GIVING INTERESTS

FINAL REPORT

UNIVERSITY OF WASHINGTON STRATEGIC ANALYSIS, RESEARCH & TRAINING (START) CENTER

REPORT TO THE GATES FOUNDATION

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Executive Summary

Introduction

This report, produced by the University of Washington's Strategic Analysis, Research & Training (START) Center for the Gates Foundation, examines global philanthropic giving trends over approximately the last decade and expanded where possible (2015–2025). Drawing on Candid data, sector reports, and secondary research, it maps mechanisms of giving, shifts in donor interests, and regional dynamics shaping the philanthropic landscape. The analysis highlights both continuities, such as the enduring dominance of health and education, and emerging priorities in climate, artificial intelligence, gender equity, and social justice. Importantly, it underscores the resilience of philanthropic flows during times of crisis, while pointing to persistent gaps in alignment, equity, and flexibility.

Key Findings

- **Diversification of mechanisms of giving:** Traditional foundations remain central, but growth has accelerated in donor-advised funds, pooled collaboratives, digital and hybrid platforms, and impact investing. These models expand donor participation, improve flexibility, and facilitate cross-border giving.
- **Shifting and expanding interests:** Health and education continue to attract the largest share of philanthropic resources. At the same time, there is notable momentum around climate change, artificial intelligence, gender equality, and social justice. These fields intersect with long-standing priorities but remain comparatively underfunded relative to stated ambitions.
- **Philanthropic resilience during crises:** Despite shocks from the COVID-19 pandemic, global conflicts, and economic volatility, philanthropic flows have remained steady. In some cases, such as pandemic response and Ukraine humanitarian relief, commitments translated into rapid, large-scale action, demonstrating agility relative to governments and markets.
- **Regional Nuances and local context:** Giving priorities vary by geography. Reproductive health and climate resilience dominate in Sub-Saharan Africa. South and Southeast Asia illustrate the dual importance of corporate philanthropy and diaspora-led contributions in shaping regional priorities. European philanthropy has placed growing attention on the ethical governance of artificial intelligence alongside advancing climate mitigation solutions. Indigenous rights and disaster response are central in Oceania. These patterns underscore

the importance of context-sensitive strategies and intermediaries that link global resources with local priorities.

- **Persistent misalignments:** While donors increasingly pledge flexible, long-term, and equity-oriented support, realized flows continue to favor short-term, project-based funding. Grassroots and community-led organizations, especially in the Global South, remain consistently underfunded, with less than two percent of flows reaching Indigenous and racial justice movements.

Recommendation

The Gates Foundation's giving interest taxonomy categories should reflect both continuity in long-standing priorities and inclusion of emergent fields. Updates to the new redefined and recommended taxonomy list to include elevating artificial intelligence, expanding climate and sustainability, broadening economic development, and distinguishing between disease-specific and population-level health investments.

Thematic lenses such as advocacy, artificial intelligence, climate, and equity should be applied across sectors. This structured approach will better capture intersectionality, ensure emerging fields are not siloed, and support alignment of funder strategies with systemic priorities.

To address gaps, funders should be encouraged to expand unrestricted, multi-year support. They should also invest in grassroots and community-led organizations, while leveraging pooled and collaborative models to scale impact and share risk.

Conclusion

Global philanthropy is becoming more complex, interconnected, and diverse. Funders are increasingly called upon to act simultaneously as donors, investors, advocates, and partners. The past decade demonstrates philanthropy's resilience, adaptability, and catalytic potential. Yet the sector's impact will hinge on its ability to align intentions with realized commitments, balance global and local priorities, and embrace equity-centered, systemic approaches. By doing so, philanthropy can move beyond transactional giving to play a transformative role in addressing the most pressing global challenges of the decades ahead.

