

**PEX** magazine.

Issue #1. June 2020

# PEX

Where European  
philanthropy  
infrastructure  
meets



# IMPRINT

## **PEX - Where European philanthropy infrastructure meets**

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DAFNE – Donors and Foundations Networks in Europe, Philanthropy House, Rue Royale 94, 1000 Brussels, Belgium, [www.dafne-online.eu](http://www.dafne-online.eu)

### **This publication was co-created:**

This magazine is a result of the PEXforum 2020 in Madrid, the first Europe-wide event bringing together leaders and experts from national, regional and European philanthropy networks. It was hosted by DAFNE and the Spanish Association of Foundations and co-created with SenseTribe and the wider European philanthropy community.

The PEXforum 2020 would not have been possible without the generous funding support from Calouste Gulbenkian Foundation, Daniel & Nina Carasso Foundation, EDP Foundation, ONCE Foundation, “la Caixa” Foundation, Charles Steward Mott Foundation and Oak Foundation. We also thank our partners Alliance magazine, Impact Hub Madrid, Rockefeller Philanthropy Advisors and WINGS for their outstanding collaboration in preparing and realising the first PEXforum.

We are indebted to all contributors who provided ideas and feedback, engaged in discussions, organised case studies, wrote articles and blog posts and shared their vision for the sector with each of us.

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**“We need a paradigm shift in how philanthropic institutions interact, connect, communicate and provide support.”**

Juliana Hoxha, Partners Albania for Change and Development

# INTRODUCTION

## A new star is born

On 23 January 2020 at 9.00 a.m. in Madrid a unique gathering of philanthropy networks in Europe kicked off with a call for the 124 participants representing 41 philanthropy networks from 23 countries to be ambitious, bold and generous, and to try to give their best answer, the highest aspiration, and a vision for the sector – for each proposition and each question.

30 hours later these 124 people left the Impact Hub conference venue **empowered by the experience of having been part of building a new peer community that has so much to offer for each and everyone involved in the European philanthropy infrastructure**, energised by the deep and highly inspirational discussions amongst the movers and shakers of the philanthropy field, and grateful that everyone in the room was open and engaging with each other.

We could physically witness how this space for collaboration and, more importantly, a sense of belonging to a community emerged right before our eyes. We collectively identified challenges and opportunities for the sector, shared best practices and insights, explored concrete projects, and invited others to collaborate.

**Collaboration requires trusted relationships which is why these moments of togetherness are the fundamental basis for jointly moving the needle** when it comes to philanthropy data insights, a broad pick-up of the Funder Commitment on climate change, effective philanthropy advocacy and other activities supporting philanthropy across Europe.

With this PEXmagazine we aim to give you a flavour of what happened in Madrid, but also to illustrate how the PEXforum has changed the way philanthropy networks engage with each other in order to make a real difference to philanthropy in Europe and, through this, to our wider societies.

The PEXforum 2020 was the result of dynamic and empowering co-creation, and we are grateful to many for contributing ideas, providing feedback, and challenging established formats and ways of thinking.

The “Road to Istanbul”, where the next PEXforum will take place, will be equally shaped by the PEXcommunity, bringing together a wealth of knowledge and experience of philanthropy in Europe.

We therefore invite you and everyone in the philanthropy infrastructure ecosystem to join this journey and contribute to what makes philanthropy across Europe so rich, effective and trustworthy: a community leading the field.

**Max von Abendroth,**  
DAFNE – Donors and Foundations Networks in Europe

# WAYS TO ENHANCE COLLABORATION OF PHILANTHROPY IN EUROPE

## Data on philanthropy

This session addressed how to improve data on the European philanthropy sector. Although a number of data initiatives exist, this information has not been systematically analysed and compared. PEXcommunity agreed to explore the sector's interest in systemised reporting. Proposed solutions include a sorting taxonomy to overcome the lack of resources within foundations to share data, as well as the organic mapping of projects, experts and skill sets.



## Gender

Gender equality was discussed in this session. One of the proposed actions included research that would measure change in foundations' grant-making operations, examine the female share in leadership and trace board and staff dynamics. Another proposal consisted of leading by example by establishing a public code of conduct. To achieve gender balance by 2030 in line with the SDGs, it is also necessary to support clarity on public programme structures and how they handle complaint procedures.



