



Annual Report
2023

Inspiring people. Shaping the future.

THE BERTELSMANN STIFTUNG

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

EXECUTIVE BOARD

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



Dr. Ralph Heck



Dr. Brigitte Mohn



Prof. Dr. Daniela Schwarzer

PROGRAMS AND CENTERS



EDUCATION AND
THE NEXT GENERATION



DEMOCRACY AND
SOCIAL COHESION



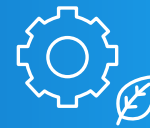
DIGITALIZATION AND
THE COMMON GOOD



EUROPE'S
FUTURE



HEALTH
CARE



SUSTAINABLE
SOCIAL MARKET ECONOMIES

CENTER FOR
SUSTAINABLE COMMUNITIES

For livable and sustainable cities,
districts and municipalities.

CENTER FOR
DATA MANAGEMENT

For a growing and open
data ecosystem in Germany

WEBLINKS

WWW.BERTELSMANN-STIFTUNG.DE



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FOREWORD



Dear Readers,

Society is changing rapidly – in all areas of life. The uncertain global situation, the astounding advances in artificial intelligence and the question of how to create a sustainable future are challenging us all. Individuals and society as a whole are called on to actively shape this transformation. At the Bertelsmann Stiftung, we are participating in this task by identifying concrete solutions and implementing them together with our partners as a way of constructively driving change.

In 2023, this is how – across all our programs and competence centers and together with our affiliated organizations – we were able to have a significant, multifaceted impact.

In the area of education, a cornerstone of every successful society, we once again drew attention to the pressing need for reform and the severe shortage of skilled professionals in Germany, while simultaneously proposing solutions. At the beginning of the year, we partnered with other institutions to call for an education summit, which 130 organizations have now joined. We successfully intensified our work with the younger generation, for example through our pilot project in Berlin which trained 141 young election workers. In addition, the “apprenticeship guarantee” that the foundation has advocated for years has now been enshrined in German law.

As a result of climate change, current technological advances and demographic developments, not to mention inflation and rising capital costs, companies face many open questions, which we have addressed together with our partners – for example, through

a circular business offensive in the region of East Westphalia-Lippe, through proposals for reducing climate-damaging subsidies, and through an index that measures how attractive Germany is to skilled workers from abroad. Our activities relating to the labor market have also been particularly effective, including our Job Monitor, which we use to provide detailed monthly analyses of approximately 1,200 occupations for all of Germany's states, counties and independent cities based on more than 60 million online job advertisements.

The multiple social crises of recent years and the resulting feeling of uncertainty among the public have highlighted the pressing need to further develop democratic structures and increase citizen participation. We have contributed effectively to achieving those goals through our projects designed to strengthen social cohesion and move forward the digital transformation of local government and public administration, and through our European network for promoting deliberative democracy. The geopolitical challenges confronting Europe have also not diminished, and the formation of new blocs and the armed conflicts in Ukraine and the Middle East require new responses. Using our eopinions survey, we were able to ascertain that, regardless of political affiliation, 87 percent of all EU citizens and 86 percent of all Germans support the creation of a common European defense policy.

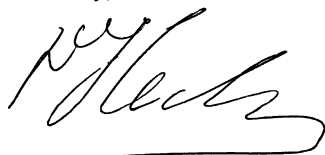
The health-care sector is also facing ongoing change due to digitalization and structural shortcomings in the provision of care – a situation that impacts patients as well. Together with the World Health Organization (WHO), our experts launched an initiative to improve the reliability of the health-related information found online, and developed approaches that address key issues such as short-term inpatient care.

In addition to the impactful efforts outlined above, we further developed our own organization to make it more effective. For example, Daniela Schwarzer, an internationally recognized expert on Europe, cross-border developments and democracy, became the third member of our Executive Board. In addition, we began systematically training our employees across the foundation to build their AI skills, and we took further steps to achieve our ambitious targets for reducing the foundation's carbon footprint. Moreover, our Ukraine taskforce continued its work, and we created a taskforce on the war in Gaza to pool our in-house expertise so we can respond quickly to developments as they unfold.

In 2024, given the numerous elections scheduled to take place and the current challenges facing democratic systems, we are using the topic "Strengthen democracy!" to set a clear focus for our activities in the coming year. Society is changing and we want to help shape that change constructively. This requires a committed society, one we aim to support and empower through our work.

In that regard, I hope you find our annual report both engaging and inspiring.

Sincerely,

A handwritten signature in black ink, appearing to read 'Ralph Heck', with a horizontal line underneath.

Dr. Ralph Heck

THE BERTELSMANN STIFTUNG IN 2023 AT A GLANCE

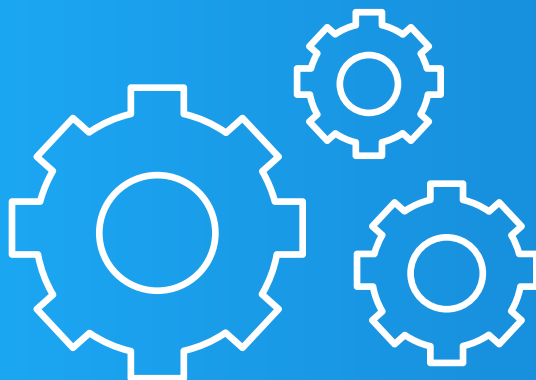
Through its projects, studies and events, the Bertelsmann Stiftung stimulates debate and provides ideas for social change. Civic engagement and sustainable impact serve as the basis for its activities. The foundation's initiatives not only generate solutions, they also provide the public with empirically 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.



334
EMPLOYEES

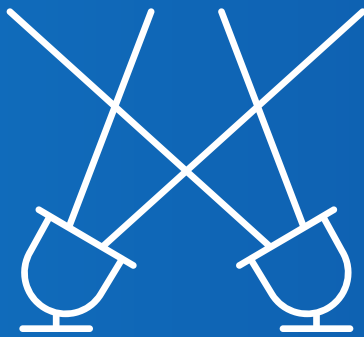


5
LOCATIONS
WORLDWIDE



A NONPROFIT,
NONPARTISAN,
PRIVATE OPERATING
FOUNDATION

35
PROJECTS



240

IN-PERSON, HYBRID AND
DIGITAL EVENTS



1.9

BILLION EURO FOR
NONPROFIT ACTIVITIES
SINCE FOUNDING



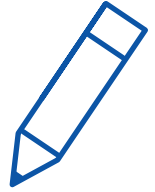
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-MILLION-EURO
ANNUAL BUDGET

PROGRAMS AND CENTERS

Education and the Next Generation

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



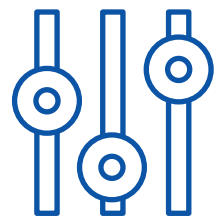
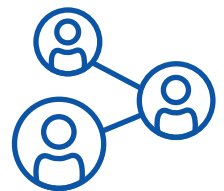
Europe's Future

For a sovereign and solidary Europe



Digitalization and the Common Good

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



Center for Data Management

For a growing and open data ecosystem in Germany



Democracy and Social Cohesion

For a sustainable democracy and strong social cohesion



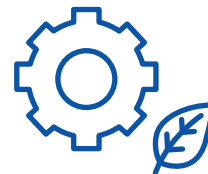
Health

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



Center for Sustainable Communities

For livable and sustainable cities, districts and municipalities



Education and the Next Generation



Executive Board Members:

Dr. Ralph Heck
Dr. Brigitte Mohn

Program Directors:

Anette Stein
Marek Wallenfels
Dr. Dirk Zorn

If young people are to participate in society, they need a good education and systemic 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:

#RestartEducationNow: Appeal for a National Education Summit

In conjunction with the education summit hosted by the federal education minister in March, we called on the country's chancellor and the heads of its state governments to make education a top priority on the political agenda. The appeal was initiated together with five other education foundations and supported by 130 leading associations, trade unions and children's rights organizations. A National Education Summit convened by the chancellor and the country's conference of state governors could mark the beginning of a fundamental transformation of Germany's educational system. The goal would be for Germany's top policy makers to share responsibility as they address the massive challenges relating to funding, governance and the country's need for educational professionals.

www.neustart-bildung-jetzt.de

Families and Education: Creating Child-Centered Policies

The goal of this project is to prevent child and youth poverty in Germany and to systematically involve young people and ask their opinion. We are supporting the introduction of Germany's guaranteed basic child allowance by publishing factsheets on child poverty and developing proposals for effectively implementing this new social benefit. In a pilot study with the institute ISA (Münster), we are collecting data on what children need in terms of material resources, education and social participation. Together

with researchers and our Youth Expert Team, we also organize innovative conferences for children and adolescents where the participants can present their demands directly to policy makers.

