



Annual Report 2022

Inspiring people. Shaping the future.

THE BERTELSMANN STIFTUNG

The Bertelsmann Stiftung was founded in 1977 by Reinhard Mohn. It engages solely and directly in non-profit 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.



Dr. Ralph Heck



Dr. Brigitte Mohn

OUR PROGRAMS



EDUCATION AND THE NEXT GENERATION

For good childhood development, fair educational opportunities and active participation in shaping a sustainable society



DEMOCRACY AND SOCIAL COHESION

For a sustainable democracy and strong social cohesion



DIGITALIZATION AND THE COMMON GOOD

For self-determination and solidarity in a world shaped by algorithms and AI



EUROPE'S FUTURE

For a sovereign and solidary Europe



HEALTH

For innovation and patient-centeredness in a health-care system based on solidarity



SUSTAINABLE SOCIAL MARKET ECONOMIES

For prosperity and employment in sustainable social market economies

WEBLINKS

WWW.BERTELSMANN-STIFTUNG.DE



www.bertelsmann-stiftung.de/podcast



www.facebook.com/BertelsmannStiftung



www.instagram.com/bertelsmannstiftung



www.linkedin.com/company/bertelsmann-stiftung



www.twitter.com/BertelsmannSt



www.xing.com/companies/bertelsmannstiftung



www.youtube.com/user/BertelsmannStiftung



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FOREWORD



Dear Readers,

In 2022, the world, Europe and German society experienced multiple crises. Russia's invasion of Ukraine in violation of international law, the way our planet's natural resources are being used, the Covid-19 pandemic and its ongoing aftereffects, and advancing digitalization and its impacts are all presenting us with major challenges. The war in Ukraine, the popular uprisings in Iran and the government's response, the digital disinformation campaigns appearing in these contexts – such events made us even more aware in 2022 that one of today's most pressing challenges is to protect and maintain liberal democracy.

At the Bertelsmann Stiftung, we work strategically not only to draw attention to critical developments, but also to develop constructive solutions to societal problems. In 2022, we engaged in a wide range of activities that are strengthening democracy and developing it further. For example, we used the Bertelsmann Transformation Index (BTI) to put a spotlight on the dangerous trend towards greater autocracy. At the same time, we had hopeful news to share: Precisely where governments were failing, everyday citizens were impressively demonstrating civic engagement and social solidarity. Today, the greatest impetus for democratic innovation is coming from critically minded civil societies, and they must be strengthened. That is what we do here at the foundation – for example, by deploying our BTI findings to bring together forces for reform from around the world, thereby stimulating change.

Using our model for effective citizen participation and our expertise, we supported the Conference on the Future of Europe in 2022. More than any other political system, the

EU needs the backing of the public if it is to have a sustainable future. The first Citizens' Councils are now taking place, bringing together individuals randomly chosen from all member states to examine concrete EU legislative initiatives. In 2022, we also tracked how social cohesion is changing and formulated proposals for improving the policy agenda. Among other things, we were able to identify which groups should receive targeted help after being hit particularly hard by the various crises. These efforts revealed that, in recent years, much trust has been lost between citizens and their political institutions and between people in general – and that, if social cohesion is to be strengthened, a new dialogue is urgently needed within society.

Promoting dialogue was also one of the goals of the first US-German Futures Forum, which we organized in November 2022 together with the German Federal Foreign Office and the US State Department. At the forum in Münster, more than 100 young experts discussed new ideas for advancing democracy in an age of digital technologies and then formulated concrete recommendations for taking action.

Even beyond the strengthening of democracy, the foundation was exceptionally active in 2022. For example, given the increasing labor shortage in Germany and the resulting uncertainties, we developed the Job Monitor, a platform that shows which jobs and skills are in demand now and which will be needed in the future. Through our participation in Alliance4Ukraine, we are assisting young people from Ukraine in a number of ways – for example, by helping them receive digital instruction in their native language and thus experience normal life once again. You can read more about our efforts to support people from Ukraine on page 14.

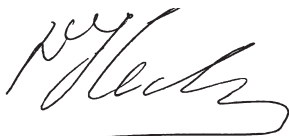
Our activities in the coming year will continue to focus on the opportunities inherent in today's challenges. In our program Sustainable Social Market Economies, for example, we will show how it is possible for key industries in Germany to become CO₂-neutral. Here, too, the overall issue is how companies in Germany can take innovation to the next level.

We have further developed our project activities in all areas and will continue to do so. In addition to the already mentioned Sustainable Social Market Economies program, this includes our programs Education and the Next Generation, Democracy and Social Cohesion, Europe's Future, Digitalization and the Common Good, Health, and our Center for Sustainable Communities.

By joining forces, we want to continue “making things a bit better,” as our founder Reinhard Mohn once said.

To that end, I hope you find our annual report both engaging and inspiring.

Sincerely,



Dr. Ralph Heck

ASSISTANCE FOR PEOPLE FROM UKRAINE

For more than a year, people in Ukraine have been fighting for their homeland and their lives. Peace and freedom are at stake for all of Europe. Ever since our foundation was established, we have worked to create a strong Europe, to support freedom and democracy. In these difficult times, we have been providing assistance on many levels – through partnerships, funding and professional expertise.

Russia's invasion of Ukraine on February 24, 2022 unsettled the international community and brought to a close the political order that had been taken for granted in Europe since the end of the Cold War. In addition to its political and economic impact, what made the war tangible in Germany were the hundreds of thousands of refugees who arrived in the country from Ukraine. As a member of Germany's democratic and solidary civil society, the Bertelsmann Stiftung responded to this momentous conflict with a range of supportive measures. Since the invasion, it has made €245,000 in funding available. Moreover, the foundation has deployed its considerable professional expertise to inform people about the war's causes and consequences.

Alliance4Ukraine and Bridge to Kyiv

The Bertelsmann Stiftung is participating in Alliance4Ukraine together with more than 300 other foundations, government agencies, civil society organizations and companies. The aim of this alliance of civil society groups is to give relief initiatives the best possible support by supplying them with the required resources quickly and unbureaucratically. The focus here is on providing housing, medical care, volunteers, translating and interpreting services, legal counseling and jobs for Ukrainian refugees. Alliance4Ukraine is being coordinated by the NGO ProjectTogether. In addition to contributing a total of €75,000, our foundation is helping promote an exchange of information and networking among the various participants. More than €2.4 million have now been raised for the alliance's relief fund. Moreover, the Bertelsmann Stiftung supported the association Brücke nach Kiew (Bridge to Kyiv) by donating €87,500 for emergency humanitarian-aid efforts in Ukraine.

Ukraine online exchange

A regularly occurring online exchange with municipalities in Germany has also been established together with Alliance4Ukraine. One goal of this initiative is to provide cities and towns with ideas and examples of good practice for responding to the challenges that arise from taking in Ukrainian refugees; another is to facilitate inter-community exchange. Key issues addressed include housing, jobs, schooling and child care. Equally relevant are the processes that are required if public authorities, civil society, businesses and Ukrainian organizations are to build effective local networks.

Support for schools

In a joint initiative with the Robert Bosch Stiftung, the Bertelsmann Stiftung has launched a service to help school administrators and teachers as they integrate refugee students from Ukraine. Linked to the Deutsches Schulportal (German School Portal), the platform brings together helpful information, practical tips and learning materials. The content is compiled by a team of education experts from Germany and Ukraine that has been formed especially for this purpose. The two foundations have also assisted the Berlin-based association Schöneberg hilft (Schöneberg Helps) in creating a "pop-up school" that provides learning opportunities for Ukrainian children and adolescents who have not yet been enrolled in a local school.

Research and expertise

In its role as a think tank, the Bertelsmann Stiftung has analyzed the conflict's various dimensions in various scientific studies and made the findings available to the public. For example, several surveys, some of them recurring, have shed light on the attitudes of people in Germany and the EU towards the support offered Ukraine. Other publications have examined a range of topics, including the impact of the war on German companies, repercussions for the global food supply, and the experiences of Ukrainian teachers who have fled to Germany. In these contexts and others, the media have often turned to the Bertelsmann Stiftung's professionals for information. In particular, the foundation's Eastern Europe specialist, Miriam Kosmehl, has been interviewed numerous times, explaining to a broader audience the conflict's causes and its progression.

“Russia’s war against Ukraine is not only a humanitarian catastrophe. It also reflects the struggle to establish a world order and determine the ground rules for a global community based on solidarity.”

DR. BRIGITTE MOHN



THE BERTELSMANN STIFTUNG IN 2022

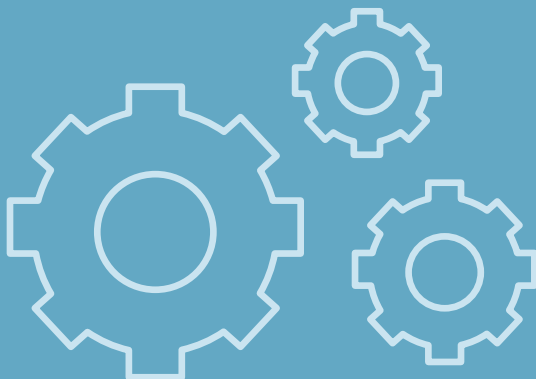
Through its projects, studies and events, the Bertelsmann Stiftung stimulates debate and provides ideas for social change. Civic engagement and sustainable impact serve as the basis for its activities. The foundation's initiatives not only generate solutions, they also provide the public with empirically sound guidance. When it is successful and recognized, change can move society forward. Inspiring people, shaping the future – achieving those goals also means providing a transparent accounting of the foundation's work.