Contents

Abbreviations

AEGN	Australian Environmental Grantmakers Network
AI	Artificial Intelligence
AWDF	African Women's Development Fund
AWID	Association for Women's Rights in Development
CEPI	Coalition for Epidemic Preparedness Innovations
COVAX	COVID-19 Vaccines Global Access
CSR	Corporate Social Responsibility
DAFs	Donor-Advised Funds
EU	European Union
FATF	Financial Action Task Force
GAVI	Global Alliance for Vaccines and Immunization
GPEI	Global Philanthropy Environment Index
IEFG	International Education Funders Group
KYC	Know Your Customer
LGBTQ+	Lesbian, Gay, Bisexual, Transgender, Queer/Questioning
LMICs	Low- and Middle- Income Countries
M&E	Monitoring and Evaluation
MENA	Middle East & North Africa
NGOs	Non-Governmental Organizations
NPT	National Philanthropic Trust
OECD	Organization for Economic Co-operation and Development
POs	Program Offices

PPT	Philanthropic Partnerships Team
SDG	Sustainable Development Goals
START	Strategic Analysis and Research Training Program
TVET	Technical and Vocational Education and Training
UHNI	Ultra High Net Worth
VAT	Value-Added Tax
WGI	Woman and Girls Index
YoY	Year Over Year

Introduction

Project Overview

This report summarizes work conducted by the University of Washington's Global Health Strategic Analysis and Research Training Program (START) team in response to the Gates Foundation's (the Foundation) work order Giving Interests. The intent is to illuminate both broad patterns and nuanced shifts in philanthropic engagement, with attention to sector-level dynamics and regional distinctions. In doing so, the report aims to strengthen strategic alignment, support prioritization of focus areas, and enhance the Foundation's understanding of how donor motivations, capital flows, and emergent trends are shaping the philanthropic landscape.

The report is structured to balance global, cross-cutting insights with regionally specific perspectives. It also draws on multiple data sources including open-source financial data, secondary research, and sectoral taxonomies to present a holistic view of philanthropic giving. Importantly, the report does not only track what has been historically well funded but also highlights emerging spaces of innovation and areas where philanthropic engagement is waning.

Methodology

A central pillar of the methodology is the use of Candid data provided by the Gates Foundation, which was structured and analyzed through a customized Power BI dashboard. This tool allowed for the systematic review of grantmaking patterns, funding flows, and changes across key giving interest areas over time for philanthropic partners of the Gates Foundation. The analysis was complemented by a review of published white papers and sector reports, including those from OECD, Giving USA, the Lilly Family School of Philanthropy, International Education Funders Group (IEFG), and The Bridgespan Group, as well as curated resources from IssueLab. By layering these diverse sources, the report captures both the measurable flows of philanthropic capital and the interpretive insights into donor motivations, behaviors, and field-level shifts.

The timeframe of this research is roughly the last decade (2015–2025), with some inclusion of earlier or later data points where necessary to provide context or capture emerging trends. This time horizon was selected to encompass key inflection points in philanthropic giving, including changes in global health, climate, education, and new frontiers such as AI. The insights gathered were also applied to reorder and refine the Gates Foundation's taxonomy of giving interests, ensuring that categories reflect not only continuity in long-standing fields but also diversification into emergent or evolving areas. This methodological framing grounds the report in both robust empirical evidence and practical application for strategic alignment.

LIMITATIONS

Several limitations shape the scope and interpretation of this report. First, the grant-level data for 2024 and 2025 remains incomplete, limiting our ability to capture the most current shifts with full confidence. Second, while we incorporated global insights where possible, much of the underlying grant data is drawn from U.S. foundations, which may skew emphasis toward U.S.-centric priorities and underrepresent regional giving practices in other geographies. Third, the COVID-19 pandemic introduced significant disruptions in philanthropic flows, marked by large surges in emergency response and health-related giving. Distinguishing which of these shifts are temporary versus which may represent a new normal remains a challenge. Finally, many of the most comprehensive resources and databases on global philanthropy such as specialized surveys, subscription platforms, and proprietary datasets are restricted behind paywalls, which limits the breadth of accessible comparative data across geographies and sectors.

Mechanisms of Giving

Background

Mechanisms of giving refer to the vehicles or channels through which philanthropic resources are mobilized such as private foundations, donor-advised funds (DAFs), and individual donations. These mechanisms differ in structure, tax treatment, and donor involvement. For instance, in the U.S. in 2024, individual donors accounted for approximately 66% of all giving, while private foundations contributed about 19%, and corporations provided around 15% (Giving USA, 2025; Lynn, 2025). Donor-advised funds are especially attractive to high-net-worth individuals due to their tax benefits and flexibility, although their lack of mandatory payout and transparency raises policy concerns. (J.P Morgan, 2024).