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

Early Childhood Education and Care

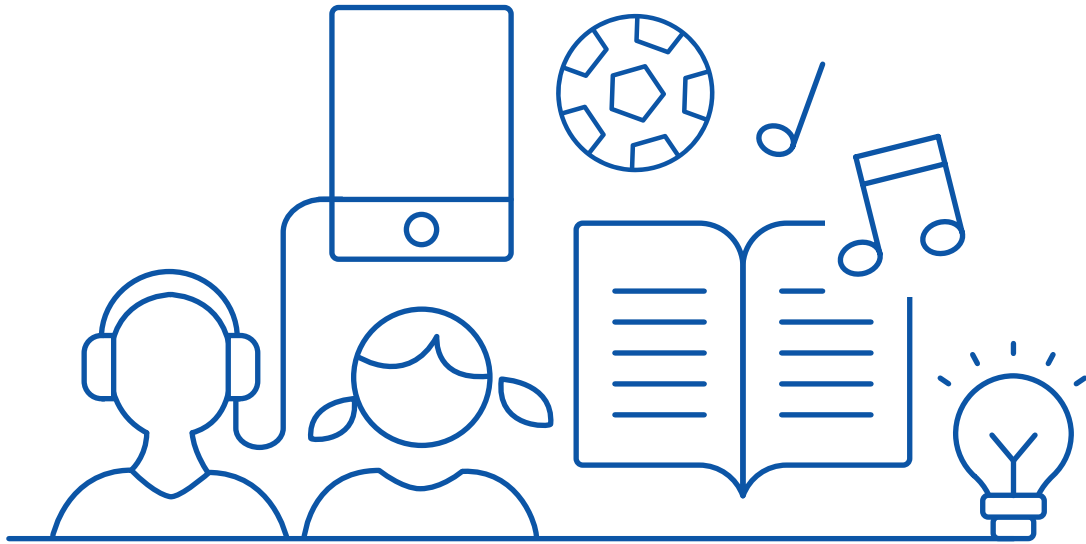
This project aims to ensure that every child in Germany, regardless of background, has access to high-quality early childhood education and care (ECEC). *The State by State: Monitoring Early Childhood Education* report provides evidence-based information on the state of ECEC in all of Germany's states. In 2023, there was a shortage of hundreds of thousands of places at ECEC facilities, especially in the country's western states, while additional ECEC professionals are still needed in the east. Our *Educator Radar* for ECEC centers and elementary schools forecasts that, by 2030, the supply of educators will make it possible to improve the quality of ECEC facilities and offer more places there – if policy makers take decisive action. The project also works with ECEC professionals from throughout Germany to develop practice-driven solutions for reforms.

www.bertelsmann-stiftung.de/state-monitoring

www.laendermonitor.de

Schools

We are helping advance the transformation of Germany's school system using new communication formats for stakeholders. Together with four German states, we are developing the cornerstones of a new culture of learning and assessment that strengthens future skills. We also contribute new ideas that give potential teachers more flexibility in entering



the profession. Our Teacher Training Monitor provides evidence-based information for policy responses targeting teacher education, while the Forum for the Digitalization of Education trains school principals from 10 states in digital leadership. In addition, we support teachers in dealing with AI in the classroom through the competence network VK:KIWA. In all our activities, we are committed to making the voices of school students more relevant in the public debate on education policy. To that end, we rely on a number of resources, including our Youth Expert Team and peer-to-peer approaches.

- www.bertelsmann-stiftung.de/schulische-bildung
- www.forumbd.de
- www.vkkiwa.de
- www.monitor-lehrerbildung.de

Strengthening Vocational Education and Training

To be sustainable, a vocational education and training (VET) system should be both equitable and efficient. We contribute ideas to help ensure that goal is achieved. The “apprenticeship guarantee,” which many have advocated for years, was enshrined in German law last year and will come into force in 2024. In our *VET Opportunities Monitor*, we examined the possibilities people in Germany have for entering VET programs after leaving school. We also surveyed young people about their prospects for vocational education and training after the pandemic. Together with the German Children and Youth Foundation, we organized Education Day 2023 to jointly

promote equitable educational opportunities. At the same time, we published a joint survey of young people that focuses on the topic of transitioning from school to work.

- 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 political decisions and economic activities that will not be a burden on future generations. Through the dialogues and formats we organize together with young people, we are working to increase awareness in German society of the issues that are important to teenagers and young adults. We want to help the younger generation get more involved, so they can play an active and sustainable role in shaping the future. In two projects, we are working with young people to develop initiatives and tools in order to increase their participation in politics and business. We are supporting the next generation’s efforts to create a sustainable society while developing proposals 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 Member:
Prof. Dr. Daniela Schwarzer

Program Directors:
Dr. Dominik Hierlemann
Ulrich Kober
Prof. Dr. Robert Vehrkamp

We want to protect democracy and move it forward. In addition to getting young people in particular excited about democracy, we want to improve social cohesion in diverse societies and make our political institutions more robust and inclusive.

Selected project activities:

New Democracy – Protecting and Rethinking Democracy

Citizen participation can strengthen trust and improve the quality of the outcomes resulting from democratic decision-making processes. We are working to achieve that goal through our partnerships with think tanks, civil society and political institutions in Germany and Europe. We are also collaborating with a network of European partners to establish participation standards. Together with the OECD, we organized an international conference on digital citizen participation, and we are promoting capacity building among young European policy makers in cooperation with the European Committee of the Regions. At our roundtables, for example with European Commissioner Věra Jourová, we consider how European democracy can be strengthened. Last year, another key activity was preparing for Forum Against Fakes, our citizen participation project organized in cooperation with Germany's Ministry of the Interior.

In our monitors on resilient democracy, we examine the strengths and weaknesses of German democracy. We use these empirical studies to develop concrete proposals for policy responses – for example, through the mid-term review of what Germany's coalition government has achieved so far. We presented the review's findings and conclusions in discussions with parliamentary groups and federal ministries.

We also collaborated with the German Political Science Association (GPSA) to organize a conference on "Modern Governance." Federal Minister of Defense Boris Pistorius attended the conference's evening event.

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

Making Values-Based Migration and Cohesion a Reality

Together with the OECD, we updated the Indicators of Talent Attractiveness, which examine how successful countries are in attracting international students, skilled workers, start-up founders and other entrepreneurs. Germany is in the top tier when it comes to students, but only in the mid-tier for other target groups. This is due to its complex visa procedures, slow pace of digitalization and lackluster approach to diversity. Consequently, our study *Diskriminierung in der Einwanderungsgesellschaft* (Discrimination in an Immigration Society), which we presented at a national press conference with the German government's commissioner for anti-discrimination, shows that Germany needs a better anti-discrimination policy.

Our Religion Monitor highlights successful approaches to dealing with religious diversity. We also used it to support decision makers in politics and the media in responding to the conflicts affecting immigration societies following Hamas's terrorist attack on Israel. Our book *Anders wird gut* (Different Is Good) provides hope by showing how social cohesion can be strengthened in times of crisis and uncertainty.