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EMPLOYEES



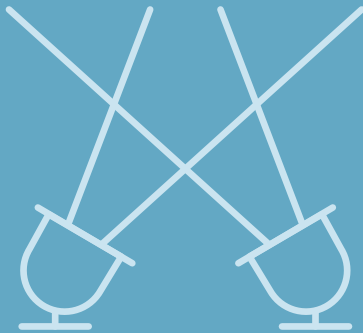
5
LOCATIONS
WORLDWIDE



A NONPROFIT, NONPARTISAN,
PRIVATE OPERATING FOUNDATION

45

PROJECTS



220

IN-PERSON, HYBRID AND
DIGITAL EVENTS



1.9

BILLION EURO FOR
NONPROFIT ACTIVITIES
SINCE FOUNDING

71

-MILLION-EURO
ANNUAL BUDGET



TOTAL EXPENDITURES* (€, thousands)

As a private operating foundation, the Bertelsmann Stiftung designs, controls and finances its projects itself. The following report 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

Preliminary expenditures for the 2022 fiscal year totaled €70.8 million. Due to increased contributions to our affiliated nonprofit institutions, expenditures in 2022 were €5 million more than the year before. Since its inception, the Bertelsmann Stiftung has made ca. €1.9 billion available for nonprofit activities.

Programs and special projects	2021		36,082
	2022		34,647
Contributions to affiliated nonprofit institutions	2021		11,573
	2022		16,838
Program-related services	2021		4,118
	2022		4,901
Communications	2021		5,195
	2022		5,316
Administration	2021		9,103
	2022		9,103
Total expenditures	2021		66,071
	2022		70,805

* 2021 data: audited / 2022 data: preliminary (as of February 7, 2023)

Program expenditures*

In its 2022 fiscal year, the Bertelsmann Stiftung invested €34.6 million directly in its program activities. That represents a decrease of €1.4 million over the previous year.

Programs and special projects**	2021	2022
Education and the Next Generation	9,241	8,680
Democracy and Social Cohesion	6,357	6,444
Europe's Future	3,449	4,220
Health	2,453	2,832
Sustainable Social Market Economies	9,460	8,122
Digitalization and the Common Good	1,000	1,578
Center for Sustainable Communities	1,823	1,572
Special projects***	2,300	1,199
	36,082	34,647

Affiliated nonprofit institutions*

In 2022, the Bertelsmann Stiftung's contributions to affiliated nonprofit institutions increased by approximately €5.3 million from the previous year to €16.8 million.

Affiliated nonprofit institutions	2021	2022
International foundations		
Bertelsmann Foundation North America	2,251	3,128
Fundación Bertelsmann, Barcelona	2,466	2,384
Shareholdings		
CHE Centre for Higher Education	910	1,820
Founders Foundation	3,400	3,000
Liz Mohn Center / Liz Mohn Foundation for Culture and Music	298	3,647
PHINEO	500	650
Weisse Liste	740	1,000
Center for Digital Education and Schools in Gütersloh	703	909
Partners		
Reinhard Mohn Institute of Management	304	300
Contributions to affiliated nonprofit institutions	11,571	16,838
Total (programs, special projects and affiliated nonprofit institutions)	47,653	51,485

* 2021 data: audited / 2022 data: preliminary (as of February 7, 2023)

** The program structure was revised in 2021 / 2022. Allocations have changed compared to previous years.

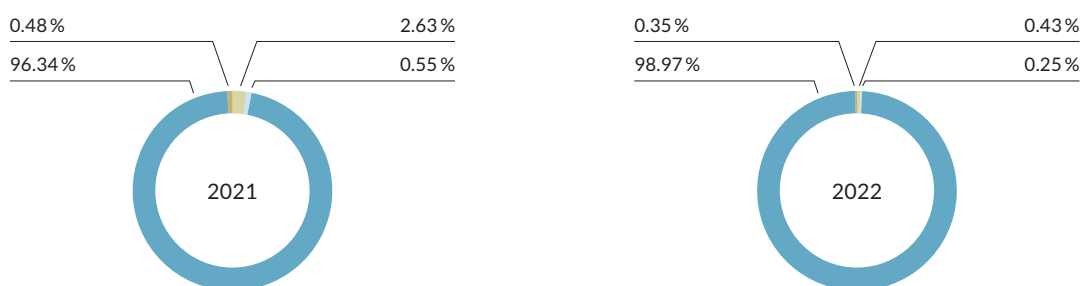
*** Including expenditures for interdisciplinary projects.

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 €157.0 million in fiscal year 2022. An additional €1.6 million were also available to the Bertelsmann Stiftung from its cooperative partnerships, from the management of its financial reserves and from other income. In the 2022 fiscal year, the foundation therefore had €158.7 million at its disposal for its nonprofit project work.

Under its bylaws, the Bertelsmann Stiftung transfers 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 2022, these reserves were increased by €52 million to €612 million.



	2021	2022
Investment income	122,225.9	157,035.8
Income from partnerships, donations	612.6	552.1
Capital income	3,332.2	681.5
Other income	703.1	400.4
Total income	126,873.8	158,669.8

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 highly diversified, international investment portfolios and a balanced risk-return ratio.

Strategic allocations take place in the following asset classes: bonds, shares, alternative investments and cash. 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. 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 strategically with the foundation and makes recommendations for asset allocation based on current market conditions and the foundation's investment guidelines.

* 2021 data: audited / 2022 data: preliminary (as of February 7, 2023)

STATEMENT*

of the Bertelsmann Stiftung's assets and liabilities as of December 31, 2022

ASSETS (€, thousands)	2021	2022
Fixed assets		
Intangible assets and tangible assets	70,734.6	68,341.0
Financial assets:		
Shares	602,310.0	602,177.7
Other securities	616,763.4	675,374.0
Total fixed assets	1,289,808.0	1,345,892.7
Current assets		
Available funds	50.2	26.4
Receivables and other assets	130.2	144.1
Securities	56,938.2	50,765.2
Liquid assets	2,568.3	36,180.2
Total current assets	59,686.9	87,115.9
Prepaid expenses	232.9	463.4
Balance from asset management	114.7	51.5
Total balance-sheet assets	1,349,842.5	1,433,523.5
Assets held in trust	6,005.5	6,129.5
LIABILITIES (€, thousands)	2021	2022
Endowment capital	619,710.3	619,710.3
Reserves		
§ 62 Para. 1 No. 3 AO (Free reserves)	560,000.0	612,000.0
§ 62 Para. 1 No. 1 AO (Reserves in acc. with bylaws)	44,579.9	46,139.0
Total reserves	604,579.9	658,139.0
Profit/loss from asset reallocation	22,710.0	19,233.0
Profit/loss carried forward	59,939.2	90,883.8
Accrued liabilities		
Provisions for pensions	35,837.7	38,301.1
Other liabilities	3,774.5	4,380.9
Total accrued liabilities	39,612.2	42,682.0
Accounts payable		
Accounts payable for goods and services	2,163.5	2,021.1
Other accounts payable	1,127.4	854.3
Total accounts payable	3,290.9	2,875.4
Deferred income and accrued expenses	0.0	0.0
Total balance-sheet liabilities	1,349,842.5	1,433,523.5
Trust accounts payable	6,005.5	6,129.5

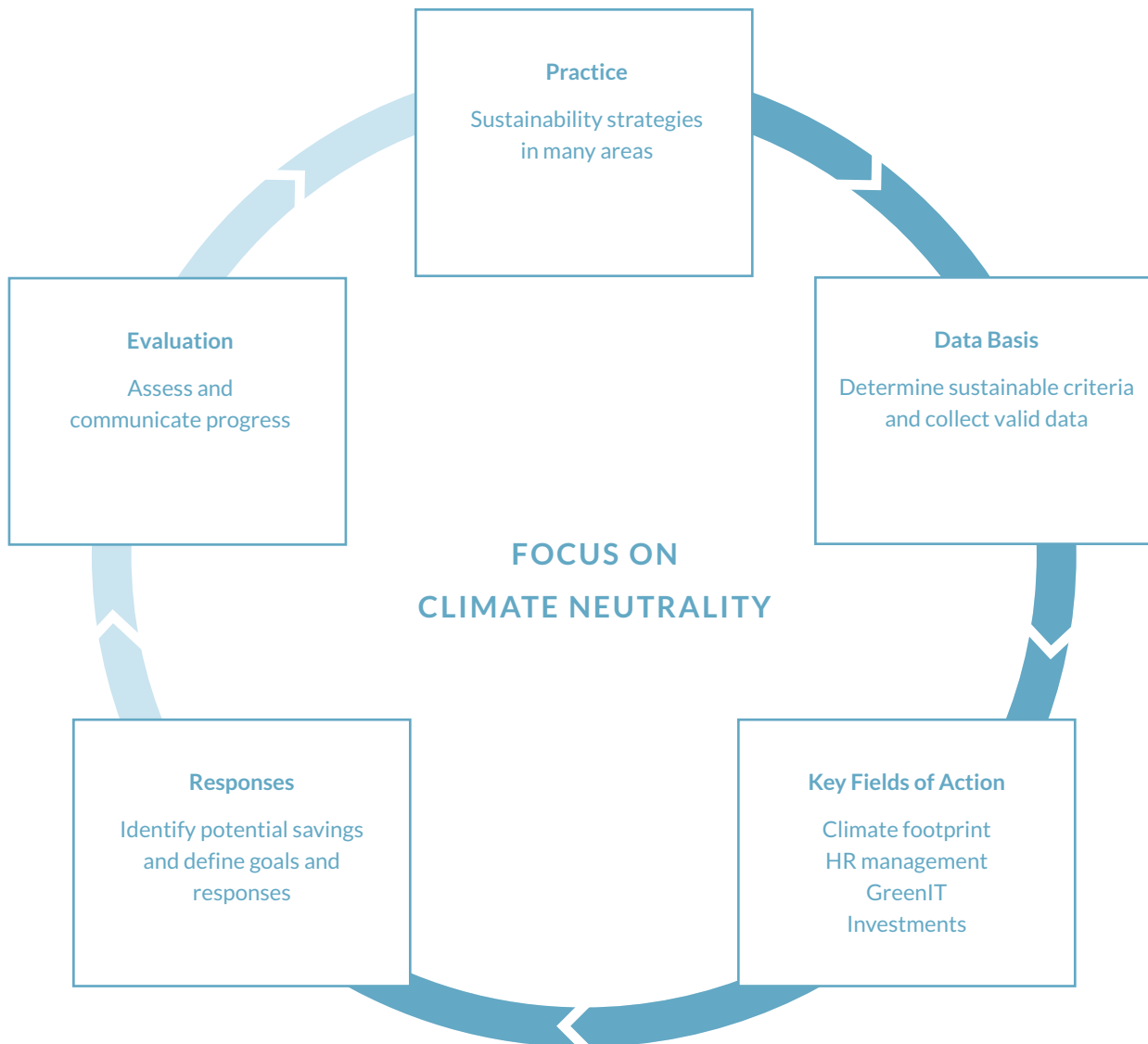
* 2021 data: audited / 2022 data: preliminary (as of February 7, 2023)