Giving interests are the issue areas or causes that donors choose to support such as education, health, climate, or social justice. While interests capture the "what" of philanthropy, mechanisms encapsulate the "how." Different mechanisms can enable or prioritize certain fields over others, based on donor intent, governance, and capital formation.

TRENDING MECHANISMS OF GIVING

Philanthropic giving operates through several dominant mechanisms, each with distinct characteristics:

Private Foundations

Private foundations are the most formalized vehicle, responsible for a large share of structured giving. In the U.S., foundations provided over $105 billion in 2022, accounting for about 19% of all giving (Giving USA, 2025).

Donor-Advised Funds (DAFs)

DAFs are one of the fastest-growing mechanisms. Contributions to DAFs reached over $85 billion in 2022, with assets now exceeding $228 billion, reflecting their increasing importance in channeling philanthropic capital (NPT, 2023).

Corporate Giving

Corporate giving includes both direct donations and in-kind contributions, with about $21 billion given in the U.S. in 2022 (Giving USA, 2025).

Individual Giving

Individual giving is the largest category globally, representing 67% of total U.S. giving between 2020-2024 but steadily decreasing since 2000 (Giving USA, 2025). Givers range from everyday small donors to UHNW donors. However, UHNW donors have increased their overall giving by 36% while micro, small, and mid-sized donors decreased giving between 1-9% (Benefactor Group, 2025).

Faith-Based Giving

Religious motivations continue to drive significant global giving. In many regions, faith-based giving constitutes the largest share of household philanthropy, underscoring its enduring influence on global philanthropic flows. However, it has declined as a share of total giving in the U.S., reflecting diversification toward other interests (Giving USA, 2025).

Impact Investing or Outcome-Based Giving

Rather than one-off grants, these mechanisms deploy capital in ways that expect measurable social or environmental outcomes alongside financial returns. Impact investing has seen 21% compound annual growth since 2019. It is estimated that $1.57 trillion in assets are managed under impact investing (Hand, 2024).

Intermediary Giving

This includes pooled funds, re-granting organizations, and networks that redistribute donor contributions to frontline organizations. Such mechanisms are important for reaching smaller, grassroots groups that may otherwise lack direct donor access. Philanthropic collaboratives, which often include stakeholders outside philanthropy, have been on the rise. Between 2021-2023, $4-7 billion is allocated to various grantees annually (Collins, 2024; Bridgespan, 2025).

Needs-Based or Collective Giving

Collective giving models such as giving circles, pooled donor collaboratives, and participatory grantmaking bring donors together around shared priorities. They elevate beneficiary voices and democratize decision-making in philanthropy. This community-based approach is gaining momentum among everyday donors. Between 2017 and 2023, more than 370,000 philanthropists contributed over 3.1 billion dollars (Layton, 2024).

Prize Philanthropy

By setting up competitions or awards, funders incentivize innovation, attract co-investment, and catalyze new ideas. While not a large share of philanthropic flows, prize philanthropy plays a disproportionate role in signaling priorities and sparking creativity.

Place-Based Giving

Targeted specifically to a geographic area, place-based giving reflects the recognition that local contexts require tailored solutions. This mechanism often emphasizes community-led initiatives, systems change within a specific locality, and collaborative partnerships with local institutions. This mechanism has become more prominent as funders recognize the importance of local context and equity in achieving sustainable change.

MAPPING MECHANISMS TO GIVING INTERESTS

Mechanism of Giving	**Most Common Giving Interests Supported**
Collective Giving (needs-based / giving circles)	Local equity issues, women and girls, education, social justice
Corporate Giving	Education (especially STEM and workforce), health, climate/ESG, local community development
Donor-Advised Funds (DAFs)	Education, faith-based initiatives, donor-driven community projects, increasingly climate and social justice
Faith-Based Giving	Poverty alleviation, humanitarian relief, education (religious schools), health missions
Impact Investing / Outcome-Based Giving	Climate solutions, health innovation, workforce development, financial inclusion
Individual Giving	Faith-based giving, health (medical research, hospitals), disaster relief, education scholarships

