

A blurred photograph of a person in a light blue shirt walking from left to right across the left side of the page.

INSPIRING
PEOPLE
SHAPING
THE FUTURE

40 YEARS | BertelsmannStiftung

Annual Report 2017

Inspiring people. Shaping the future.

THE BERTELSMANN STIFTUNG

The Bertelsmann Stiftung was founded in 1977 by Reinhard Mohn. It engages solely and directly in nonprofit activities. It is a private operating foundation which develops and initiates all of its projects itself, providing the support required for their implementation.

EXECUTIVE BOARD

The foundation's activities reflect the principles laid out by our founder. The Executive Board is the team responsible for the foundation's program work.



Aart
De Geus



Liz
Mohn



Dr. Jörg
Dräger



Dr. Brigitte
Mohn

ORGANIZATION

70
PROJECTS



380
EMPLOYEES



€90 MILLION BUDGETED
EACH YEAR

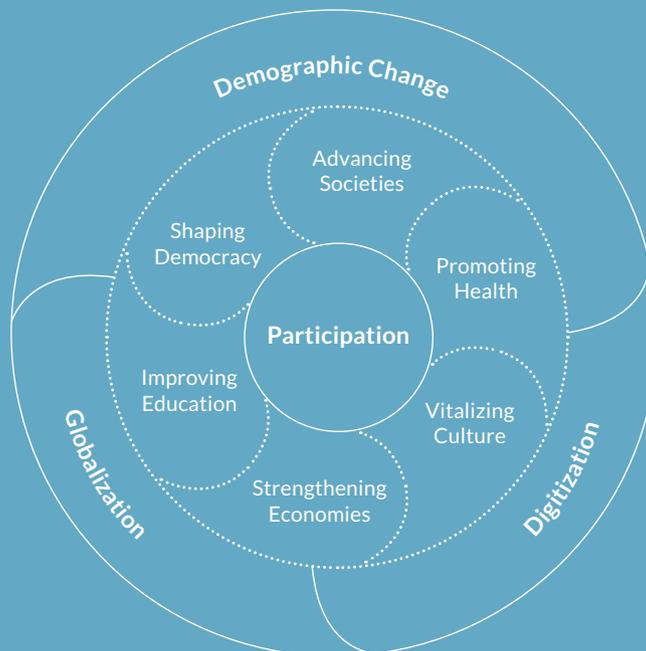


OPERATIONAL,
NONPROFIT,
NONPARTISAN



TOPICS

The Bertelsmann Stiftung is active in the areas of education, democracy, society, health, culture and the economy. It takes into consideration the megatrends – globalization, digitization and demographic change – that are impacting social, economic and political developments.



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FOREWORD



Dear Readers,

In 2017, we celebrated the 40th anniversary of our founding, which made it a year full of special events and activities. The highpoint was the gathering held in Gütersloh Theater with former German President Joachim Gauck as keynote speaker. In June, we awarded the Reinhard Mohn Prize to former Estonian President Toomas Hendrik Ilves. To honor our hometown of Gütersloh, we worked with city officials to organize a Citizens Day in September, which we used to recognize civil society and its multi-faceted forms of engagement.

Also in September, German President Frank-Walter Steinmeier launched a series of events together with the Bertelsmann Stiftung examining the future of democracy. The inaugural discussion took place at Bellevue Palace in Berlin. Held at regular intervals, the Bellevue Forum on the Future of Democracy will provide a venue for addressing controversial issues while offering new perspectives on how liberal democracy can succeed. Our NEUE STIMMEN International Singing Competition for young opera talents also celebrated an anniversary, its 30th, in October.

As our founder Reinhard Mohn once said, “People of all cultures are born with a need for values. The reason for this is the desire to give a fundamental moral meaning to whatever we do.” In this spirit, he founded the Bertelsmann Stiftung and identified three guiding values for it: freedom, solidarity and goodwill.

For us, these values remain crucial, especially at a time when they are increasingly being called into question. They give us the strength to achieve our goal: ensuring everyone can engage in democratic processes, can participate in society, culture and the economy, and can access educational and health-care systems. To make this possible, we search for practical solutions to the most pressing challenges of our time, from integrating refugees into communities to getting young people involved in elections. We recommend effective responses while daring to innovate. In other words, we are both a think tank and a “do tank.” That is the role we will continue to play in the coming year as well.

Sincerely,

A handwritten signature in black ink, consisting of a stylized 'A' followed by 'D' and 'G' with a horizontal line through them.

Aart De Geus

TOTAL EXPENDITURES¹⁾ (€, thousands)

As a private operating foundation, the Bertelsmann Stiftung designs, controls and finances its projects itself. The following documents our total expenditures for these activities. At the same time, we support a number of affiliated nonprofit institutions by contributing financially and in non-material ways. For greater transparency, the expenditures are divided into two groups: expenditures for ongoing project work (programs and special projects) and contributions to affiliated nonprofit organizations.

Total expenditures

Expenditures for the 2017 fiscal year totaled €90.2 million. Since its inception, the Bertelsmann Stiftung has made over €1.4 billion available for nonprofit activities.

Programs and special projects	2016		45,042
	2017		55,040
Contributions to affiliated nonprofit institutions	2016		10,837
	2017		13,206
Program-related services	2016		3,410
	2017		3,620
Communications	2016		5,432
	2017		6,953
Administration	2016		8,611
	2017		11,338
Total expenditures	2016		73,332
	2017		90,158

¹⁾ 2016 data: audited / 2017 data: preliminary (as of January 29, 2018)

Program expenditures

In its 2017 fiscal year, the Bertelsmann Stiftung invested €55.0 million directly in its program activities. Due to a greater number of activities, that was €10.0 million more than in the previous year.

Programs and special projects	2016	2017
Germany and Asia	1,867	1,723
Europe's Future	3,863	4,406
Integration and Education	3,605	3,696
Competence Center for Leadership and Corporate Culture	1,484	1,575
Living Values	2,436	2,879
Communities for Better Living	4,833	6,952
Learning for Life	3,947	7,495
Discovering Music	1,991	2,657
Shaping Sustainable Economies	4,608	5,432
Business in Society	2,422	2,692
Improving Healthcare – Informing Patients	3,338	3,151
Effective Investments in Education	2,337	3,103
Center for International Forums and Trends	3,100	2,135
Future of Democracy	1,805	2,217
Civil Society	3,210	4,307
Special projects	198	620
	45,042	55,040

¹⁾ 2016 data: audited / 2017 data: preliminary (as of January 29, 2018)

Affiliated nonprofit institutions

In 2017, the Bertelsmann Stiftung's contributions to affiliated nonprofit institutions increased by approximately €2.4 million from the previous year to € 13.2 million.

Affiliated nonprofit institutions	2016	2017
Shareholdings		
CHE Centre for Higher Education	1,730	1,730
Founders Foundation	2,046	3,000
Phineo	980	860
Weisse Liste	500	1,000
Center for Digital Education and Schools in Gütersloh	-	65
International foundations		
Bertelsmann Foundation North America	2,741	2,985
Fundación Bertelsmann, Barcelona	1,987	2,762
Partners		
Reinhard Mohn Institute for Corporate Governance	300	300
German Stroke Foundation	552	503
	10,837	13,206
Total (programs, special projects and affiliated institutions)	55,879	68,246

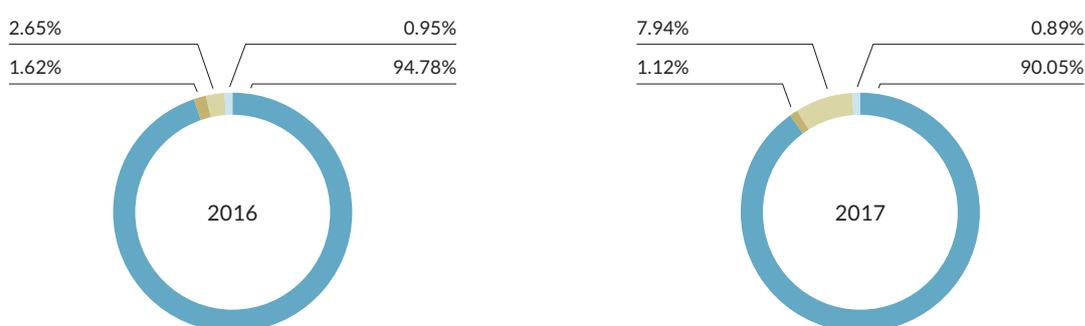
¹⁾ 2016 data: audited / 2017 data: preliminary (as of January 29, 2018)

INCOME* (€, thousands)

Funding the foundation's activities

The Bertelsmann Stiftung finances its project work primarily through income from its indirect holdings in Bertelsmann SE & Co. KGaA, which generated funds of €121.3 million in fiscal year 2017. An additional €13.4 million were also available to the Bertelsmann Stiftung from its cooperative partnerships and from the management of its financial reserves. In the 2017 fiscal year, the foundation therefore had approximately €134.7 million at its disposal for its nonprofit project work.

Under its bylaws, the Bertelsmann Stiftung is required to transfer funds into an unrestricted reserve fund in accordance with Section 62 Para. 1 No. 3 of the German Fiscal Code (Abgabenordnung, AO). In fiscal year 2017, these reserves were increased to €452 million.