SUSTAINABILITY

At the Bertelsmann Stiftung, we believe that taking responsibility also means actively promoting sustainability, both in society and in our own organization. We want to increase the effectiveness of our efforts in this area and have therefore defined sustainability as one of the key fields of action for the foundation's strategic further development.

Climate change, environmental degradation and the increasing scarcity of natural resources are putting the traditional economic and social model under pressure. Shaping the transition to sustainability is a task for everyone in society. In keeping with our bylaws, we want to make an effective contribution to this change through the work we do in many of our projects.

In our in-house processes as well, it has long been both a guiding principle in our organizational culture and lived practice to manage resources, people, capital and the environment responsibly. We have also set the overall goal of making the Bertelsmann Stiftung climate neutral.



Where do we stand?

Following a systematic stocktaking, we are focusing on four key fields of action. They encompass activities at the foundation that have a decisive impact on sustainability in its various aspects. Clear goals and responses are being identified and implemented in these fields so we can meet the standards we have set for ourselves for sustainable action:

Climate footprint

To ensure the foundation is helping protect the climate by managing its energy use intelligently, we analyze a number of factors, including the direct connection between our facilities and our energy consumption. We have been carrying out an energy audit of our headquarters in Gütersloh regularly since 2015. A key goal of the audit is to determine additional steps we can take to increase our energy efficiency.

We address other issues so we can reduce our carbon footprint even further. To that end, we ask a number of questions: Where are CO₂ emissions occurring? What evidence-based methods can we use to determine the amount? Which responses would be appropriate? This applies to business trips and events, for example, and to the use of automobiles for commuting to work.

HR management

Increasing complexity, more tasks and a rapid pace of change are the hallmarks of today's working world, something that is placing new demands on employees at all levels. We are implementing a sustainable human resources (HR) policy to counteract these developments.

Our HR activities focus on a number of important areas, including targeted support for new talent, the training and individual development of our employees, and measures for promoting workplace health. The Bertelsmann Stiftung has signed the German Diversity Charter, which underscores the importance of recognition, appreciation, inclusion and respect in corporate culture.

We therefore revise the section on Human Resources in our Annual Report each year (page 16).

Green IT

The concept of GreenIT shapes how information and communications technology (ICT) is used throughout its entire lifecycle. It encompasses the resource-conserving and environmentally friendly production, use and disposal of an organization's ICT. We are already applying the concept's basic principles and are developing more specific approaches. As early as 2011, for example, we began using server virtualization, which significantly reduces the number of physical servers needed. In addition, we are expanding the use of leasing agreements for mobile devices.

Investments

Our investment strategy has long taken sustainability criteria into account. For more than 15 years, we have not invested in businesses active in the tobacco, alcohol or arms industries. In 2016, we expanded the list of exclusion criteria and redefined our ethics and sustainability strategy. The Bertelsmann Stiftung distinguishes between countries and businesses, as both bear responsibility for the future of society in different ways. When deciding to exclude a country, the foundation considers the findings from the Bertelsmann Transformation Index (page 33). The Bertelsmann Stiftung's mission and values serve as the basis for the sustainability criteria underpinning its investment activities. The lists of excluded entities are updated several times each year.

www.bertelsmann-stiftung.de/en/about-us/what-we-represent

HUMAN RESOURCES

We believe that working successfully as a foundation means addressing social challenges at an early stage and having a sustainable impact on society. This is made possible by our employees, with all their knowledge, skills and abilities. It is also why, as part of our forward-looking human resources activities, we find it very important to create the conditions that allow each individual employee to develop to their full potential.

Attractive employer

In addition to systematic opportunities for professional development, we offer our employees international and cultural diversity as well as a partnership-based culture of working and learning. We initiate a dialogue that allows employees, executive managers and human resources managers to shape personal development opportunities, thereby determining possible career paths and development options. To strengthen the competencies of our employees, we make available a wide range of individualized training options and an in-house mentoring program, among other supportive measures. Various mechanisms for sharing feedback have also been put in place to promote employee development.

[□ https://www.bertelsmann-stiftung.de/en/careers](https://www.bertelsmann-stiftung.de/en/careers)

Promoting new talent

We have been using our Junior Professionals Program to promote new talent since 2008. The highly capable participants benefit from mentoring and targeted training, becoming qualified project managers with an interdisciplinary and international focus by spending 18 months addressing a range of exciting and challenging tasks. Additional options and offerings play a key role in this forward-looking process – for example, a cross-institutional program we carry out with other foundations to provide organization-specific training for next-generation talents; a traineeship as an online editor; a “Professional Year”; and other mentoring programs. Moreover, the Bertelsmann Stiftung partners closely with colleges and universities, offering both students and recent graduates the possibility of doing an internship at the foundation lasting several months, allowing them to gain practical experience.

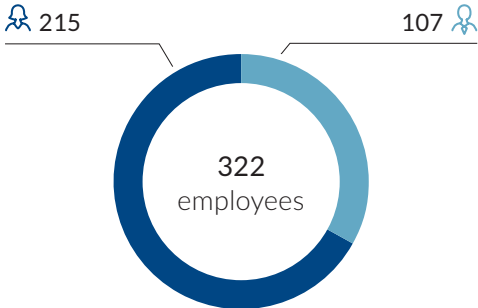
Diversity

Diversity management is an important part of our HR activities. As a signatory to the German Diversity Charter, we have committed ourselves to creating an appreciative, prejudice-free working environment. We promote diversity within our organization and put the framework conditions in place that enable as many people as possible to come together at the foundation and succeed in making an impact “irrespective of age, ethnic background and nationality, gender and gender identity, physical and mental abilities, religion and worldview, sexual orientation and social background.”

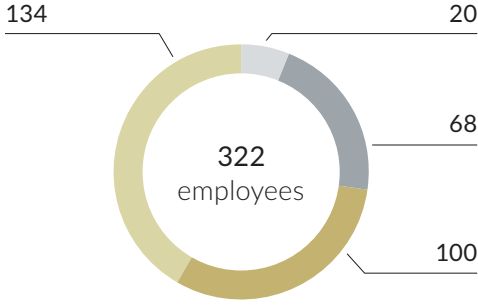
Work-life balance and health promotion

We believe helping our employees manage their health and achieve 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 organizing their lives, for example through adaptable work schedules, sabbaticals and opportunities for working from home and working part-time. We promote work-life balance through an extensive range of offerings and options in the areas of child, elder and home care. Together with employee representatives, we have put a framework in place that maintains and promotes the health and effectiveness of our staff. This includes preventive measures, talks by experts, precautionary screenings and an extensive health program.

Our Employees*



 female
 male



● < 30 years
● 30–39 years
● 40–49 years
● ≥ 50 years
⊘ avg. 46.0 year

* Figures do not include employees at affiliated nonprofit institutions.

