

MISSION STATEMENT

»Inspiring people. Shaping the future.
Participating in a globalized world.«

What we believe

Our work focuses on people. The Bertelsmann Stiftung's programs are therefore designed to empower people, strengthen society and further develop the resources necessary to achieve these goals. Even as the world grows increasingly complex, everyone should have the opportunity to participate – politically, economically and culturally.

How we work

Founded in 1977 by Reinhard Mohn, the Bertelsmann Stiftung is predicated on the belief that wealth entails responsibility.

As a private operating foundation, the Bertelsmann Stiftung conceives and initiates all of its own projects, then supports them as they are carried out. To that end, we work across disciplines with experts from research and practice, while collaborating closely with public and private institutions. Our programs activate knowledge, develop solutions and disseminate skills.

Policy makers and society at large are ultimately the ones who decide whether our ideas become reality.

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TOTAL EXPENDITURES* (€, thousands)

Programs and special projects	2015	2016
International affiliates	4,679	4,813
CHE Centre for Higher Education	1,667	1,797
Germany and Asia	1,408	1,781
Europe's Future	3,732	3,848
Integration and Education	3,607	3,589
Competence Center for Leadership and Corporate Culture	1,656	1,788
Living Values	1,326	2,423
Communities for Better Living	5,081	4,806
Learning for Life	3,253	3,932
Discovering Music	2,582	1,958
Shaping Sustainable Economies	5,268	4,589
Business in Society	3,143	2,408
Improving Healthcare – Informing Patients	4,237	4,368
Effective Investments in Education	2,250	2,327
Center for International Forums and Trends	2,942	3,091
Future of Democracy	1,822	1,755
Civil Society	4,087	4,231
Special projects	1,038	2,091
	53,775	55,595

* 2015 data: audited / 2016 data: preliminary (as of January 23, 2017)

Total expenditures

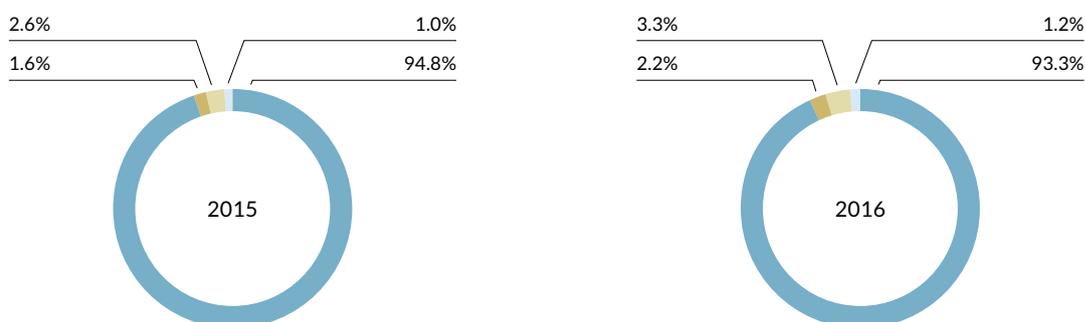
Expenditures for the 2016 fiscal year totaled € 72.7 million (preliminary figure). Since its inception, the Bertelsmann Stiftung has invested some € 1.35 billion in nonprofit work.

Program expenditures

In its 2016 fiscal year, the Bertelsmann Stiftung invested € 55.6 million directly in its program activities. That was € 1.8 million more than in the previous year.

Programs and special projects	2015		53,775
	2016		55,595
Program-related services	2015		3,754
	2016		3,350
Communications	2015		5,009
	2016		5,233
Administration	2015		9,278
	2016		8,519
Total expenditures	2015		71,816
	2016		72,698

INCOME* (€, thousands)



	2015	2016
● Investment income	148,058.6	120,363.7
● Income from partnerships, donations	2,525.8	2,801.6
● Capital income (interest, dividends, foreign exchange)	4,149.3	4,237.0
● Other income (asset appreciation, financial assets)	1,485.8	1,602.7
Total income	156,219.5	129,005.0

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 € 120.4 million in fiscal year 2016. Additional funds are available to the Bertelsmann Stiftung from its cooperative partnerships and from the management of its financial reserves. In the 2016 fiscal year, the foundation therefore had approximately € 129.0 million at its disposal for its 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 2016, these reserves were increased to € 410.8 million.

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. And advisory council appointed by the Executive Board consults with the foundation as investments are made.

The foundation held investments in the following asset classes at the end of the 2016 fiscal year: bonds (corporate, government [eurozone/periphery], high-yield, and emerging market debt: 78%), shares (Europe, world, emerging market: 16%), and real estate and near-cash assets (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 largely conservative investment strategy allowed the Bertelsmann Stiftung to achieve an overall annual return of 3.3% in 2016.