	2016	2017
● Investment income	120,363.7	121,270.9
● Income from partnerships, donations	2,704.7	1,505.1
● Capital income (interest, dividends, share price gains)	4,106.7	10,693.1
● Other income (asset appreciation, financial assets)	1,172.8	1,194.8
Total income	128,347.9	134,663.9

Asset management

The goal of the Bertelsmann Stiftung's asset management strategy is to sustain the organization's assets over the long term while generating ongoing income. These objectives are pursued with an approach that essentially relies on a highly diversified, international investment portfolio and a balanced risk-return ratio. The foundation's asset management strategy is based on investment guidelines determined by the Executive Board. An advisory council appointed by the Executive Board consults the foundation on its investments. It makes recommendations for strategic asset allocation based on current market conditions and the foundation's investment guidelines.

The foundation held investments in the following asset classes at the end of the 2017 fiscal year: bonds (government, corporate, emerging market and high-yield) 56%; shares (Europe, world, emerging markets), 38%; real estate and cash, 6%. Tactical over- and under-weighting of various asset classes and of foreign currencies is used to respond to current market conditions and to developments of particular importance. This investment strategy allowed the Bertelsmann Stiftung to achieve an overall annual return of 5.3% in 2017.

* 2016 data: audited / 2017 data: preliminary (as of January 29, 2018)

STATEMENT*

of the Bertelsmann Stiftung's assets and liabilities as of December 31, 2017

ASSETS (€, thousands)	2016	2017
Fixed assets		
Intangible assets and tangible assets	32,984.3	46,467.8
Financial assets:		
Shares	592,186.8	592,722.3
Other securities	422,385.4	516,428.4
Total fixed assets	1,047,556.5	1,155,618.5
Current assets		
Available funds	423.4	423.4
Receivables and other assets	618.1	505.3
Securities	30,062.7	30,089.7
Liquid assets	148,574.9	101,777.6
Total current assets	179,679.1	132,796.0
Prepaid expenses	379.8	339.4
Balance from asset management	156.1	163.5
Total balance-sheet assets	1,227,771.5	1,288,917.4
Assets held in trust	5,340.2	5,458.3
LIABILITIES (€, thousands)	2016	2017
Endowment capital	619,497.6	619,497.6
Reserves		
§ 62 Para. 1 No. 3 AO (Free reserves)	410,800.0	452,000.0
§ 62 Para. 1 No. 1 AO (Reserves in acc. with bylaws)	60,034.9	58,147.2
Restructured assets	13,646.1	22,256.1
Total reserves	484,481.0	532,403.3
Funds carried forward	92,887.7	89,057.6
Accrued liabilities		
Provisions for pensions	17,368.0	19,671.1
Other liabilities	7,704.2	19,839.0
Total accrued liabilities	25,072.2	39,510.1
Accounts payable		
Prepayments received	1,160.6	3,520.4
Accounts payable for goods and services	2,956.7	3,783.6
Other accounts payable	1,659.6	1,144.8
Total accounts payable	5,776.9	8,448.8
Deferred income	56.1	0.0
Total balance-sheet liabilities	1,227,771.5	1,288,917.4
Trust accounts payable	5,340.2	5,458.3

* 2016 data: audited / 2017 data: preliminary (as of January 29, 2018)

HUMAN RESOURCES

Attractive employer

In addition to systematic opportunities for professional development, we offer our 378 employees international and cultural diversity as well as a partnership-based culture of working and learning. We initiate a dialogue that allows employees, senior managers and HR managers to discuss personal development opportunities, thereby determining possible career paths and development options. A range of tools are used, from training, coaching and mentoring, to secondments to our international affiliates. We hired 23 new employees in 2017. www.karriere.bertelsmann-stiftung.de

Supporting new talent

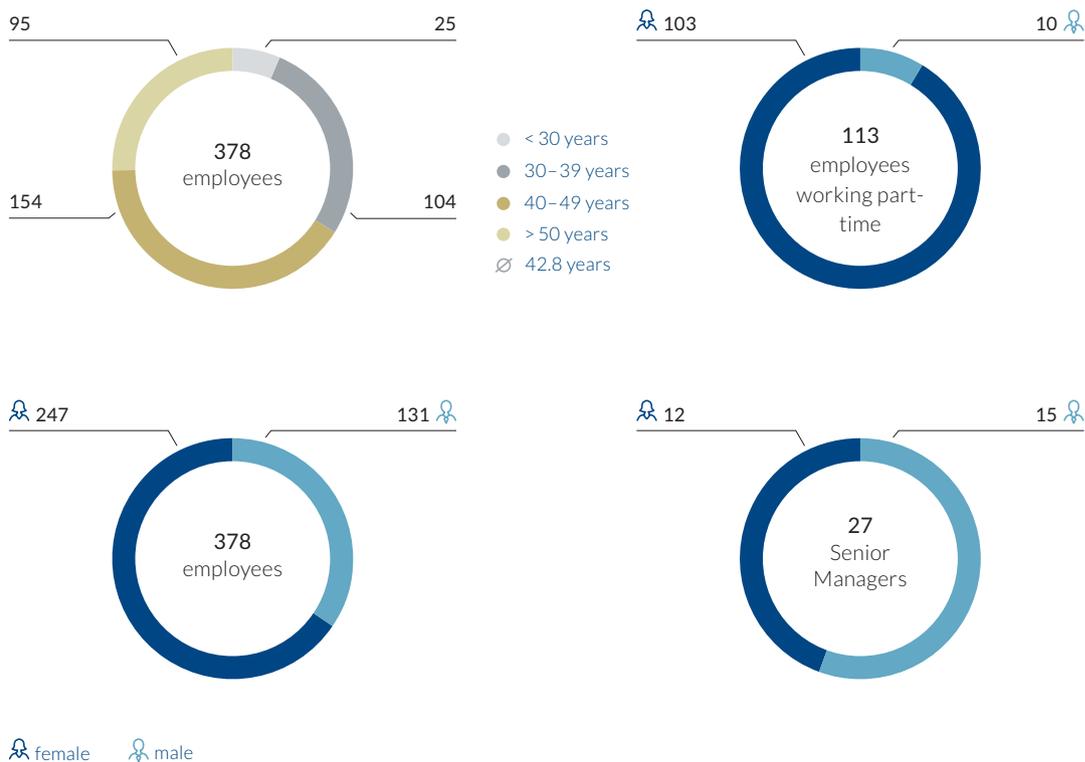
We use our Junior Professionals program to train up to four employees as project managers with an interdisciplinary and international focus. In addition, 64 university students and recent graduates completed internships at the Bertelsmann Stiftung.

Work-life balance

We believe achieving a good work-life balance is of critical importance. The Bertelsmann Stiftung's human resources policies are therefore designed to give employees more flexibility in carrying out their professional duties. The tools used include flexible work schedules, sabbaticals and opportunities for working from home and working part-time.

Promoting health

The topic of health plays a key role in our HR activities. Together with employee representatives, we have put a framework in place that promotes the health and effectiveness of our staff. This includes preventive measures, precautionary screenings and an extensive exercise and wellness program.



LOCATIONS



GÜTERSLOH

Bertelsmann Stiftung
Carl-Bertelsmann-Str. 256
33311 Gütersloh
Germany

BARCELONA

Fundación Bertelsmann
Travessera de Gràcia,
47-49
08021 Barcelona
Spain

WASHINGTON

Bertelsmann Foundation
North America
1275 Pennsylvania
Avenue, NW
Suite 601
Washington, DC 20004
USA

BRUSSELS

Liaison Office
Bertelsmann Stiftung
Rond-Point Schumann 11
4th Floor
1040 Brussels
Belgium

ACCOUNTABILITY

Freedom, solidarity, goodwill. Not only do we convey those values to the outside world through our many projects, we also live them within the Bertelsmann Stiftung. In doing so, our focus is always on acting responsibly towards society and our employees.

Responsible engagement

At the Bertelsmann Stiftung, we understand sound philanthropic engagement to be more than simply complying with the law. The legal framework serves as the basis for our nonprofit work, through which we interact responsibly with individuals and society in keeping with the foundation's core principles. This insistence on responsible action is paramount in both the projects carried out by the Bertelsmann Stiftung and its in-house activities.

Communication and transparency

The Bertelsmann Stiftung communicates transparently as an expression of its social responsibility. In order to increase the trust society has in the foundation, we make key information about our work and funding available to the public. We view this as a natural part of our philanthropic activities.

Privacy

The Bertelsmann Stiftung is committed to protecting privacy. We have put a wide range of technical and organizational measures in place to safeguard personal and other sensitive data from accidental or intentional manipulation, loss or destruction, or access by unauthorized persons. We review these measures on an ongoing basis to ensure they meet current technology standards and legal requirements. These steps demonstrate the importance of privacy at the Bertelsmann Stiftung.

Contractual procedures

The Bertelsmann Stiftung firmly believes in using contractual procedures that are well documented and clear. It only enters into written contracts that have been verified by its Legal department. Moreover, all legally relevant agreements that entail a financial obligation of more than €5,000 (gross) are signed by two authorized individuals, and a member of the Executive Board must sign any agreement involving financial sums that exceed a predetermined amount.

External services

When external services are required, the Bertelsmann Stiftung is committed to ensuring the relevant financial resources are used economically, meaningfully and effectively. The terms and conditions must be commensurate with the services rendered. Remuneration is always negotiated and paid in a way that reflects the Bertelsmann Stiftung's status as a nonprofit organization.

