

SOUTHERN PHILANTHROPY, SOCIAL JUSTICE AND HUMAN RIGHTS

A CIVICUS DISCUSSION PAPER

CIVICUS

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CIVICUS is a global alliance of civil society organisations and activists dedicated to strengthening citizen action and civil society around the world. Founded in 1993, CIVICUS strives to promote marginalised voices, especially from the Global South, and has members in countries throughout the world.

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1. Introduction

This discussion paper addresses the question of how philanthropists in the global south could better support the activities of civil society organisations (CSOs) to promote human rights and social justice, including actions that focus on advocacy, accountability and mobilisation; for shorthand here, these are referred to as the change-seeking activities of CSOs. This paper is informed by interviews conducted with 12 representatives of philanthropic foundations and institutions, based in and operating in the global south, in which they were asked to reflect on their practices and the challenges they encounter. A seminal aim of the paper is to encourage a model of 'transformational philanthropy' that uses a rights based approach rather than 'charitable philanthropy,' which addresses important gaps in society but does not seek or induce systemic change. In this context, the paper aims to identify some of the key questions facing southern philanthropists and civil society, and frame a broader discussion on what more can be done to support change seeking activities.

2. Context: current resourcing challenges of CSOs

The debate about how philanthropy can support change-seeking civil society activity has become a more urgent one for CSOs in recent years as traditional CSO funding sources have come under renewed challenges, sparking a search for alternatives. There are two trends in particular that are relevant here: firstly, funding from traditional donors, particularly from the donor agencies of global north governments, is becoming more volatile and unpredictable, and secondly, the restrictions that states place on the ability of CSOs to receive funds from international sources are increasing.

The global financial crisis that began in 2008 disrupted established patterns of domestic and international financing. For numerous global south CSOs that received financial support as part of the Official Development Assistance (ODA) provided by member states of the Organisation for Economic Cooperation and Development (OECD), the financial crisis brought a fresh challenge to their funding bases. ODA was cut back by many donors as an immediate reaction to the financial crisis, and established philanthropic institutions also cut back, leaving CSO funding squeezed. A global study of 640 CSOs around the world found a worsened financial situation for them in 2008-2010 following the crisis.²

¹ The geographic coverage of these foundations includes Brazil, India and South Africa, and countries in the Middle East, North Africa and Sub-Saharan Africa. Some respondents also represented global and regional networks of philanthropic foundations. A full list of those interviewed, their organisations and countries is listed in Annex 1. Interviews took place between July and October 2015.

² Hanfstaengl, Eva-Maria (February 2010). *Impact of the Global Economic Crises on Civil Society Organisations*. Available at: https://ngosocdev.files.wordpress.com/2010/01/full-study-on-impact-of-global-crises-on-csos-2-25-10.pdf

Although the global economy has rebounded to some extent since the financial crisis, ODA appears now to have plateaued, and ODA for civil society is currently being threatened by political changes and pressures in many OECD countries.³ Several European states, including states that have traditionally given proportionately large amounts of ODA to civil society, have recently moved politically to the right. In such contexts, ODA is being more closely linked to the assertion of national interests, particularly economic, trade and foreign policy interests, and priorities of national security and combatting extremism and terrorism. Renewed donor concern with delivering economic and trade advantage is unlikely to lead to increased support for activities that seek human rights and social justice, while concerns with security often play out as an interest in supporting state stability in global south countries, which can enable those states to restrict civil society.

A new development further threatens donor funding for CSOs: several European governments reacted to 2015's upsurge of refugees arriving in European countries by committing to use a larger portion of their development budgets to provide domestic support for newly arrived refugees. Some donors are suggesting that a large proportion of their ODA in the immediate future will be used for refugee reception.⁴ This can only reduce the amount of funding available for global south civil society.

The current trends exacerbate a series of enduring challenges that CSOs often experience in accessing ODA: most funding goes not to civil society but to states and multilateral institutions, and some established donors consistently give very little to civil society; substantial amounts of ODA given to civil society in the global south are channelled through CSOs based in the global north; most funding is given to projects run by CSOs and defined by donors, as opposed to the core costs of CSOs; most project funding is for service delivery activity rather than human rights and social justice actions; larger, well established CSOs find it easier to attract funding and comply with donor reporting requirements than smaller, newer CSOs; and most funding is short-to-medium-term, with long-term funding a rarity, and regular changes of funding policy making it difficult to predict

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³ CIVICUS (forthcoming). State of Civil Society Report 2016. To be published in May 2016.

⁴ See for example: BBC (6 September 2015). *Migrant crisis: UK aid budget will help refugees response — Osborne*. Available at http://www.bbc.co.uk/news/uk-34167271; University of Sussex (11 September 2015). *Analysis: If aid budgets are used to help refugees, is it still foreign aid*? Available at http://www.sussex.ac.uk/broadcast/read/31869; IRIN (18 November 2015). *How the refugee crisis is hurting foreign aid*. Available at: http://www.irinnews.org/report/102225/how-refugee-crisis-hurting-foreign-aid; The Huffington Post (23 December 2015). *Why Slashing Foreign Aid in Europe to Pay for Refugees Won't Help Solve the Long-Term Crisis*. Available at: http://www.huffingtonpost.com/adam-moe-fejerskov/foreign-aid-europe-refugee-crisis b 8869794.html; The Guardian (16 February 2016). *European leaders told to keep aid for poor people, not hosting refugees*. Available at: http://www.theguardian.com/global-development/2016/feb/16/european-leaders-aid-poor-people-hosting-refugees-security-poverty.

funding.⁵ Philanthropic foundations have been accused of offering similar challenges, particularly in providing mostly project based, short-term and service delivery funding.

While new state donors are emerging in the large economies of the global south, such as China, which is now the most significant donor in many Sub-Saharan African states, global south CSOs do not necessarily benefit from this development. OECD members tend, to a greater or lesser extent, to attach human rights conditions when they provide funding to states, which can help to create opportunities for civil society to act and uphold civil society freedoms. But many new donors show no such concerns. Much of the funding they give goes towards large-scale infrastructure projects, typically involving government-to-government cooperation, or partnership with large corporations, which neither benefits nor creates space for civil society, and in some instances even works against civil society interests.