## Harvesting academic research

The session on harvesting academic research discussed the need for a closer dialogue between researchers and practitioners. For instance, academia could take into account practitioners' needs when designing a new study, while foundations could involve academia more in selecting projects and writing calls for proposals. Furthermore, the difference was made between academic expertise in long-term impact studies and consultants' role in offering practical advice and guidance.



## New technology and philanthropy

The potential for new technology and philanthropy lies within the critical evaluation of how to advance common good. Since data is a new resource, a more sophisticated way is needed to gather and analyse data, and make valid predictions. Participants in this session discussed what role governments could play in regulating the digital space and what philanthropy could contribute to critically evaluating the potential of digital technology and artificial intelligence in contributing to the public good.



## Communicating philanthropy

One of the key insights of this session was the need to create a narrative that is European, reflects diversity and offers a unique value proposition. It is important to improve storytelling on philanthropy, based on facts and linked to burning societal issues. To achieve this, it was deemed practical to establish a European Communications Hub, gathering the philanthropy ecosystem's communications professionals who can work out a common communications plan, a narrative and a toolbox.



## SDG philanthropy platform

Foundations have always been working towards achieving the SDGs, even before this framework came into existence. Linking philanthropy's work with the SDGs, however, can help foundations and philanthropy networks increase their visibility and credibility in the public domain as well as influence policy. Thus, it is important to share concrete practices, develop impact-measurement tools and facilitate multi-sector alliances. Data gathering, with surveys framed in the same language as the SDGs, could support this process.



## Climate emergency

Participants of this session stressed that foundations and networks, which are not specialising in tackling environmental issues, want to act but do not necessarily know how to proceed and what tools to use. Hence, it is important to share best practices and to start using the climate lens on existing programmes. To be the most effective, addressing climate change needs to be adopted to local and national contexts..



## Critical philanthropy

Engagement with critical perspectives on philanthropy is crucial to address the general perception of philanthropy as elitist and self-serving. A space where the philanthropy ecosystem can have open discussions is essential to empower foundations to own the space in which they operate. Topics to be explored include: communications need substance; research needs the beneficiary's voice; foundations need an alternative participatory model; and the conversation needs to be shifted from impact to learning.



## Future of philanthropy and next generation

Philanthropy is changing before our eyes, with new forms and patterns of giving emerging. This session focused on discussing the future of philanthropy and how to engage with the next generation. Whatever form philanthropy takes, it could play a critical role in providing space and infrastructure for a meaningful conversation about topics that matter. Philanthropy needs to create a compelling narrative and value-proposition, focusing on long-term results and involving young people in more participatory ways.



## Weakness of philanthropy

While philanthropy is embedded in society, it needs to be aware of its weaknesses in practice. To tackle existing power dynamics, for example, foundations need to have the courage to ask what their beneficiaries need, instead of telling them what to do. Through critical self-perception and the basic understanding of one's own power and influence, the ecosystem can shift towards a new philanthropic model, which is risk-taking, pluralist and transparent.



## Human Rights Philanthropy data project

### CASE STUDY by Ariadne & Candid

What is the global landscape of human rights funding? Where is the money going, and what are the gaps? A collaboration between Human Rights Funders Network and Candid, in partnership with Ariadne and Prospera, developed the Advancing Human Rights initiative, which collects and analyses data and provides insights into global human rights grant-making.

This project's key learning was that all participants were interested in sharing their own data sets to improve comparability and lessen the burden on foundations, and they were also eager to overcome existing challenges through collective effort.

The project's value lies in how it can be used for communicating philanthropy. Participants uncovered the importance of informing about data projects which are already happening, and of applying a specific taxonomy to existing data.

# CHALLENGES

Philanthropy is expected to respond to the complex, interconnected and multi-layered problems of our time. Today's challenges require us to act together, mobilise all available resources and act quickly. Digital disruption puts us under pressure to adapt to new ways of working and collaborating. At the same time, a tightening political climate in many countries poses a threat to civil society.