Intermediary Giving	Climate justice, grassroots community resilience, education access in underserved regions
Place-Based Giving	Affordable housing, public health, local education reform, community resilience, workforce training
Private Foundations	Education, health, global development, arts & culture, scientific research
Prize Philanthropy	Climate innovation, global health breakthroughs, AI/technology for social good, education innovations

Landscape of Global Giving

Overview

A DYNAMIC AND EXPANDING FIELD

Global philanthropy is no longer confined to a handful of wealthy foundations. It is a diverse ecosystem of actors including individuals, families, corporations, faith-based institutions, diaspora networks, and grassroots collectives that mobilize resources across borders and sectors. This expansion has integrated charity, development, and investment. Thus, philanthropy is being positioned as both a complement to and sometimes a challenger of government and market solutions.

SHAPING THE LANDSCAPE

Several forces are redefining how giving operates. Global crises such as COVID-19, climate shocks, and conflicts have accelerated collaboration and spurred innovation in funding mechanisms. Technology, through digital platforms and data systems, has enabled new models of participation and transparency. At the same time, regulatory environments and levels of public trust continue to determine where and how philanthropy can act.

OPPORTUNITIES AND CHALLENGES

Philanthropy's global reach comes with both promise and complexity. It offers agility, risk capital and the ability to elevate neglected issues and voices. However, it also faces persistent tensions including the concentration of funding among a small group of UHNWIs, underinvestment in locally led initiatives, and mismatches between donor priorities and community needs. Understanding these dynamics is essential for funders who want to navigate the space strategically and responsibly.

The Impact of COVID-19

GIVING REMAINS STRONG

COVID-19 pandemic had variable impact on giving and giving interest across US and globally. Despite COVID-19's impact in 2020, philanthropic outflows remained steady. This implies that there was resilience in philanthropic giving despite the pandemic (Global Philanthropy Tracker, 2023).

CHANGES IN MECHANISMS OF GIVING

The COVID-19 pandemic provided an opportunity for hybrid giving mechanisms including digital and crowdfunding to increase. Additionally, it fostered inter-organization collaboration and swift response to support government due to less bureaucracy in comparison to governments. Additionally, in Europe, COVID-19 strengthened collaborations for crisis management resulting in strong alignment in crisis and mitigation responses Murisa, 2025; Doan, 2025 ; Enjolras, 2025).

CHANGES IN INTERESTS

Some reports indicate changes in giving interest. For instance, post COVID-19 there has been increased interest in climate change, risk mitigation, environmental causes and natural disasters giving increased significantly between 2018 and 2021 in Australia. Interestingly, single women increased their giving to secular causes (in comparison to religious causes) such as social services, community needs and education during the pandemic (Enjolras, 2025). Furthermore, they were more responsive to community level crises and urgent needs. Despite this, it was noted women suffered the most shocks during COVID-19. Fewer women gave but those who did gave more and to secular causes. There was also a general decrease in religious giving (Ackerman, 2024). Giving Tuesday report for 2024 indicates that giving for education reduced due to COVID-19 (Candid, GivingTuesday, & Network for Good, 2024).

Global Affairs

HIGH LEVEL SUMMARY

This refers to the portion of philanthropic giving dedicated to global affairs, including conflict prevention, crisis response, resilience building, and cross-border development efforts. It draws on the 2025 Global Philanthropy Environment Index, OECD reports, and insights from Giving USA. The key areas of emphasis discussed in the mentioned global giving documents include the following:

1. Coordination of Global Philanthropy

- **Crisis Response as a Catalyst**: The COVID-19 pandemic, the Ukraine war, and global climate disasters triggered unprecedented coordination among large foundations (e.g., Gates Foundation, Mastercard Foundation, Rockefeller Foundation), with joint initiatives like COVAX, GAVI, and CEPI spearheading vaccine equity and health system strengthening globally (OECD, 2025).
- **Rise of Philanthropic Collaboratives**: Initiatives like Co-Impact, GROW Fund, and feminist regranting intermediaries (e.g., Mama Cash, AWID) exemplify pooled donor efforts to tackle gender, climate, and health issues across multiple regions (Bridgespan, 2025).