Alongside such restrictions, a growing number of governments are restricting CSOs' ability to receive funds, particularly from foreign sources, often on the pretext of preserving state sovereignty from external interference, or preventing terrorism. ⁶ India's Foreign Contribution Regulation Act requires CSOs to obtain official clearance before they can receive international funds, meaning that the state can block support for groups critical of official policies. In Ethiopia, human rights advocacy groups have largely been forced to close due to the restrictive Charities and Societies Proclamation, which allows only a maximum of 10 per cent of funding to be received from foreign sources. Russia's government requires CSOs that have received funding from abroad to designate themselves as "foreign agents", a term clearly intended to undermine CSOs' credibility in the eyes of citizens. In Mexico, anti-money laundering legislation treats donations to CSOs as "vulnerable activity" creating several intrusive bureaucratic burdens. These are just a few examples of many, and the use of such restrictions is spreading; it can be observed that all of these actions are being imitated by neighbouring states. In addition, domestic measures to restrict civil society funding have been given an inadvertent boost by the actions of the Financial Action Task Force (FATF), an intergovernmental body that works to limit international money laundering and terrorist financing. Under the guise of compliance with FATF standards, governments are able to introduce policies

http://www.civicus.org/index.php/en/media-centre-129/press-releases/2278-civil-society-at-forefront-of-emergency-response-but-faces-dire-threats-and-funding-crisis-says-new-report.

⁵ CIVICUS (2015). *CIVICUS Essay*. In: CIVICUS (2015). State of Civil Report 2015. Available at: http://www.civicus.org/images/SOCS2015CIVICUSEssay.pdf; CIVICUS (2015). *Civil Society at Forefront of Emergency Response but Faces Dire Threats and Funding Crisis, Says New Report*. Press Release. Available at: <a href="http://www.civicus.org/index.php/en/media-centre-129/press-releases/2278-civil-society-at-forefront-of-emergency-php-

⁶ Douglas Rutzen (March 2015). *Aid Barriers and the Rise of Philanthropic Protectionism.* In: International Journal of Notfor-Profit Law, vol. 17, no. 1. Available at: http://www.icnl.org/research/journal/vol17ss1/Rutzen.pdf; UN Special Rapporteur on the Freedom of Peaceful Assembly and of Association (April 2013). *Report on Civil Society's Right to Funding and Resources*. Available at: http://freeassembly.net/reports/funding-report.

that make it harder for CSOs to receive funding.⁷ Philanthropic institutions can also face similar restrictions, and the enabling environment for philanthropy can often be characterised as weak.⁸

These challenges and restrictions are particularly experienced by global south CSOs that prioritise human rights and social justice, because many of them lack strong domestic resource bases. They tend not to have strong membership bases, or be successful in accessing domestic funding from the state and private sector. Domestic funding may not be available, or may be withheld because CSOs are seen as working on controversial issues.

For a healthy and sustainable civil society, CSOs need to have access to diverse and multiple sources of funding, and avoid reliance on single, unpredictable funding sources. The challenges set out above have prompted renewed interest in how domestic sources of funding can be identified to support the change-seeking activities of civil society. The Sustainable Development Goals (SDGs) also place fresh emphasis on the need to mobilise domestic sources of funding, to complement ODA and other sources of funding.

Given this context, this paper outlines philanthropic trends in emerging economies, specifically highlighting the work of some foundations at the forefront of supporting the human rights and social justice work of CSOs. It identifies obstacles that prevent giving to change-seeking causes, and points to some of the practices being used to overcome those obstacles. The paper also describes the challenges faced in the development of a philanthropic environment that would be supportive of change.

3. Philanthropy in the global south: current opportunities and challenges

Although this paper mainly examines emerging, institutionalised forms of philanthropy, it is important to stress that philanthropy is not a new phenomenon in the global south. Every country has its own, established practices of giving for a variety of purposes, typically rooted in local traditions, cultures and religious beliefs.¹⁰ There are also long-established patterns of philanthropic

http://civicus.org/images/SOCS2015 ESSAY9 AntiTerroristFinancingEffectsOnCS.pdf.

 $\underline{\text{http://www.undp.org/content/dam/undp/documents/partners/civil_society/UNDP-CSO-philanthropy.pdf.}$

⁷ Kay Guinane (2015). *The International Anti-Terrorist Financing System's Negative Effect on Civil Society Resources*. In: CIVICUS (2015). State of Civil Society Report 2015. Available at:

The Hudson Institute (2015). *Index of Philanthropic Freedom 2015*. Available at: http://hudson.org/research/11363-index-of-philanthropic-freedom-2015; UNDP (July 2014). *Philanthropy as an Emerging Contributor to Development Cooperation*. Paper prepared by Heather Grady, Independent Philanthropy Advisor. Available at:

⁹ CIVICUS (2015). CIVICUS Essay. op. cit.

¹⁰ Paula D Johnson (2010). *Global Institutional Philanthropy: A Preliminary Status Report*. Available at: http://www.tpi.org/sites/files/pdf/global institutional philanthropy a preliminary status report - part one.pdf.

giving that does not flow through institutions. Such philanthropic heritage continues to influence the ways in which giving is exercised today.

For example, in Latin America, the Catholic Church played a central role in the development of charitable philanthropy, while on the African continent, philanthropy developed indigenous narratives, "such as ubuntu, harambee, ajo, ujamaa, ilima and susu, amongst others, which reflect a diversity of local traditions and practices." In the Middle East, charitable giving has long and deep roots, as Zakat, the third pillar of Islam, is obligatory for believers. 12

Despite diverse economic, political, social and cultural realities, there are also some commonalities in philanthropic giving. Similarities include a culture of philanthropy rooted in religious and cultural traditions, and a currently growing middle class, which suggests fresh potential to encourage giving to support civil society. Alongside established traditions, it is indeed economic growth in the global south that is sparking increased interest in the potential of philanthropy.