PEXforum invited participants to define and discuss the challenges philanthropy is facing at national and European levels. Three main challenges stood out from the discussions:

- The need for more **collaboration** in philanthropy and across different sectors. Collaboration is key for effectiveness and impact, and it is necessary in pooling resources, learning from each other's experiences and acting together to promote change
- The need to create a common **narrative** of philanthropy. Distrust towards philanthropy is growing, while important questions around its legitimacy as well as its dynamics of power are becoming more widely discussed. For many outside the sector, philanthropic institutions are opaque and usually associated with wealth, and the value of philanthropy is unclear
- The need to build a European philanthropy **identity**. The socio-political and economic conditions as well as the legal and fiscal environment for foundations vary across the European countries.

Liana Varon,  
Support Foundation for Civil Society, Turkey

**“Philanthropy is rooted in Europe; it's part of the very fabric of European society but it is absolutely not understood.”**

Lisa Jordan, DRK Foundation

## Foundations – a good deal for society?

### CASE STUDY by SwissFoundations and PwC Switzerland

The reputation of philanthropy is being challenged by the perception that it is motivated by tax privileges, and that this benefit comes at a cost to the public purse. SwissFoundations and PwC Switzerland launched a new study to provide fact-based insights into the economic benefits of charitable grant-making in Switzerland.

Based on the results presented during the session, it became clear that – contrary to some public



perceptions – foundations are not a tax-saving model. A break-even between tax deductions and the added value to society is on average reached within two years.

The value of the study lies in its potential for advocacy and communications, which inspired participants to conduct similar studies in their networks.

## The Funder Commitment on Climate Change

### CASE STUDY: The UK experience by ACF & Carasso Foundation & DAFNE

The UK Funder Commitment on Climate Change is an invitation for foundations to take action on climate change. ACF is currently considering its next steps, including hosting the Commitment and providing the required support.

Signing the Commitment is not an end goal but a “pledge”, the start of a process, which involves all types of foundations. Such a pledge will only be valuable if its implications are clear, and it finds legitimacy in the (moral) responsibility of associations to consolidate efforts and act on climate change.



There is value in Europeanising this effort in order to build momentum and bring it to scale. Such a commitment could work at various levels: at the national level, designed to fit the national context; at the European level; and at a global level, which may inspire others to share learning, good practice and reporting.

# OPPORTUNITIES

Opportunities for European philanthropy outweigh its challenges, but this is not owing to a lack of threats. As DAFNE Chair Felix Oldenburg aptly noted in his opening remarks at the first PEXforum, “Philanthropy is more threatened and more needed than ever.” Not only is the European support infrastructure lagging far behind other sectors, we also lack a common voice to communicate our values, aspirations and achievements. However, threats to the sector also spur opportunities. Opportunities to unite, collaborate, form alliances that reflect the diversity of European philanthropy and advocate for the common good. The pressure to respond to challenges and our ability to do so have never been better aligned.

Data, for instance, can be a valuable resource for the entire sector. Shared and reliable European-level data, which is curated, transparent, safe and flexible, can be the basis for effective collaborations. It can provide the robust intelligence and statistics needed for raising public awareness and advocating for social change, establishing a common

**“Philanthropy operates with a long-term horizon and beyond the market and electoral scrutiny, which represents huge potential for risk-taking and innovation testing on the large-scale policy interventions.”**

Georgia Efremova, European Commission

narrative and reaching out to new constituencies. It can also help in measuring and communicating collective impact, increasing transparency, facilitating innovation and supporting systems change. Generating a Europe-wide database is a tremendous challenge, but also a fantastic opportunity.

Philanthropy needs to seize these opportunities and move to an open floorplan office, a dynamic space allowing other sectors and stakeholders to engage with each other, to exchange ideas, knowledge and information.

Lev Fejes,  
ARC, Romania

# “THE ROAD TO ISTANBUL”

## Milestones and actions



How can foundations operate in a new space? How to respond to growing critiques and build trust in philanthropy? **Philanthropy Insight** seeks to develop a common understanding of a trust-driven philanthropy that is stronger, better defined and more accountable. A self-assessment tool for foundations will be available online to help them critically reflect on and improve their practices.