Preventing corruption

Corruption is not tolerated at the Bertelsmann Stiftung. Educational and preventive measures are used to ensure that no suspicion of wrongdoing inadvertently arises. If employees are offered a gift or benefit as part of their work, they must immediately inform their supervisor in order to ascertain if accepting it would violate any guidelines or laws. This does not apply to occasional, customary gifts costing less than €25.

Anti-discrimination policy

Every employee at the Bertelsmann Stiftung has the right to be treated with respect and to work in a supportive, nonthreatening environment. Respect and tolerance are key aspects of our work, and our in-house structures are designed to reflect that. The dignity of each individual is always recognized, and all participants are considered equal during interactions, which take place in an atmosphere of cordiality and mutual respect. Harassment and bullying directly contravene the Bertelsmann Stiftung's core principles.

Openness

Doors are always open at the foundation for our employees to make suggestions, discuss problems and express concern. An employee's primary contact person is his or her supervisor, while the Human Resources department and the foundation's employee representatives are also available to provide assistance. That allows both professional and personal issues to be discreetly addressed. There are no repercussions if an employee shares information about suspected misconduct.



GOVERNANCE

Executive Board



Aart De Geus
(chairman)



Liz Mohn
(vice-chairwoman)



Dr. Jörg Dräger



Dr. Brigitte Mohn

Board of Trustees



Prof. Dr.-Ing. Werner J.
Bauer (chairman)



Liz Mohn
(vice-chairwoman)



Wolf Bauer



Dr. Wulf H. Bernotat
(† Aug. 27, 2017)



Dr. Thomas Buberl
(until March 31, 2018)



Prof. Dr. Ulrike Detmers
(as of Jan. 1, 2018)



Dr.-Ing. Ralph Heck



Prof. Dr. Dr. h.c. mult.
Wolfgang A. Herrmann



Christoph Mohn



Carolina Müller-Möhl



Dr. Viviane Reding



Dr. Philipp Rösler
(as of Jan. 1, 2018)



Prof. Dr. Jürgen Stark

Executive Board

The members of the Bertelsmann Stiftung Executive Board are jointly responsible for the foundation's activities and operations. The Executive Board members are Aart De Geus (chairman), Liz Mohn (vice-chairwoman), Dr. Jörg Dräger and Dr. Brigitte Mohn.

Board of Trustees

The Board of Trustees serves as an advisory and controlling body, comparable to a supervisory board. It is made up of individuals who have demonstrated ongoing interest in the work of the foundation, as well as leadership experience and insight into social progress.

 As the founder of the Bertelsmann Stiftung, Reinhard Mohn was a member of the Board of Trustees until his death on October 3, 2009.

 Prof. Dr. Werner J. Bauer (chairman), former chairman of the Supervisory Board of Nestlé Deutschland AG

 Liz Mohn (vice-chairwoman), member of the Supervisory Board of Bertelsmann SE & Co. KGaA; chairwoman of the Shareholders' Meeting and chairwoman of the Steering Committee of Bertelsmann Verwaltungsgesellschaft mbH

 Wolf Bauer, former CEO of UFA Film & TV Produktion

 Dr. Wulf H. Bernotat, former chairman of the Board of Management of E.ON AG († Aug. 27, 2017)

 Dr. Thomas Buberl, CEO of the Axa Group

 Prof. Dr. Ulrike Detmers, copartner and member of the Management Board of the Mestemacher Group; professor of business administration at the Bielefeld University of Applied Sciences

 Dr.-Ing. Ralph Heck, former director of McKinsey & Company, Inc.

 Prof. Dr. Dr. h.c. mult. Wolfgang A. Herrmann, president of the Technical University of Munich

 Christoph Mohn, chairman of the Supervisory Board of Bertelsmann SE & Co. KGaA; CEO of Christoph Mohn Internet Holding GmbH; shareholder of Bertelsmann Verwaltungsgesellschaft mbH; chairman of the Executive Board of the Reinhard Mohn Stiftung

 Carolina Müller-Möhl, president of the Müller-Möhl Group and the Müller-Möhl Foundation

 Dr. Viviane Reding, member of the European Parliament

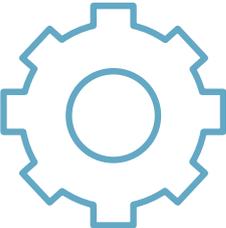
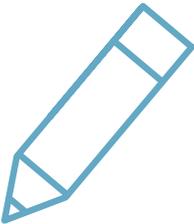
 Dr. Philipp Rösler, former vice-chancellor of the Federal Republic of Germany; CEO of the Hainan Charity Foundation

 Prof. Dr. Jürgen Stark, former chief economist and member of the Executive Board of the European Central Bank

As of January 1, 2018

OUR TOPICS AT A GLANCE

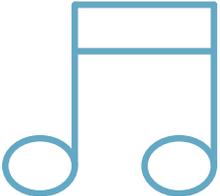
*Improving
Education*



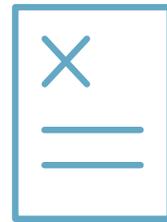
*Strengthening
Economies*



*Vitalizing
Culture*



*Shaping
Democracy*



*Advancing
Societies*



*Promoting
Health*



PROGRAMS AND PROJECT ACTIVITIES

Germany and Asia



-  Executive Board Member:
Liz Mohn
-  Program Director:
Stephan Vopel
-  www.bertelsmann-stiftung.de/DA

Asia will have a defining influence on the 21st century. We analyze the changes taking place in Asia in order to develop the relevant policy recommendations for Germany and Europe. The program promotes mutual understanding, lays the foundation for cooperation and provides momentum for developments on site.

Select project activities:

Social Cohesion Radar in Asia

For the first time, the study *What Holds Asian Societies Together* presents empirical data on social cohesion in 22 countries in South, Southeast and East Asia. The determining factors and impacts of social cohesion are also compared and analyzed.

-  www.bertelsmann-stiftung.de/social-cohesion-asia

Asia Policy Briefs

In our Asia Policy Briefs, experts analyze political and economic developments in Asia and their implications for Germany and Europe. A number of briefs appeared in 2017, including “Can Modi Make the Elephant Dance?” and “President Moon Jae-in – The Right Choice for South Korea.”

-  www.bertelsmann-stiftung.de/asia-policy-briefs

Regional Focus: China

Together with stakeholders from business, politics and academia, the program develops scenarios and strategies for developments in Asia and their impact on Germany and Europe. In cooperation with the German Chamber of Commerce in China, the More Than a Market initiative promotes social responsibility among German businesses operating in China. In 2017,

the More Than A Market Awards were given in Shanghai for the second time.

-  www.bertelsmann-stiftung.de/china

Regional Focus: India

Our studies *Indian High-Skilled Migrants and International Students in Germany* and *Indian Investments in Germany* examined economic partnerships and other opportunities for both countries. In cooperation with the Fraunhofer Institute, we laid the groundwork for the Inclusive Innovation Index, which will measure the potential for inclusive innovation in Asian countries.

-  www.bertelsmann-stiftung.de/indien

Asia-Europe Young Leaders Forum

Organized in cooperation with the Asia-Pacific Committee of the German Economy, the Asia-Europe Young Leaders Forum has been providing a platform for exchange among young leaders from Asia and Europe since 2012. In 2017, the second Alumni Conference was held in Berlin.

Europe's Future



 Executive Board Member:

Aart De Geus

 Program Director:

Joachim Fritz-Vannahme

 www.bertelsmann-stiftung.de/ez

The European Union must do more to uphold its standards and values. That means increasing its ability to take effective action and its acceptance levels. The EU also needs an economy that is more innovative, more inclusive and more socially just. It must also promote stability and peace in its neighborhood.

Select project activities:

Strengthening Europe

We examined how the division of responsibilities between the EU and its member states can be made more efficient, subsequently publishing the study *How Europe Can Deliver. Optimising the Division of Competences*. In cooperation with the Jacques Delors Institute Berlin, the Europa Briefing series examined the strengths and weaknesses of the economic and monetary union. As part of eupinions, our series of surveys, we published *Is Right the New Left?* during the French presidential elections and *A Source of Stability?* during the German parliamentary elections. An SIM Europe conference in Vienna addressed the questions of which social model is appropriate for the EU and Austria's role in a "social Europe."

 www.bertelsmann-stiftung.de/europa

 www.strengthentheeuro.eu

 www.social-inclusion-monitor.eu

Connecting Europe

Presented at the 2017 Munich Security Conference together with European Commissioner Johannes Hahn and at discussions held in various European capitals, the publication *Escaping the Escape. Toward Solutions for the Humanitarian Migration Crisis* provides 20 country reports which explain why people flee from their native country. The authors also recommend steps

the EU can take to counteract the causes of displacement and migration. Estonia and Malta, who held the presidency of the Council of the European Union in 2017, were our partners for a conference at which participants discussed the implementation of reforms in the EU's southern and eastern neighborhoods. The focus on German-French relations continued with an assessment of the partnerships between cities in the two countries.

 www.bertelsmann-stiftung.de/europa

Brussels Office

In 2017, the foundation presented the photo exhibition "Challenging Chances. Escape in Pictures" in Brussels. In conjunction with the exhibition, our Brussels office organized a panel discussion on the role of religious communities in refugee-aid efforts. A discussion was also held on how to respond to populist parties in Europe.

Integration and Education



 Executive Board Member:

Dr. Jörg Dräger

 Program Director:

Ulrich Kober

 www.bertelsmann-stiftung.de/IB

Germany is a country of immigration. We are committed to helping create an open society in which everyone has a fair chance to participate and can get actively involved regardless of their background. Successful education is crucial for achieving this goal.