The World Giving Index (WGI) 2014, which assesses charitable trends in 135 countries, features several countries in the global south in its top 10 of "giving behaviour". When it comes to donations, the WGI lists India, China, Indonesia, Pakistan, Brazil and Thailand as countries with the largest number of individuals who had donated money in the previous month.¹⁴

Further, the 2014 Global Wealth Report indicates that all regions of the world except for Latin America have experienced a growth in wealth and the number of high net worth individuals in the past year. The stock of wealth owned by high net worth individuals has grown globally over the past five years. Philanthropy is a growing and diverse sector, as is witnessed by the proliferation of philanthropy structures, such as professionalised networks and centres dedicated to philanthropy. The growth of philanthropic institutions in emerging economies could, if accessed, significantly help to address the resourcing challenges outlined above.

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¹¹ Trust Africa, UBS Philanthropy Advisory (2014). *Africa's Wealthy Give Back - A perspective on philanthropic giving by wealthy Africans in sub-Saharan Africa, with a focus on Kenya, Nigeria and South Africa*. Available at: https://www.ubs.com/global/en/wealth-management/uhnw/philanthropy-sustainable-investing/philanthropy-advisory/research-and-videos.html.

advisory/research-and-videos.html.

12 Naila Farouky (2015). *Trends in philanthropy in the Arab region: beyond a charity-based model*. In: CIVICUS (2015). State of Civil Society Report 2015. Available at: http://civicus.org/images/SOCS2015 ESSAY7 TrendsInPhilanthropy.pdf.

¹³ The Guardian (19 April 2014). *Home-grown philanthropy: the rise of local giving in the south*. Available at: http://www.theguardian.com/global-development/2014/apr/19/homegrown-philanthropy-local-giving-global-south.

¹⁴ Charities Aid Foundation (November 2014). *World Giving Index 2014. A global view of giving trends.* Available at: https://www.cafonline.org/docs/default-source/about-us-publications/caf wgi2014 report 1555awebfinal.pdf.

¹⁵ Cappemini , RBC Wealth Management (2015). *World Wealth Report 2015*. Available at: https://www.worldwealthreport.com/download. This report defines high net worth individuals as having investable assets of US\$1m or more.

These developments suggest opportunities for CSOs, but also challenges. There is often a sentiment that the newly wealthy should 'give back' to society, including amongst society and wealthy people themselves. The emergence of new foundations, including individual, family and corporate, can be seen as responding to this notion. However, a significant expansion of institutionalised philanthropy in the global south has yet to translate fully into enhanced support for change-seeking CSO activity.

Part of the reason for this, several of our interviewees suggest, is that global south philanthropy is mostly connected to charitable and corporate initiatives, with support for social justice and human rights advocacy actions much more rare. For example, a 2012 study produced by the Foundation Centre and the International Human Rights Group indicates the paucity of philanthropic foundations that support human rights and social justice actions in the global south. The research analysed 745 foundations around the world that provide grants amounting to US\$1.8 billion to human rights organisations or initiatives. Almost 650 of the analysed foundations were located in North America, while only nine were based in Latin America, seven in Asia and the Pacific, seven in Sub-Saharan Africa, and just one in the Middle East and North Africa.¹⁶

A further enduring challenge comes in the lack of reliable data on global south philanthropy; the above-cited study may at least partly reflect a difficulty in obtaining accurate and up-to-date data on philanthropic trends in the global south, and there may well be small and emerging philanthropic institutions that are been overlooked in research. The very dynamism of the philanthropy sector in emerging economies serves to make analysis and measurement more complex. According to Helena Monteiro of Worldwide Initiatives for Grantmaker Support (WINGS), the need for reliable, high quality, globally "...comparable and readily available data on philanthropy has never been greater." ¹⁷

WINGS' global institutional philanthropy report indicates the scale of the challenge. It identifies that, "Among the key deficiencies: there is no reliable philanthropic data in many countries; where data does exist it often relies on a small sample size or response rate and may not be representative; existing data derives from various projects using different definitions and approaches; there are no standards or norms for institutional definitions, asset valuation, or expenditure accounting; there are few baseline studies that allow analysis of increases or decreases over time; existing data sets are seldom updated." 18

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¹⁶ Foundation Centre, International Human Rights Funders Group (2014). *Advancing Human Rights - Update on Global Foundation Grantmaking*. Available at: http://humanrights.foundationcenter.org.

¹⁷ Helena Monteiro (2015). *Philanthropy infrastructure in a transforming world: current developments*. In: CIVICUS (2015). State of Civil Society Report 2015. Available at:

http://civicus.org/images/SOCS2015 ESSAY19 PhilanthropyInfrastructure.pdf.

¹⁸ Paula D Johnson (2010). op. cit.

Better and more frequently updated data would greatly help to enhance understanding about the influence, impact and challenges of philanthropy. In the absence of this, it is hard to understand accurately how the philanthropic sector could be encouraged to give more support to civil society. With the aim of helping to address the data challenge, the Global Philanthropic Capital Project has set up a working group aimed at improving understanding of giving trends and philanthropic flows globally, regionally and locally.¹⁹

Despite these challenges, our research has identified a number of remarkable initiatives undertaken by innovative foundations in the global south that demonstrate an alternative to the current challenges in CSO funding. There are organisations that are at the forefront of funding human rights and social justice work, and that are aiming to transform the culture of giving in their countries. The added value of such organisations, the innovative perspectives they present on philanthropy, and the challenges they face, are analysed in the following sections.

4. Establishing partnerships through and beyond grant-making

"You cannot do things on your own, you need to structure, you need to partner with others, and grant-making is a brilliant way of partnering with multiple people to achieve shared objectives."

Jenny Hodgson, Global Fund for Community Foundations

Philanthropic foundations may choose to work alone: they may set up, manage and implement their own programmes, directly participate in decision-making processes and work with CSOs only by giving them contracts to provide services. Foundations can also choose to respect the autonomy of CSOs and recognise civil society as a vital force, by awarding grants to activities determined by CSOs, either for their projects or their core operations. A stronger and healthier civil society is encouraged by giving that respects CSO autonomy and enables CSOs to set their own priorities. However, to date, this approach has been rare, and the global south institutional philanthropy landscape has been dominated by institutions striking out alone.

nttp://pnilantnropy.salzburgglobal.org/fileadmin/user_upload/subsites/pnilantnropy/outcomes_and_resources/outcon _gpcp.pdf.