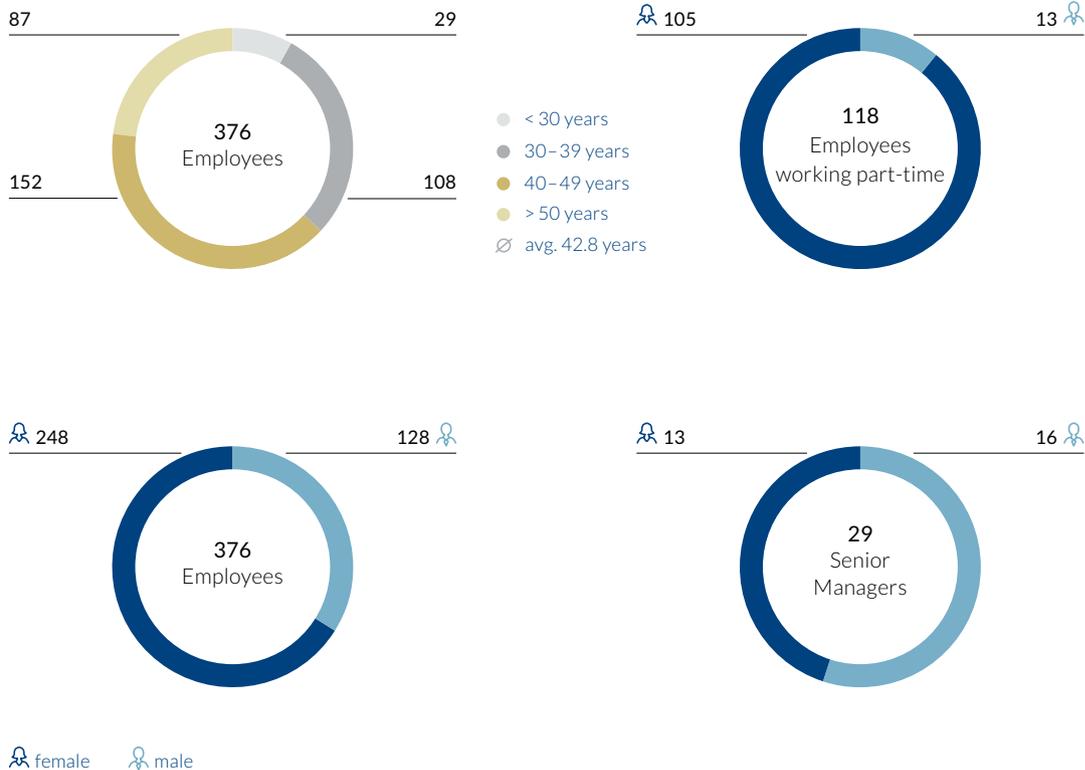
STATEMENT*

of the Bertelsmann Stiftung's assets and liabilities as of December 31, 2016

ASSETS (€, thousands)	2015	2016
Fixed assets		
Intangible assets and tangible assets	28,875.5	29,712.3
Financial assets:		
Shares	592,186.8	592,186.8
Other securities	419,154.2	422,385.4
Total fixed assets	1,040,216.5	1,044,284.5
Current assets		
Available funds	77.5	472.2
Real estate	1,657.2	4,143.0
Receivables and other assets	550.7	590.2
Securities	20,000.0	30,062.7
Liquid assets	111,017.2	149,121.6
Total current assets	133,302.6	184,389.7
Prepaid expenses	226.5	379.8
Balance from asset management	303.7	156.1
Total balance-sheet assets	1,174,049.3	1,229,210.1
Assets held in trust	5,260.5	5,340.2
LIABILITIES (€, thousands)	2015	2016
Endowment capital	619,497.6	619,497.6
Reserves		
§ 62 Para. 1 No. 3 AO (Free reserves)	369,000.0	410,800.0
§ 62 Para. 1 No. 1 AO (Reserves in acc. with bylaws)	51,465.7	62,004.9
Restructured assets	13,833.5	13,646.1
Total reserves	434,299.2	486,451.0
Funds carried forward	94,579.8	95,985.2
Accrued liabilities		
Provisions for pensions	17,020.8	17,173.2
Other liabilities	4,042.3	4,409.6
Total accrued liabilities	21,063.1	21,582.8
Accounts payable		
Prepayments received	0.0	1,160.6
Accounts payable for goods and services	3,532.5	2,862.2
Other accounts payable	1,021.0	1,614.6
Total accounts payable	4,553.5	5,637.4
Deferred income	56.1	56.1
Total balance-sheet liabilities	1,174,049.3	1,229,210.1
Trust accounts payable	5,260.5	5,340.2

* 2015 data: audited / 2016 data: preliminary (as of January 20, 2017)

HUMAN RESOURCES



Attractive employer

In addition to systematic opportunities for professional development, we offer our 376 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 41 new employees in 2016.

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, 51 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 health program.