“The potential is to strategically align the position of each of the networks locally but also at the European level, and you only align, when you do it from your heart.”  
Isabelle Le Galo Flores, Daniel & Nina Carasso Foundation

“Communicating philanthropy requires greater diversity in the face of changing generations and rapid technological development.”  
Polina Nyukhina, Ukrainian Philanthropists Forum



**Next Philanthropy** is a global partnership highlighting news, trends and developments across the philanthropy sector. The vision is of more inclusive, agile, purpose- and value-driven philanthropy. The project offers space for discussion, joint exploration of topics that matter and building a community. It creates potential to reach out to new constituencies and shape the future of philanthropy. Join the conversation!

“We won’t get this done by working in silos of any kind.”  
David Biemesderfer, United Philanthropy Forum



Gender inequality is an urgent issue facing Europe. A working group on **gender justice** and, more generally, diversity, equity and inclusion emerged at the PEXforum. The aim of the group is to frame the debate on gender and diversity and to contribute to a gender-balanced and more diverse sector. You can contribute a story on gender justice in your organisation!



How can philanthropy respond to the **climate crisis** and contribute to a fair and lasting transition to a post-carbon society? Inspired by the Funder Commitment on Climate Change in the UK, explored opportunities for action at national and European levels. The vision is that every foundation in Europe commits to tackle the climate crisis. Help us spread the word, so that this vision becomes reality.

While philanthropy is flourishing across Europe, there is no reliable and robust information about the sector. The challenge is how to collect and analyse data and make this information comparable and publicly accessible. Building on this, PEX community explored opportunities for a joint European Philanthropy **Data Insight Platform** that would serve the sector as well as the wider public.



How to position philanthropy as a partner when shaping public policy? **Advocacy** offers tools and strategies to engage with policymakers and the public. It requires regular monitoring of national and European regulatory developments, legal analysis and engagement with policymakers. But first and foremost, advocacy requires coordinated action and a united European voice which reflects the diversity of the sector.



# PEXFORUM 2020 IN A NUTSHELL

## A new era for European philanthropy

For many, PEXforum had unexpected results. Surely hardly anyone came to Madrid anticipating that they would be part of the birth of a new era for philanthropy networks in Europe. PEXforum was not just an event; it was the start of a new way of collaboration – the result of decades of work complemented by months of careful planning and co-creation of the occasion.



### FOCUS philanthropy: Telling hidden stories of philanthropy

#### CASE STUDY by Russian Donors Forum & DAFNE

Philanthropy's contribution to society is largely unknown, which often leads to misconceptions or unrealistic expectations. FOCUS Philanthropy sheds light on foundations' everyday work and is aimed at building trust in grant-making organisations. Launched in Russia and expanded to European national associations, the project invites foundations to showcase their work via a photo and an accompanying story.

The key learning from this session was the power of the visual, which can awaken feelings and reach a wider public. Photos can bring out the human element or story in an impactful way. Moreover, participants considered using a contest to hold exhibitions in public spaces and to reach out to new audiences.

The value of the project lies within its illustration of a European adaptation of a national project. It was also deemed helpful as a blueprint for a visual storytelling platform.



“This is the first time that all European networks have been brought together and that is a wonderful opportunity to get an understanding of the depth and strength of the philanthropy support ecosystem in Europe.”  
James Magowan, ECFI

“PEXforum has filled me with a new hope, a feeling of belonging, a belief in the power of the philanthropic community.”  
Lev Fejes,  
ARC Romania

PEXforum 2020 was a unique gathering of 124 leaders and experts from 41 networks, philanthropy networks, national associations, media, research institutions and foundations from across Europe and the world.

Over the last decades, philanthropy networks were established in numerous European countries, mirroring the dynamic growth of the philanthropic sector. However, peer exchange is not enough. The world is urging each of us to take collective action on the climate crisis, migration and digital transformation. We need a united European voice for philanthropy.

PEXforum provided space and time for discussing urgent matters and exploring ways for cross-border collaboration and joint action. It facilitated not only fruitful discussions around advocacy, communications and data, but also led to very concrete outcomes – the roadmap with a series of practical actions for the ecosystem and the evolving PEXcommunity. PEXforum has demonstrated that our convening power has to be put into use – a step change for many of us.