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¹⁹ The Global Philanthropic Capital Project (GPCP) is an unprecedented global effort to address this knowledge gap. It brings together a working group of global experts and is building a coalition of institutional partners around the world to develop and implement a methodology and workplan to track institutional philanthropic capital globally. GPCP's development is being coordinated by The Philanthropic Initiative, Inc. and the Salzburg Global Seminar. More information is available at: http://philanthropy.salzburgglobal.org/fileadmin/user-upload/subsites/philanthropy/outcomes and resources/outcomes

²⁰ The Guardian (19 April 2014). op cit.

The challenge seems to lie particularly with newer philanthropic institutions. Several interviewees noted that, while their foundations, most of which are well-established, provide support to CSOs through grants, many recently established southern-based foundations do not give grants to CSOs. Instead, they prefer to create their own structures to implement projects and programmes. Interviewees highlighted the lack of grant-making foundations in global south countries as one of the main impediments that CSOs face in accessing new sources of funding.

"What we see as a trend, in different parts of the world, is that grant-making is not a common practice; it is not a trend. Take Brazil for example: there is very limited grant-making - what we can see are international foundations making grants in other countries, but this is not a characteristic of local philanthropy. And if you don't have private resources supporting the common good which are embedded in civil society, civil society will not develop." - Helena Monteiro, WINGS

Some argue that this absence of grant-giving connections fosters limitations on both sides: it holds back the potential to develop civil society in the global south, and it also limits the capacity of foundations to effect change, because they do not engage with CSOs that are working on the ground. It also hinders the development of constructive relationships that can grow out of grant-making.

Interviewees believe that grant-making is a vital channel through which resources are provided to actors who are closest to challenges on the ground and are thus qualified to design suitable strategies to deal with them. Grants are "...a very critical [tool of support] — which is probably the core of the partnership, and I am speaking from the perspective of the CSO," comments Amitabh Behar of the National Foundation for India. Additionally, while core funding is too rarely given to human rights and social justice CSOs and groups, it can be pivotal, because it can lead to groups being "...more enabled to not only strategically intervene in a timely fashion but also to maintain their existence," as Samar Haidar of the Arab Human Rights Fund explains.

Simply giving money, however, is not enough. What the money is given for, and with what degree of flexibility, is also important, particularly if philanthropic funding is to be an alternative to official donor funding that may be very prescriptive, with heavy reporting requirements. Bhekinkosi Moyo of the Southern Africa Trust points out that there is a need for "…a combination of more but better financing," and greater flexibility over how resources are employed.

Some interviewees indicate that their institutions seek to build-in flexibility by offering simple, malleable procedures and eligibility requirements, that enable them in particular to reach out to small, nascent and rural-based groups, and CSOs that work on human rights and social justice issues.

For example, Samar Haidar of the Arab Human Rights Fund prefers to speak of "groups" rather than CSOs, allowing them the flexibility to include informal groups, individuals and non-institutionalised organisations that work on human rights, commenting that, "they are nascent and they don't have track records that demonstrate their work, sometimes they don't cooperate with any donors, so this of course poses an additional risk". A balance is struck here between exercising due diligence and enabling opportunities for groups that would not be able to fulfil the requirements of most traditional donors. For the Arab Human Rights Fund, flexibility and continuous technical assistance throughout the process are essential components of its grant-making.

Some foundations also understand that funding is more effective when it is supplemented with non-financial support. The National Foundation for India enhances its grant-making work by also providing capacity building support and networking opportunities for local CSOs. According to Amitabh Behar, work to connect local CSOs and build larger groups, both regionally and thematically, often yields positive results. Similarly, the Southern Africa Trust focuses on knowledge generation and the creation of spaces and platforms for dialogue between, as Bhekinkosi Moyo puts it, "...groups that normally don't speak with each other." The Brazilian Fund for Human Rights is following a similar approach by creating opportunities for partners to engage with well-established organisations, and providing learning spaces for smaller and newer organisations to develop their capacities.

Part of the reason why new foundations often lack similar deep and enabling connections with civil society may lie in the approach and decision-making styles through which global south high net worth individuals tend to have acquired their wealth. Helena Monteiro indicates that the accumulation of wealth in the global south is a recent phenomenon, arising out of entrepreneurial activity that exploits global connectivity. High net worth individuals may expect to run their foundations in the same style that they made their fortunes, leading from the front and directly participating in projects and decision-making, coupled with an eagerness to see immediate returns on investment.

A number of interviewees noted that such leadership styles create a distance between foundations and CSOs. CSOs tend to adopt a more consensual, discursive approach, emphasising that process is important as well as output. Consultation and inclusion, and the transparency and accountability this demands, may however be viewed by some new philanthropists as an obstacle to efficient working, equated with streamlined decision-making styles and an emphasis on results rather than process.

The lesson to be drawn is that private foundations should adopt grant-making models that empower civil society, which means providing resources in flexible ways that speak to priorities that CSOs themselves define, but also offering more than just resources. Foundations can offer capacity development and local connections, and work to influence decision-makers about the need to support and enable civil society.

This added value that foundations can offer will be realised only if there are relationships of trust, built on routines of collaboration with, and transparency between, foundations and civil society. The fact that some of our interviewees offer examples of how to build positive connections been foundations and civil society and provide quality resources suggests that there is potential for greater learning about good practice.

5. New money, old priorities?

"How do we fund our revolutions? We cannot always expect people who have always had power to change power relations." - Theo Sowa, African Women's Development Fund

The choice of problems that philanthropic foundations attempt to solve depend significantly on their analysis of what major challenges face society. These institutions should ideally be open to dialogue and be willing to be influenced by a range of actors familiar with challenges on the ground, so that their priorities reflect a strong understanding of local needs. However, interviewees suggest that new philanthropists often fail to conduct such analysis. Interviewees suggest that if funders fail properly to understand the complexity of the problems they are attempting to solve, then their resulting interventions are likely to prove ineffective.