Select project activities:

Managing Migration Fairly

Together with other foundations, we support the Offene Gesellschaft (Open Society) initiative and the Expert Council of German Foundations on Integration and Migration. In addition to studies on Germany's "culture of welcome," in 2017 we published recommendations for drafting a transparent immigration law. At the Global Forum on Migration and Development, we presented an innovative approach to international educational partnerships. We are also involved in worldwide efforts to create a Global Compact on Migration, which is designed to improve international cooperation in the area of migration.

 www.bertelsmann-stiftung.de/migration-fair-gestalten/

All Kids Are VIPs

All Kids Are VIPs is a competition organized by the Bertelsmann Stiftung that encourages young people to develop ideas for promoting social integration. Germany's federal commissioner for integration serves as its patron. A record number of school and youth groups – more than 200 – registered to compete in the latest round.

 www.allekidssindvips.de

Learning Better in Diversity

Together with our partners from the political and social spheres, we are helping to create a fair and effective educational system in Germany. The Chancenspiegel (Excellence and Equity Monitor)

attests to the progress Germany has made in the last decade, but also to the considerable regional differences in educational opportunities. In 2017, we published a study about the sharp increase in the number of school students and partnered with three other foundations to present a new approach to all-day schools. We also support the "school workshop" organized by the Forum for Education and Digitization.

 www.bertelsmann-stiftung.de/in-vielfalt-besser-lernen

Jakob Muth Award

Together with the German Commission for UNESCO and Germany's commissioner for matters relating to disabled persons, we presented the Jakob Muth Award for Inclusive Schools in 2017 for the eighth time. A school in Mecklenburg-Western Pomerania was honored for the first time.

 www.jakobmuthpreis.de

Refugees and Schools

In 2017, we launched an innovative training program for refugee teachers in cooperation with the Education Ministry in the state of North Rhine-Westphalia, Stiftung Mercator and the universities of Bielefeld and Bochum. Prior to the summer break, 25 people were selected from 250 applicants to participate in the pilot round.

Competence Center for Leadership and Corporate Culture



 Executive Board Member:

Liz Mohn

 Program Director:

Martin Spilker

 www.creating-corporate-cultures.org

Digitization is undoubtedly the most important driver of change in the world of employment, and it increasingly requires agile methods of working and leading. Today's programs for developing managers must therefore make use of innovative approaches to life and career planning if they are to inspire people to work effectively and creatively.

Select project activities:

Creating Corporate Cultures

This project supports business leaders in developing forward-looking corporate cultures. In 2017, two executive training events for female managers were held dedicated to "Women and Cultural Change," along with an event on "Future-Ready Leadership." The reader *Alles hat seinen Preis (Everything Has Its Price)* examines possibilities for improving life and career planning; another publication looks at how the number of women in corporate governance can be increased. A representative survey was carried out for the Executive Radar in cooperation with the University of St. Gallen and market research organization GfK.

 www.creating-corporate-cultures.org

Leaders' Dialogue: Trilogue Salzburg

The Trilogue Salzburg is an interdisciplinary exchange on the challenges stemming from global developments. At the 2017 gathering, international guests from the business, political and cultural spheres discussed the topic "A Closer Look at Globalization. The Positive Facets and the Dark Faces of a Complex Notion."

 www.bertelsmann-stiftung.de/salzburger-trilog

Leaders' Dialogue: Business Meets Culture

This conference brings together decision makers from business, political and cultural organizations and the media. The first event was held in 2017 in Berlin with 200 participants.

Bellevue Forum on the Future of Democracy

This series of events organized together with Germany's president is designed to stimulate an open and critical debate on current issues of fundamental importance to democracy. Academic, political, cultural, business and civil society leaders from Germany and other countries discuss issues such as digitization, the impact of demographic change and how much inequality a democracy can bear. Two forums took place in 2017.

 www.forum-bellevue.de

Crisis Management in the 21st Century

This project evaluates methods for identifying crises early on and managing them efficiently. International experts including specialists from the German Defense Ministry discuss interdisciplinary risk analyses, how to improve security policies, and what is needed to ensure the military, police and other first responders can do their jobs effectively.

 www.bertelsmann-stiftung.de/krisenmanagement

Living Values



 Executive Board Member:

Liz Mohn

 Program Director:

Stephan Vopel

 www.bertelsmann-stiftung.de/LW

We examine the level of cohesion present in society and the role that religion and values play in it. Our goal is to achieve free, open and heterogeneous societies based on values which allow for diversity, which enable individuals to develop their potential and which ensure social cohesion.

Select project activities:

Social Cohesion Radar

We measure social cohesion, thereby providing insight into the changes taking place in societies with diverse populations. In 2017, our efforts focused on a study examining the current state of social cohesion in Germany on a regional level.

 www.gesellschaftlicher-zusammenhalt.de

Reinhard Mohn Prize 2018:

Living Diversity – Shaping Society

The Living Values program is responsible for organizing the 2018 Reinhard Mohn Prize. In 2017, preparations for the prize were begun. In particular, this meant carrying out an international search to identify best practices for living together peacefully in communities home to diverse populations.

 www.reinhard-mohn-preis.de

Living in Diversity/Shaping Cohesion

We are committed to strengthening social cohesion in view of the current refugee situation. In 2017, we developed strategic responses in this area and partnered with the Alliance for Democracy and Tolerance to organize a conference on promoting social cohesion in cities with diverse populations.

 www.bertelsmann-stiftung.de/vielfalt-leben

Religion Monitor

The Religion Monitor investigates the role played by religious and cultural diversity in social cohesion. In 2017, initial findings from the current Religion Monitor were released shedding new light on the subject. Two “fireside chats” on identity and cohesion in secular societies were also held. Among the speakers were Prof. Udo Di Fabio, former justice of Germany’s Constitutional Court, and Bishop Heinrich Bedford-Strohm, chair of the Council of the Evangelical Church in Germany.

 www.religionsmonitor.de

German-Israeli Young Leaders Exchange

By promoting dialogue and organizing events, this project seeks to build a network of young professionals and executives to serve as a foundation for the long-term relationship between Germany and Israel. The 18th German-Israeli Young Leaders Exchange was dedicated to the topic “Inspiring Innovation.”

 www.bertelsmann-stiftung.de/DIYL

Promoting Role Models – Imparting Values

We are committed to helping young people develop values. In 2017, the TeamUp! model project for building values among young people in soccer clubs welcomed its second round of participants. The Network for Building Values developed guidelines for good practice.

 www.bertelsmann-stiftung.de/wertebildung

Communities for Better Living



-  Executive Board Member:
Dr. Brigitte Mohn
-  Program Director:
Dr. Kirsten Witte
-  www.bertelsmann-stiftung.de/LK

Communities face growing challenges: Society is aging and social divisions are increasing. Moreover, integrating large numbers of refugees demands considerable commitment on the part of individuals and organizations. Our projects therefore promote shared efforts that create more equitable access to social participation.

Select project activities:

Arriving in Germany

Integration takes place at the local level. Together with the JPMorgan Foundation, the Bertelsmann Stiftung is supporting 24 communities as they establish local networks for refugee integration.

-  www.bertelsmann-stiftung.de/ankommen-in-deutschland

Leave No Child Behind!

Organized together with the state of North Rhine-Westphalia, this project aims to build local prevention networks for children and young people. The state-wide rollout began in 2017 following conclusion of the pilot phase, which included 18 communities. The Bertelsmann Stiftung continues to provide support by participating in ongoing research and by disseminating findings throughout Germany.

-  www.bertelsmann-stiftung.de/kekiz

Sustainable Local Government Finances

Our goal is to ensure communities remain capable of taking effective action. Our financial report makes public funding at the community level more transparent. In 2017, the project team carried out surveys on budget oversight practices, querying local- and state-level officials in Hesse, North Rhine-Westphalia and Saxony. In addition, it developed policy recommendations.

-  www.bertelsmann-stiftung.de/nachhaltige-finanzen

Sustainable Communities Monitor

Sustainable strategies require transparency. Together with Difu, the German Institute for Urban Affairs, we published the second sustainability monitor for German communities. As part of Germany's National Sustainability Day activities, the Bertelsmann Stiftung held its 10th Local-Level Congress, addressing the topic "Community 2030 – Sustainable and Digital."

-  www.monitor-nachhaltige-kommune.de

Smart Country – Reinhard Mohn Prize 2017

Intelligent digital technology and connectivity can create equal living conditions among cities and regions. Following an international search to identify best practices, the 2017 Reinhard Mohn Prize was awarded to former Estonian President Toomas Hendrik Ilves.

-  www.bertelsmann-stiftung.de/smart-country

Community Roadmap

Updated socioeconomic data were released on the Community Roadmap website, which now includes content for individual communities. New forecasts of nursing care needs were also published and the list of good practices expanded.

-  www.wegweiser-kommune.de
-  www.blog.wegweiser-kommune.de

Learning for Life



 Executive Board Member:

Dr. Jörg Dräger

 Program Director:

Frank Frick

 www.bertelsmann-stiftung.de/LL

We are committed to creating an equitable educational system that both provides optimal support for individual learning and overcomes social disadvantages. Every young person must have the opportunity to complete a vocational training program, and it must be possible for every employee to receive formal recognition of any skills they have acquired on the job.