2. Cross-Regional Taxonomies

Philanthropic priorities are increasingly converging globally around the following subject areas

Global Taxonomy	Regional Application
Climate Change	Mitigation prioritized in North America and Europe; adaptation dominates in Africa, Asia, and Latin America (IssueLab, OECD)
Gender Equality	Sub-Saharan Africa receives over 50% of cross-border gender giving; focus on reproductive health, civil rights, VAWG (OECD, WGI)
Digital Transformation	AI and fintech are prominent in North America, Northern Europe, and East Asia; lower uptake in Latin America and Africa
Education & Youth	Post-secondary education dominates global flows (IEFG), but basic/primary education is prioritized in Africa, MENA, and South Asia

3. Mechanisms Enabling Global-Local Alignment

- **Intermediaries & Regranting**: Foundations increasingly use regional hubs and local POs (e.g., AWDF, Shujaaz, C'est La Vie, community foundations) to tailor implementation and align with local priorities.
- **Cross-Border Giving Tools**: Use of DAFs, crypto, mobile money, and cross-border tax treaties is expanding, despite uneven regulatory environments (GPEI, 2025).
- **Hybrid Giving Models**: Post-COVID shifts toward diaspora fundraising, hybrid work, and online giving have improved philanthropic agility in places like Oceania, Africa, and Asia.

4. Equity & Power Rebalancing

- Between 2016 and 2020, only 0.6% of global giving benefited Indigenous Peoples globally (AEGN, 2025).
- Gender-lens and intersectional investing are rising but remain limited to 5–10% of total capital flows. Feminist funds emphasize unrestricted core support, diverging from traditional donor models.
- Participatory Grantmaking is gaining traction in collaboratives (40% use it), though still rare in mainstream foundations (only 10%) (Bridgespan, 2025).

Gaps and Opportunities

Challenge	**Opportunity**
Concentration of funding in a few taxonomies	Foster diversification (e.g., VAWG only receives ~1% of gender-related giving)
Regulatory barriers in LMICs	Harmonize cross-border laws to enable faster crisis response
Limited flexible funding	Expand core and multi-year support for grassroots actors
Lack of data on informal/local giving	Invest in localized philanthropy indices and participatory M&E systems

The global affairs landscape in philanthropy is evolving toward more collaborative, tech-enabled, and equity-oriented models, while geography-specific nuances remain central. Effective global coordination depends on balancing donor-driven priorities with local needs, scaling flexible and feminist multi-year funding mechanisms, and enhancing the interoperability of cross-border giving tools. It also requires aligning global taxonomies such as climate, gender, and education with regionally grounded implementation strategies.

GEOGRAPHIES AND SUBJECT AREA TRENDS IN PHILANTHROPY

Philanthropic giving patterns vary significantly across regions, shaped by local context, donor priorities, and global events. Below is a comparative review of how philanthropy manifests across geographies, highlighting regional giving characteristics, emerging taxonomies, and key insights, based on the *2025 Global Philanthropy Environment Index* (GPEI, 2025) and complementary OECD 2024 reports.

CHANGES IN POPULATIONS OF INTEREST

Though grant amount varied year by year, children and youth have received most of the funding since 2006, only seconded by academia (*See Figure 1*). However, economically disadvantaged, ethnic and racial groups, and adults have received more funding since 2015. Economically disadvantaged persons received most in 2020 at $2.2 billion, surpassing both children and youth as well as academia. Notably, the highest amount of funding of $78 billion, was fluid and not earmarked for any recipient population.