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 the foundation's 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. We make key information about our work and funding available to the public, including to increase the trust society has in the foundation. 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, 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. 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



Dr. Ralph Heck
(Chairman)



Dr. Brigitte Mohn

Board of Trustees



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



Liz Mohn
(Honorary Member)



Wolf Bauer



Carsten Coesfeld



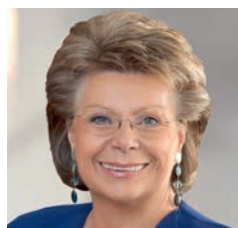
Thomas Coesfeld



Christoph Mohn



Carolina Müller-Möhl



Dr. Viviane Reding



Dr. Philipp Rösler



Bodo Uebber






Executive Board


The members of the Bertelsmann Stiftung Executive Board are jointly responsible for the foundation's activities and operations. In 2022, the Executive Board members were Dr. Ralph Heck (chairman as of August 1, 2020) 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.-Ing. Werner J. Bauer (chairman), vice-chairman of the Supervisory Board of Bertelsmann SE & Co. KGaA; former executive vice-president of Nestlé AG, responsible for the areas of Technology, Production, Research and Development; shareholder of Bertelsmann Verwaltungsgesellschaft mbH
-  Liz Mohn, philanthropist and honorary member of the Bertelsmann Stiftung Board of Trustees; member of the Supervisory Board of Bertelsmann SE & Co. KGaA; shareholder of Bertelsmann Verwaltungsgesellschaft mbH
-  Wolf Bauer, film producer
-  Carsten Coesfeld, CEO of Bertelsmann Investments and member of the Group Management Committee at Bertelsmann
-  Thomas Coesfeld, CFO of BMG and member of the BMG Executive Team

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

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

 Dr. Viviane Reding, former member of the Chamber of Deputies of the Grand Duchy of Luxembourg; former member of the European Parliament; former vice-president of the European Commission

 Dr. Philipp Rösler, member of the Supervisory Board of various publicly listed companies; former vice-chancellor, minister of economic affairs and technology, and minister of health of the Federal Republic of Germany

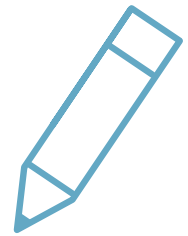
 Bodo Uebber, independent corporate consultant; former member of the Board of Management of Daimler AG responsible for Finances & Controlling, Daimler Financial Services; member of the Supervisory Board of Bertelsmann SE & Co. KGaA; shareholder of Bertelsmann Verwaltungsgesellschaft mbH

As of December 31, 2022

OUR PROGRAMS AT A GLANCE

Education and the Next Generation

For good childhood development, fair educational opportunities and active participation in shaping a sustainable society



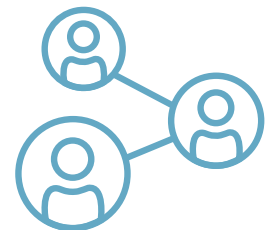
Europe's Future

For a sovereign and solidary Europe



Digitalization and the Common Good

For self-determination and solidarity in a world shaped by algorithms and AI



Democracy and Social Cohesion

For a sustainable democracy and strong social cohesion



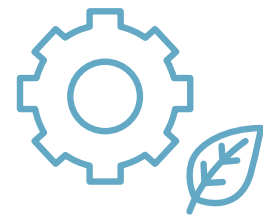
Health

For innovation and patient-centeredness in a health-care system based on solidarity



Sustainable Social Market Economies

For prosperity and employment in sustainable social market economies



Education and the Next Generation



Executive Board Members:

Dr. Ralph Heck
Dr. Brigitte Mohn

Program Directors:

Anette Stein
Marek Wallenfels (as of Sept. 1, 2022)
Dr. Dirk Zorn (as of Sept. 1, 2022)

If young people are to participate in society, they need a good education and framework conditions that allow them to truly get involved and have their say. We are committed to ensuring there is equitable access to high-quality education and to helping the younger generation play a greater role in German society's sustainable development.

Selected project activities:

ACT2GETHER – Fair Opportunities for Young People

Established in 2018, this project promoted fair opportunities for socially disadvantaged children and adolescents. In 2019 and 2022, these children and adolescents were empowered at numerous workshops during the week-long 2GETHERLAND camp. Afterwards, they were able to continue their activities in local follow-up projects. In the 2GETHERLEARN module, teacher trainers and educators were supported in empowering and working with disadvantaged young people. A robust network of partners and a youth expert team worked closely with the project from the start. Concluded in October 2022, ACT2GETHER was successfully transferred to its longstanding project partner, the children's rights organization KRF (KinderRechteForum) in Cologne.

www.bertelsmann-stiftung.de/act2gether-en

Early Childhood Education and Care

In 2022, the project State by State: Monitoring Early Childhood Education identified how many more places would be needed at early childhood education and care (ECEC) centers to meet parents' child-care wishes in 2023. According to the forecast, there will be significantly fewer places available throughout 2023 than are needed. Moreover, there are not enough educators for ECEC centers to ensure child-friendly staffing levels. Our 2022 Educator Radar also shows that an enormous increase in educators will be

required if all elementary-school children are to exercise their legal right to attend an all-day school by 2030. Our analyses stimulated a lively discussion among the relevant stakeholders about measures to increase the number of available educational professionals.

www.laendermonitor.de

www.fachkraefte-radar-kita-grundschule.de

Families and Education: Creating Child-Centered Policies

This project focuses on combatting child poverty in Germany and the possibilities for systematically involving children and asking their opinion. We are therefore supporting and augmenting Germany's planned introduction of a guaranteed basic child allowance and the redefinition of its subsistence level for children. Together with the ifo Institute, we simulated the costs and impacts of different versions of the guaranteed basic child allowance in terms of preventing poverty and influencing employment behavior, and discussed the findings with key stakeholders. When it comes to redefining the subsistence level for children, we are showing in studies with young co-researchers how important it is to ask young people themselves about their needs.

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



Schools

With our project activities, we are driving change in Germany's schools. Jointly with the OECD and others, we are raising public awareness for the importance of future skills. We promote digital skills through the Forum for Digitalization of Education, which among other activities hosts Germany's leading conference on digital education in schools. Policy makers and researchers use the data from our teacher training monitor. Our evaluation of a master's degree program for second-career teachers in Berlin provides evidence-based options for combating the shortage of teachers. Our expertise has also been sought by a government commission on teacher education. We have been supporting Germany's introduction of a legal right to all-day elementary education critically and constructively, including with input from school children themselves.

www.bertelsmann-stiftung.de/schulische-bildung

Strengthening Vocational Education and Training

We are committed to creating a vocational training system in Germany that is both equitable and effective. Consequently, for years we have advocated the creation of an "apprenticeship guarantee" for young people, as is now enshrined in the German government's coalition agreement. In addition, we have published various studies to contribute ideas to the discussion and ensure that the guarantee is

implemented successfully. Our youth survey has allowed members of the target group to have their say. Together with the German Children and Youth Foundation, we also surveyed experts on the future of the vocational training market. All findings were discussed with policy makers, vocational training professionals and other stakeholders, and were very well received.

www.bertelsmann-stiftung.de/opportunity-apprenticeship

Next Generation

Young people need better opportunities if they are to help shape a sustainable future. They are calling for policy decisions and economic activities that will not be a burden to coming generations. We therefore believe society must pay considerably more attention to the concerns of adolescents and young adults. We want to help the younger generation participate more, so they can play an active and sustainable role in shaping the future. As a result, two of our projects are developing ideas and tools together with adolescents and young adults: The project Next Generation and Society is focusing on political participation and helping young people get involved in creating a sustainable society. In the project Next Generation and the Economy, we are working to improve the framework conditions for young people who want to engage in sustainable entrepreneurship.

www.bertelsmann-stiftung.de/nextgen-society
www.bertelsmann-stiftung.de/nextgen-economy

Democracy and Social Cohesion



Executive Board Members:

Dr. Ralph Heck
Dr. Brigitte Mohn

Program Directors:

Dr. Dominik Hierlemann
Ulrich Kober
Prof. Dr. Robert Vehrkamp
Stephan Vopel

Globalization, migration and digitalization are polarizing our societies, but they also offer new opportunities. We develop ideas and projects that make democracy in Germany and Europe more diverse and inclusive and that strengthen social cohesion. We are creating new spaces for democracy so that people – especially young people – can get more involved.

Selected project activities:

Participation in Europe and Monitoring Democracy

The European Union likes to talk about a “Europe of the Citizens” but often has difficulty putting those words into practice. In fact, Europeans do want to contribute to the EU’s policy-making, and the EU will only be fit for the future if its citizens are able to participate. But how can this happen, beyond voting in elections? Our studies and recommendations show how citizen participation can be made more effective, including in the EU. Through our Conference Conversations, we supported the Conference on the Future of Europe. Together with the European Committee of the Regions, we trained stakeholders in 50 European cities and regions to carry out innovative Citizens’ Dialogues.

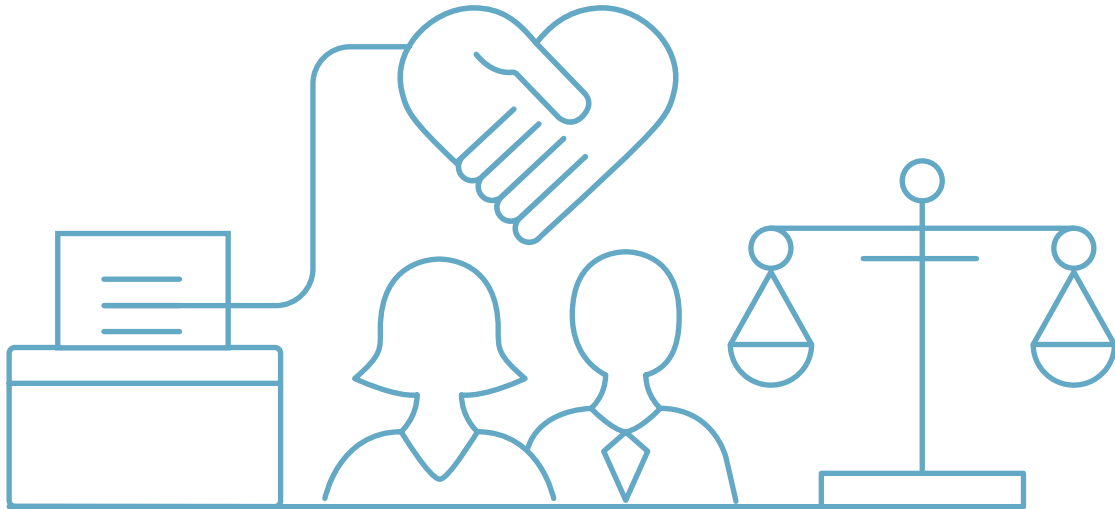
We use our Democracy Monitors to examine the strengths and weaknesses of German democracy, deriving from these empirical studies concrete proposals for solutions, reforms and action agendas for policy makers. Since being included in Germany’s commission on electoral reform in 2022, the Democracy Monitor has had the opportunity to contribute ideas that support the German Bundestag’s efforts to reform the country’s democratic structures on a practical level. This applies in particular to proposals for increasing voter turnout and making it more socially inclusive, reforming electoral law and lowering the voting age to 16 years for national and European elections.