Select project activities:

Vocational Training – Opportunities for Everyone

This project works to make Germany's vocational education system more equitable and effective. In 2017, the project's second phase was launched together with representatives from 15 German states and the Federal Employment Agency. In addition, studies were published on developing occupational training at small and mid-sized enterprises and on the vocational education systems in Germany's individual states.

 www.bertelsmann-stiftung.de/chance-ausbildung

Developing Skills to Get Ahead

This project develops programs for offering learning opportunities that are both personalized and motivating, along with methods for recognizing skills that have been acquired both formally and non-formally. In 2017, we published a study together with the Hans Böckler Foundation on the use of partial qualifications at transitional companies, a dossier of language-learning materials on the further education website wb-web.de, and various contributions in books and trade journals on skill-assessment tools. Our "competence cards" were nominated for the 2017 Global VPL Prize, and together with www.meine-berufserfahrung.de we developed a digital tool people can use to assess their own professional experience. Finally, we signed a cooperative agreement with the city of Cologne

and the local job center for evaluating the city's educational model.

 www.bertelsmann-stiftung.de/weiterbildung

Recognizing Occupational Skills

Together with the Federal Employment Agency and our Shaping Sustainable Economies program, we are developing competency assessment tests for 30 occupations so that people can benefit from their practical experience when looking for a job or gaining a qualification. The tests are now offered in six languages. An advisory council has also been created made up of representatives from government ministries and trade associations. On November 20, 2017, the first eight tests were rolled out and are now available in 160 testing centers throughout Germany. That means all government employment agencies and job centers can now make use of the tests.

 www.bertelsmann-stiftung.de/berufliche-kompetenzen-erkennen

Discovering Music



 Executive Board Member:

Liz Mohn

 Program Director:

Helmut Seidenbusch

 www.bertelsmann-stiftung.de/MF

Culture is the basis for communication and communal life. Our projects make use of music's potential to promote tolerance, participation and equitable opportunities in society and to support personal and professional development among educators and young artists.

Select project activities:

NEUE STIMMEN

NEUE STIMMEN is a long-running project for promoting young opera talent from around the globe. In addition to the acclaimed singing competition (with its worldwide auditions) and the master classes, the project includes modules which provide individualized, ongoing assistance so that young singers can prepare for and build a career. Concerts, seminars and coaching sessions are all part of the Creating Careers initiative, which will soon include online education courses.

 www.neue-stimmen.de

Musical Primary School

This project improves the quality of schools by making music a central part of the school day. Primary schools use musical activities to drive a school development process that promotes inclusive, individual learning – regardless of a student's background, language or achievement.

 www.bertelsmann-stiftung.de/musikalischegrundschule

MIKA – Music in Child Care Every Day

This project aims to give all children access to music, thereby taking a holistic approach to their education and development. It is carried out regionally in cooperation with child-care providers and other partners.

 www.bertelsmann-stiftung.de/mika

Mobile Music Workshop

Upon request, our Mobile Music Workshop visits child-care centers, schools and other educational facilities, allowing children, parents and teachers to build “sound spaces” and experiment with music.

 www.mobile-musikwerkstatt.de

Music – Language – Participation

This project uses music to promote language learning, equitable opportunities, social participation and social cohesion. Training is provided to teachers and volunteers who work with recently immigrated young people.

 www.bertelsmann-stiftung.de/musik-sprache-teilhabe

Cantara

This project uses intercultural choral activities at Gütersloh's elementary schools to promote and shape social cohesion by bringing together children from local and refugee families.

 www.bertelsmann-stiftung.de/cantara-chor

Focusing on Music Education – Foundations' Alliance

Using expert opinions, studies and its membership in Rat für Kulturelle Bildung e.V. (Council for Cultural Education), this project promotes discussion of social disparities, migration, digitization and the quality of classroom instruction.

 www.bertelsmann-stiftung.de/rat-fuer-kulturelle-bildung

Shaping Sustainable Economies



-  Executive Board Member:
Aart De Geus
-  Program Directors:
Dr. Stefan Emptner, Andreas Esche
-  www.bertelsmann-stiftung.de/NW

Globalization and advancing technology bring prosperity while also posing new challenges. We are therefore committed to promoting social development through good governance, economic and social participation, fair competition and intergenerational justice.

Select project activities:

Global Economic Dynamics

This project aims to increase understanding of globalization's impacts by publishing numerous studies and blogs.

 www.ged-project.de

Inclusive Growth for Germany

Growth does not have to happen at the expense of social justice. Project activities in 2017 focused on a number of topics, including Germany's social market economy as an economic model, the country's tax system and the impact of public investments.

 www.bertelsmann-stiftung.de/inklusive-wachstum

Recognizing Occupational Skills

Together with the Federal Employment Agency and our Learning for Life program, we are developing competency assessment tests for 30 occupations so that people can benefit from their practical experience when looking for a job or gaining a qualification. The first eight tests have been used at all government employment agencies and job centers in Germany since November 20, 2017.

 www.bertelsmann-stiftung.de/berufliche-kompetenzen-erkennen

The Changing World of Work

Globalization, digitization and demographic shifts will all permanently change the job

market and social security programs. This project develops responses that can help shape these changes.

 www.beschaeftigungswandel.de

Sustainable Governance Indicators

The Sustainable Governance Indicators (SGI) assess and compare the long-term viability of developed market-based democracies in the OECD and the EU. Published in November 2017, the *Social Justice Index 2017* examined 28 EU member states and received widespread attention in over 40 countries.

 www.sgi-network.org

Transformation Index

The Bertelsmann Stiftung's Transformation Index (BTI) assesses the quality of political systems, economic development and governance in 129 developing and transition countries. The next BTI report will appear in the spring of 2018.

 www.bti-project.org

Sustainable Development Goals Index

The SDG Index examines how countries are progressing in implementing the UN's 17 Sustainable Development Goals and what can be done to ensure the goals are reached. It is published in cooperation with the UN Sustainable Development Solutions Network (SDSN).

 www.sdgindex.org

Business in Society



 Executive Board Member:

Liz Mohn

 Program Director:

Birgit Riess

 www.bertelsmann-stiftung.de/CSR

Businesses bear responsibility not only for the economic impacts of their actions, but for the social and environmental consequences as well. We develop practical strategies that activate the potential of corporate engagement for shaping social change proactively and responsibly.

Select project activities:

Regional Corporate Responsibility

This project is developing Engaged in the Region, a data- and fact-based platform that calls attention to social challenges “on site” while showcasing examples of how businesses can respond to them effectively. As part of the My Best Practice competition, small and mid-sized businesses were honored for the sixth time in Berlin for their social engagement.

 www.bertelsmann-stiftung.de/regionale-unternehmensverantwortung

Workplaces in the Age of Digitization

As a global megatrend, digitization will fundamentally transform the economy and consumption. Digital business models always have a direct impact on workplace conditions. We develop strategies for shaping digital transformation that focus on employees and their opportunities to participate. In 2017, a meta study provided insight into how Germany’s mid-sized businesses perceive and are making use of digital technologies.

 www.zukunftderarbeit.de

end of the project’s pilot phase, Federal Labor Minister Andrea Nahles and Liz Mohn recognized 24 businesses, public authorities and trade associations in Berlin. The INQA audit is now gradually being transferred to the project’s new organizer in Hannover.

 www.inqa-audit.de

“Family-Friendly Workplaces” Quality Seal

The quality seal helps companies develop flexible work arrangements and family-friendly programs. To conclude the project, 31 businesses were recognized after successfully completing the certification process. Now that the pilot phase is complete, the quality seal will “go live” and be awarded by qualified auditors.

 www.familienfreundlicher-arbeitgeber.de

INQA Audit for a Sustainable Corporate Culture

Supported by both the business community and trade unions, the INQA Audit for a Sustainable Corporate Culture encourages companies and other organizations to create working conditions that are stable and fair. In June, at the

Improving Health Care – Informing Patients



-  Executive Board Member:
Dr. Brigitte Mohn
-  Program Director:
Uwe Schwenk
-  www.bertelsmann-stiftung.de/VV

Germany's health-care system must respond to a number of new challenges. To do so, it will need health-care consumers capable of making informed choices, care provision that reflects actual needs, and a stable financial foundation. We are committed to helping achieve that goal.

Select project activities:

Weisse Liste – Comparing Health-Care Providers

This project sheds light on differences in quality in Germany's health-care system, thereby helping reduce them. In 2017, we proposed reforms for the system used to evaluate nursing homes in Germany and published information on women's experiences with hospital maternity wards.

 www.weisse-liste.de

Health-Care Fact Check

Concluded in 2017, this project has provided an in-depth look at health-care issues several times a year. In 2017, fact checks were published on nursing-care staffing levels in hospitals and on surgical procedures for back pain.

 www.faktencheck-gesundheit.de

Patients with Impact

Medical outcomes are better and patients more satisfied when patients are involved in test and treatment choices. The aim of this new project is to embed the concept of shared decision-making in everyday care.

 www.bertelsmann-stiftung.de/patient-mit-wirkung

The Digital Patient

Through this project, we want to help ensure that technology is used to meet health-care needs. In 2017, we published a detailed proposal for introducing electronic health records in Germany. We also used our Roadmap to Digital Health to provide practical suggestions and strategies for digitizing the country's health-care system.

 www.der-digitale-patient.de

Integrated Health Insurance

The Bertelsmann Stiftung is committed to creating a system of integrated health insurance that strikes a fair balance between social solidarity and competition. The study we published in 2017 examined the impact that would result if civil servants in Germany were required to join the country's public health-care system.

 www.bertelsmann-stiftung.de/integrierte-krankenversicherung

Effective Investments in Education



 Executive Board Member:
Dr. Jörg Dräger
 Program Director:
Anette Stein
 www.bertelsmann-stiftung.de/WB

Our projects aim to promote fair educational opportunities for every child. The first learning environments children experience are their families and child-care centers. We want to help ensure that children grow up in strong families and that high-quality educational institutions mitigate unequal educational opportunities. This requires effective investments in education.