We welcomed the first nurses from the Philippines who arrived in Germany thanks to the Global Skills Partnerships pilot program. Together with the German government’s special commissioner for migration agreements, we discussed the potential such partnerships have in the area of international cooperation. In addition, we supported municipalities in their integration activities through our online offerings, and developed recommendations for relieving the pressure that public authorities face due to increased immigration. Through our constructive proposals, we show why advocates are needed for admitting refugees who are considered particularly vulnerable.

- www.bertelsmann-stiftung.de/fair-migration
- www.bertelsmann-stiftung.de/social-cohesion
- www.religionsmonitor.de

Young People Committed to Democracy and Values

In 2023, we trained school students as peers so they could provide support for the parliamentary elections held in Bremen. A social media campaign was prepared for 2024 that works with influencers to motivate young people to vote and to participate in volunteer service programs. We also contributed substantive expertise to the discussion on reducing the funding for volunteer service programs. Together with the organization Förderverein Ökologische Freiwilligendienste e.V., we initiated a pilot project designed to increase diversity in volunteer programs that focus on ecology

and the environment. Finally, we concluded an agreement with the German Football Association to integrate the concept behind our TeamUp! project into the association’s structures.

- www.bertelsmann-stiftung.de/young-peoples-voices-in-our-democracy

Upgrade Democracy

The Upgrade Democracy project – a joint endeavor with the foundation’s Digitalization and the Common Good program – develops proposals for how we can become better prepared for the challenges resulting from digital life.

Our eupinions study *Disinformation: A Challenge for Democracy – Attitudes and Perceptions in Europe* shows that Europeans are unsure if and when they can trust the information they find on the Internet. With the Alexander von Humboldt Institute for Internet and Society, we conducted an “impulse series” on the topic of digital platforms. At workshops held in Kenya, Thailand and Argentina, we discussed current findings on the fight against disinformation with key players in different global regions.

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

Europe's Future



Executive Board Members:

Dr. Ralph Heck
Dr. Brigitte Mohn
Prof. Dr. Daniela Schwarzer

Program Directors:

Stephan Vopel
Dr. Malte Zabel

The war against Ukraine and today's geopolitical tensions highlight how important it is for the EU to be capable of taking effective action. In times of uncertainty and transformation, Europe must stand together and progress if it is to defend its values and interests. Through our projects, we work to help achieve that goal.

Selected project activities:

Europe's Economy – Strengthening Cohesion in the Single Market

Economic cohesion is one of the prerequisites for having a unified EU capable of taking effective action. Even in times of massive change, the EU must deliver on its promise of prosperity in as many of its regions as possible. We therefore develop proposals for a sustainable European cohesion policy that can reduce the imbalances between Europe's regions and strengthen European unity.

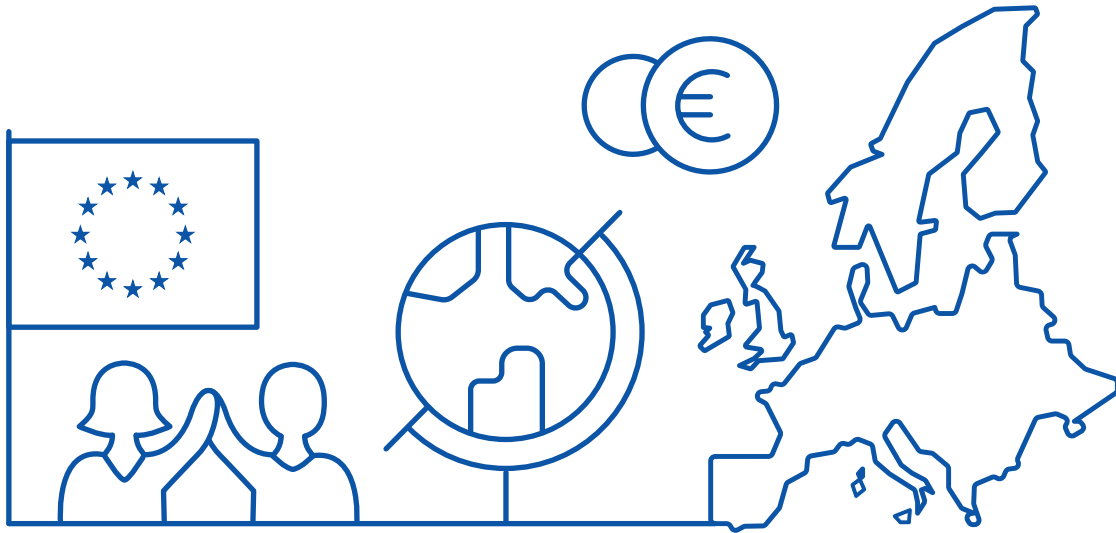
In 2023, we examined how ongoing transformation and the resulting structural changes are affecting economic convergence within the EU. As a result, we published empirical studies on how potential collaboration between European regions could help them benefit from future technologies, and on the energy transition and its economic impact. In parallel, we put a new focus on governance structures and their importance for the effective deployment of EU funds in Europe's regions. To that end, we used a peer-learning approach that looked at selected regions in Croatia, Romania, Italy and Germany.

www.bertelsmann-stiftung.de/europes-economy

Sovereign Europe – Strategic Management of Global Interdependence

China's increasingly aggressive conduct and Russia's war against Ukraine are challenging the European Union. The EU's high level of economic integration has become a risk, leading to critical dependencies that make it vulnerable to political blackmail. Against that background, we examine three geographic regions – China/Asia, the United States, and the European neighborhood – to ascertain how the EU can increase its ability to take action without restricting global trade.

In 2023, following a baseline study on the EU's economic interdependence with its neighbors, we analyzed how Europe can make its trade relations more resilient and less risky. Using animated info graphics, we highlighted the growing competition from China in the Indo-Pacific, the Middle East and North Africa, and developed proposals showing how new partnerships for the generation of green energy could lead to win-win relationships, especially in the Southern European neighborhood. Together with partner organizations, we analyzed the profits being made by German investors in China and how much of those earnings are repatriated to Germany. The findings show that Germany is less economically dependent on these financial resources than is commonly believed and that the European single market remains much more important than China in this respect.



In addition, in two analyses carried out together with the Vienna Institute for International Economic Studies, we examined Ukraine's current readiness to join the EU and developed recommendations for how investments in the country's reconstruction can be coordinated with the economic transformation necessary for its accession.

With the help of the RANGE crowdsourcing platform, we identified trends in transatlantic relations and created forecasts on issues of strategic importance. In addition, together with a Transatlantic Expert Group, we developed guardrails for sustainable EU-US policy approaches and discussed them in a series of policy briefs.

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 2023, we focused primarily on Russia's war against Ukraine, looking at how the EU's citizens feel about efforts to provide Kyiv with political support. We released several publications which showed that a relatively stable majority

of people in the EU believe that European values are also being defended in Ukraine and that supporting the country is the right thing to do.

www.eupinions.eu

US-German Futures Forum

During the 2023 Munich Security Conference, the Bertelsmann Stiftung, together with the US Embassy in Berlin and Amerikahaus Munich, organized a US-German Futures Forum event on the topic of technology and security in the current Ukraine conflict. Participants included German Cyber Ambassador Regine Grienberger and US Principal Deputy National Cyber Director Kemba Walden. At the event, an intergenerational panel of experts from government, the private sector and think tanks discussed transatlantic cooperation and issues of cyber innovation and cyber security in light of potential conflicts.

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

Health Care



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, regional models for providing integrated care, and the promotion of health literacy.

Selected project activities:

Digital Transformation in Health Care

The digitalization of the German health-care system is gaining momentum thanks to the introduction of the electronic patient record (elektronische Patientenakte – ePA) and electronic prescriptions. Through this project, we want to support a digital transformation that is both sustainable and truly beneficial for those who use the system.