www.bertelsmann-stiftung.de/democracy-participation-europe

www.bertelsmann-stiftung.de/monitoring-democracy

Making Values-Based Migration and Cohesion a Reality

In our new Skilled Migration Monitor, we show how great the demand is for skilled workers among German companies and how few skilled workers have come to Germany from non-EU countries to date. Administrative hurdles should be reduced and cooperation increased with the native countries of potential skilled workers. A good example is our vocational training partnership with the Philippines in the field of nursing, which is about to be concluded. Together with stakeholders, the Global Skill Partnerships Think Tank was launched to scale up good practices. In a new study on Germany’s “culture of welcome,” we examined public attitudes towards migration. Since the start of Russia’s war of aggression against Ukraine, we have been involved in Alliance4Ukraine and are supporting communities as they integrate refugees. We welcomed Germany’s Commissioner for Integration Reem Alabali-Radovan and numerous other guests to a Berlin Background Talk, where we discussed how to overcome the challenges resulting from displacement and migration. A study on coexisting in an immigration society served as the basis for a joint roundtable with the Deutsche Nationalstiftung.



We research social cohesion and social harmony. With our analyses of corporate political responsibility, social cohesion in Baden-Württemberg and how fairness is perceived in Germany, we have contributed empirical evidence to the public debate, along with policy recommendations for taking action on key issues in these times of crisis. Through our Religion Monitor, we explore the importance of religion, values and diversity. For the 2023 monitor, we conducted surveys in Germany and six other countries. A study containing initial findings was published in 2022.

- www.bertelsmann-stiftung.de/fair-migration
- www.bertelsmann-stiftung.de/social-cohesion
- www.bertelsmann-stiftung.de/religion-monitor

Young People Committed to Democracy and Values

We are working to ensure that young people aged 16 and older can vote in all elections in Germany, something that will already apply to the 2024 European elections. A study of volunteer service programs in Germany showed that there is still untapped potential when it comes to social cohesion and that the programs should be expanded as a result. We have therefore begun networking with civil society organizations in order to reach more young people, including those who are disadvantaged.

To promote more constructive attitudes towards diversity, we are developing and disseminating approaches that build good values, and are creating a nationwide online portal. The TeamUp! training courses were scaled up together with the German Football Association. We transferred our findings on school prevention programs for combatting right-wing extremism, populism and antisemitism to the Federal Agency for Civic Education, thereby making them available to a broad group of users in teacher training programs and Germany's schools.

- www.bertelsmann-stiftung.de/wertebildung

Upgrade Democracy

Democracy is changing, not least in digital spaces. That is why the project Upgrade Democracy – a joint endeavor with the foundation's Digitalization and the Common Good program – has been working since October 2022 on ways to prepare democracy for the challenges arising from digital life. We will be promoting constructive discourses in online venues, testing and making visible the potentials offered by alternative communication structures, and identifying the opportunities and risks for democracy resulting from future technologies. The focus here will be on countering disinformation.

- www.bertelsmann-stiftung.de/upgrade-democracy-en

Europe's Future



Executive Board Members:

Dr. Ralph Heck
Dr. Brigitte Mohn

Program Directors:

Cathryn Clüver Ashbrook (since Aug. 1, 2022)
Stephan Vopel
Dr. Malte Zabel

The war against Ukraine and new geopolitical constellations highlight that it is vital for the EU to be capable of taking effective action. Europe must stand together if it is to defend its values and interests in times of transformation. Our projects focus on maintaining European unity and achieving greater sovereignty in its decision-making.

Selected project activities:

Europe's Economy – Strengthening Cohesion in the Single Market

The European Union's economic progress in an ever-changing world lies at the heart of this project. We develop solutions that reduce disparities and achieve higher levels of cohesion between Europe's regions in times of green and digital transformation.

In 2022, we examined various developments on how the structural changes accompanying Europe's decarbonization and digitalization are impacting its economic cohesion. To this end, we published an empirical study in the fall of 2022 on the transformative potential of all of Europe's regions and presented it to European stakeholders in a series of events. We were able to prove that Europe's regions will drift even further apart as structural change deepens existing divisions unless a strategic cohesion policy is put in place to counteract this trend.

www.bertelsmann-stiftung.de/europes-economy

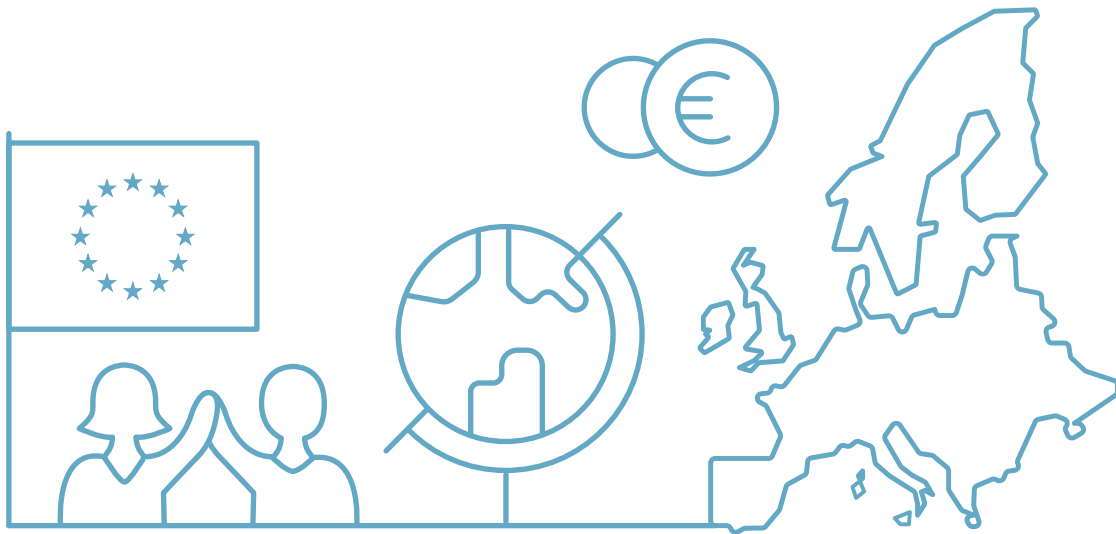
Sovereign Europe – Strategic Management of Global Interdependence

The return of geopolitical rivalry due to China's increasingly aggressive international posturing and Russia's war against Ukraine has revealed that the EU is vulnerable to political and economic blackmail as a result of critical economic

dependencies. Against this background, this project examines three geographic regions – China/Asia, the United States, and the European neighborhood – to ascertain how the EU can maintain its positioning in global trade, which is so crucial to its prosperity and social cohesion, and how it can do so without forfeiting its sovereign decision-making capacity, even in times of increasing rivalry among the world's political and economic systems.

In a comprehensive empirical study that measured the degree of interdependence between the EU and its neighborhood, we found that even here the EU faces growing competition from China, along with the ever-more-urgent task of deepening its trade relations. Our study on the impact of Russia's war in Ukraine on global food security underscores this: It shows which countries are vulnerable, and to what degree, given their dependency on basic agricultural and food exports from Ukraine, as well as which options the EU has to mitigate resulting food crises. Finally, we increased our capacity in forecasting transatlantic relations with the help of our new crowdsourcing platform, RANGE, which allows us to produce forecasting analysis on strategically important issues.

www.bertelsmann-stiftung.de/sovereign-europe



eupinions – European Opinion Research

Every three months, we survey attitudes throughout the EU on the European Union and emerging political issues. We use our trend data and publications to shed light on questions the European public cares about, promoting evidence-based debates in a vibrant civil society.

In 2022, we focused primarily on Russia’s war against Ukraine, examining how the EU’s citizens feel about efforts to provide Kyiv with political support. We released several publications which showed that a clear majority of people in the EU are in favor of supportive measures, such as supplying weapons and allowing Ukraine to join the EU.

www.eupinions.eu

At the forum, some 120 cross-generational leaders from civil society, academia, the private sector and government discussed the topic “The Future of Democracy in a Digital World” and developed concrete recommendations for strengthening democracy in view of digital transformation. Additional transatlantic momentum was provided by a joint appearance by German Foreign Minister Annalena Baerbock and US Secretary of State Antony Blinken, who both underscored the importance of German-American cooperation. The 2023 Futures Forum will take place in the United States in the autumn.

<https://futuresforum.diplo.de/zukunftsforum-en>

US-German Futures Forum

In the Washington Declaration of July 2021, the American and German governments established a new conference format to jointly develop solutions to strategically important challenges in the 21st century. The first US-German Futures Forum took place in November 2022 on the sidelines of the G7 foreign ministers’ meeting in Münster. The event was jointly organized by the German Federal Foreign Office, the US State Department, the Bertelsmann Stiftung and the American Institute for Contemporary German Studies (AICGS).