Select project activities:

State by State:

Monitoring Early Childhood Education

For the 10th time, the project published current data on early childhood education and care (ECEC) in Germany's 16 states. The *State-by-State Report on ECEC* includes 16 state profiles in book form. In addition to ECEC indicators, which can be used for cross-state comparisons, the relaunched website www.laendermonitor.de now offers data on the county/city level and for the districts served by youth welfare offices.

A congress examining "ECEC Leaders Under Pressure" was held, concluding the project module on ECEC-center leadership personnel. Disseminated in a series of publications, research results and policy recommendations were discussed with educational associations, trade unions and public administrators.

Conducted for the second time, a nationwide survey allowed parents to share their opinions about ECEC centers. The issues examined include participation, quality and funding.

 www.laendermonitor.de

Families and Education:

Creating Child-Centered Policies

All children have a right to grow up in a nurturing environment and to participate in the world around them, regardless of their social or cultural background. The family is therefore the most important setting for a child's learning and development. Child and family poverty can have significant consequences for a child's development. As our studies show, one child in four in Germany now lives in poverty, and two-thirds of those children experience poverty permanently or at recurring intervals. In cooperation with experts, we have therefore developed a new approach to ensuring children have fair opportunities and can fully participate in society. The goal is the effective prevention of child poverty.

 www.bertelsmann-stiftung.de/family-and-education

Center for International Forums and Trends



-  Executive Board Member:
Aart De Geus
-  Program Director:
Eric Thode
-  www.bertelsmann-stiftung.de/IFT

The goal of the Center for International Forums and Trends is to advance the foundation's international focus through interdisciplinary activities across Bertelsmann Stiftung programs. It also contributes responses to socially relevant global developments. In addition to doing exploratory project work, the center provides support for other programs at the foundation.

Select project activities:

Participation in a Digitized World – Taskforce on Digitization

This project addresses digitization's impact and its ability to create more equitable opportunities for participating in society and accessing educational offerings. In 2017, the Digital Education Monitor analyzed the use and benefits of digital learning at schools and universities. A joint effort of seven foundations and now incorporated as an association, the Forum for Education and Digitization organized a national workshop for schools. The workshop series "The Common Good in the Digital Era" examined the role of foundations and NGOs in times of digital transformation.

-  www.bertelsmann-stiftung.de/teilhabe-digital
-  www.digitalisierung-bildung.de
-  www.forumbd.de

The Ethics of Algorithms

The goal of the new Ethics of Algorithms project is to ensure software and machine-based decision-making allow everyone to participate in society. We therefore want to increase awareness of the growing impact algorithmic systems are having on everyday life. We also want to help shape discussion of this topic and participate in efforts that can increase participation, such as the development of professional ethics and the creation of independent oversight bodies.

-  www.algorithmenethik.de

Demographic Change Under Scrutiny

This project uses expert opinions, representative surveys and interviews with specialists to provide current information on demographic change. In addition to increasing awareness of the strategies needed in the short- and medium-term, the project's goal is to prioritize problems and responses and identify long-term challenges early on.

-  www.bertelsmann-stiftung.de/demowandel

Vision Europe

In 2017, this network made up of eight European foundations and think tanks examined the topic of who wins and who loses as economic globalization progresses. Findings from the network's workshops and policy papers also served as the basis for a conference in Turin, which brought together representatives from throughout Europe to discuss policy proposals for ensuring more people join the ranks of globalization's winners.

-  www.bertelsmann-stiftung.de/vision-europe

Future of Democracy



 Executive Board Member:

Aart De Geus

 Program Directors:

Christina Tillmann, Dr. Robert Vehrkamp

 www.bertelsmann-stiftung.de/ZD

Democracy requires constant responses to new challenges that range from globalization, digitization and increasing social divisions to citizens' expectations that they should be part of the decision-making process. We want to help ensure that Germany's democracy does a better job of adapting to these changing needs.

Select project activities:

Democracy Monitor

We systematically analyze the strengths and weaknesses of German democracy, carry out studies on the crucial challenges it faces and determine where reforms are needed. In 2017, we analyzed Germany's parliamentary elections and the state elections in North Rhine-Westphalia, documenting once again the social divide which exists in the electorate and which means that election results in Germany are not socially representative. The results of our analysis identified another line of conflict, namely the one between skeptics and supporters of globalization. We used the study *A Populist Moment?* to examine the degree of populism in Germany and to show that a majority of German voters did not hold populist views before the 2017 parliamentary elections.

 www.bertelsmann-stiftung.de/demokratiemonitor

Shaping a Diverse Democracy

The various forms of political participation – representative, direct-democratic and dialogue-oriented – must be strengthened and better integrated. In 2017, together with the national Alliance for a Diverse Democracy, a network initiated by the Bertelsmann Stiftung, we developed 12 concrete proposals that show how new forms of citizen participation can increase the public's impact on policy-making. Our principles for ensuring quality, our guidelines for citizen involvement and our proposals for participatory law-making can help make citizen participation a standard part of representative democracy. In addition, our guidelines for getting more people involved early on assist practitioners from the political arena, public administration and civil society in their efforts to increase participation in democratic processes.

 www.bertelsmann-stiftung.de/vielfaeltige-demokratie

Civil Society



-  Executive Board Member:
Dr. Brigitte Mohn
-  Program Director:
Bettina Windau
-  www.bertelsmann-stiftung.de/ZZ

Social cohesion, social innovation, public spirit, volunteering, funding – those are just some of the factors we are committed to improving so that civil society can take effective action.

Select project activities:

“jungbewegt – Volunteering and Democracy”

This project promotes civic engagement, participation and citizenship education in preschools, schools and youth organizations. It also combines political and social learning. In 2017, we further disseminated our approach to preschools by partnering with child welfare organizations and by training approximately 100 specialists in the field.

 www.jungbewegt.de

Committed Communities

This project works with 50 cities to establish robust, sustainable framework conditions and structures for civic engagement. To network the cities, we worked with our project partners in the past year to organize network meetings, BarCamps, webinars and regional engagement forums.

 www.engagiertestadt.de

Building Local Synergies

Together with pilot communities and experts, this project identifies challenges and, subsequently, solutions that can create effective partnerships for assisting young people, refugees and senior citizens. It also tests new tools for providing assistance.

 www.synergien-vor-ort.de

Civil Society for Young Refugees

This project aims to improve the situation of unaccompanied minor refugees. It therefore cooperates with Stiftung Bürgermut, Aktionsgemeinschaft junge Flüchtlinge NRW and the German Children and Youth Foundation, among others.

 www.bertelsmann-stiftung.de/zivilgesellschaft-fuer-junge-fluechtlinge

Impact Investing

This project researches the use of new investment strategies to overcome social challenges. The goal is to promote prevention, innovation and scaling in the social sector.

 www.bertelsmann-stiftung.de/impact-investing

Placing Civil Society on the Economic Map

Stifterverband für die Deutsche Wissenschaft makes empirical data available on German civil society's services and structures. Recent publications include the ZiviZ Survey, which focused on integration, community organizations and civic engagement in educational contexts.

 www.ziviz.info

TRANSFER & SCALE



 Executive Board Member:

Aart De Geus

 Director:

Dr. Sebastian Muschter

Transfer & Scale is a new unit created to ensure the Bertelsmann Stiftung's work has an ongoing impact as it achieves the desired goals and addresses the relevant target groups. The unit has also been tasked with increasing the reach of the work done at the foundation. It therefore develops new methods and platforms and is currently scaling the activities of four pilot projects.

The unit supports the foundation's programs in identifying and realizing the potential for transferring and scaling projects at an early stage. To that end, it makes use of the extensive knowledge the foundation has gained transferring and spinning off various projects such as CHE, Phineo and Weisse Liste.

The unit is creating strategies and detailed action plans for three areas:

1. Developing a structured approach that project teams can use during events such as our Impact Workshop to consider possibilities for transferring and scaling activities early on. This includes a cooperation strategy, opportunities for partnering with a wider range of sponsors (including public-sector institutions), and best practices for building sustainable networks.
2. Developing an infrastructure that supports the transfer and scaling of products. This includes a Transfer-&-Scale platform strategy that we can use to increase the visibility of our project work and its findings, while making it easier to engage digitally with users.
3. Cooperation with four pilot projects which is making it possible to test scaling options quickly and effectively.

The pilot projects:

In the "jungbewegt" project, a massive open online course (MOOC) is being developed for schoolteachers, both those in the classroom and those still in training, to help them impart an understanding of democracy to their students. Social media and marketing initiatives will be used to maximize the MOOC's reach and impact.

The Community Roadmap and KECK projects make it possible for communities to address a range of issues using data-driven management tools. Local-level actors are now being better positioned to address their most pressing management problems by giving them access to more intuitively structured data and automated, individualized reports designed to facilitate decision-making.

Together with the programs Communities for Better Living and Business in Society, an assessment is being carried out to determine which synergies would be generated for local-level and public-sector institutions by combining the INQA audit and the "Family-Friendly Workplaces" quality seal.