Automatically providing people with an ePA and allowing them to opt out is essential for moving the digitalization of health care forward in Germany. Our representative survey showed that there is broad public support for taking this step and for allowing data to be used for research purposes. The breakthrough of the ePA also depends on the successful repositioning of the company responsible for developing it, gematik GmbH, as a digital health-care agency. To provide input for the law governing digital health care drafted by the Federal Health Ministry, we examined examples of international best practice and made proposals for gematik's strategic framework and potential new responsibilities.

Together with our board of medical experts, we have developed a procedure for assessing the impact of digital apps on health-care provision, thereby offering guidance to practitioners prescribing the use of such apps. Experience gained

through the procedure has enriched the debate on fast-tracking the approval process for digital apps. Key findings have been taken up by the Central Research Institute of Ambulatory Health Care in Germany.

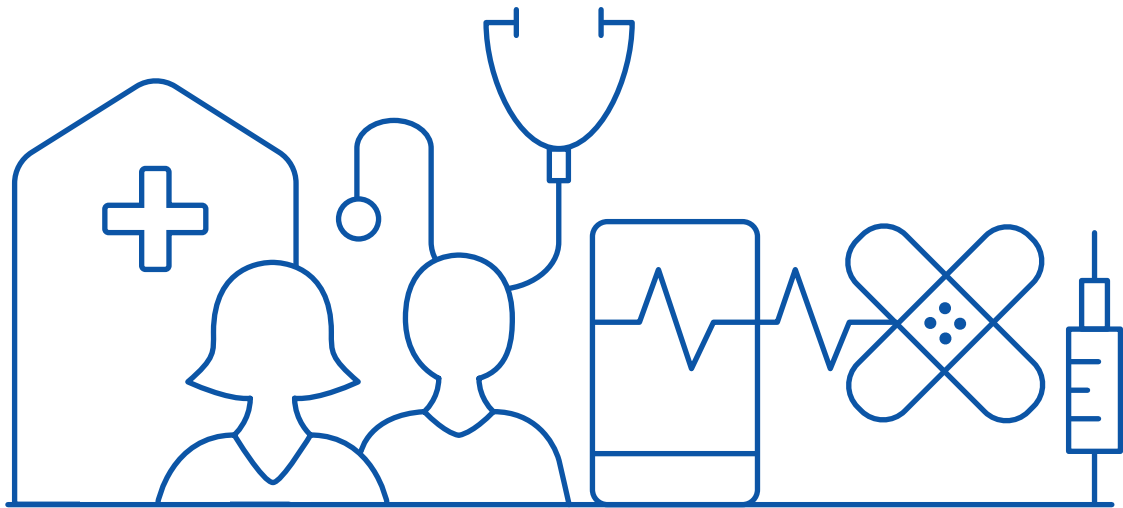
www.bertelsmann-stiftung.de/digitale-transformation-im-gesundheitswesen

Towards Quality-Oriented and Patient-Centered Health Care

Patient-reported outcomes (PROs) – assessments by patients of how they perceive their own health and how successful their treatments have been – are not regularly used in Germany. Yet they are important for improving individual therapies and the quality of health-care provision overall. Through this project, we work to ensure that PROs are systematically collected and used, since this is the only way to be sure that health care is provided in a way that truly reflects patients' needs.

To promote their use in Germany, we published a magazine that documents exemplary uses of PROs in hospitals and medical practices. We presented the magazine at a major international conference, together with a position paper jointly written with a group of experts. Based on international research, we also worked with cancer specialists to develop good examples of how PROs can be integrated into routine oncological care in Germany.

www.bertelsmann-stiftung.de/quality-healthcare



Sustainable Supply Structures in Health Care

Our project work shows that Germany's health-care system needs new momentum to transform with a focus on quality provision and actual needs. Knowledge transfer and support for local stakeholders are crucial for the success of this complex transformation.

We have identified examples of successful transformation and documented them in clear, comprehensible feature stories. Together with stakeholders, we designed a series of workshops for those stakeholders who are taking responsibility for health-care provision locally. The events focus on transferring knowledge from experienced individuals to those who are just beginning the journey of transforming their health-care structures. The main topic at our first workshop in the city of Balve was repurposing a closed hospital into a successful health-care campus. Participants included mayors, county officials, health authorities and regional representatives of medical associations and health insurance companies.

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

Trusted Health Ecosystems

Through this project, we advocate for the creation of a just and inclusive digital health-care system. As part of our commitment to this goal, we've developed a vision of a national health platform that fosters inclusive health in the context of trusted digital spaces.

In 2023, we presented the concept behind our platform to the professional health community for the first time, making it available on a German- and English-language website, which serves as the central location for information and feedback. In particular, our prototype for a "Patient Information Pathway," the heart of the platform, received a wide range of responses from stakeholders and began bringing together key players from Germany's system of self-administrated health care to engage with our approach. The project also established an international network of experts to help ensure the quality of health-related information. A partnership with the Digital Transformations for Health Lab and alliances with WHO and the World Health Summit have laid the foundation for the project's international orientation and scaling.

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

Sustainable Social Market Economies



Executive Board Member:
Dr. Ralph Heck

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

Ensuring the social market economy remains a reliable model for future generations means transforming it into a “sustainable social market economy” – a climate-neutral and resource-conserving economy that is competitive, provides good job opportunities and enables social participation.

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

www.sustainabilitytransformation.org

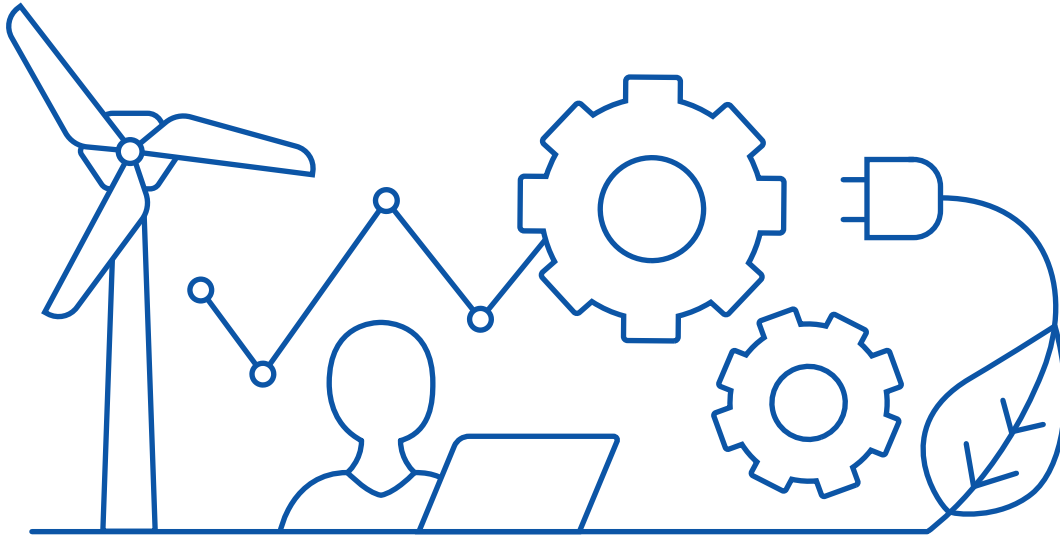
Fostering Innovation and Entrepreneurial Dynamism

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. In 2023, the project’s proposals for better, mission-oriented governance were very well received by decision makers in the Federal Chancellery and government ministries and have become a point of reference in the innovation policy debate.

Employment in Transition

Using our Job Monitor – which provides a monthly picture, down to the regional level, of the skills needed on Germany’s labor market – we show the ways people can acquire future skills and good jobs, and we highlight the trends that are changing the world of work. We make training requirements for green jobs and future competencies transparent and we develop options for pinpointing partial qualifications. Our tools, such as MYSKILLS and meine-berufserfahrung.de, make it easier to assess individual skill sets and to find attractive, promising occupations. At the same time, we analyze current developments such as changes in the automotive sector to identify interim paths for workers during the transition to e-mobility. We respond to structural change and the shortage of skilled labor with innovative ideas for labor market and further education policies, along with proposals for integrating



more older workers and women into the workforce.