Rosa Gallego, Spanish Association of Foundations



Want to learn more about European philanthropy networks? Have a look at their IDs here

[www.alliancemagazine.org/wp-content/uploads/2020/01/IDs-PEX2020-Forum.pdf](http://www.alliancemagazine.org/wp-content/uploads/2020/01/IDs-PEX2020-Forum.pdf)

“PEXforum was the best foundation conference, which I have ever participated in, and I've been in the field for 20 years.”  
Liisa Suvikumpu, Association of Finnish Foundations

# EUROPEAN PHILANTHROPY NETWORKS UP THEIR GAME

What happens when you bring philanthropy works together, roughly divided into two groups, to spend quality time with one another? One set of groups represents the interests of foundations in individual countries and the other set is focused on joint action on shared issues and themes. To put the question a different way, what do you get when the European Human Rights Funders Network meets the Albanian Donors Forum?

Would they talk past each other? Would they even be talking the same language?

This was the social experiment recently conducted by the Donors and Foundation Networks in Europe (DAFNE) and the Spanish Association of Foundations (AEF). They brought together 124 willing accomplices from across Europe's burgeoning eco-system of national, regional, European and thematic networks to the Impact Hub in Madrid. With paper, marker pens, post it notes and circular signs hanging and floating from the tall ceiling, the Philanthropy Europe Networks or PEXForum – as it was billed – was and felt like a first-of-its-kind gathering: pioneering, purposeful, ego-less and intimate, enthused with a spirit of co-operative endeavour far removed from some of the larger funder dominated meetings.

The attitude and spirit of participants was a large part of the success but it was also thanks to DAFNE's foresight in arranging some remarkably self-effacing and skilled facilitators from Sense Tribe to manage the event. Even those suffering forced or self-imposed exile from the European Union – Albanians, Turks and more than a few Brits – seemed genuinely delighted by the warm welcome.

Apart from the inter-philanthropy cultural relations and consumption of tapas, serious sector business was also in the making and a sense of ambition was apparent from the outset. Spanish foundation leader Rosa Gallego invited participants to join a 'new stage of the game' while DAFNE's CEO Max von Abendorth encouraged participants to 'be ambitious' and 'give their best answers' to some immense questions facing the sector.

DAFNE's Chair Felix Oldenburg highlighted opportunities for philanthropy infrastructure to help philanthropy work more effectively with government. 'Government wants to work with philanthropy as sources of funding and intelligence but our sector hasn't fully worked out how to partner on big things yet', he noted.

Oldenburg also raised the spectre of climate change. Here, it turned out that British foundations are actively leading a European-wide philanthropy conversation. A delegation from its Association of Charitable Foundations, led by CEO Carol Mack, shared insights from a recently launched a UK climate funders commitment. With backing from France's Carasso Foundation, this initiative looks set to cross borders and could even become a pan-European commitment. Be bold but not too bold, however. The ACF were keen to stress that no foundations were informed that they must sign up to this commitment. After all, no one, certainly not foundations, like to be told what to do.

Another first was seeing men from across Europe agree to write articles about gender equality prompted by the Bundersverband's Anke Pättsch. This was one of the concrete outputs from a small gender working group, one of a handful of ad hoc groups which came together to agree action on specific issues. Others included activity on next generation giving under the #NextPhilanthropy rubric and a further cluster on data, and deepening ties between philanthropy scholars and practitioners.

There was also a specific focus on advocacy and lobbying including a helpful framing of the topic from the Good Lobby's Alberto Alemanno. It is surely not long now before we start talking routinely of a 'philanthropy lobby' in Europe. Some of what this lobby will seek was articulated in an impressive session delivered by Max Von Abendorth and the European Foundation Centre's Hanna Surmatz – two of the sector's most knowledgeable and informed figures when it comes to Europe wide policy engagement.

One issue which wasn't on the PEX agenda was the future status of the relationship between DAFNE and the European Foundation Centre. While discussions about a possible merger are ongoing, more than one person muttered over tapas about whether such a merger would actually happen and whether it was even desirable.



Did foundations hear that message? That was one question which wasn't directly addressed in the final 'funders panel' – a panel which seemed somewhat jarring after the highly interactive and intense sessions which preceded it.