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



Dr. Thomas Buberl



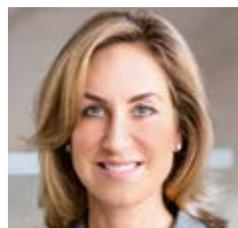
Dr.-Ing. Ralph Heck



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



Christoph Mohn



Carolina Müller-Möhl



Dr. Viviane Reding



Dr. Wolfgang Schüssel
(until Dec. 31, 2016)



Prof. Dr. Jürgen Stark

Executive Board

The members of the Bertelsmann Stiftung Executive Board 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), 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, CEO of UFA Film & TV Produktion GmbH
- Dr. Wulf H. Bernotat, former chairman of the Board of Management of E.ON AG
- Dr. Thomas Buberl, CEO of Axa Germany and board member of the Axa Group
- Dr. 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 and of Bertelsmann Management SE; shareholder and member of the Steering Committee 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; member of the Board of Directors of Orascom Development Holding AG and of Neue Zürcher Zeitung AG

- Dr. Viviane Reding, member of the European Parliament

- Dr. Wolfgang Schüssel, former chancellor of the Republic of Austria (member until Dec. 31, 2016)

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

As of December 31, 2016

CONTACTS AT A GLANCE

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Germany and Asia

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Competence Center for Leadership and Corporate Culture

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Controlling

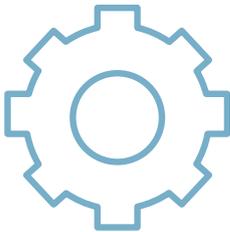
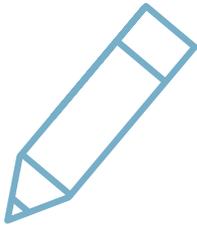
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OUR TOPICS AT A GLANCE

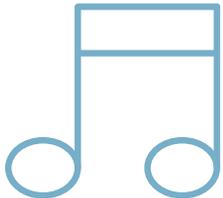
*Improving
Education*



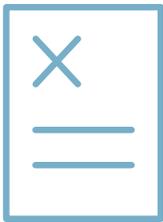
*Strengthening
Economies*



*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

Our “Asian Radar” measures and analyzes how social cohesion is developing in Asia in order to forecast potential impacts on Germany and Europe. In preparation for the final study, an expert workshop was held with participants from Germany, India and China.

-  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. In 2016, the topics examined included “The End of Panda Politics” and “What Economic Slowdown? Asia Looks at China.”

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

Regional Focus: China

The study *China 2030: Szenarien und Strategien für Deutschland (China 2030: Scenarios and Strategies for Germany)* analyzed developments in China, their consequences for Germany and potential political and economic responses. Organized together with the German Chamber of Commerce in Shanghai, the More Than a Market initiative

promotes corporate social responsibility, in particular among German businesses in China.

-  <https://china-szenarien.bertelsmann-stiftung.de>
-  www.bertelsmann-stiftung.de/more-than-a-market

Regional Focus: India

Held in Berlin, the conference “India and Germany: A Promising Partnership?” analyzed the opportunities and challenges of German-Indian cooperation. At the conference “Innovation in India” in Delhi, the study of the same name was presented examining India’s innovation landscape. Opportunities for cooperation in the areas of research, politics and business were also discussed.

-  www.bertelsmann-stiftung.de/innovationsstudie-indien

Asia-Europe Young Leaders Forum

Addressing the topic of innovation and its consequences for society, the 2016 Asia-Europe Young Leaders Forum was held in conjunction with the Asia-Pacific Conference of German Business in Hong Kong, in cooperation with the Asia-Pacific Committee of German Business.

-  www.bertelsmann-stiftung.de/asia-young-leaders

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, in addition to being sustainable, inclusive and more socially just.

Select project activities:

Strengthening Europe

We investigate how the division of responsibilities between the EU and its member states can be made more efficient and citizen-oriented. We also develop strategies for completing the Economic and Monetary Union and for improving social cohesion within Europe. The report *Border Protection and Freedom of Movement. What People Expect of European Asylum and Migration Policies* was published as part of the eupinions series, along with *Repair and Prepare: Growth and the Euro after Brexit* following the UK's decision to leave the EU. A SIM Europe Debate in Rome examined the topic "Tackling Poverty and Fostering Social Inclusion. The State of Play in Italy and Europe."

 www.bertelsmann-stiftung.de/europa

 www.strengthentheeuro.eu

 www.social-inclusion-monitor.eu

tion in Ukraine, Libya, Syria, Morocco, Lebanon, Jordan and Italy. Two eupinions publications have appeared on how people feel about being part of the EU and the rise of populist parties.

 www.bertelsmann-stiftung.de/europa

Brussels Office

The Brussels Office provides substantive support for the foundation and its programs at the European level. In 2016, an expert workshop was held in Brussels on long-term unemployment in Europe, as was a panel discussion with Rita Süßmuth on the topic "From Reception to Integration – Moving beyond the Refugee Crisis." A roundtable was also organized on "Redefining Europe's Perspectives."

 www.bertelsmann-stiftung.de/bruessel

Connecting Europe

We develop strategies that can help the European Union stabilize its neighborhood and that can prevent the refugee situation from being used to create divisions within the EU. "Migration and Integration: German-French Challenges," the opening event in the German-French Dialogues, was organized in cooperation with the French embassy in Berlin. As part of the series Facts on the European Dimension of Displacement and Asylum, factsheets were published on the situa-

Integration and Education



 Executive Board Member:

Dr. Jörg Dräger

 Program Director:

Ulrich Kober

 www.bertelsmann-stiftung.de/IB

Germany is an immigration society. Regardless of background, everyone must be given a fair chance to develop their potential and get involved. We are committed to establishing a culture that welcomes newcomers and promotes participation. Successful education is a key to achieving that goal.