The Musical Primary School project is currently running in 450 schools. We are now exploring innovative ways to increase its dissemination and penetration.

CORPORATE COMMUNICATIONS



 Executive Board Member:

Aart De Geus

 Director:

Dr. Andreas Knaut

Corporate Communications is responsible for how the Bertelsmann Stiftung brand is perceived by the public. Working closely with the foundation's Executive Board and managers, Corporate Communications disseminates information from our programs and projects while communicating the results of our ongoing activities.

Our work focusses on making the Bertelsmann Stiftung as a whole known to decision makers and a wider public. The goal is to present the foundation in a way that is cohesive and clear. As a partner for the Bertelsmann Stiftung's programs and projects, Corporate Communications is responsible for addressing the relevant target groups and ensuring the messages conveyed are consistent.

The foundation's media team manages contacts with all media, be they print publications, digital providers, radio stations or television broadcasters. It develops custom-made communications strategies and supports the entire implementation process, both within the foundation and externally. This includes dialoguing with social media users, interacting with opinion leaders and developing new approaches and formats.

Corporate Brand Management is responsible for all the tools used in the foundation's communications activities. It produces all corporate products in this area, including the Annual Report, both the print and online versions; the Bertelsmann Stiftung corporate magazine *change* and its website www.change-magazin.de; and the various materials, such as pamphlets and brochures, that document the results of the foundation's activities. Findings from the foundation's projects appear as both print

and e-books published by Verlag Bertelsmann Stiftung. In 2017, 20 new books, 40 e-books and 14 reprints were published, along with our catalogue of titles (also available online at www.bertelsmann-stiftung.de/verlag) and 172 other printed works. Corporate Brand Management is also responsible for the Bertelsmann Stiftung's corporate design and for managing the target groups addressed throughout the foundation.

Our website www.bertelsmann-stiftung.de has had 4.5 million page views (one-quarter of which have taken place on mobile devices) with an average interaction of more than three minutes per user. The foundation can also be found online in social media, primarily on Facebook, LinkedIn, Twitter, Xing and YouTube. Many of our project teams and experts have their own online profiles and blogs: bertelsmann-stiftung.de/blogs.

Corporate Communications is also responsible for internal communications and the foundation's intranet. Moreover, it works with Human Resources to develop and implement continuing education courses and training programs on communications topics for Bertelsmann Stiftung employees.

CORPORATE OPERATIONS



 Executive Board Member:
Aart De Geus

 Director:
Wilhelm-Friedrich Uhr

Corporate Operations supports the foundation's work through its departments Finance & Tax, Controlling, Human Resources, Information Technology, and Services. Its goal is to ensure accuracy and accountability, coordinate financial and human resources, and continually make the foundation more cost-effective and efficient.

The Corporate Finance & Tax department oversees accounting procedures for all of the foundation's business transactions. It also produces its annual financial statement, including its profit-and-loss report. It ensures that the Bertelsmann Stiftung makes use of its resources in keeping with the foundation's bylaws, German tax law and the country's laws governing nonprofit organizations. It is accountable to both the Bertelsmann Stiftung's governance bodies and public-sector regulatory authorities. Its asset management team is responsible for investing the foundation's liquid assets and overseeing its cash management activities.

A core responsibility of the Corporate HR department is recruiting and developing motivated employees so they can tackle the challenging tasks required by the Bertelsmann Stiftung's projects. This includes carrying out the foundation's annual HR capacity planning, overseeing the ongoing deployment of personnel and implementing HR-related organization development measures. Corporate HR creates HR policies that promote a culture of work, learning and partnership. Moreover, it is responsible for answering all questions relating to employment contracts, workplace conditions and employees' rights.

The members of the Controlling department serve as consultants and advisors for questions relating to budget planning, budget management, project proposals and cost effectiveness. The department provides business analysis and assessments. It also offers assistance when the foundation enters into financial partnerships with other organizations.

The Corporate IT team provides assistance when technical issues arise relating to workplaces or events. It also serves as an advisor when information systems are being developed. In addition to further developing the foundation's IT system, its responsibilities include coordinating and managing the development of IT systems for individual projects.

The Corporate Services department provides various types of support, including facility management, property services and strategic procurement. It is also responsible for the foundation's library, including its research and information services, and the main Service Desk.

AFFILIATED NONPROFIT INSTITUTIONS



Academy of Manual Medicine

- Münster
- Managing Director:
Martin Spilker
- Medical Director:
Prof. Dr. med. Markus Schilgen
- www.manuellemedizin.de

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Bertelsmann
FOUNDATION

Founders Foundation gGmbH

- Bielefeld
- Managing Director:
Sebastian Borek
- www.foundersfoundation.de

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Fundación Bertelsmann

- Barcelona
- Directors:
Clara Bassols,
Francisco Belil
- www.fundacionbertelsmann.org

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Phineo

- Berlin
- Executive Board:
Dr. Andreas Rickert,
Klaus-Dieter Becker
- www.phineo.org

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German Stroke Foundation

- Gütersloh
- Executive Board:
Dr. Michael Brinkmeier,
Sylvia Strothotte
- www.schlaganfall-hilfe.de

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Weisse Liste

- Berlin
- Managing Director:
Roland Rischer
- www.weisse-liste.de

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The Bertelsmann Stiftung supports its affiliated nonprofit institutions by contributing ideas and funding.*

Bertelsmann Foundation North America

- 📍 Washington, DC
- 👤 Executive Director: Irene Braam
- 🌐 www.bfna.org

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CHE Centre for Higher Education

- 📍 Bielefeld
- 👤 Managing Directors: Dr. Jörg Dräger, Prof. Dr. Frank Ziegele
- 🌐 www.che.de

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Liz Mohn Foundation for Culture and Music

- 📍 Gütersloh
- 👤 Chairwoman: Liz Mohn
- 👤 Managing Director: Nadine Sträter
- 🌐 www.kultur-und-musikstiftung.de

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Reinhard Mohn Institute for Corporate Governance

- 📍 Witten
- 👤 Director: Prof. Dr. Guido Möllering
- 🌐 www.reinhard-mohn-institut.de

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Reinhard Mohn Stiftung

- 📍 Gütersloh
- 👤 Executive Board: Christoph Mohn, Dr. Erkan Uysal
- 🌐 www.reinhard-mohn-stiftung.de

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Center for Digital Education and Schools in Gütersloh

- 📍 Gütersloh
- 👤 Managing Directors: Christian Ebel, Rüdiger Bockhorst
- 🌐 www.digitale-schule-gt.de

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*See "Total Expenditures" on pp. 6-7.

Academy of Manual Medicine

The Academy of Manual Medicine is dedicated to promoting research, teaching and treatment in the area of conservative orthopedics, thereby including manual medicine in academic programs and practice.

Founded by the Bertelsmann Stiftung, the Akademie für Manuelle Medizin (Academy of Manual Medicine) is an institute at the University of Münster. Its shareholders are the Bertelsmann Stiftung, the University of Münster and the university's medical clinic. The academy offers training and further education programs for medical professionals, such as doctors and physiotherapists, and university courses for students. It also plans to conduct research. Structured from the beginning to take an interdisciplinary approach, the Department of Manual Medicine has been expanded over time to include the areas of neurology and rheumatology.

In carrying out its work, the academy focuses on creating solutions that are practical, effective and exemplary. It combines theory and practice by taking an application-oriented approach to defining objectives and addressing problems, while also engaging in evidence-based analysis and research. Together, these activities lay the foundation for creative innovations and useful medical interventions which result in successful orthopedic treatments.



Managing Director:

Martin Spilker



Medical Director:

Prof. Dr. med. Markus Schilgen



www.manuellemedizin.de

Bertelsmann Foundation North America

The Bertelsmann Foundation North America is an independent, nonpartisan and nonprofit think tank in Washington, DC with a transatlantic perspective on global challenges. Our innovative projects and discussion events allow policy makers and thought leaders to develop practical recommendations for pressing political, economic and social issues.

Founded in 2008 as an affiliate of the Bertelsmann Stiftung, the Bertelsmann Foundation North America advances social change, supports civil liberties and promotes international understanding. Serving as a bridge between Europe and the United States, it highlights best practices on both sides of the Atlantic in the areas of foreign, economic and social policy. Its work is predicated on the belief that sooner or later Europeans and Americans will face the same challenges and can learn from each other's solutions.

The Bertelsmann Foundation North America provides insight into German and European perspectives on international issues and introduces them into policy discussions. An area of key interest is globalization as experienced in Europe and the US, including the impact of the financial crisis and the opportunities offered by a transatlantic free-trade agreement.



Executive Director:

Irene Braam



www.bfna.org

CHE Centre for Higher Education

Germany's system of higher education is being transformed by an unprecedented change: Going to university has now become normal. Almost anyone can enroll – the possibilities are virtually endless. That means many people who would like to study have difficulty choosing the program that is right for them.

CHE offers them detailed information and makes the numerous offerings more transparent. Moreover, not only are there more students in Germany, they have become more diverse as well. Ensuring anyone can study regardless of background is a challenge that university administrators and policy makers must address. CHE supports them by providing recommendations and solutions.

CHE was founded in 1994 by the Bertelsmann Stiftung and the German Rectors' Conference. For 20 years, the organization's best-known project, the annual CHE University Ranking, has been providing students with guidance on

higher education programs at German-speaking institutions. In 2014, U-Multirank was introduced, the first multidimensional ranking of universities on an international scale. In March 2017, it compared institutions from 99 countries using more than 30 criteria from the areas of research, teaching, internationality, regional engagement and knowledge transfer.