But overall, this was a meeting when a significant number of Europe's philanthropy networks came together, and talked to each other. **Priorities were shared, collaborations planned and bonds strengthened.** Next year in Turkey and the one after in Rome. By opening their networks beyond geographical confines, DAFNE has unleashed new momentum into Europe's philanthropy sector.

**Charles Keidan,**  
Alliance magazine





# MORE BLOG POSTS ABOUT PEXForum

## **Zibran Choudhury, Alliance magazine**

**Networks for impact, not networking**

([www.alliancemagazine.org/blog/making-networks-work](http://www.alliancemagazine.org/blog/making-networks-work))

## **David Biemesderfer, United Philanthropy Forum**

**Witnessing firsthand a growing philanthropic collaboration in Europe**

([www.alliancemagazine.org/blog/witnessing-firsthand-a-growing-philanthropic-collaboration-in-europe](http://www.alliancemagazine.org/blog/witnessing-firsthand-a-growing-philanthropic-collaboration-in-europe))

## **Filiz Bikmen, Esas Social Investments**

**What's next for PEX?**

([www.alliancemagazine.org/blog/whats-next-for-pex](http://www.alliancemagazine.org/blog/whats-next-for-pex))

## **Lev Fejes, ARC Romania**

**PEX-ed up!**

([www.alliancemagazine.org/blog/pex-ed-up](http://www.alliancemagazine.org/blog/pex-ed-up))

## **Tobias Jung, Centre for the Study of Philanthropy & Public Good**

**PEX through paintings**

(<https://www.philanthropy.scot/category/pex-2020-ten-points-in-ten-paintings/>)

## **Polina Nyukhina, Ukrainian Philanthropists Forum**

**Let's tell the story, not whisper it!**

([www.alliancemagazine.org/blog/lets-tell-the-story-not-whisper-it](http://www.alliancemagazine.org/blog/lets-tell-the-story-not-whisper-it))

## **Juliana Hoxha, Partners Albania for Change and Development**

**Interact, connect, communicate**

([www.alliancemagazine.org/blog/interact-connect-communicate](http://www.alliancemagazine.org/blog/interact-connect-communicate))

## **Rupert Strachwitz, Maecenata Foundation**

**Audiatur et altera pars**

([www.alliancemagazine.org/blog/audiatur-et-altera-pars](http://www.alliancemagazine.org/blog/audiatur-et-altera-pars))

## **Liisa Suvikumpu, Association of Finnish Foundations**

**1350 words and nine concrete actions for a better future for foundations**

([www.alliancemagazine.org/blog/1350-words-and-nine-concrete-actions-for-a-better-future-for-foundations](http://www.alliancemagazine.org/blog/1350-words-and-nine-concrete-actions-for-a-better-future-for-foundations))

## **Liana Varon, Support Foundation for Civil Society**

**Co-creating a new narrative for philanthropy in Europe**

([www.alliancemagazine.org/blog/co-creating-a-new-narrative-for-philanthropy-in-europe](http://www.alliancemagazine.org/blog/co-creating-a-new-narrative-for-philanthropy-in-europe))

## **Ruth Williams, MSc, Austrian Foundations Association**

**It's time to act. Together.**

([www.alliancemagazine.org/blog/it-is-time-to-act-together](http://www.alliancemagazine.org/blog/it-is-time-to-act-together))

# WHO IS THE PEX COMMUNITY?

PEX is where European philanthropy infrastructure meets. There are less than 100 philanthropy networks serving over 145,000 foundations in Europe.

## Year of establishment



Italy, 1919

Germany, 2016

ACRI is the **OLDEST** philanthropy network  
ECFI is the **YOUNGEST** philanthropy network

## Number of employees



Small teams

Philanthropy networks usually operate in small teams, having 10 or less employees. The total number of employees ranges from 0,5 - 55 employees.