Select project activities:

Immigration and Diversity

We are committed to helping create an open society and fair migration management policies that ensure successful integration. In 2016, we supported a national network of cities in developing a “culture of welcome” for foreign students. The project also released studies on integrating refugees into the job market, on whether Switzerland’s asylum system could serve as a model for Germany, and on Germany’s role in international migration policy.

 www.einwanderungundvielfalt.de

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. State Minister Aydan Özoğuz, Germany’s commissioner for integration, serves as its patron. In April, six youth projects were recognized in Berlin for their efforts to increase understanding in a diverse society. During the year, project participants were visited by the competition’s celebrity ambassadors.

 www.allekidssindvips.de

Better Learning Through Diversity

Together with our partners from the political and social spheres, we are helping to create a fair and effective educational system in Germany. In 2016, the project carried out surveys among parents on the topics of all-day schools

and tutoring. A study examined the human resources that Germany’s states are making available for all-day schools. Together with three other major educational foundations, we supported the international teachers’ summit organized by the Standing Conference of the Ministers of Education and Cultural Affairs.

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

Jakob Muth Award

In June, in cooperation with the German Commission for UNESCO and the German government’s commissioner for matters relating to disabled persons, we presented the Jacob Muth Award for Inclusive Schools. In 2016, the award went to schools in Bavaria and Saxony-Anhalt and, for the first time, a Gymnasium, one of Germany’s academically advanced secondary schools.

 www.jakobmuthpreis.de

Refugees and Schools

Together with the Mercator Foundation, we support educators as they help refugee children acquire language skills. The project is also researching the role teachers with refugee backgrounds can play in schools.

Competence Center for Leadership and Corporate Culture



 Executive Board Member:

Liz Mohn

 Program Director:

Martin Spilker

 www.creating-corporate-cultures.org

The issues leaders face are becoming increasingly complex thanks to globalization and, in particular, digitization. Executives must ensure their organizations are ready for the future; at the same time, they must lead them responsibly. Executives' actions and values play a key role in defining corporate culture, thereby laying the foundation for sustainable success.

Select project activities:

Creating Corporate Cultures

The project uses executive training and studies to support leaders in developing a forward-looking corporate culture. In 2016, executive training events for female managers on the topic "Women and Cultural Change" took place in April and June, with another held in September on the topic "Sustainable Leadership." In October, 180 former participants gathered for an alumni meeting in Berlin. A focus-group workshop laid the groundwork for a new event, Checkpoint: Career. Twenty-five interviews were conducted on the topic of including women as board members for the study *Diversity on Corporate Boards*. In addition, together with the University of St. Gallen a pretest was carried out for the Executive Monitor on the conditions required for effective leadership. The website www.creating-corporate-cultures.org was relaunched and a book published on how to develop a value-generating organizational culture.

 www.creating-corporate-cultures.org

Leaders' Dialogue:

Trilogue Salzburg

The Trilogue Salzburg is an annual interdisciplinary exchange for decision makers from the arts, the economic sector and the political sphere that convenes in August to address future trends. In 2016, 30 international participants discussed the topic "Dealing with Neighbors: Fighting a Ring of Fire or Building a Ring of Friends?" and the future development of the European Neighbourhood Policy. The participants' recommendations were communicated to international policy makers and presented at various forums, including one with Austrian Foreign Minister Sebastian Kurz.

 <http://www.bertelsmann-stiftung.de/en/our-projects/trilogue-salzburg/>

Crisis Management in the 21st Century

The project evaluates methods for recognizing crises early on and managing them efficiently. During workshops with international specialists, including experts from Germany's Ministry of Defense, the preliminaries for prevention programs were discussed, as was an interdisciplinary risk analysis.

 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 that allow for diversity, enable individuals to develop their potential, and 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 2016, we published three books on social cohesion: one on the degree to which it is found in the western world, one on how it is being affected by the refugee situation in Germany, and one examining why societies are cohesive to begin with. We also published a study on social cohesion in the city of Bremen.

 www.gesellschaftlicher-zusammenhalt.de

Event Series: Life Together

In cooperation with broadcasters Deutschland-radio and ORF3, the Living Values program organized three panel discussions as part of Life Together, a series of events examining migration-related developments in Germany and Austria.

 www.bertelsmann-stiftung.de/miteinander-leben

Religion Monitor

The Religion Monitor investigates the role played by religious and cultural diversity in social cohesion. In 2016, representative surveys were again carried out among people of different religions and world views. The findings will be published in 2017.

 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. A meeting of 120 alumni in Israel examined the topic “Dealing with Risk.” The 17th German-Israeli Young Leaders Exchange on “Rethinking Innovation” was also held.

 www.bertelsmann-stiftung.de/DIYL

Promoting Role Models - Imparting Values

We are committed to helping young people develop values. The pilot project TeamUp! was launched in November to build values in youngsters at soccer clubs. A conference on “Building Values in an Immigration Society” was organized together with the German Ministry for Migration and Refugees.

 www.bertelsmann-stiftung.de/wertebildung

Living in Diversity / Shaping Cohesion

We are committed to strengthening social cohesion, particularly in view of the current refugee situation. We are therefore developing strategies for local-level actors and examining the role that mosque congregations can play in social integration.

 www.gesellschaftlicher-zusammenhalt.de

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 joint efforts that provide more equitable access to social participation.