Health



Executive Board Member:

Dr. Brigitte Mohn

Program Directors:

Uwe Schwenk

Dr. Sebastian Schmidt-Kaehler

Innovation and a patient-centered approach are the keys to creating a sustainable health-care system based on solidarity. As a result, we advocate for quality and safety, digitalization that is truly beneficial, integrated regional models for providing care, and the targeted promotion of health literacy.

Selected project activities:

Digital Transformation in Health Care

There is general agreement that Germany's health-care system needs to be digitalized, even though implementation of this process is often slow. Through this project, we want to support a digital transformation that is both sustainable and truly beneficial for those who use the system.

Germany's current government intends to grant everyone in the country automatic access to their medical records in electronic form.

Anyone who does not want to participate can opt out. Together with the nonprofit foundation Stiftung Münch, we presented an expert opinion on ways to implement this possibility for opting out that are compatible with the country's data protection laws. In addition, we identified a number of international good practices that could contribute to the Ministry of Health's planned digitalization strategy, and made them available to the relevant stakeholders. Through both activities, we want to help ensure that the digital transformation Germany's health-care system requires actually improves care and increases the focus on patients – and is thus truly beneficial.

www.bertelsmann-stiftung.de/digitale-transformation-im-gesundheitswesen

Towards Quality-Oriented and Patient-Centered Health Care

The primary objective of any health system is to improve the health of the individuals and populations they serve. Yet the German health system does not assess the impacts on health from the patients' perspective. To facilitate a stronger focus on what really matters to the patient, we advocate for the integration of the patient perspective into care through the collection and use of patient-reported data.

The project began with an assessment of how patient-reported outcomes are used in Germany. In one study, we show that health apps inquire about health status and conditions and use this data to provide individualized information and services, for example on training and therapy. Yet there is often little exchange of data between apps and medical practices. Another study shows the challenges and success factors of using patient-reported outcome data from the perspective of researchers, practitioners and other industry stakeholders.

www.bertelsmann-stiftung.de/quality-healthcare



Sustainable Supply Structures in Health Care

Through this project, we want to generate momentum for the need-based and quality-oriented transformation of Germany's health-care system. To ensure this complex transformation is successful, we focus on transferring know-how and supporting local stakeholders.

We have identified examples of successful transformation and documented them in clear, comprehensible reports. As our findings show, when people get involved and local decision makers communicate effectively, even difficult situations can be productively overcome. In such cases, a health-care location can be preserved despite the closure of a local hospital – for example, by converting it into an out-patient health-care campus, one that even offers previously unavailable specialized care.

www.bertelsmann-stiftung.de/versorgungsstrukturen-patientenorientiert-gestalten

Trusted Health Ecosystems

Health platforms operated by global tech companies pose major challenges for solidarity-based health-care provision. National systems must develop their own platform strategies if they want to clearly counterbalance the monopolies, dependencies and loss of control associated with big-tech platforms. In this project, we are therefore designing a non-commercial digital ecosystem that offers quality-assured health information and services, one that consistently focuses on patients' needs.

In the exploration phase, we modeled the basics of the ecosystem, analyzed the relevant stakeholders' needs and, based on this, identified the benefits for different actors. We also defined the legal framework for a national health platform and integrated our project activities into an international network.

www.bertelsmann-stiftung.de/trusted-health-ecosystems

Sustainable Social Market Economies



Executive Board Members:

Dr. Ralph Heck
Dr. Brigitte Mohn

Program Directors:

Andreas Esche
Frank Frick
Birgit Riess
Dr. Daniel Schraad-Tischler

To ensure the social market economy remains a reliable model for future generations, we need to transform it into a “sustainable social market economy.” This implies not only striking a balance between growth and social participation, but also promoting sustainability as a global responsibility.

Selected project activities:

Shaping Sustainable Economies

Having sustainable social market economies means reconciling the dynamics of the economy with social equity and our planet’s existing limits. In this project, we empirically examine the conflicting objectives present in sustainable social market economies in order to develop implementation-oriented responses. In doing so, we consider the framework that must be set by the state, along with sustainable activities in the private sector. This approach makes it possible to analyze the relevant mechanisms and their impacts holistically, while identifying the paths needed to transform business and society.

www.bertelsmann-stiftung.de/nachhaltigwirtschaften

Fostering Innovation and Entrepreneurial Dynamism

Innovation is the basis for prosperity, competitiveness and solutions to pressing societal problems. This project develops evidence-based ideas and reforms that promote innovation and entrepreneurial activity – in the service of sustainable transformation. Reforming innovation-policy governance in Germany, strengthening the *Mittelstand*’s innovation potential, improving knowledge transfer from academia and developing measures to increase the number of impact-oriented startups are the key levers used.

www.bertelsmann-stiftung.de/fosteringinnovation

Employment in Transition

By increasing transparency on changes in the labor market, we show the ways people can acquire future skills and good jobs. We also use innovative testing procedures to more accurately identify employee skill sets, and we make it possible to pinpoint further training options through modular approaches to partial qualifications. In addition, we show how more older workers and women can be integrated into the workforce. Through our innovative concepts for the job market and for policies on further education, we want to help society respond better to structural change.

One of the first results of our new project is the Job Monitor. Each month, it makes visible the changing demand on Germany’s labor market and the relevant qualifications by analyzing online job advertisements at the federal, state and regional levels.

www.jobmonitor.de

www.bertelsmann-stiftung.de/beschaefigung-im-wandel

AI in Further Education: The APOLLO App

With support from the German Ministry of Education and Research and together with partners in the area of further education, we are developing a free app that uses artificial intelligence to identify and evaluate users’ work-related



skills and then make individualized suggestions for further training and job openings. The app creates a personal skills profile based on employer references and a CV uploaded by the user. In addition, users can assess their own capabilities and check them against evaluations of their professional and soft skills. APOLLO is designed to be a smart assistant that accompanies people throughout their lifelong training journey.

□ www.project-apollo.de

Better Working Conditions in Nursing Care

The aim of this project is to leverage the previously underused potential of digital technologies in nursing care. It is also designed to drive forward the effective use of technology in order to relieve the burden on caregivers and improve working conditions in the field. As a result, we are developing and piloting a scalable digital innovation strategy that also takes into account necessary adjustments to work structures, care management and caregivers' qualifications. Based on practical experience, we create indicators for measuring impact and formulate policy options for creating the required framework conditions.

□ www.pflegeinnovativ.de

Bertelsmann Transformation Index

In cooperation with a global network of experts, the Bertelsmann Transformation Index (BTI) assesses the quality of political systems, economic development and governance in 137 developing and transition countries. Published every two years, it provides essential guidance for managing transformation processes successfully. Numerous governments and international organizations actively use the BTI for their own decision-making – including for development policy and cooperation.

□ www.bti-project.org

Sustainable Governance Indicators

As a sister project of the BTI, the Sustainable Governance Indicators (SGI) analyze the long-term viability of all OECD and EU member states. Based on this international comparison, the project identifies best practices in the areas of sustainable policymaking and political governance. The data are used by governments and by international organizations. They also serve as an empirical foundation from an international perspective for the Sustainable Social Market Economies program.

□ www.sgi-network.org

Digitalization and the Common Good



Executive Board Members:

Dr. Ralph Heck
Dr. Brigitte Mohn

Program Director:

Ralph Müller-Eiselt



Digital technologies influence the opportunities people have available to them. Such technologies can promote participation, but they can also increase discrimination. Our projects foster social solidarity and individual self-determination in a world shaped by algorithms and AI – to ensure that today’s technologies serve the common good.

Selected project activities:

Ethics of Algorithms

Between 2017 and 2022, this project addressed the social consequences of automated decision-making. It raised public awareness of the topic, structured the discourse among experts, and developed and disseminated concrete solutions such as Algo.Rules – Rules for the Design of Algorithmic Systems. In the five years it ran, the project released almost 60 publications, ranging from books for the general public to guidelines for digital administrators, and it reached over 160,000 users through more than 200 posts on the blog [Algorithmenethik.de](https://www.algoethik.de).

www.bertelsmann-stiftung.de/ethics-of-algorithms

reframe[Tech] – Algorithms for the Common Good

Technology development should focus more on serving the common good – with that mission, this successor project to Ethics of Algorithms launched in July 2022. The project team remains committed to reducing the risks stemming from algorithmic systems and artificial intelligence, and introducing ethical principles into everyday practice. In addition, reframe[Tech] is doing even more to tap the positive potential these technologies offer society. Our work also focuses on expanding the skill set that key stakeholders in public administration and civil society need if these goals are to be achieved.

<https://www.reframetech.de/en>

Upgrade Democracy

Democracy is changing, not least in digital spaces. That is why the project Upgrade Democracy – a joint endeavor with the foundation’s Democracy and Social Cohesion program – has been working since October 2022 to equip democracy for the challenges arising from digital life. We will be promoting constructive discourses in online venues, testing and making visible the potentials offered by alternative communication structures, and identifying the opportunities and risks for democracy resulting from future technologies. The focus here will be on countering disinformation.

www.bertelsmann-stiftung.de/upgrade-democracy-en

Center for Sustainable Communities



Executive Board Members:

Dr. Brigitte Mohn

Director:

Dr. Kirsten Witte



The aim of the newly established Center for Sustainable Communities is to support local stakeholders in actively implementing the United Nations' Agenda 2030 and its 17 Sustainable Development Goals (SDGs). To that end, we cooperate closely with the foundation's programs.