As Amitabh Behar explains, in India a number of new philanthropists "...have not engaged with the poor, the excluded... They want to look at the problems from their vantage point, they are not really doing the journey of understanding what the real problem is." Similarly, according to Theo Sowa, "People decide to give in relation to what their vision, or to what their version of the problem, is."

Often, the structural causes of poverty and inequality are not visible to those in positions of privilege and power. There may be a tendency to think in terms of charitable or technocratic fixes, rather than solutions that challenge existing power structures. In some instances, there may also be deep rooted ideological reasons for not wanting to whole-heartedly support human rights and social justice initiatives which may upset existing power relations.

"If all the actions are planned by whoever owns the resources in highly inequitable societies, it is hard to imagine how inequality will decrease. It is difficult for a person who is standing in a position of great wealth to plan and implement actions to fight against social disparities." - Helena Monteiro, WINGS

This perception is reflected in a recent study that assessed the areas of support most commonly chosen by high net worth individuals in the African continent. The study noted that decisions on giving in new philanthropic institutions were often made in consultation with close family members of the philanthropist, and concluded that:

"Education and health attracted, unsurprisingly, the most support. These are both perceived as areas of urgent need and key springboards for African development. The findings also show that many wealthy individuals are more inclined to support service provision in these areas, rather than focusing on the systemic issues underlying the lack of delivery even if they acknowledge the need for it."²¹

It is important to note that this tendency is not only seen in the global south, and there are other reasons for this than the backgrounds and beliefs of those involved in private foundations. Work to advance human rights and social justice, including advocacy and accountability action, has less tangible outcomes than service delivery activities, and interventions in these areas typically have longer timeframes, making them less attractive for donors that want to see results from investment.

Bhekinkosi Moyo of the Southern Africa Trust points to the missing link between the private sector and what he describes as "transformational philanthropy," due to the fact that donors are still very much attached to what he calls "material philanthropy", a perspective on giving where tangible results must be observed, rather than a contribution made to profound change. He makes the point that, although important impact can result from building a school, such an effort "...can only contribute to social justice issues if it is linked to particular transformational issues."

"People don't want to get involved in politics and messy issues; they are interested in impact initiatives: providing bursaries, for example – which doesn't involve systemic interventions. Bursaries are not going to change the world, and the world needs changing. It is gratifying to give a poor child a bursary because donors get immediate gratification as they are filling the gap in service delivery." - Audrey Elster, The RAITH Foundation

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²¹ Trust Africa, UBS Philanthropy Advisory (2014). op. cit.

A number of interviewees indicated that part of the change needed is to encourage foundations to go beyond immediate and tangible projects, which can be understood as charitable philanthropy, into longer-term change inducing developmental philanthropy and transformational philanthropy.

Bhekinkosi Moyo argues that charitable, developmental and transformational philanthropy should be seen as lying on a spectrum of interventions, which, to a greater or lesser extent, can foster transformational impact. Jenny Hodgson similarly highlights, "There is a big untapped area between service delivery and social justice which actually links all of these things, where service delivery is seen in the context of social justice. And social justice is around people having the right to basic services, not just kind of political rights." The potential this suggests is that foundations engaged in charitable philanthropy can be nudged to move further along the spectrum, towards more transformational activities.

The politics of giving decisions also must be acknowledged and explored. For example, corporate philanthropy is coming to greater prominence in the global south, due in large part to recent economic growth in many emerging economies, and growing awareness of the concept of corporate social responsibility. A recent study has shown that in Latin America, "…corporations dominate institutional philanthropy and [are] perceived as leaders in social investment."²²

By their very nature, foundations that derive their funds from private enterprises or private wealth can be expected to be unlikely to tackle the root causes of social injustice. To advance social justice implies questioning the economic and political status quo in which social injustice is grounded.

Fighting systemic and structural injustices can also lead to confrontations with governments. For example, Amitabh Behar of the National Foundation for India underlines that most new foundations in India are corporate foundations, which refrain from engaging on topics that would displease the government. This presents a significant challenge in the current context in India, where social justice and environmental CSOs are being increasingly smeared by the current government as opposed to economic development.²³ Even when private foundations are socially more concerned and connected to issues of structural injustice, a fear of damaging relations with the government may deter them from taking on sensitive political issues.

²² UBS, Hauser Institute for Civil Society (2014). From Prosperity to Purpose. Perspectives on philanthropy and social investment among wealthy individuals in Latin America. Available at: http://ubs-epaper.com/from-prosperity-to-purpose/2015-en/?p=182.

purpose/2015-en/?p=182.

²³ CIVICUS (15 April 2015). *Civil society in India being demonised says global civil society alliance*. Press Release. Available at: http://www.civicus.org/index.php/en/media-centre-129/press-releases/2217-civil-society-in-india-being-demonised-says-global-civil-society-alliance.

Another problem here is that the nature of what is considered to be politically sensitive and controversial is constantly being redefined, particularly in the current context where a number of states are pushing back against human rights, including the fundamental civil society rights, of association, assembly and expression. CIVICUS has documented that in all global regions, these fundamental rights are under assault.²⁴

In restricted situations, one approach for foundations that still seek to advance human rights and social justice is to adapt the language they use to describe the work they support. As Andrew Milner wrote, "Chinese foundations have learned to use pragmatic language to effectively advocate for marginalized people... Likewise in challenging environments, foundations use more guarded language... CSOs advocating for fighting poverty in Saudi Arabia focus on a sufficiency line, rather than a poverty line, for example."²⁵ In the same vein, Naila Farouky of the Arab Foundation Forum states that in the Arab region, "We discuss relevant issues that are pertinent to the enabling of a philanthropic sector but we don't say the word advocacy because that is something that could get us in trouble."

Partly in response to challenges mentioned above, community foundations have risen as a growing philanthropic alternative.²⁶ Community foundations are multi-stakeholder initiatives in which resources are raised and priorities set locally, allowing for communities to develop ownership of their funds and drive the transformation of their own situations. Jenny Hodgson of the Global Fund for Community Foundations explains that community foundations offer a model in which power imbalances between donors and grantees can be tackled. In these initiatives, she explains, donors and beneficiaries are sometimes the same people, and communities become active participants rather than passive recipients in their own sustainable development. Because such initiatives are supported by a large number of small donors, they are able to build strong constituencies who are directly connected to the work they undertake. It is perhaps because of such inclusive approach that community foundations have grown considerably in the past 15 years.²⁷

6. Disconnects between CSOs, foundations and constituencies

²⁴ CIVICUS (June 2015). *Civil Society Watch Report*. Available at:

http://www.civicus.org/images/CIVICUSCivilSocietyWatchReport2015.pdf.