Select project activities:

Arriving in Germany

Integration takes place at the local level. A conference was organized in cooperation with DStGB, the German association of towns and municipalities, on integrating refugees. Twelve communities are also supporting the foundation in implementing local networks for refugee integration.

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

Leave No Child Behind!

To conclude the pilot phase, which included 18 communities in the state of North Rhine-Westphalia, State Premier Hannelore Kraft and Dr. Brigitte Mohn presented the project results in Düsseldorf.

-  www.bertelsmann-stiftung.de/kekiz

Sustainable Local Government Finances

Our goal is to ensure communities remain capable of taking effective action. As part of this project, local-level actors and state authorities in Hesse, North Rhine-Westphalia and Saxony were surveyed on budget oversight practices.

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

Sustainable Communities Monitor

Sustainable strategies require transparency. In 2016, we published the first sustainability monitor for German communities in cooperation with Difu, the German institute for urban affairs.

-  www.monitor-nachhaltige-kommune.de

Smart Country - Reinhard Mohn Prize 2017

Intelligent digital technology and connectivity can help everyone participate in society while creating equal living conditions among cities and regions. As part of this project, expert interviews were conducted and international research carried out to identify best practices. The 2017 Reinhard Mohn Prize is also examining this issue. Former Estonian President Toomas Hendrik Ilves was chosen to receive the prize.

-  www.bertelsmann-stiftung.de/smart-country
-  www.reinhard-mohn-preis.de

Community Roadmap

Updated socioeconomic data were released on the Community Roadmap website, as were new forecasts of nursing care needs. A study on designing care at the community level was presented at the National Care Congress.

-  www.wegweiser-kommune.de
-  <https://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 effective, equitable educational system, one 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 acquired on the job, and to make use of further training programs to gain an occupational qualification.

Select project activities:

Vocational Training – Opportunities for Everyone

This project works to make Germany’s vocational education system more equitable and effective. A position paper was therefore published on vocational education in an immigration society. A print version was also released of the 2015 report on occupational training in Germany’s 16 states. In September, a breakfast briefing was held in Brussels on “Higher Education vs. Vocational Training – Cooperation or Competition?”

 www.bertelsmann-stiftung.de/chance-ausbildung

Further Education for All

This project develops career advisory programs that reflect real-world experiences, along with learning opportunities that are both personalized and motivating. It also works to ensure informally and non-formally acquired skills are recognized. Together with Kolpingwerk Deutschland, we organized a conference in Frankfurt on “Recognizing Skills.” We also published findings from a survey of employers and employees on the role informal learning plays during job searches and recruitment. And to help identify skills among refugees, more than 8,000 sets of “competence cards” were made available free of charge to government job centers, refugee organizations and educational providers.

 www.bertelsmann-stiftung.de/weiterbildung

Recognizing Occupational Skills

Together with the German Federal Employment Agency, 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. As part of the pilot phase, the first two tests were introduced in December at employment agencies and job centers. In addition, an advisory council was created for the project consisting of representatives from government ministries and trade associations.

 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 foundation of communal life. Our projects make use of music's potential to promote tolerance, social participation, equitable opportunities and personal development.

Select project activities:

NEUE STIMMEN

NEUE STIMMEN – International Singing Competition

Founded by Liz Mohn in 1987, the NEUE STIMMEN International Singing Competition is widely recognized as one of the premier international forums for young opera singers. The fourth prizewinners' concert was held in Berlin in May. As part of the Creating Careers initiative, experts convened in Berlin to discuss the topic "Start-up Opera Singers – What Will Careers Be Like in the Future?" Auditions followed by a coaching session were organized in cooperation with the Hanns Eisler School of Music Berlin.

NEUE STIMMEN – International Master Class

During the master class, especially gifted young opera singers work with internationally recognized artists and music-world experts to develop their voices, stage presence and musical technique. They also receive coaching in the areas of career management, networking and marketing. In October, the master class was held in Gütersloh for the 11th time.

 www.neue-stimmen.de

Music Education

Musical Primary School

This project turns music into a quality improvement tool by making it 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 background, language or achievement.

 www.bertelsmann-stiftung.de/musikalischegrundschule

MIKA – Music in Child Care Every Day

This project gives 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 experiment with music and build "sound spaces."

Music – Language – Participation

This project makes use of music's potential to promote language learning, equitable opportunities, social participation and social cohesion. Training is provided to teachers from all types of schools throughout Germany who work with recently immigrated young people.

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

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 economic impacts. In 2016, numerous studies were published – including *Departure from the Schengen Agreement* and *Globalization Report 2016*.

 www.ged-project.de

Inclusive Growth for Germany

Growth does not have to happen at the expense of social justice. In 2016, using studies on how growth is changing and on migrant-owned businesses in Germany, we examined opportunities for inclusive growth.

 www.bertelsmann-stiftung.de/inklusives-wachstum

Economic Dynamics and Employment

This project generates ideas for expanding job markets in Germany and Europe and making them more flexible. In 2016, we therefore published studies on mobility in Europe's labor markets and on how refugees can be brought into the workforce, among other topics.

 www.beschaeftigungsdynamik.de

Recognizing Occupational Skills

Together with the German Federal Employment Agency, 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. As

part of the pilot phase, the first two tests were introduced in December at employment agencies and job centers. In addition, an advisory council was created for the project consisting of representatives from government ministries and trade associations.