- ☐ www.jobmonitor.de
- ☐ www.meine-berufserfahrung.de
- ☐ www.bertelsmann-stiftung.de/beschaeftigung-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. 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

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

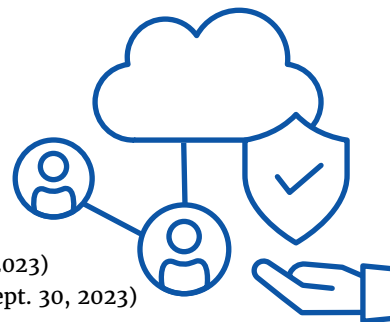


Executive Board Members:

Dr. Ralph Heck
Dr. Brigitte Mohn

Program Directors:

Martin Hullin (since Oct. 1, 2023)
Ralph Müller-Eiselt (until Sept. 30, 2023)



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:

reframe[Tech] – Algorithms for the Common Good

Technology development should focus more on serving the common good – with that mission, this successor to the Ethics of Algorithms project launched in July 2022. The project team analyzes how the risks stemming from algorithmic systems and artificial intelligence can be reduced and how ethical principles can be introduced into everyday practice. In addition, reframe[Tech] taps 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. The Upgrade Democracy project – a joint endeavor with the foundation’s Democracy and Social Cohesion program – develops proposals for how we can become better prepared for the challenges resulting from digital life. Our opinion study *Disinformation: A Challenge for Democracy – Attitudes and Perceptions in Europe* shows that Europeans are unsure if and when they can trust the information they find on the Internet. With the Alexander von Humboldt Institute for Internet and Society, we conducted an “impulse series” on the topic of digital platforms. At workshops held in Kenya, Thailand and Argentina, we discussed current findings on the fight against disinformation with key players in various global regions.

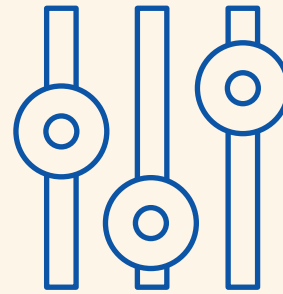
www.bertelsmann-stiftung.de/upgrade-democracy-en

Center for Data Management



Executive Board Member:
Dr. Ralph Heck

Director:
Carsten Große Starmann



We make high-quality data available to our own project teams and the public. Our data support empirically based discussions and data-based analyses. We raise awareness of open data's communal benefits and highlight the importance of diverse data for transparency and informed societal decision-making.

Selected project activities:

Data Science Lab


Robust data are indispensable for a digital transformation that serves the common good. Freely available, high-quality datasets are a key element in fair algorithms. They also make it possible for journalists and scientists to contribute to democratic discourse, and they facilitate evidence-based decisions on all policy levels. We are committed to expanding the data ecosystem and its focus on the common good by publishing (open) data ourselves and supporting public administrators and civil society in making more (open) data available.

As an in-house service provider, the Data Science Lab (DSL) supports the foundation's projects by deploying the tools that data science has to offer, such as data engineering and data analysis. In addition to preparing and evaluating data, the DSL promotes organizational learning, structures capacity-building and establishes internal and external networks and partnerships. As a result, the DSL not only works intensively with data, but also provides structural impulses on a regular basis for further developing the organization. The goal is to expand and shape data intelligence for the foundation.

Data for Society

Demographic change, climate change, the energy crisis, the mobility transition – shaping a sustainable and livable society requires having a robust data basis. To make informed decisions, we need sufficiently well-prepared data. Our project is committed to raising awareness of the importance of (open) data for the common good and overcoming the barriers that prevent people from accessing such data.

We do this using three components: Through the Community Roadmap data portal, open data are made available for download in a series of visualizations. Through the Municipal Sample Data Catalogue, we increase awareness of the open data published by Germany's communities while supporting the latter in providing access to their data, for example by developing guidelines and organizing events for exchanging ideas and know-how. Finally, we are currently working on an initiative to promote the use of open data by and for civil society.

 www.bertelsmann-stiftung.de/ZDM

Center for Sustainable Communities



Executive Board Member:
Dr. Brigitte Mohn

Director:
Dr. Kirsten Witte



The Center for Sustainable Communities supports municipalities in implementing the United Nations 2030 Agenda for Sustainable Development. To that end, we cooperate closely with external stakeholders and the foundation's programs.

Selected project activities:

Supporting Sustainability Management

On our SDG portal, we visualize indicators and data on the United Nations' 17 Sustainable Development Goals. The data are accessible as timeseries for all of Germany's counties and municipalities with at least 5,000 inhabitants. Updated annually, the data can be used by local authorities as a basis for their sustainability reports. The majority of the data are retrieved from the Community Roadmap, a Bertelsmann Stiftung data portal, which offers forecast figures on population development as well as a demographic classification.

www.sdg-portal.de/en

www.wegweiser-kommune.de

Network Management for Local Sustainability

We pool expertise and resources in a network that brings together 11 institutions. In the coming year, we will be adding a digital platform to the network that will make it easier for municipalities to find contributions by network partners and develop their own sustainability strategies.

Supporting Engaged Communities

Over 100 municipalities now belong to the Engaged Communities network, which is supported by the Bertelsmann Stiftung and other sponsors. In 2023, the foundation launched a module specifically designed to increase young people's involvement in local sustainability.

www.engagiertestadt.de

Municipal Congress for Actively Shaping Sustainability

Together with Engagement Global's SKEW – Service Agency Communities in One World, we organized a Municipal Congress last summer in Potsdam. Participants included Minister of State Sarah Ryglewski and 150 other stakeholders mainly from local governments, but also from the state and federal levels.

Mid-Term Review: Implementing Agenda 2030 at the Local Level

As part of the Municipal Congress, we published and discussed our mid-term review of Germany's efforts to implement Agenda 2030 at the local level. In addition to an evaluation of data from the SDG portal, the review contains findings from a survey, along with assessments of municipal sustainability reports. The results were mixed: There are innovative municipalities leading the way, but overall Germany's communities must become faster and better if they want to achieve the sustainability goals by 2030. The leading umbrella organizations representing Germany's municipalities used the mid-term review as an opportunity to issue a joint interim assessment. In particular, they called on the federal and state governments to provide more support to their local counterparts.

www.bertelsmann-stiftung.de/agenda-2030-halbzeitbilanz

Financial Report: Sustainable Municipal Finances

The best strategy will prove ineffective if it is not properly funded, which is why having a sustainable financial framework is crucial. In our Financial Report, we examined the current situation in Germany's municipalities and the steps they can take to create sustainable budgets. Our conclusion: Financial resources vary greatly from community to community, which could prevent Germany from achieving its nationwide sustainability transformation.

www.bertelsmann-stiftung.de/kommunaler-finanzreport-2023

Cooperating with Bertelsmann Stiftung Programs

Together with the foundation's programs, we took a closer look at other issues impacting municipalities, such as providing health care in rural areas and the conditions educational professionals face at Germany's preschools and schools, as well as the circular economy, open data and urban diplomacy.