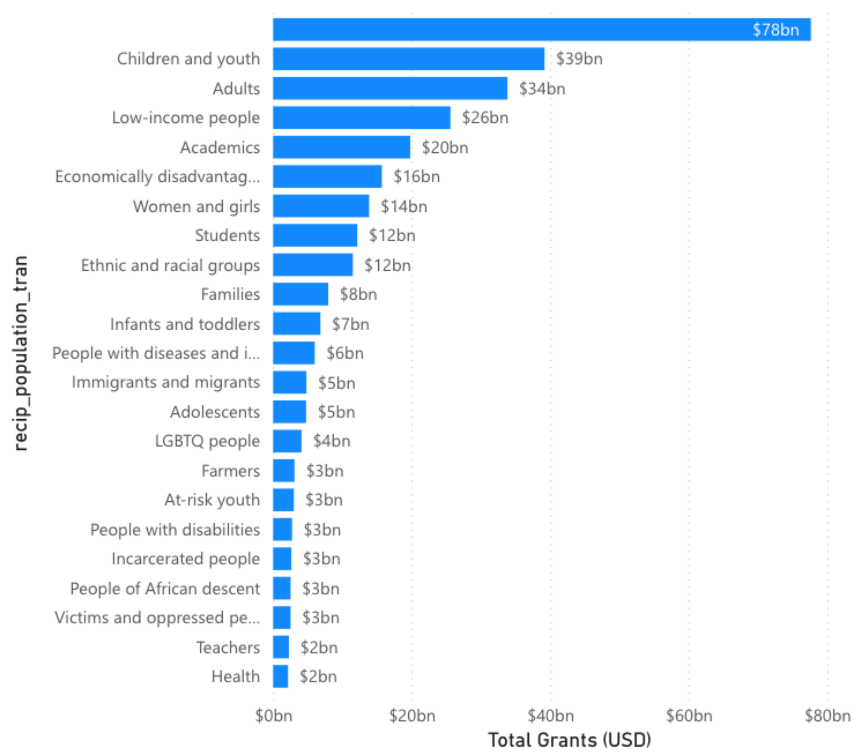

Figure 1: Gates Foundation PowerBI Dashboard: Grant Totals by Recipient Population (2006-2025)

Region-Specific Giving Interests

1. SUB-SAHARAN AFRICA

Community investment in Sub Sharana Africa is dominate by informal giving and remittance flows with formal philanthropic infrastructure emerging (Murisa, 2025).

Top Emerging Taxonomies:

- Reproductive and maternal health (gender-focused)
- Education (basic and secondary)
- Climate resilience (food security, drought response)
- Community giving and informal philanthropy

Over 50% of global cross-border gender-related giving flowed here, largely driven by the Gates Foundation (OECD, 2024). Traditional mechanisms like Harambee (Kenya) and grain banks illustrate how communities mobilize collective resources outside formal channels. Formal philanthropic organizations are growing but remain concentrated in urban centers, leaving rural areas dependent on diaspora and religious giving.

2. SOUTH AND SOUTHEAST ASIA

Philanthropy in South and Southeast Asia is anchored in strong domestic ecosystems, complemented by diaspora and religious contributions such as zakat (Doan, 2025).

Top Emerging Taxonomies:

- Post-COVID health response
- Disaster relief
- Climate adaptation
- Gender equity and social justice

India’s corporate social responsibility (CSR) law continues to channel billions annually into philanthropy, though unevenly across states. Nepal and Pakistan rely heavily on diaspora networks, which supplement limited domestic resources. Religious giving (zakat, dana) represents a large, steady funding base, but is often directed toward immediate welfare rather than systemic reform.

Climate adaptation remains underfunded despite rising vulnerability, signaling a gap between donor interest and urgent local needs.

3. NORTH AMERICA (U.S. & CANADA)

North America is the largest source of global philanthropic outflows, with strong institutional environments but limited flexible funding (OECD, 2024; Badertscher, 2025).

Top Emerging Taxonomies:

- Climate change mitigation (more than adaptation)
- AI and digital transformation
- Gender equity and racial justice
- Mental health and social justice

U.S. foundations account for the majority of global private philanthropic flows, shaping agendas worldwide. Growth in women's giving circles and community foundations shows a democratization of philanthropy beyond elite donors. Racial justice movements post-2020 shifted significant resources toward equity-focused initiatives, though sustainability of this funding is questioned. While outflows are high, grantees report a lack of long-term, flexible, or unrestricted support, limiting resilience.

4. LATIN AMERICA

Philanthropy in Latin America is dominated by diaspora contributions and religious/in-kind giving, with some progress in formalization led by Chile (Evans, 2025).

Top Emerging Taxonomies:

- Climate change adaptation
- Gender equity and social justice
- Religious and in-kind giving

Economic instability and inflation erode philanthropic resources, pushing donors to in-kind rather than cash contributions. Chile's payroll giving reforms serve as a potential model for regional replication, signaling state-supported philanthropy formalization. Venezuelan and Central American diaspora remittances double as philanthropic transfers, often earmarked for education and healthcare. Political instability reduces donor confidence in some countries, leading to reliance on international NGOs rather than domestic organizations.