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

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 and examining the 28 EU member states, the *Social Justice Index 2016* was well received 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.

 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 how the goals can be reached. Initially published in July, the index will be released annually 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 strategies for addressing the changing role of business in a globalized world.

Select project activities:

2016 Reinhard Mohn Prize: Responsible Entrepreneurship

The 2016 Reinhard Mohn Prize was awarded to Prof. Klaus Schwab, founder and executive chairman of the World Economic Forum, in recognition of his commitment to promoting responsible entrepreneurship.

 www.reinhard-mohn-preis.de

Regional Corporate Responsibility

This project is developing the Engaged in the Region platform to call attention to social challenges “on site” and to highlight examples of how businesses can respond effectively. As part of the My Best Practice competition, small and mid-sized businesses were honored for the fifth time in Berlin for their social engagement.

 www.bertelsmann-stiftung.de/regionale-unternehmensverantwortung

Future of Work

As a global megatrend, digitization will have a major impact on existing business models and everyday activities in the workplace. The Future of Work film festival was organized in Gütersloh in October in cooperation with the German Ministry of Labor and Social Affairs.

 www.bertelsmann-stiftung.de/zukunft-der-arbeit

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 September, Federal Labor Minister Andrea Nahles recognized 22 businesses in Berlin for completing the INQA audit.

 www.inqa-audit.de

“Family-Friendly Workplaces” Quality Seal

The quality seal helps companies develop flexible work arrangements and family-friendly programs. Companies receiving the seal in 2016 were honored at a ceremony held at the Bertelsmann Stiftung in March.

 www.familienfreundlicher-arbeitgeber.de

Improving Healthcare – 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 online portal increases transparency about the quality of health-care providers, thereby promoting competition and improving the quality of care. In 2016, the project reevaluated quality assessment data for 26,000 nursing facilities in Germany. It also published a number of studies examining which conditions must be put in place to ensure quality of care and to make quality transparent. The Diagnosis Translator, which helps explain diagnoses, was expanded to include 10,000 terms. In addition, the portal now offers 27 parameters that can help users decide on the right examination or treatment.

 www.weisse-liste.de

Health-Care Fact Check

This project takes an in-depth look at health-care issues several times a year. In 2016, fact checks appeared on the topics of hospital specializations, difficulties treating back pain, and a need-based distribution of psychotherapy practices.

 www.faktencheck-gesundheit.de

On-Site Care

This project highlights the ways that Germany can meet its increasing demand for long-term nursing care. Our studies on care infrastructure answer key questions people have, for example about cost and quality.

 www.bertelsmann-stiftung.de/pflege-vor-ort

Health-Care Monitor

In September, to conclude the project after 15 years, 150 experts from the fields of research, administration and policy-making were invited to Berlin, where they discussed how scientific studies can have an ongoing impact on health-care policy. All of the project's studies have been archived on its website and remain readily accessible through the site's comprehensive search engine.

 www.gesundheitsmonitor.de

The Digital Patient

Through this project, we want to ensure that technology is used to meet people's health-care needs. In 2016, we examined how to introduce digital innovations into daily care. In the network 30 Under 40, we brought young experts together to discuss "digital health." The new project blog is used as a platform for public discourse on the issue.

 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. In 2016, we published a study on expanding mandatory health insurance coverage for the self-employed.

 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 right from the start. Children learn from the moment they are born – every minute of the day, wherever they are. We want to ensure that children grow up in strong families and that educational institutions both help them develop to their full potential and mitigate unequal educational opportunities.

Select project activities:

State-by-State:

Monitoring Early Childhood Education

Each year, our internet portal provides facts and figures on participation, investments and quality for Germany's 16 early childhood education and care (ECEC) systems. In 2016 for the first time, parents were surveyed on the subject of ECEC centers. The majority would like mandatory, nation-wide quality standards for child-staff ratios, meals and training of ECEC personnel.

 www.laendermonitor.de

KiTa ZOOM – Financing Child-Care Centers Effectively

KiTa ZOOM has created innovative approaches to funding that enable child-care centers to help all children learn and develop to their full potential. To conclude the project, tools were made available that ensure effective funding of child-care centers by state and local authorities and educational providers. In Brandenburg, ongoing development of the model will now be carried out by the project partners.

 www.bertelsmann-stiftung.de/kita-zoom

KECK: Community Development – Opportunities for Children

Communities are using the KECK atlas to create integrated systems for reporting on children's opportunities and monitoring social environments. This allows resources to be deployed where they are actually needed. The Communities for Better Living program has been responsible for the atlas since 2016.

 www.keck-atlas.de

Families and Education: Creating Child-Centered Policies

The family – no matter what form it takes – is the most important setting for a child's development. The project's studies have successfully shown that child and family poverty have major consequences for children's development and education. Poverty must therefore be combated effectively, especially among single-parent households and large families. The project is developing a new approach that ensures children have an adequate standard of living that reflects *their* needs.

 www.bertelsmann-stiftung.de/familie-und-bildung

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 multiple Bertelsmann Stiftung programs. In addition, it contributes ideas for responding to socially relevant global trends. The center helps drive in-house developments while creating a multiplier effect for disseminating program contents outside the foundation.