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 experts, 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, centers and projects, Corporate Communications develops dialogues with target groups, ensuring that the messages conveyed are relevant and 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 digital and analogue materials

that document the results of the foundation's efforts. Findings from the foundation'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. 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 research, 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

	<h3>Bertelsmann Foundation North America</h3> <ul style="list-style-type: none">📍 Washington, DC👤 Executive Director: Irene Braam🌐 www.bfna.org <p>📄 28</p>	
<h3>Founders Foundation</h3> <ul style="list-style-type: none">📍 Bielefeld👤 Managing Director: Dominik Gross🌐 www.foundersfoundation.de/en <p>📄 29</p>		<h3>Fundación Bertelsmann</h3> <ul style="list-style-type: none">📍 Barcelona👤 Directors: Clara Bassols, Francisco Belil🌐 www.fundacionbertelsmann.org <p>📄 30</p>
	<h3>Liz Mohn Foundation for Culture and Music</h3> <ul style="list-style-type: none">📍 Gütersloh👤 Chairwoman: Liz Mohn👤 Managing Director: Nadine Lindemann🌐 www.kultur-und-musikstiftung.de <p>📄 31</p>	
<h3>Reinhard Mohn Stiftung</h3> <ul style="list-style-type: none">📍 Gütersloh👤 Executive Board: Christoph Mohn, Dr. Erkan Uysal🌐 www.reinhard-mohn-stiftung.de <p>📄 32</p>		<h3>German Stroke Foundation</h3> <ul style="list-style-type: none">📍 Gütersloh👤 Executive Board: Dr. Michael Brinkmeier, Sylvia Strothotte🌐 www.schlaganfall-hilfe.de <p>📄 33</p>

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

BSt Gesundheit

- 📍 Gütersloh
- 👤 Managing Directors:
Jan Carels, Uwe Schwenk
- 🌐 www.bst-gesundheit.de

📄 28



CHE Centre for Higher Education

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

📄 29



Liz Mohn Center

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

📄 30



PHINEO

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

📄 31



Reinhard Mohn Institute of Management

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

📄 32



Center for Digital Education and Schools in Gütersloh

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

📄 33



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

BSt Gesundheit

BSt Gesundheit is a do tank that focuses on implementing practical innovations in Germany's health-care system. It develops, tests and realizes innovative, scalable solutions. As a partner of the Bertelsmann Stiftung's Health program, it operates the Health Transformation Hub, a platform that supports stakeholders who are actively working to modernize health-care provision in Germany.

Since its founding in September 2023, BSt Gesundheit has begun operating the Health Transformation Hub and launched its first pilot projects. In the initial phase of the project High-Performance Health Regions, for example, the project team is working with regional stakeholders to determine how health care can be organized to include all relevant service sectors and digital support systems. In addition, BSt Gesundheit has used its expertise and practical findings from Weisse Liste – the online portal that has compared the quality of hospitals and nursing facilities for years – to help pave the way for Germany's new Hospital Atlas. Enshrined in the Hospital Transparency Law passed in 2023, the interactive atlas is scheduled to go

online in 2024. Both the new law and the atlas will make it easier for patients to find the medical facility that is right for them.

Managing Directors:

Jan Carels, Uwe Schwenk

www.bst-gesundheit.de

CHE Centre for Higher Education

CHE provides guidance on studying at university for both traditional and non-traditional 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 offers them facts and figures, as well as innovations and solutions. The latter include approaches to integrating post-secondary offerings, for example by creating the still-lacking interfaces that are urgently needed to facilitate transitions between Germany's different systems of academic and occupational/vocational education. Through its Hochschulforum Digitalisierung, CHE 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 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's further education offerings and training courses for university managers have not only proven successful in Germany, but also in Asia and Africa. The only one of its kind in Germany, CHE's course "Leadership as an Opportunity" supports vice-presidents and pro-rectors in carrying out their leadership duties.

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 from the region of East Westphalia-Lippe, the heart of Germany's *Mittelstand*. It develops and realizes initiatives that are shaping the region's digital future and serves as a blueprint for building startup ecosystems outside of metropolitan areas throughout Germany.

The Founders Foundation fosters, educates and promotes entrepreneurs in the successful creation of 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. So far, over 950 talented entrepreneurs have benefitted from one of the organization's startup programs.

The Founders Foundation currently focuses on two sectors. First, on ideas and business models along the industrial value chain. Over 50 percent of these startups are based in East Westphalia-Lippe and

92 percent feature a B2B business model. They are increasing the region's profile and facilitating an innovation transfer that is helping ensure the location's long-term competitiveness. Second, the project EdTech Next, which is also funded by North Rhine-Westphalia's Ministry of Economic Affairs, has been supporting entrepreneurs in the educational sector since 2022.

In total, approximately 100 startups have attracted over €82 million in investments and created more than 740 jobs.

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 2023, more than 170 companies offered guidance activities, benefitting some 15,000 school students.

With its network Alliance for Dual Vocational Training, Fundación Bertelsmann helps anchor high-quality dual vocational education programs in Spain. 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. Fundación Bertelsmann is now supporting key stakeholders during the law's implementation phase. In 2023, Ambassadors for Dual Vocational Education, a network initiated by the foundation, was expanded to 13 of Spain's 17 regions in cooperation with the Chamber of Commerce and Industry and with support from the European Social Fund.

Directors:

Clara Bassols, Francisco Belil
www.fundacionbertelsmann.org

Liz Mohn Center

Through its events, studies and expertise, the Liz Mohn Center promotes the quality of leadership in politics, business and culture. It focuses on the areas of international understanding and business – with an emphasis on questions of contemporary leadership – as well as the power of culture and global talents.

The Liz Mohn Center gGmbH was founded in 2022 as an initiative of the Bertelsmann Stiftung, continuing 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 supports decision makers in leading sustainably and responsibly, increases understanding between nations and cultures, and promotes young talents from different areas of society. As a result, it initiates and supports international events such as the Trilogue Salzburg, projects addressing economic topics

that highlight questions of contemporary leadership, as well as multiple cultural initiatives.

President:

Liz Mohn

Managing Directors:

Dr. Jörg Habich,
Matthias Meis (until Sept. 30, 2023)
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 supported 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

PHINEO is committed to helping create an open, sustainable and peaceful society in which people work together to have a meaningful impact by doing good.

PHINEO supports all of those who want to achieve a positive social impact: companies, startups, foundations, the public sector, philanthropists, investors and, of course, nonprofit organizations. At the same time, PHINEO makes its own contribution to societal and ecological transformation.

It accomplishes this in four ways:

1. As an analytics specialist, PHINEO makes social impact visible.
2. As an impact consultancy, PHINEO provides guidance and advice to all of those needing support.
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 has been one of PHINEO's shareholders since it founded the nonprofit organization 13 years ago.

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 co-operation 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 leadership 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 do not depend on their cultural, social or economic background. Against this backdrop, its activities are aimed at improving the quality of education in daycare centers 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. 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 2023, a special focus was put on the project Read Along, which has introduced reading aloud in Gütersloh's primary and special-needs

schools. Taking place four to five times a week, the ongoing lessons in reading fluency have had a positive impact on students' reading speed and comprehension. Given the clear outcomes, other school districts are planning to introduce the project in their own schools. All of the foundation's offerings are developed and implemented together with local partners.

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, through its work it also contributes ideas and expertise for further developing 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

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 advocating for better participation and educational opportunities for young people 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, all of the district's 18 school boards and their over 100 schools had joined the cooperative project for promoting digital education in schools. Local roundtables have also been established, enabling participants to exchange

information and coordinate activities. In addition, numerous training courses have been 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 as a way of sustainably anchoring its support programs in the region. The training course "School Development: Learning and Teaching in a Digital Culture" was a main focus in 2023, and 20 schools have now participated in the course.

Managing Directors:

Rüdiger Bockhorst, Christian Ebel,
Katja Hattendorf, Oliver Vorndran
www.digitale-schule-gt.de

OUR ORGANIZATION IN 2023





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, centers and special projects) and contributions to affiliated nonprofit organizations.

Total expenditures

Preliminary expenditures for the 2023 fiscal year totaled €75.6 million. Due largely to higher expenditures for our projects and increased contributions to our affiliated nonprofit institutions, expenditures in 2023 were €4.3 million more than the year before. Since its inception, the Bertelsmann Stiftung has made ca. €1.9 billion available for nonprofit activities.