Andrew Milner (September 2015). *To shield advocacy, foundations seek safe words*. In: Alliance Magazine, vol. 20, no. 3, p. 35. ²⁶ The Guardian (19 April 2014). op. cit.

²⁷There was an 86 per cent growth of community foundations between 2000 and 2010, with around 70 new foundations established every year. See: Global Fund for Community Foundations and Charles Stewart Mott Foundation and Rockefeller (2014). The Case for Community Foundations: How the Practice Builds Local Assets, Capacity, and Trust and Why It Matters. Available at: http://www.mott.org/files/publications/CaseForCommunityPhilanthropy.pdf.

Breaking taboos and resistance [against funding social justice causes] is craft work: lots of dialogue and creating opportunities is needed. This will not happen suddenly, but I think this work needs to be done.

... Resistance does not have a face – it is an enormous dark cloud – we need to identify weaknesses, as points of vulnerability can start the dialogue. - Candace Lessa, Network of Independent Funds for Social Justice

The challenges highlighted so far suggest a lack of strong connections between CSOs on the one hand and global south foundations and publics on the other. Many CSOs working on human rights and social justice issues have worked hard to build their international profile in order to attract the support of foreign funders. But this leaves them vulnerable to the accusation that they prioritise international connections over domestic ones.

As Jenny Hodgson explains, CSOs "... have struggled sometimes to build support for their own work because they have the cushion of external funding which allows them to be strongly networked globally." Anantha Padmanabhan of Azim Premji Philanthropic Initiatives in India believes that many global south CSOs are distant from their own societies because "...they might not have the capacities, they do not think it is important, they do not know how to ask, and most importantly they don't speak a language which domestic constituencies necessarily relate to." If CSOs are to secure domestic financial support, they must build domestic profile, create accessible channels to engage with local donors, and gain the trust of local donors and citizens. To do so may entail CSOs making an effort to adjust their language and discourse, if these have been tailored to foreign donors.

Despite their myriad contributions to society, negative perceptions can persist about CSOs among global south institutions and citizens. While the level of trust depends on the context and issue, CSOs may be seen, including by foundations, as inefficient, corrupt, self-serving, elitist, too closely tied to foreign donors, or even viewed as government agents, in cases where CSOs implement government programmes.²⁸

At the same time, according to the interviewees, foundations and CSOs are to some extent suspicious of each other and fearful of the compromises involved in working together, which inhibits closer engagement. There are challenges of culture and jargon: foundations, particularly corporate foundations, tend to use private sector language and models, which do not resonate with the language employed by civil society groups.

²⁸ Caroline Hartnell (September 2015). *Individual, family and corporate philanthropy: Common Trends*. In: Alliance Magazine, vol. 20, no. 3, p. 26.

"There are a lot of strong rights groups and a lot of strong social justice grant-makers and they are all either funded by external money or they are poor. You have a lot of new money and legislation that says that people have to give and they go around [but] there is nobody to give it to. And partly it is behaviour on both sides: they don't want to talk to each other." - Jenny Hodgson, Global Fund for Community Foundations.

This suggests that channels of dialogue between CSOs and foundations need to be established and consolidated. As part of this, CSOs need to ensure that their operations are visible, transparent and of high quality. Foundations need in turn to be challenged to make space available for civil society, and recognise civil society as a key actor in the enabling of lasting social change.

7. Proximity and accountability

If closer connections need to be built, then foundations in the global south should have a powerful advantage over their counterparts in the global north, in being located in the same societies whose challenges they aim to address. Because they are locally rooted, they can understand local cultures and contexts, and be closer to their beneficiaries and the challenges that they face.

"In the language of sports, international foundations are probably like the sumo fighters; they've got the financial power, the political power, the expertise power; but they are heavy lifters, they are limited in the sense they might be too slow, there is a huge bureaucracy. They are probably also not really grounded on local issues, decisions are made elsewhere and not on the ground." - Bhekinkosi Moyo, Southern African Trust

According to Jenny Hodgson of the Global Fund for Community Foundations, the added value of global south institutions lies in the possibility to "...bring people together, you can have those conversations, and you can actually sort of take that as part of your work."

Most interviewees indicate that proximity can result in greater flexibility, a better identification of issues and needs on the ground, and more appropriate tools to assess the work of grantees. This local advantage means that global south foundations have the potential to develop closer and better relationships with the CSOs they support. Interviewees indicated, for example, that funders are able to hold meetings and visit organisations they support due to their geographic proximity.

The majority of interviewees referred to their grantees as "partners", and the partnerships as a "journey" they take jointly. Audrey Elster of the South African based RAITH Foundation, for example, indicates that much effort is put into establishing a relationship of partnership from the beginning

between the foundation and its partners, which allows them to support partner organisations closely, and go beyond the provision of financial resources.

In addition, close partnerships have resulted in a shift in the way that impact is measured and understood. Donors that traditionally support CSOs have long been criticised for their focus on assessing the impact of the projects they fund through narrow performance metrics and burdensome reporting requirements, which often stretch the capacities of CSOs, particularly smaller CSOs, and takes away from their energy for core activities.²⁹ In comparison, the new foundations of the global south have the potential to see impact through a different lens. Interviewees noted that traditional donor methods of assessing impact have been related to the fact that donors and grantees are separated by continents and cultural differences, with little opportunity to interact. Activity reports and impact assessment tools have long served as a poor substitute for genuine interaction.