Selected project activities:

Supporting sustainability management

Through our SDG portal, we provide data on the 17 SDGs for all of Germany's counties and all of its municipalities with 5,000 inhabitants or more. The data are available as time series and updated annually. To provide this information, we partner closely with the German Institute of Urban Affairs and the Center for Interdisciplinary Regional Research at Ruhr University Bochum. The SDG indicators are further developed on an ongoing basis in a working group that includes leading municipal associations and other organizations. Also available are proposed action plans, examples of good practice, and tools for creating local sustainability reports.

A majority of the data come from Community Roadmap, a Bertelsmann Stiftung data portal, which also includes forecast figures on population development as well as a demographic classification.

We use the data to analyze how sustainable development activities are progressing in Germany's communities. In 2022, as part of a review of Agenda 2030 at the halfway mark, we conducted a survey of local government administrators to see what the country's municipalities have achieved in this area to date.

www.sdg-portal.de/en

www.wegweiser-kommune.de

Driving innovative issues forward

Together with the foundation's programs, we provide impetus for innovative ideas. For example, we are supporting the model region of East Westphalia-Lippe as it develops a circular "cradle to cradle" economy.

As part of the Committed Community project, we are working with partners from civil society and Germany's Ministry for Family Affairs to help 113 model municipalities build local structures for civic engagement.

Together with PHINEO and with funding from the Federal Chancellery, the foundation is supporting local actors as they create "cosmopolitan communities." As a member of Alliance-4Ukraine, we are assisting cities and towns in Germany in their efforts to integrate refugees.

The foundation's Education and the Next Generation program also supports community stakeholders in creating high-quality programs for all-day schools, for example through the program's Educator Radar for child-care centers and elementary schools.

Our Health program examines the need-based and quality-oriented restructuring of regional health care in Germany together with know-how transfer by local actors.

www.bertelsmann-stiftung.de/ZNK

CORPORATE COMMUNICATIONS



Executive Board Member:

Dr. Ralph Heck

Directors:

Jochen Arntz

Dr. Malva Sucker

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.

The goal of the Bertelsmann Stiftung's communications activities is to present the foundation's work and actions to decision makers and a wider public in a way that is cohesive and clear. Together with the foundation's programs and projects, Corporate Communications develops dialogues with the relevant target groups, ensuring that the messages conveyed are consistent.

Corporate Media Relations manages contacts with all media, be they print publications, digital providers, agencies, radio stations or television broadcasters. Together with the foundation's projects, it develops communications strategies and supports the entire implementation process. In addition to maintaining contacts with journalists, its activities include dialoging with social media stakeholders, interacting with opinion leaders and developing new media formats. Corporate Media Relations is also responsible for in-house communications and the intranet.

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 efforts. Findings from the founda-

tion's projects appear as both print and e-books published by Verlag Bertelsmann Stiftung. Corporate Brand Management is also responsible for the Bertelsmann Stiftung's corporate design.

In addition to bertelsmann-stiftung.de, its corporate website, the foundation can be found on social media – on Facebook, LinkedIn, Twitter, Instagram, Xing and YouTube. Many of its experts are active in social networks, maintaining profiles on behalf of their projects and even posting on their own blogs: bertelsmann-stiftung.de/blogs. The foundation's podcast "Zukunft gestalten – Shaping the Future" highlights current issues, allowing its experts to contribute to the conversation.

Corporate Relationship Management is responsible for managing the foundation's contacts and handling mailings and other communications activities relating to specific target groups.

Corporate Information Services supports the foundation's knowledge management, overseeing its libraries and archive. It also carries out media evaluations and impact analyses, among other activities.

CORPORATE OPERATIONS



Executive Board Member:

Dr. Ralph Heck

Senior Vice President:

Wilhelm-Friedrich Uhr

Corporate Operations consists of the departments Finance & Tax/Asset Management, Human Resources & Legal, Controlling, Information Technology, and Services. Its goal is to ensure accuracy and accountability, coordinate financial and human resources, and make the foundation more cost-effective and efficient on an ongoing basis.

The Finance & Tax/Asset Management department oversees accounting procedures for all of the foundation's business transactions. It also produces its annual financial statement, including the 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. Asset Management is responsible for investing the foundation's liquid assets and overseeing its cash management activities.

A core responsibility of the Human Resources (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. Human Resources 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 Legal team provides advice and support for all legal issues relating to contracts. It ensures

that compliance measures, privacy regulations and guidelines are observed.

The members of the Controlling department are responsible 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 Business Intelligence Competence Center develops procedures for carrying out systematic, database-driven data analysis, and it offers support when data migrations occur.

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 landscape, its responsibilities include coordinating and managing the development of IT systems for individual projects. Corporate IT also oversees IT security at the Bertelsmann Stiftung.

The Corporate Services department provides various types of in-house support. Its core responsibilities are facility management, property services, strategic procurement and the main Service Desk.

AFFILIATED NONPROFIT INSTITUTIONS

**Bertelsmann
FOUNDATION**

Bertelsmann Foundation North America

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

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CHE
Centrum für
Hochschulentwicklung

Fundación Bertelsmann

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

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Liz Mohn Center

- 📍 Gütersloh
- 👤 President:
Liz Mohn
- 👤 Managing Directors:
Matthias Meis
Dr. Jörg Habich
- 🌐 www.liz-mohn-center.de

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PHINEO

- 📍 Berlin
- 👤 Chairman:
Dr. Andreas Rickert
- 🌐 www.phineo.org/en

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German Stroke Foundation

- 📍 Gütersloh
- 👤 Executive Board:
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- 🌐 www.schlaganfall-hilfe.de

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Weisse Liste

- 📍 Gütersloh
- 👤 Managing Director:
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- 🌐 www.weisse-liste.de

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

CHE Centre for Higher Education

- 📍 Gütersloh
- 👤 Executive Director:
Prof. Dr. Frank Ziegele
- 🌐 www.che.de/en

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Founders Foundation

- 📍 Bielefeld
- 👤 Managing Director:
Dominik Gross
- 🌐 www.foundersfoundation.de/en

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Liz Mohn Foundation for Culture and Music

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

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Reinhard Mohn Institute of Management

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

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Reinhard Mohn Stiftung

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

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Center for Digital Education and Schools

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

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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.

Through its research, debate forums and multimedia tools, the Bertelsmann Foundation North America provides analysis and solutions to the most pressing economic, political and social challenges impacting the United States and Europe. Founded in 2008 as an affiliate of the Bertelsmann Stiftung, it advances social change, supports civil liberties and promotes international understanding.

The Bertelsmann Foundation North America serves as a bridge between Europe and the United States, highlighting 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.

Executive Director:
Irene Braam
www.bfna.org

CHE Centre for Higher Education

CHE provides guidance on studying at university for both traditional and nontraditional students, along with information and further education courses for university managers. It also offers university administrators and policy makers innovative ideas – for example, on shaping transitions between occupational and academic education.

CHE addresses the challenges confronting Germany's universities and its policy makers active in the field of higher education. It looks for ideas that can integrate post-secondary offerings, for example by creating the still-lacking interfaces needed to facilitate transitions between Germany's different systems of academic and occupational/vocational education. Through its Hochschulforum Digitalisierung, it aims to tap the potential that digitalization offers universities. As a result, it is developing ideas for future-ready higher education programs that include blended learning.

CHE was founded in 1994 by the Bertelsmann Stiftung and the German Rectors' Conference. For almost 25 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. CHE has also been publishing an international ranking of universities, U-Multirank, since 2014. This ranking compares 2,200 institutions from 96 countries in the areas of research, teaching, internationality, regional engagement and knowledge transfer.

Executive Director:
Prof. Dr. Frank Ziegele
www.che.de/en

Founders Foundation

Established on the initiative of the Bertelsmann Stiftung, the Founders Foundation educates the next generation of successful entrepreneurs in the heart of Germany's *Mittelstand*. As a result, it is developing initiatives that are shaping the digital future for the region of East Westphalia-Lippe and building B2B startup ecosystems throughout Germany.

The Founders Foundation develops, educates and promotes entrepreneurs as they successfully create their own startups. With the support of a unique network of experienced business leaders, international experts, and leading thinkers from the startup scene, the Founders Foundation strategically prepares entrepreneurs for the various steps on their startup journey, based on their individual business idea and its level of development.

Over 640 talented entrepreneurs have benefited from one of the organization's modular training programs. The 66 resulting startups have attracted over €35 million in investments and created more than 550 jobs. More than half are

based in East Westphalia-Lippe and three out of four feature a B2B business model. They are thus increasing the region's profile and facilitating an innovation transfer that is helping ensure the location's long-term competitiveness. Since 2022, the Founders Foundation has been making its expertise available to the project EdTech Next, funded by North Rhine-Westphalia's Ministry of Economic Affairs, thereby providing targeted support to entrepreneurs in the educational sector.

Managing Director:

Dominik Gross

www.foundersfoundation.de/en

Fundación Bertelsmann

The Bertelsmann Stiftung promotes social change in Spain through its Barcelona-based affiliate, Fundación Bertelsmann. Since 2014, all of the Spanish foundation's activities have focused on increasing employment among young people by promoting cooperation between educational institutions and the business community.

Established by Reinhard Mohn in 1995, Fundación Bertelsmann focuses on improving occupational opportunities for Spanish youth and promoting dual vocational education. In the area of career counseling, it established the Xcelence quality framework based on international standards. Together with regional decision makers, it is working to better integrate career counseling into the business world, and vice versa. In 2022, more than 100 companies offered guidance activities, benefitting some 12,000 school students.