## Geographic focus



European



National



Regional

## Annual budgets

range from:

60.000€ - 9 million€

13 1 million€

Only 13 philanthropy networks have an annual budget of more than 1 million

## PEXpartners



Foundations



Banks & advisors



Networks



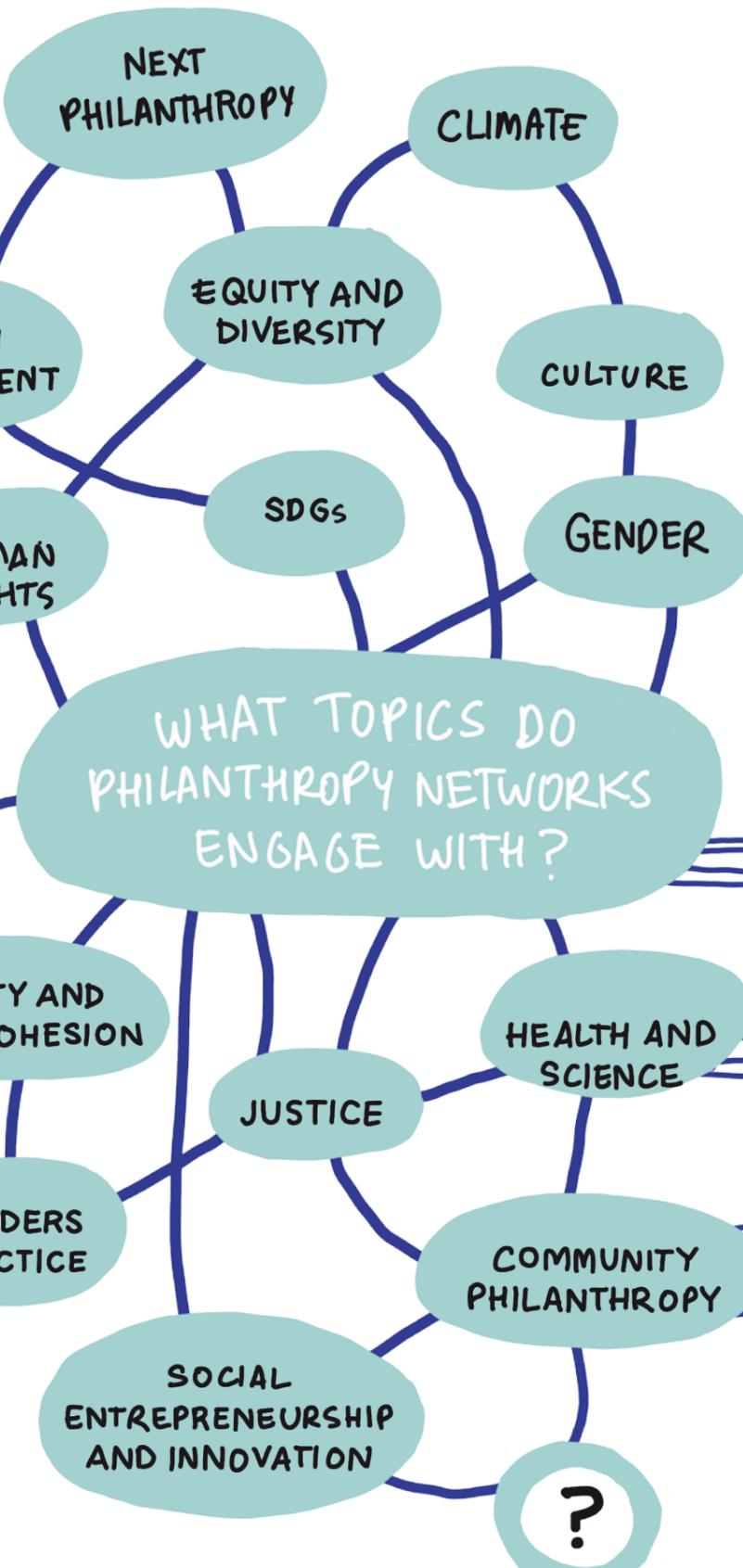
Policy makers & public bodies



Media



Academia



This can be the topic YOUR organisation is working on

# WHAT DIFFERENCE DOES PEX MAKE?

PEX helps philanthropic organisations to be more ambitious, transparent, efficient and impactful.



\* This information is based on IDs of 33 European philanthropy networks collected ahead of the PEXforum 2020.

# PEXforum 2020

## participants, supporters and funders:



Join the conversation  
with the growing PEXcommunity:  
[www.pexcommunity.eu](http://www.pexcommunity.eu)

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