Managing Directors:

Dr. Jörg Dräger, Prof. Dr. Frank Ziegele



www.che.de

Founders Foundation

The Founders Foundation in Bielefeld uses its two practice-oriented academies to train next-generation entrepreneurs and business leaders and to network them with established companies.

In 2016, the Bertelsmann Stiftung launched the nonprofit Founders Foundation. Making use of the practices developed by Bertelsmann Stiftung's founder, Reinhard Mohn, the Founders Foundation is training the next generation of entrepreneurs in East Westphalia/Lippe. As a result, new opportunities are taking shape in the region for individuals with entrepreneurial potential. The Founders Foundation supports tomorrow's business leaders as they launch their start-ups. The foundation's training courses, workshops, networks and work spaces are designed to motivate people with innovative ideas to start businesses in the region. In addition to the Founders Academy, a Founders

Camp supports start-ups for six months as they go from initial idea to actual business. The program's various elements include strategic consulting, seminars led by professionals, and shared office space. Within five years, the Bertelsmann Stiftung will be investing up to €17 million in this unique project.



Managing Director:

Sebastian Borek



www.foundersfoundation.de

Fundación Bertelsmann

The Bertelsmann Stiftung promotes social change in Spain through its Barcelona-based affiliate, the Fundación Bertelsmann. Since 2014, all Fundación Bertelsmann activities have focused on reducing the country's high level of youth unemployment.

Reinhard Mohn established the Fundación Bertelsmann in Barcelona in 1995. Initially it focused on developing libraries in Spain, thereby making use of longstanding practice-oriented efforts in Germany to modernize public libraries. After 10 years, the Barcelona-based foundation began launching projects designed to increase civic engagement in Spain. Since 2014 it has focused on combatting the country's high rate of youth unemployment. The nonprofit foundation supports organizations in the educational sector and job market as they improve training programs and employment opportunities for young people in Spain. It has therefore launched the Alliance for Dual Vocational Training, which

brings together businesses, vocational schools and other institutions. It also offers further education programs that increase the quality of the country's career counseling services.



Directors:

Clara Bassols, Francisco Belil



www.fundacionbertelsmann.org

Liz Mohn Foundation for Culture and Music

Through its projects, the Liz Mohn Foundation for Culture and Music focuses on developing young opera talent and advancing music education. It also works to increase understanding among children and young people of different cultural backgrounds.

This nonprofit foundation was established in 2005. In keeping with the vision of its founder, Liz Mohn, the organization's mission is to make greater use of the opportunities culture and music offer for personal development and for society at large. The focus of its work is on promoting music education and supporting up-and-coming opera singers. In addition, it aims to increase understanding among children and young people of different cultural backgrounds. Within these focus areas, the foundation supports the Opera Studio at the Staatsoper Unter den Linden in Berlin and the studio's participants. It also organizes the project Children's Musical Theater, which contributes to local

efforts supporting culture and young people in the city of Gütersloh, where the organization is based. The Liz Mohn Foundation for Culture and Music accepts applications for grants once a year as part of the national Cultural Diversity With Music initiative.



Chairwoman:

Liz Mohn



Managing Director:

Nadine Sträter



www.kultur-und-musikstiftung.de

Phineo

Doing good and achieving the best – that’s Phineo’s goal. Its analysis and consulting help ensure that social investors are effective when they engage on behalf of society. Phineo is also committed to helping civil society grow – quantitatively and qualitatively.

The Bertelsmann Stiftung founded Phineo gAG in 2009 together with business, government and civil society organizations. The idea behind Phineo originated in a project developed and realized as part of the Bertelsmann Stiftung’s Civil Society program, which is overseen by Dr. Brigitte Mohn in her role as a member of the foundation’s Executive Board. Phineo helps social investors (philanthropists, donors and CSR managers) identify promising projects and highly effective organizations. Through its reports, manuals, analyses, workshops, free quality seal and individual consulting services for social investors, Phineo makes social challenges and the resulting solutions more

transparent. It thus supports nonprofits and investors, such as foundations and businesses, in increasing the effectiveness of their social engagement. As a result, its activities assist and strengthen civil society on an ongoing basis. The Bertelsmann Stiftung supports Phineo as one of the organization’s shareholders.



Executive Board:

Dr. Andreas Rickert, Klaus-Dieter Becker



www.phineo.org

Reinhard Mohn Institute for Corporate Governance

The Reinhard Mohn Institute for Corporate Governance is an educational institute at the University of Witten/Herdecke. Through research, teaching and dialogue with practitioners in the field, it contributes innovative ideas that advance the theory and practice of corporate governance on the national and international levels.

Named for the founder of the Bertelsmann Stiftung, the Reinhard Mohn Institute for Corporate Governance (RMI) at the University of Witten/Herdecke was established in 2010. The institute’s program is anchored in organization theory and reflects Mohn’s participatory and accountability-driven management philosophy. The RMI increasingly sees strategy, management, organization and governance as one cross-functional concept which results in cooperative, networked corporate leadership. Key issues addressed by the institute include cooperative relationships; network and alliance strategies; managing accessibility and transparency; trust in and among organizations; new

forms of leadership and work in the digital age; and corporate responsibility.

The RMI faculty is comprised of two professors and one research professor, one of whom holds the Reinhard Mohn Professorship in Corporate Governance. Since its founding, the RMI has received ongoing support from the Bertelsmann Stiftung.



Director:

Prof. Dr. Guido Möllering



www.reinhard-mohn-institut.de

Reinhard Mohn Stiftung

The Reinhard Mohn Stiftung works to ensure that the educational achievement of children and young people does not depend on their social or cultural background. Its activities are thus designed to improve the quality of education in preschools and schools.

The Reinhard Mohn Stiftung began its project work in 2009. Its activities focus on helping all children and young people reach their full potential regardless of social or cultural background. It bases its work on successful programs in Germany and other countries, especially those used in Toronto and Zurich. The foundation's projects take place in the cities and towns of East Westphalia/Lippe, the area Reinhard Mohn was from and where his family still lives today. The Reinhard Mohn Stiftung engages in a range of activities to achieve its goals, including programs for getting parents more involved and for creating multi-professional teams in preschools and schools. It also works to ensure children

transition successfully from one educational institution to the next. All of its projects are developed and carried out together with local partners.

 Executive Board:
Christoph Mohn, Dr. Erkan Uysal
 www.reinhard-mohn-stiftung.de

German Stroke Foundation

The German Stroke Foundation is a first point of contact for questions relating to stroke. It assists people who have experienced a stroke, and their families, as well as practitioners in the field. Its services range from providing information, educational materials and advice to promoting self-care following a stroke and organizing training for medical professionals.

The German Stroke Foundation was established by Liz Mohn in 1993 after a medical incident in her own family. The foundation engages in health promotion and works to improve prevention, acute care, rehabilitation and recovery following a stroke. In addition to coordinating initiatives that advance stroke treatment, such as the use of "stroke stewards," it assists and networks innovative approaches. The foundation supports measures for assessing and enhancing the quality of care stroke patients receive, for example by promoting the creation of stroke units and the introduction of integrated care on a national level. In the area of stroke management, the German Stroke Foundation

is a people-centered solutions provider which helps ensure patients have access to interdisciplinary care that is modern and efficient. Regardless of the activity, the organization's first priority is meeting the needs of patients and their families.

 Executive Board:
Dr. Michael Brinkmeier, Sylvia Strothotte
 www.schlaganfall-hilfe.de

Weisse Liste

Weisse Liste (White List) supports patients and their families in finding the right physician or hospital. It offers information on the services provided by medical practitioners and facilities and on the quality of their services. The online portal is a Bertelsmann Stiftung project. The umbrella associations of Germany's major patients' and consumers' organizations serve as its strategic partners.

Online since 2008, Weisse Liste is Germany's largest independent portal for medical patients. Incorporated in 2011 as a Berlin-based nonprofit and a wholly owned subsidiary of the Bertelsmann Stiftung, it is responsible for maintaining and further developing the site's services.

Weisse Liste's mandate is to offer the public guidance as they engage with Germany's health-care system. Free of charge and without advertisements, the website helps users find the medical service provider that is right for them. It also offers information on examinations and treatments. In 2017, some 8.5 million people

used the site. It was also recognized as one of Germany's best online portals by the German Institute for Service Quality.

Weisse Liste sheds light on the differences in quality among health-care providers. The greater transparency promotes competition and thus improves quality, benefitting the public.

 **Managing Director:**
Roland Rischer
 www.weisse-liste.de

Center for Digital Education and Schools in Gütersloh

The center supports the 122 schools and their administrators in the district of Gütersloh by helping them include digital learning in the school development process. The goal is to continue improving the quality of classroom instruction and ensure all young people can participate as digital technology transforms how we live and work.

Digitization is creating fundamental change in almost all areas of life. Schools, moreover, must prepare students for their future in a digital society. That means ensuring young people are not only able to use digital media, but can interact with them critically and responsibly. To mark the 40th anniversary of its founding, the Bertelsmann Stiftung partnered with the Reinhard Mohn Stiftung to create the Center for Digital Education and Schools in Gütersloh. Working closely with individuals and institutions responsible for education in the greater Gütersloh area, the center will provide ongoing support for developing the role media play in schools. The goal is to ensure all of the area's

122 schools benefit from the center's activities over the next five years and beyond.

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