5. WESTERN & NORTHERN EUROPE

Philanthropy in Western and Northern Europe is characterized by stability, civic engagement, and high legal autonomy for philanthropic organizations (OECD, 2024; Enjolras, 2025; Meyer, 2025).

Top Emerging Taxonomies:

- Climate mitigation
- Ukraine humanitarian response
- Social services and AI ethics

Ukraine-related humanitarian flows surged, temporarily reshaping funding priorities. Governments' strong social welfare role means philanthropy often complements, rather than substitutes, public spending. High civic engagement fosters trust in philanthropic organizations, easing domestic fundraising. Emerging debates on AI ethics reflect Europe's global leadership in digital rights and privacy.

6. CENTRAL & EASTERN EUROPE / BALKANS

Philanthropy here is largely domestic, shaped by weak incentives for cross-border giving and public expectations of state-led welfare (Korzeniewska, 2025; Koeshall, 2025).

Top Emerging Taxonomies:

- Food insecurity
- Environmental health
- Capacity building and digital transformation

Value-added Tax (VAT) reforms in Bosnia incentivized food donations, highlighting the power of fiscal policy levers. Public skepticism toward private philanthropy reflects a socialist legacy where welfare was expected from the state. Cross-border flows remain small; instead, international donors (EU, bilateral aid) dominate external resource transfers. NGOs focus heavily on service delivery due to limited space for advocacy.

7. EAST ASIA

Philanthropy in East Asia is rapidly evolving, with corporate and blockchain-driven giving rising in Japan, Korea, and Taiwan, but legal restrictions in China and Hong Kong limiting global flows (OECD, 2024; Janes, 2025).

Top Emerging Taxonomies:

- Disaster relief (Ukraine, earthquakes)
- Education
- Social innovation and environmental causes

Disaster relief repeatedly catalyzes domestic fundraising, though often short-lived. Legal restrictions in China constrain cross-border giving, with foreign funding flows under heightened scrutiny. Japan’s blockchain-based philanthropy is expanding transparency and donor engagement. Despite growth, tax incentives remain underdeveloped — only 3% of Japanese POs qualify for tax-deductible donations.

8. OCEANIA

Philanthropy in Oceania is robust and domestically oriented, with favorable tax environments and strong Indigenous rights advocacy (Murray, 2025).

Top Emerging Taxonomies:

- First Nations rights
- Natural disaster response
- Education and advocacy

Australia’s national target to double giving by 2030 reflects political prioritization of philanthropy. Natural disaster response remains a recurring priority given climate vulnerability. Indigenous advocacy has gained visibility, with philanthropic organizations funding rights, land stewardship, and reconciliation. Online platforms are reshaping donor engagement, broadening participation beyond wealthy elites.

9. MIDDLE EAST & NORTH AFRICA (MENA)

Philanthropy in MENA is largely remittance-driven, with political instability constraining innovation in formal philanthropy (OECD, 2024).

Top Emerging Taxonomies:

- Food security and climate resilience
- Gender equity and aging populations
- Limited cross-border philanthropy

High reliance on remittances sustains household resilience, but funds are directed mostly to consumption rather than systemic reform. Restrictive laws limit NGO independence, deterring international donors. Philanthropy often takes place through religious channels (waqf, zakat), which command public trust. Gender-focused philanthropy is emerging but concentrated in urban centers.

10. CENTRAL ASIA & SOUTH CAUCASUS

Philanthropy in this region is heavily shaped by diaspora contributions and digital giving, while authoritarian regimes constrain local civil society (Salibekova, 2025).

Top Emerging Taxonomies:

- Disaster response
- Climate change and gender equity
- Education and vulnerable populations

Diaspora contributions often exceed formal philanthropy, filling welfare gaps. Authoritarian restrictions limit NGO activity, with some states labeling foreign-funded NGOs as “foreign agents.” Digital giving platforms are increasingly popular among younger populations. Vulnerable groups (children, elderly, displaced populations) attract the most philanthropic attention, often in partnership with international NGOs.