"To be entirely honest I don't know if anybody truly 'gets' the impact evaluation aspect — particularly in relation to working with small organisations. I sometimes fear the tyranny of so-called impartial M & E done without context. I think it is important to know what is being done and that it is effective but if you are working with rights issues some things might not be measurable for years after you have done the work." - Theo Sowa - African Women's Development Fund

Ana Valéria Araújo of the Brazilian Fund for Human Rights highlights that impact has to be understood in relation to an institution's capacity to engage with local civil society. As she explains, as a local foundation they are able to achieve impact and be efficient in identifying and supporting the key projects, and the people who are leading transformative actions in local communities. This is only possible if the foundation is able to grasp local realities and cultures.

Global south foundations that strongly support human rights and social justice actions tend to understand that traditional methods of understanding impact are not particularly helpful. "There are not a lot of quick wins," explains Audrey Elster. In general, interviewees indicated that a closer interaction allows donors to be more flexible in assessing impact.

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²⁹ In his sharp contribution to the 2015 State of Civil Society Report, Darren Walker, President of Ford Foundation, reflects that "[o]ur sector's obsession with quantifiable impact, and frequently dogmatic adherence to discrete deliverables, undercuts the expansive purpose of CSOs, miniaturising them in their ambition." Darren Walker (2015). How Can we Help You? In: CIVICUS (2015). *State of Civil Society Report 2015*. Available at: http://civicus.org/images/SOCS2015 ESSAY27 HowCanWeHelp.pdf

Further, global south foundations are able to fill a gap often left by foreign donors, which have traditionally prioritised the larger, more structured CSOs that are better able to absorb grants and comply with the bureaucratic requirements imposed by foreign funders, as opposed to smaller and less institutionalised organisations, including community and grassroots groups. By contrast, initiatives such as the Brazilian Fund for Human Rights and the African Women's Development Fund, among others, make conscious efforts to support smaller and less visible organisations, including by providing non-financial support.

Another way in which global south foundations that strongly support human rights and social justice actions may differ from other donors, is in the composition of their staff teams, boards and advisory structures. Often their boards and staff are activists, as in the case of the Brazilian Fund for Human Rights, or they have very close connections with activists who support their work. This helps them to understand better how CSOs function and what their main challenges are.

It also became clear in the interviews that most foundations themselves have received or still count on considerable support from foreign donors. Sometimes this is because they have been constituted as part of donor exit strategies from countries, and sometimes it is because foundations struggle to secure domestic support sufficient for their ambitions. This raises a danger that foundations and CSOs may find themselves positioned as competitors for funding from foreign donors. It also implies that foundations that operate in contexts where civil society rights are restricted, including the right to receive funding, may encounter the same restrictions faced by CSOs, particularly when it comes to making grants. For example, Amitabh Behar of the National Foundation for India states that his organisation receives support from foreign contributors that are now under government surveillance, which has directly impacted on its work. Similarly, Samar Haidar indicates that the Arab Human Rights Fund is legally considered as a provider of foreign funding by some governments in the Arab region.

This suggests that, as with CSOs, the work of global south foundations would be enhanced if they are better able to access domestic resources, enabling them to grow and develop according to their own agendas. It also suggests that close relations between CSOs and global south foundations are needed to avoid competition for funding, and develop joint strategies to resist restrictions on the movement of resources.

8. Building local constituencies

As discussed earlier, CSOs that are long-standing recipients of foreign support may be accused of being foreign-facing, and not strong at articulating themselves towards domestic donors and citizens. CSOs often lack the capacity to engage with and build domestic constituencies. CSOs seeking to develop domestic funding sources may face a challenging task: to convince citizens that protecting human rights and promoting social justice benefits everyone in society, and that advocacy, analysis, scrutiny and research are as legitimate civil society functions as service delivery, and essential in bringing about durable change.

Global south foundations supporting human rights and social justice actions face similar challenges. As Ana Valéria Araújo highlights, reaching out for individual local support for human rights is one of the biggest challenges that such foundations face. Many citizens remain hesitant about understanding and accepting the language of rights. Similarly, many respondents indicated that there needs to be a cultural shift in the way citizens understand giving and philanthropy, why it is important, and the role it can play in strengthening civil society.

Having identified this as a challenge in South Africa, the RAITH Foundation established an initiative in 2013 around giving to social justice projects, which aims to foster increased local support for change-seeking CSO activity.³⁰ Audrey Elster indicates that this is not an easy field to advocate for domestically, but the message promoted by the Social Justice Initiative is clear: "Advancing democracy strengthens our society and that is good for everyone including you, your family and your business. By supporting the SJI, you can play an active role in promoting an active and engaged citizenry."³¹

In this regard, a clear and accessible message, to which people can relate, and a consistent communication strategy, have been suggested as important tools for foundations to use in advocating for human rights and social justice initiatives. "Communications is key," advises Cindy Lessa, from the Network of Independent Funds for Social Justice. "There needs to be a broader understanding of philanthropy and the function of civil society organisations." There is also a need to make clear how the change-seeking work of CSOs benefits society as a whole.

Communication strategies may need to target the mind sets of both individual givers and those institutional funders that do not currently address social justice and human rights issues. As Samar Haidar of the Arab Human Rights Fund explains, "Introducing the concept of human rights is the first step before asking these philanthropists to donate to and support human rights work. They first need to know what human rights are."

³⁰ More information on the Social Justice Initiative can be found at: http://www.sji.org.za/socialjustice.html.

³¹ Social Justice Initiative. *Social Justice Initiative – make it real, make it last*. Available at: http://www.sji.org.za/images/Brochure.pdf.

Communication strategies may include enhancing visibility in local media and using accessible language to reach out to broader audiences. To that end, the National Foundation for India has established the National Media Fellowship, through which the foundation supports professionals from different regions of India to publish stories on development issues. The aim is to increase awareness of and support for social justice issues, and to influence the way that marginalised communities are portrayed in the media.

9. Platforms and safe spaces for multi-stakeholder dialogues

The recent growth of philanthropy has led to the creation of more philanthropic infrastructure, including membership organisations and networks for philanthropic foundations. Examples include the African Grantmakers Network, the Network of Independent Funds for Social Justice, the Arab Foundations Forum and, on a global level, WINGS. These structures offer foundations strategic guidance and technical assistance. Through such structures, new and emerging foundations can learn from each other, as well as from more established foundations and their global north counterparts, about how to structure themselves and overcome challenges. Peer-learning opportunities can also create spaces for networking and research on philanthropy and civil society. Interviewees point out that networks can also help emerging philanthropists to make giving more strategic, by enabling them to identify and fill gaps where financial support is needed. Many interviewees spoke of the need to consolidate and invest in such networks.

