 4.6% of total foundational foci in Switzerland in 2022 (CEPS, 2022). Comparing these numbers to those from 2017, where education and research made up 25.4%, environmental protection 7.5%, and international projects 6.4%, reveals some interesting changes in philanthropic giving (CEPS, 2017).

There is a pervasive giving culture in Switzerland that is not advertised, but is a very personal matter for those individuals who give. As discussed previously, giving in Switzerland is highly personal and kept in the private sphere. In the future, Switzerland-based international organizations and organizations catering towards the Swiss philanthropic market will have to cater towards donors who do not want to engage directly and would like to remain anonymous while also finding a project that matches certain donors' interests. **Showing that programs can be adaptable and are receptive to donor engagement will prove invaluable within the Swiss context.** Further, three interviewees highlighted that an important new actor in philanthropy is the people, often wealthy and quite young, who want to change the world by contributing to potential solutions to the globe's most notable problems. This group of actors is extremely mission driven and **want to see how an organization is working globally through partnerships and coalitions, how they utilize technological advances to their advantage, and how an organization connects these global issues to local contexts and communities.** Long-term involvement, focus, and organizational vision are crucial to the cultivation of this new actor in Switzerland.

Philanthropy in Switzerland is as varied as the language regions themselves. In the Lac Léman region there are two types of philanthropists. First, the traditional Geneva families who moved to the region during the Protestant Reformation and have remained here for centuries. Their typical way of doing philanthropy is the one that we view as standard for the region: discrete, reserved, and as a part of their familial and professional traditions. As the generations of family members go by, they pass their philanthropic values on and encourage the next generation to be even more generous than the one before. Many of the large Geneva banks are the sources of these families' wealth, including J. Safra Sarasin, the Pictet Group, and Lombard Odier.

The other type of philanthropist in Geneva is the expat, really wealthy people who have built businesses or who work in business, but are not from the Lac Lemman region. They are well-educated in philanthropy, typically have advisors, and tend to be very cosmopolitan within the international sphere. One major similarity that two interviewees brought up about these two groups is the level of professionalism with which donors conduct themselves - they view this as part of their personal/professional tasks, they take it very seriously, and once earned, they are extremely loyal.

Contrast this with Zurich, where philanthropy focuses much more on organizational and individual corporate donors, prioritizing fewer donors but with much larger numbers. Despite this, recent data has shown that in the last 5 years, Zurich has overtaken the canton of Geneva in terms of new foundation production (the vast majority of which are family foundations), with Zurich having a total of 2,232 foundations and 51 new foundations in 2021, in contrast to Geneva's 1,294 foundations and 48 new foundations in 2021. **The move towards professionalization through the formal organization of philanthropy in Zurich, rather than through traditional person-to-person relationships like in Geneva, marks a potential mobilization opportunity for international organizations that struggle to maintain long-term individual relationships due to their size and ever changing composition.**

Some organizations based in Geneva have developed strategies which simultaneously engage with the local Geneva philanthropic community and respect the global mandate present in the many facets of their work. They have built communities of donors who engage with the organization's work on a personal level, giving time and money alike. **To be successful in Geneva and the Lemanic region, you must adopt the strategy of, as one interviewee put it, "people-centered fundraising," rather than "money-centered fundraising." The goal must be as much about raising funds as it is about cultivating long-lasting personal relationships with donors.**

According to multiple interviewees, digital fundraising will begin to take on new importance as the Swiss philanthropic market shifts towards the younger demographic and away from the traditional cash and check approach. In line with the trend of increasing small donations, **digital fundraising and the well-designed technological ecosystems that organizations must possess to execute it properly should be crucial components of any Swiss organization's strategic plan for the next two-three years.**

6.5 Key Conclusions and Recommendations for Switzerland for UNHCR

This report has provided an overview of the new actors emerging in the field of Swiss philanthropy, as well as identifying some prevailing trends along the way, in the context of the work of Switzerland for UNHCR. With that in mind, the report highlights the potential for Switzerland for UNHCR to collaborate and develop partnerships with all of the sectors mentioned above, but primarily through organizational relationships with corporate foundations throughout Switzerland and through cultivating personal relationships with the rising generation of family foundation decision makers that have been ever present in the Lemanic region and beyond. Given that generational shifts in foundation management are increasingly present in this field and that such foundations wield significant financial power in Switzerland and abroad, it is recommended that Switzerland for UNHCR focus on developing people-centered fundraising partnerships with the newer generation of fund managers.

Further, Switzerland for UNHCR is encouraged to find new and innovative way to incorporate donor engagement at every level of their work and with nearly every type of donor. A few ways that Switzerland for UNHCR can begin to do this are:

Find common ground with corporations on current events or particular interests and build a strategy in tandem with one another, aligning both values and mission

Explore ways for millennials to integrate philanthropy into their businesses

Develop and share long-term priorities not only for the organization, but for the philanthropic mission as well, including how the organization plans to address global issues in a strategic, efficient, and creative manner

Craft strategies that use a localized, decentralized, and polycentric approach to engage with individual donors, ensure future sustainability, secure the younger generations as lifelong donors

Create an approach to partnerships and cooperation that is flexible, adaptable, and receptive to donor engagement, which will prove invaluable to the new generation of philanthropists in Switzerland

Invest in digital fundraising, and the well-designed technological ecosystems that organizations must possess to execute it properly, as a priority in short-term strategy

7. Further Research

As stated above, this project has provided an overview of new actors in the field of Swiss philanthropy. The research presented in this report can serve as the groundwork for further study, which does a deep dive into the sectors referenced in the “Future of Philanthropic Actors” section and within our conclusions more broadly. Our recommendations for further research include the following:

- The intricacies of Swiss grantmaking corporate and family foundations
- Technological innovation in philanthropy and the emergence of blockchain
- The revival and proper utilization of crowdfunding platforms
- Digital influencers as the next generation of actors in philanthropic mobilization

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