Select project activities:

Participation in a Digitized World – Taskforce on Digitization

The project addresses digitization's impact and its ability to create more equitable opportunities for social participation. As part of the project module Digitization in Education, the inaugural issue of the *Digital Education Monitor* examined digital learning in vocational education and its benefits. The blog www.digitalisierung-bildung.de offers a platform for reporting on the foundation's project activities addressing learning in all stages of life. In addition, the Forum for Education and Digitization was launched as a joint effort of five foundations. A project examining "The Public Good in the Digital Age" was initiated in cooperation with the Stiftung Neue Verantwortung.

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

Vision Europe

Comprising eight European foundations and think tanks, the Vision Europe network focused in 2016 on the topics of migration and displacement. At the conference in Lisbon on "Improving the Responses to the Migration and Refugee Crisis in Europe," participants discussed constructive solutions for the challenges stemming from displacement and migration. In

preparation for the event, the network released a series of publications, including an open letter containing proposed solutions addressed to policy makers at the national and EU levels.

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

Coordinating Refugee Initiatives

Germany has faced an enormous challenge receiving and integrating the many refugees who have arrived since 2015. We want to help make the discussion relating to refugees and migration more objective while also developing sustainable solutions. We have therefore created a dossier documenting Bertelsmann Stiftung activities that are responding to the refugee situation.

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

Future of Democracy



 Executive Board Member:

Aart De Geus

  Program Directors:

Christina Tillmann, Prof. Dr. Robert Vehrkamp

Democracy requires ongoing responses to new challenges – 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 addressing these changing needs.

Select project activities:

Democracy Audit

We systematically analyze the strengths and weaknesses of German democracy to determine where reforms are needed, before developing concrete solutions. For example, an eight-point plan for increasing voter participation was presented and then discussed in Germany’s parliament. Key questions were: Who votes? How do they vote? And according to which rules? Two in-depth analyses of absentee voting and voting regulations showed the changes that would be required to motivate people from all social groups to begin voting once again.

 www.bertelsmann-stiftung.de/demokratiemonitor

Shaping a Diverse Democracy

The various forms of political participation – representative, direct-democratic and dialogue-oriented – must be better integrated. Together with the national Alliance for a Diverse Democracy, we developed 18 concrete proposals that show how new forms of citizen participation can increase the impact the public has on policy-making. Launched in cooperation with the State Ministry of Baden-Württemberg, a new website offers support to cities wanting to improve integration of refugees, in dialogue with all interested parties. To that end, 27 dialogue events were organized with more than 1,500 participants.

 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 – For Engagement and Democracy.”

This project promotes civic engagement and participatory democracy among young people, for example by offering training programs for child-care centers, schools and youth organizations. In North Rhine-Westphalia, State Premier Malu Dreyer and Brigitte Mohn recognized 30 youth engagement initiatives.

 www.jungbewegt.de

Committed Communities

This project works with 50 cities to establish robust, sustainable conditions and structures for civic engagement. To that end, network meetings were organized, along with BarCamps and regional engagement forums.

 www.engagiertestadt.de

Building Local Synergies

In cooperation with the cities of Dessau-Roßlau, Hannover, Langenfeld and Pirmasens and the rural district of Vorpommern-Greifswald, this project is developing models for effective partnerships at youth welfare, senior citizen and refugee aid organizations.

 www.synergien-vor-ort.de

Civil Society for Young Refugees

This project aims to improve the situation of unaccompanied minor refugees. To that end, it works with the Federal Association of Unaccompanied Minor Refugees, Stiftung Bürgermut,

Aktionsgemeinschaft junge Flüchtlinge NRW and the German Children and Youth Foundation.

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

Social Investing / Impact Investing

This project researches the use of private investment capital to drive positive social change.

 www.bertelsmann-stiftung.de/SI

PHINEO gAG

As one of its founders, the Bertelsmann Stiftung supports PHINEO gAG in providing guidance to social investors and nonprofit organizations, thereby helping ensure their social engagement activities are effective.

 www.phineo.org

Placing Civil Society on the Economic Map

Stifterverband für die Deutsche Wissenschaft makes empirical data available on German civil society's services and structures, including on the integration of refugees and on nonprofits' educational activities.

 www.ziviz.info

 www.ziviz.info/publikationen/publikationen-und-materialien/

CHE Centre for Higher Education



 Executive Board Member:

Dr. Jörg Dräger

 Director:

Prof. Dr. Frank Ziegele

 www.che.de

Germany's system of higher education is being transformed by an unprecedented change: Going to university has now become normal. That means not only are there more university students, those students are also more diverse. CHE is addressing this development through numerous projects and studies.