Theo Sowa indicates that, "There is a real power to having northern and southern foundations working together. They can share knowledge, concepts and access to power." But, she cautions, "We have to make sure in the south we are developing our philanthropy, and our foundations work in ways that reflect our concepts and realities." This suggests that south-south learning is needed as much as north-south learning.

In addition, philanthropic structures have been responsible for taking forward initiatives that aim to create an enabling environment for philanthropy nationally, regionally and globally. For example, Paula Jancso Fabiani notes that the Institute for Development and Social Initiatives (IDIS), based in Brazil, has been advocating for the creation of an endowment law in the country.

Further, as Naila Farouky indicates, strategic structures can champion the interests of foundations working in restrictive environments. She highlights that one of the main objectives of the Arab

Foundations Forum is to take forward advocacy issues of concern to their membership "...whether it has to do with governance, and enabling environment within the governments of the region we work in." This approach is driven by the recognition that, for their members, engaging in or supporting advocacy can be dangerous.

At the global level, WINGS' report on philanthropic infrastructure summarises the main strategic benefits of such organisations as being their ability to build capacity, resources and connections, and to enhance knowledge of and for the philanthropic sector. Such infrastructure clearly has some important roles to play, and should be supported.³²

10. Conclusion

This research has found that there is a nascent local culture of institutionalised philanthropy for human rights and social justice causes in the global south, but so far it is not sufficiently developed to bridge the gap left by reducing support from foreign donor agencies and increased government restrictions on the receipt of funding. Global south foundations still need to be challenged further on the extent to which they are willing to take risks, recognise the longer-term limitations of the direct, service-delivery interventions they tend to support, and open up their decision-making structures to civil society participation.

Against this, there is also a growing number of what can be classified as "activist foundations"³³ that have committed themselves to pursuing long-term structural change. Informed by their proximity to local realities, such foundations are questioning the traditional ways in which philanthropy has been developed, and are aware of the consequences of past limited approaches to change-seeking civil society activity. Some are making genuine attempts to reach smaller and newer organisations and looking at their work through the lenses of solidarity and partnership.

During a moment of great uncertainty for southern-based CSOs, global south philanthropists could play a central role in bringing about positive change.³⁴ But for this to happen, institutional philanthropic practices should be relevant, sustainable and, ultimately, informed by local realities.

³² WINGS (March 2014). *Infrastructure in Focus: a Global Picture of Organizations Serving Philanthropy*. Available at: http://wings.issuelab.org/resource/infrastructure in focus a global picture of organizations serving philanthropy.

³³ Shelagh Gastrow (27 July 2015). *Op-ed: Activist philanthropists offer more than cash*. Daily Maverick. Available at: http://www.dailymaverick.co.za/article/2015-07-27-op-ed-activist-philanthropists-offer-more-than-cash.

³⁴ Christopher Harris (14 November 2014). *New directions in Southern Human Rights Funding*. Open Democracy. Available at: https://www.opendemocracy.net/openglobalrights/christopher-harris/new-directions-in-southern-human-rights-funding.

11. Key questions for further discussion

This paper has provided some indications of how philanthropic foundations in the global south could evolve, particularly to support the change-seeking activities of CSOs. In line with our aim to frame further discussion, we have identified a series of key questions, which could form the basis for further research, dialogues and experimental projects:

How can southern foundations...

- Create spaces for emerging philanthropists to build a common understanding of what philanthropy to advance human rights and social justice entails?
- Engage with each other on best practices and experiences in human rights and social justice philanthropy?
- Encourage the development of better, more reliable data on global south philanthropy?
- Foster inclusive multi-stakeholder platforms?
- Develop safe spaces for ongoing dialogue with CSOs, including those that occupy controversial positions?

How can northern foundations...

- Develop strategies that involve innovative ways of unlocking and safeguarding local resources for social change?
- Continue to share knowledge and experience and facilitate networking, to develop the capacities of southern foundations, without imposing agendas or assuming a monopoly of knowledge?

How can national, regional and international CSOs working in the global south...

- Adopt language and messaging that resonates locally and fosters a domestic support base that includes both individual donors and organised philanthropy?
- Drive the creation of spaces for dialogue in order to engage foundations and new philanthropists?
- Develop common cause with philanthropic institutions to resist restrictions on the receipt of funding?

How can governments...

- Create the necessary social and fiscal incentives to encourage giving by individuals and organisations?
- Work with local philanthropists and civil society to develop more constructive dialogues and ways of working?

CIVICUS looks forward to further constructive engagement with philanthropists, philanthropic institutions and other funders, governments and official donors, and civil society at local to global levels, to take this discussion forward.

Annex 1

We would like to thank the following interviewees for their contribution:

Table: List of interviewees, organisation and country

Amitabh Behar	National Foundation for India	India
Ana Valerio Araujo	Fundo Brasil de Direitos Humanos	Brazil
	(Brazilian Fund for Human Rights)	
Anantha Padmanabhan	Azim Premji Philanthropic Initiatives	India
Audrey Elster	The RAITH Foundation	South Africa
Bhekinkosi Moyo	Southern African Trust	Southern Africa
Candace ("Cindy") Lessa	Rede de Fundos Independentes para a	Brazil
	Justiça Social (Network of Independent	
	Funds for Social Justice)	
Helena Monteiro	Worldwide Initiative for Grantmakers	Global
	Support (WINGS)	
Jenny Hodgson	Global Fund for Community Foundations	Global
Naila Farouky	Arab Foundations Forum	Middle-East and
		North Africa
Paula Jancso Fabiani	IDIS – Instituto para o Desenvolvimento	Brazil
	do Investimento Social	
	(Institute for Development and Social Initi	
	atives)	
Theo Sowa	African Women's Development Fund	Africa
Samar Haidar	Arab Human Rights Fund	Middle-East and
		North Africa

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