Programs, centers and special projects	2022		35,490
	2023		38,693
Contributions to affiliated nonprofit institutions	2022		16,826
	2023		17,573
Program-related services	2022		4,514
	2023		4,504
Communications	2022		5,299
	2023		5,379
Administration	2022		9,132
	2023		9,442
Total expenditures	2022		71,261
	2023		75,590

* 2022 data: audited / 2023 data: preliminary (as of February 16, 2024)

Program expenditures*

In its 2023 fiscal year, the Bertelsmann Stiftung invested €38.7 million directly in its program activities, an increase of €3.2 million over the previous year.

Programs and special projects	2022	2023
Education and the Next Generation	8,529	7,242
Democracy and Social Cohesion	5,896	5,325
Europe's Future	4,134	4,382
Health Care	2,782	3,664
Sustainable Social Market Economies	9,017	10,980
Digitalization and the Common Good	1,546	1,716
Center for Data Management	897	1,681
Center for Sustainable Communities	1,550	1,635
Special projects**	1,139	2,067
	35,490	38,693

Affiliated nonprofit institutions*

In 2023, the Bertelsmann Stiftung's contributions to affiliated nonprofit institutions increased by approximately €0.7 million from the previous year to €17.6 million. In addition, an endowment of €53.3 million was made to the Liz Mohn Foundation. In the future, this institution will bring together the activities of the former Liz Mohn Foundation for Culture and Music and the Liz Mohn Center.

Affiliated nonprofit institutions	2022	2023
International foundations		
Bertelsmann Foundation North America	3,128	3,031
Fundación Bertelsmann, Barcelona	2,384	2,567
Shareholdings		
CHE Centre for Higher Education	1,820	1,820
Founders Foundation	3,000	3,000
PHINEO	650	750
BSt Gesundheit (formerly: Weisse Liste)	1,000	1,172
Center for Digital Education and Schools in Gütersloh	906	1,088
Partners		
Liz Mohn Center / Liz Mohn Foundation for Culture and Music	3,639	3,670
German Stroke Foundation		146
Reinhard Mohn Institute of Management	300	328
Contributions to affiliated nonprofit institutions	16,826	17,573
Total (programs, special projects and affiliated nonprofit institutions)	52,316	56,265

* 2022 data: audited / 2023 data: preliminary (as of February 16, 2024)

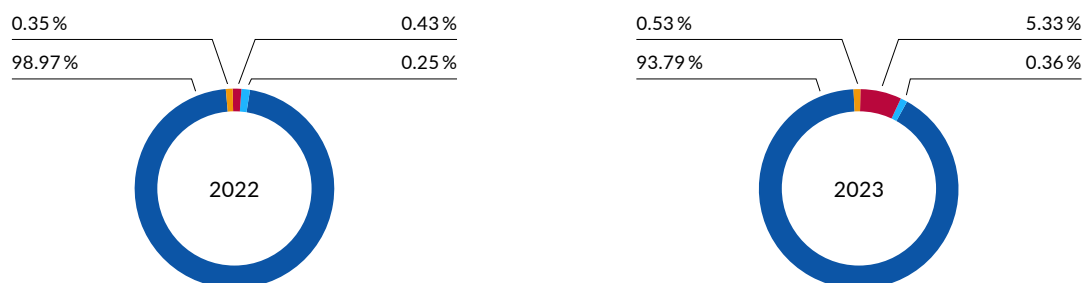
** Including expenditures for interdisciplinary projects

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 €152.9 million in fiscal year 2023. An additional €10.1 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 2023 fiscal year, the foundation therefore had €163.0 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 2023, these reserves were increased by €53 million to €665 million.



	2022	2023
● Investment income	157,035.8	152,879.3
● Income from partnerships, donations	552.6	858.4
● Capital income	681.5	8,680.5
● Other income	400.2	581.0
Total income	158,670.1	162,999.2

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 makes it possible 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 strategic asset allocation based on current market conditions and the foundation's investment guidelines.

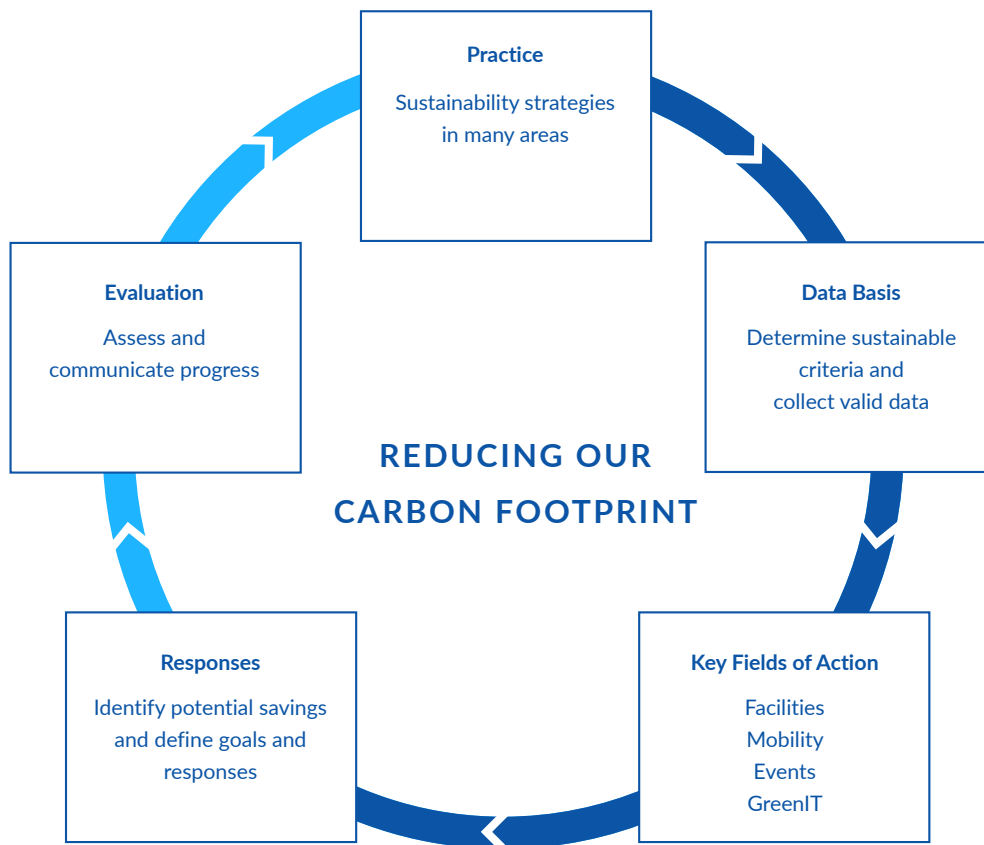
* 2022 data: audited / 2023 data: preliminary (as of February 16, 2024)

ENVIRONMENTAL – CARBON FOOTPRINT

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, including by adhering to ESG (environmental, social and governance) criteria. We 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 reducing the Bertelsmann Stiftung’s carbon footprint.



Where do we stand?

Following a systematic stocktaking, we have assembled the relevant key indicators and are focusing on those areas and activities at the foundation that have a decisive impact on sustainability.

Bertelsmann Stiftung’s CO2 emissions in tons	2023	2,600*
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* Calculation is based on the Gütersloh headquarters and includes extrapolated values.

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?

Facilities

We have tracked the energy consumed at our facilities for a number of years in order to identify potential savings. The use of energy from renewable sources is of particular importance, and we now purchase only green electricity. We also identify areas with high levels of energy consumption and take steps to optimize them, for example by systematically upgrading pumps to high-efficiency models and replacing conventional lighting with LED technology. Moreover, the measures introduced in the winter of 2022/2023 in response to the energy crisis have led to significant savings in heat and electricity.

The foundation's outdoor areas are highly diverse in terms of flora and fauna. We further promote this diversity by planting flower borders and cultivating green spaces. These outdoor areas support the storage of CO₂.