CHE is committed to creating a higher education system with:

- autonomous institutions
- empowered participants
- diverse institutional profiles
- transparent performance
- the necessary structures and processes.

 www.che.de

An initiative of the Bertelsmann Stiftung, CHE, the Deutsche Telekom Foundation and Stifterverband, the **Monitoring Teacher Training** platform offers not only clearly presented facts and figures, but focus topics designed to make teacher training at Germany's universities more transparent.

 www.monitor-lehrerbildung.de

Our **online guide for nontraditional students** offers a detailed overview of the requirements for university study mandated by Germany's states, as well as a regularly updated databank covering developments at both the national and state level pertaining to individuals from nontraditional backgrounds.

 www.studieren-ohne-abitur.de

The **CHE University Ranking** is the most comprehensive assessment of German universities, allowing users to make multidimensional comparisons based on information from university departments and administrative sources, as well as from public-sector statistics and student

evaluations. The 2016 ranking was published in May offering updated information on the areas of linguistics, education, psychology, engineering and the natural sciences.

 www.che-ranking.de

U-Multirank assists international students in choosing a university and makes it possible for higher education institutions to compare themselves to their international peers. The third edition of U-Multirank was released in March. With some 1,300 institutions in more than 90 countries, it is the largest source of comparative international information in the higher education sector.

 www.umultirank.org

As an independent, national platform, the **German Forum for Higher Education in the Digital Age** facilitates dialogue on digitization's potential at Germany's universities. Six groups focus on the different facets of digitization and its impact on teaching at higher education institutions.

 www.hochschulforumdigitalisierung.de

Bertelsmann Foundation North America



 Executive Board Members:
Aart De Geus, Liz Mohn
 Director:
Irene Braam
 www.bfna.org

The Bertelsmann Foundation North America is an independent, nonpartisan and non-profit think tank in Washington, DC with a transatlantic perspective on global challenges. We engage policy makers and thought leaders through innovative projects, research and debate to shape practical recommendations and policy solutions for pressing political, economic and social issues.

Select project activities:

In 2016, the Bertelsmann Foundation hosted “**Migration Flows: Facts, Fiction and the Politics in Between,**” its eighth annual conference organized in cooperation with the *Financial Times*. The event examined the economic impact of migration and the potential threat to stability. Panelists included Jeroen Dijsselbloem, president of the Eurogroup and minister of finance of the Netherlands; Madeleine Albright, former US secretary of state; Mehmet Şimşek, deputy prime minister of Turkey; Kristalina Georgieva, EU commissioner for budget and human resources; David Miliband, president and CEO of the International Rescue Committee; and Werner Hoyer, president and chairman of the board of directors of the European Investment Bank.

In cooperation with the German Marshall Fund and with support from the German Embassy in Washington, the Bertelsmann Foundation also hosted an **expert roundtable** on the topic of migration. The roundtable’s objective was to discuss effective, practical policy solutions for the US and its European partners. In addition, the **Congressional European Parliamentary Initiative (CEPI)** invited staff members of the US Congress, European Parliament and German Bundestag to participate in an exchange program held in Washington, Brussels and Berlin. This year’s program also focused on the topic of migration.

The Bertelsmann Foundation is using its **New-politik** project to examine Germany’s important and changing role in the European Union and the world. As part of the project, a publication was released providing an in-depth analysis of Germany’s foreign and domestic policies.

The foundation also organized its inaugural **Transatlantic Policy Lab** in Boston together with the German Marshall Fund, the Open Society Foundations and the Rockefeller Foundation’s 100 Resilient Cities initiative. The second round of the lab was convened in Athens. During the labs, European and US experts met with city officials, residents and leaders of local institutions to develop innovative policy solutions that can address social inequity.

Fundación Bertelsmann



 Executive Board Member:

Liz Mohn

  Directors:

Clara Bassols

Francisco Belil

 www.fundacionbertelsmann.org

The Bertelsmann Stiftung has been promoting social change in Spain since 1995 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. In September, to mark the Spanish foundation's 20th anniversary, Liz Mohn was recognized by Spanish Education Minister Íñigo Méndez de Vigo for two decades of social engagement in Spain.

Select project activities:

Alliance for Dual Vocational Training

The Alliance for Dual Vocational Training continues to grow. At the end of 2016 it had 380 members representing businesses, vocational training institutions and other organizations. Since the beginning of the year the Fundación Bertelsmann has been working with the JP Morgan Chase Foundation to coordinate the training and funding of external consultants who support small and mid-sized enterprises in introducing dual vocational training. Thanks to the efforts of the Fundación Bankia, it was possible to expand this successful model by scaling it in three new regions in Spain. The Forum of the Alliance for Dual Vocational Training was held for the second consecutive year, offering more than 200 representatives from businesses, vocational training institutions and public-sector agencies the opportunity to discuss how to improve and expand Spain's system of dual vocational education. The Fundación Bertelsmann also organized a roundtable discussion of the system at Spain's most important economic forum, which brings together the country's political and economic elite once a year. The partnerships with InCharge and GAN were expanded in order to promote international networking in the area of dual vocational training.

Coordinated Career Guidance

Following conclusion of pilot projects on career guidance at 30 schools, the Fundación Bertelsmann conducted numerous training programs for teachers, allowing it to further disseminate its career-advising handbook. The newly developed website MyWayPass makes it possible for young people to take a virtual journey and complete exercises designed to help them consider possible future occupations. The Fundación Bertelsmann was also present with a stand, workshops and presentations at the AIOEP Congress, an international gathering for educational experts and vocational guidance counselors.

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