With its network of 1,500 partners, the Alliance for Dual Vocational Training supports businesses, vocational schools and other institutions in

Spain as they launch dual vocational education programs. In April 2022, dual vocational training was enshrined in a national law that includes elements which have been promoted and recommended by the Spanish foundation for years. Since 2022, Ambassadors for Dual Vocational Education, the network initiated by the foundation, has received significant support from the Chamber of Commerce and Industry and the European Social Fund.

Directors:

Clara Bassols, Francisco Belil

www.fundacionbertelsmann.org

Liz Mohn Center

Through its events and studies, the Liz Mohn Center promotes the quality of leadership in politics, business and culture in order to build bridges of understanding across language barriers and borders.

The Liz Mohn Center gGmbH was founded in 2022 as an initiative of the Bertelsmann Stiftung, continuing all of Liz Mohn's civic engagement activities within one organization.

The Liz Mohn Center pursues the following goals: Based on evidence-driven findings and analyses, it helps accelerate the global transfer of knowledge in order to improve the quality of leadership decisions in politics, business and culture. In addition, it assists decision makers in leading sustainably and responsibly, increases understanding between nations and cultures, and promotes young talents from different areas of society. It also initiates and supports international

events such as the Trilogue Salzburg, projects addressing economic topics that highlight questions of contemporary leadership, and cultural projects. Finally, it promotes and supports talented young people.

President:

Liz Mohn

Managing Directors:

Matthias Meis, Dr. Jörg Habich

www.liz-mohn-center.de

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 from different cultural backgrounds.

Through her foundation, Liz Mohn would like to make greater use of the opportunities culture and music offer for personal development and for society at large. Within its focus areas, the Liz Mohn Foundation for Culture and Music supports the Opera Studio at the Staatsoper Unter den Linden in Berlin and the studio's participants. As part of the yearly Cultural Diversity With Music initiative, the foundation accepts funding applications for projects that promote intercultural interactions among children and young people in Germany. Through this national initiative and its local cultural activities in Gütersloh, where the nonprofit organization is based, the Liz Mohn Foundation for Culture

and Music aims to achieve one goal above all: giving disadvantaged children and young people equitable opportunities to participate in culture and thus in society.

Chairwoman:

Liz Mohn

Managing Director:

Nadine Lindemann

www.kultur-und-musikstiftung.de

PHINEO

Doing good and achieving the best – that's PHINEO's goal. PHINEO is a think tank, consultancy and social organization all in one.

PHINEO supports nonprofits, companies, philanthropists and impact investors in achieving their goals more effectively and in making a difference through social engagement. Originally incubated at the Bertelsmann Stiftung and an independent entity for the last 12 years, the analytic and consulting organization accomplishes this in four ways:

1. As an analytics specialist, PHINEO makes social impact visible.
2. As a consultancy, PHINEO supports and networks nonprofits, foundations, businesses, government ministries and individuals. It thus makes projects possible that could

not be realized by people working on their own.

3. As a think tank, PHINEO combines innovation with activities that are tried and tested.
4. As a visionary organization, PHINEO implements its own ideas – quickly and effectively.

The Bertelsmann Stiftung is one of PHINEO's shareholders, which allows for numerous mutually beneficial synergies.

Chairman:
Dr. Andreas Rickert
www.phineo.org/en

Reinhard Mohn Institute of Management

The Reinhard Mohn Institute of Management is an academic institute at Witten/Herdecke University. Through research, teaching and dialogue with practitioners in the field, its interdisciplinary and international approach produces innovative ideas that advance the theory and practice of management, thereby serving individuals and society at large.

Supported by the Bertelsmann Stiftung, the Reinhard Mohn Institute of Management (RMI) was founded in 2010 as an extension of the Reinhard Mohn Endowed Chair in Management, which was established in 1991. Its program reflects Reinhard Mohn's participatory and responsibility-driven management philosophy, and the RMI emphasizes the importance of cooperation in strategy, organization, leadership and management. Key issues addressed include network and alliance strategies, strategic realignment processes, managing openness and transparency, and trust in and among organizations. Additional topics are innovation and learning in organizations, new forms of leader-

ship and work in the digital age, and corporate responsibility in keeping with the UN's 17 Sustainable Development Goals. The institute hosts the annual RMI Management Day and uses the Führungskräfte-Radar (Leadership Radar), its representative survey, to show how favorable conditions can be created to promote effective leadership.

Director:
Prof. Dr. Guido Möllering
www.reinhard-mohn-institut.de

Reinhard Mohn Stiftung

The Reinhard Mohn Stiftung advocates for better educational opportunities for children and young people in East Westphalia-Lippe. It works to ensure their educational achievements do not depend on their cultural, social or economic background. Its activities are therefore designed to improve the quality of education in preschools and schools.

The Reinhard Mohn Stiftung began its project work in 2009. All its activities aim to achieve educational justice by empowering children and young people to reach their full potential, regardless of cultural, social or economic background. Developed and implemented with local partners, the foundation's projects take place in cities and towns located in East Westphalia-Lippe, the region Reinhard Mohn was from and where his family still lives today. Two of the foundation's key concerns are that the projects develop effectively over the long term and that their outcomes are disseminated and anchored in the educational system. In 2022, school administrators and teachers were particularly

interested in projects focusing on the subjects of math and German. Just as well received were the measures in support of curriculum development offered by our project for promoting digital education in schools. These measures will be further developed over the next two years by 10 schools which recently joined the project. All support is made available in close cooperation with regional educational authorities.

Executive Board:

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

German Stroke Foundation

Learning from people, providing integrated assistance: Established by Liz Mohn in 1993, the German Stroke Foundation not only aids people affected by stroke, it also works to further develop Germany's health-care system.

The German Stroke Foundation is dedicated to preventing stroke, assisting people with stroke and their families, and improving stroke-related care. Its activities focus on those whose lives have been affected by this health issue. The foundation uses what it learns in its interactions with individuals to aid the greater community dealing with stroke. It gives a voice to those who would otherwise not be heard, while offering them advice and assistance.

It provides information on risk factors and what to do in the case of stroke. It also encourages people to adopt healthier lifestyles, since 70 percent of strokes are preventable. The foundation

dialogues with actors across the entire care-provision chain, from preventive, emergency and acute care to rehabilitative and follow-up care. It contributes new ideas, for example through the LEX LOTSEN OWL pilot project, which is exploring the creation of a legal framework for stroke case managers. In addition, it networks individuals and institutions.

Executive Board:

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

Weisse Liste

By developing innovative concepts and digital applications, Weisse Liste (White List) makes quality more transparent within Germany's health-care system. The online portal is a Bertelsmann Stiftung project. Germany's leading patients' and consumers' organizations serve as strategic partners.

Weisse Liste was established to offer people a reliable, non-commercial tool for comparing the quality of health-care services in Germany. Incorporated in 2011 as a nonprofit and a wholly owned subsidiary of the Bertelsmann Stiftung with an office in Berlin, it maintains and develops information services that help create a transparent, quality-driven health-care system. The project's main offering is the online portal weisse-liste.de, which guides users in their search for the right hospital or nursing facility. In addition, it publishes information on the range and quality of services offered by health-care providers. In 2022, the project developed an online catalogue of digital care apps on

behalf of Germany's Federal Institute for Drugs and Medical Devices. In 2022, it also transferred to the institute a portal it developed that allows users to search for medically approved health apps.

Managing Director:
Uwe Schwenk
www.weisse-liste.de

Center for Digital Education and Schools in Gütersloh

The center supports schools and their school boards in the district of Gütersloh as they "go digital." The goal is to initiate processes for further developing both classroom instruction and schools as a whole, while ensuring young people can participate as digital technology transforms the way we work and live.

Digitalization is creating fundamental change in almost all areas of life, and schools must prepare students for their future in a digital society. That means ensuring not only that young people learn how to use digital media in school, but that they are able to engage with them thoughtfully, critically and responsibly. In 2017, the Bertelsmann Stiftung liaised with the Reinhard Mohn Stiftung and with project partners in the regional educational network to create the nonprofit Center for Digital Education and Schools in Gütersloh.

By the end of 2019, 18 school boards representing over 100 schools had joined the cooperative project for promoting digital education in

schools. Local roundtables were also established, enabling participants to exchange information and coordinate activities. Numerous training courses were held for school administrators, school project-development groups and school board members. At the beginning of 2022, the cooperative partners agreed to extend the project until 2027 in order to sustainably anchor its offerings in the region. A main focus in 2022 was the training course "Curriculum Development: Learning and Teaching in a Digital Culture."

Managing Directors:
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www.digitale-schule-gt.de

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Fundación Bertelsmann, Barcelona



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CHE Centre for Higher Education

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Founders Foundation

 **Managing Director:**
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 **Chairwoman:**
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 www.kultur-und-musikstiftung.de

PHINEO



Chairman:

Dr. Andreas Rickert



www.phineo.org/en

Reinhard Mohn Institute of Management



Director:

Prof. Dr. Guido Möllering



www.reinhard-mohn-institut.de

Reinhard Mohn Stiftung



Executive Board:

Christoph Mohn, Dr. Erkan Uysal



www.reinhard-mohn-stiftung.de

German Stroke Foundation



Executive Board:

Dr. Michael Brinkmeier, Sylvia Strothotte



www.schlaganfall-hilfe.de

Weisse Liste



Managing Director:

Uwe Schwenk



www.weisse-liste.de

Center for Digital Education and Schools in Gütersloh



Managing Directors:

Christian Ebel, Rüdiger Bockhorst



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