Mobility

A key focus at the foundation is raising awareness among our employees of the need to use environmentally friendly transport. To that end, we offer them discounted public transit tickets, flexible working conditions and the possibility of borrowing or leasing bicycles, as well as charging stations for electric vehicles and parking spaces reserved for carpools in preferred locations. A working group organized by the foundation's employees regularly provides suggestions to help people reflect critically on the topic of mobility.

Our employees generally travel by train or public transport when taking business trips within Germany. Our "Environmentally Friendly Travel Guide" provides a wealth of information on how to travel in a way that is more climate-friendly.

Events

Events are a crucial medium for communicating what we do to the public. To that end, we organize everything from small workshops to large conferences, ceremonies and concerts. In the future, we will be planning and realizing these events sustainably. Various aspects will be taken into consideration, including catering, travel planning, the selection of locations and service providers, and the responsible use of resources.

We carry out pilot projects to systematically identify the carbon footprints of our events, including potential ways to reduce and avoid emissions, and to offset unavoidable emissions. The emissions generated by participants as they travel to our events are a particular challenge, since they account for the largest share of each event's carbon footprint.

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.

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

SOCIAL – HUMAN RESOURCES

The foundation brings together committed employees with a wide range of knowledge, skills and abilities. Only together can we address social challenges at an early stage and have a sustainable impact on society. That is 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 and contribute in a way that adds value to the foundation's work.

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 specialists to shape personal development opportunities, thereby determining possible career paths and development options. One of our priorities here is providing equitable compensation (“equal pay for equal work”). Moreover, 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.

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 the forward-looking acquisition of talent – for example, the 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 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.

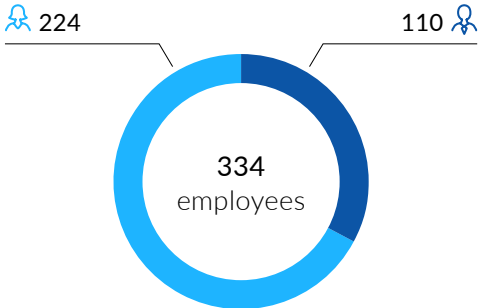
Diversity and inclusion

Diversity and inclusion 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.”

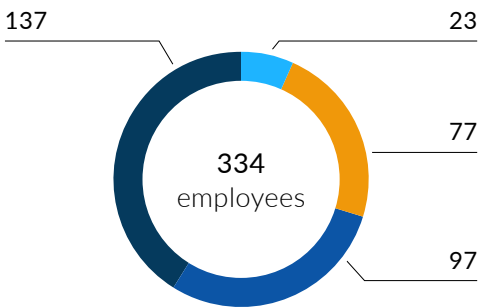
Work-life balance and health promotion

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 flexible working hours, 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.

Employees*



female
male



< 30 years
30-39 years
40-49 years
≥ 50 years
∅ avg. 45.6 years

* Figures do not include employees at affiliated nonprofit institutions.

GOVERNANCE – 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 it 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 their 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. In the event that an in-house contact person does not seem suitable, all employees also have the possibility of contacting an external ombudsperson appointed by the Bertelsmann Stiftung. There are no repercussions if an employee shares information about suspected misconduct.

Investments

The Bertelsmann Stiftung also takes social responsibility and sustainability into account when investing its assets. For more than 20 years, we have not invested in businesses active in the tobacco, alcohol or illegal arms industries. Moreover, we have developed specific criteria which are based on the values expressed in our bylaws and mission statement and which are taken into account in the exclusion lists we update several times a year. In particular, we focus on the issues of human rights, corporate governance and entrepreneurial accountability. Our ethical and sustainable investment strategy distinguishes between businesses and countries, as both bear responsibility for society's future but in different ways. When deciding to exclude a country, the foundation considers findings from the Bertelsmann Transformation Index (page 19), among other factors.

GOVERNING BODIES

Executive Board



Dr. Ralph Heck
(Chairman)



Dr. Brigitte Mohn



Prof. Dr. Daniela Schwarzer
(since May 1, 2023)

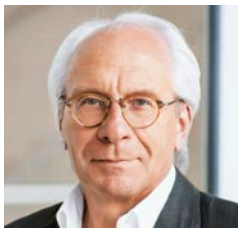
Board of Trustees



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



Liz Mohn
(Honorary Member)



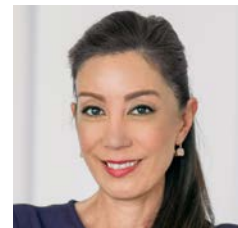
Wolf Bauer



Carsten Coesfeld
(until Dec. 31, 2023)



Thomas Coesfeld



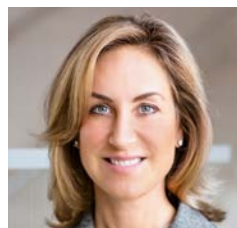
Saori Dubourg
(since July 1, 2023)



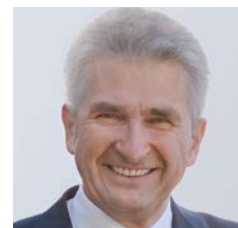
Arancha González Laya
(since July 1, 2023)



Christoph Mohn



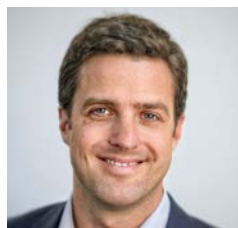
Carolina Müller-Möhl



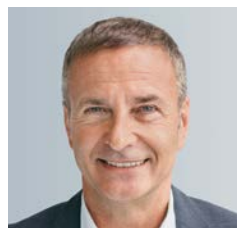
Prof. Dr. Andreas Pinkwart
(since June 1, 2023)



Dr. Viviane Reding
(until April 30, 2023)



Matthias Schulz
(since Sept. 1, 2023)



Bodo Uebber


Executive Board


The members of the Bertelsmann Stiftung Executive Board are jointly responsible for the foundation's activities and operations. In 2023, the Executive Board members were Dr. Ralph Heck (Chairman as of August 1, 2020), Dr. Brigitte Mohn and Prof. Dr. Daniela Schwarzer.


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; member of the Group Management Committee at Bertelsmann


 Thomas Coesfeld, CEO of BMG; member of the Group Management Committee at Bertelsmann


 Saori Dubourg, former member of the Board of Executive Directors at BASF SE; member of the German government's Council for Sustainable Development

 Arancha González Laya, dean of the Paris School of International Affairs at Sciences Po; former Spanish Minister of Foreign Affairs, European Union and Cooperation


 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; member of the Board of Directors of Fielmann AG; member of the Foundation Board and Advisory Board of Avenir Suisse, the University of Zurich and the University of St. Gallen, among others

 Prof. Dr. Andreas Pinkwart, Professor of Innovation and Technology Management at TUD Dresden University of Technology; former Deputy Minister President of the State of North Rhine-Westphalia

 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

 Matthias Schulz, Artistic Director of Staatsoper Unter den Linden

 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, 2023

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Irene Braam
 www.bfna.org

BSt Gesundheit

 **Executive Directors:**
Jan Carels, Uwe Schwenk
 www.bst-gesundheit.de




CHE Centrum for Higher Education

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


Founders Foundation

 **Executive Director:**
Dominik Gross
 www.foundersfoundation.de/en




Fundación Bertelsmann

  **Directors:**
Clara Bassols, Francisco Belil
 www.fundacionbertelsmann.org

Liz Mohn Center

 **Executive Directors:**
Matthias Meis, Dr. Jörg Habich
 www.liz-mohn-center.de

Liz Mohn Foundation for Culture and Music

 **Chairwoman:**
Liz Mohn
 **Executive Director:**
Nadine Lindemann
 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

Center for Digital Education and Schools in Gütersloh



Managing Directors:

Rüdiger Bockhorst, Christian Ebel,

Katja Hattendorf, Oliver Vorndran



www.digitale-schule-gt.de



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AND PARTNERS FOR THEIR ENGAGEMENT AND
THE SUPPORT THEY HAVE GIVEN OUR WORK
THROUGH THE YEARS.**

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