REGIONAL SHIFTS IN PHILANTHROPIC PRIORITIES

Philanthropic giving is evolving in distinct ways across regions, reflecting both local contexts and global pressures. in sub-Saharan Africa, gender equality initiatives account for more than half of cross-border flows, yet progress is constrained by inflationary pressures and regulatory bottlenecks. in South and Southeast Asia, strong traditions of domestic and religious giving persist, but climate adaptation remains markedly underfunded. North America continues to drive global trends through large outflows, though flexible funding remains limited even as climate, AI, and racial justice attract growing attention. in Latin America, philanthropy has advanced in places such as Chile through formalization efforts, while currency controls and broader instability dampen activity elsewhere.

In Western Europe, surges in Ukraine-related giving contrast with the region's otherwise steady, welfare-oriented flows. Eastern Europe and the Balkans have strengthened food insecurity responses following VAT reforms, though cross-border giving remains weak. In East Asia, disaster relief and corporate or blockchain-enabled giving are expanding, even as legal barriers restrict international activity. Oceania has launched a national effort to double giving by 2030, leveraging strong First Nations engagement and digital platforms, though much funding remains tied to cyclical disaster response.

In the Middle East and North Africa (MENA), support for gender equity is increasing, but political instability continues to constrain cross-border flows. Finally, in Central Asia and the Caucasus, diaspora-driven digital giving is on the rise, though authoritarian restrictions limit the role of NGOs and formal philanthropy.

Giving Interests

Notable Trends in Giving Interests

CHANGES IN GIVING SUBJECT

In terms of grant totals, the health subject area received more funding than any other sector in amounts surpassing $100 billion. This is in tandem with the fact that the top 5 recipients of philanthropic organizations work in health-related matters. Considering the trend across the top 20 recipient subject areas over time by grant subject, it seems in general the international development subject area has always received more grant funding (*See Figure 2*). Since 2006, international development and public health have been key grant subjects receiving more grant funds till around 2014 when they both declined. However, between 2014 and 2016, there was a sudden rise in grant funding going to health care administration and financing. Similarly, most of the subjects started receiving gradual increase in grant funding from around 2014 though relatively smaller in comparison to international development and public health. Between 2018 and 2022 there was sudden surge in grant funding that was non-specific. It is possible that some of these funds were directed towards COVID-19 effect mitigation. From 2020 to 2025, there has significant increase in grant funding towards all subject areas. However, international development funding has been going down since 2021 (Gates Foundation PowerBI Dashboard).

Furthermore, it must be noted that recent reports have indicated that since the pandemic there has been a shift in interest towards climate giving, disaster preparedness, risk mitigation, cross border resilience, artificial intelligence and poverty and migrant support.

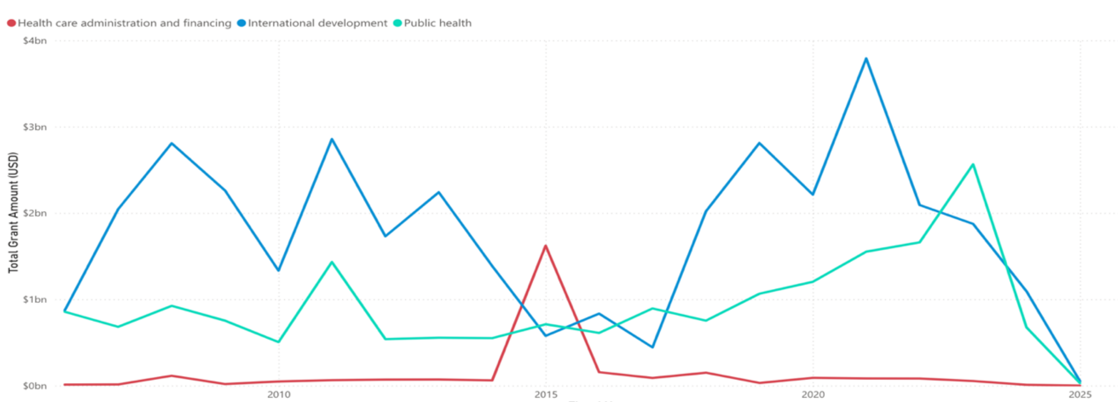

Figure 2: Gates Foundation PowerBI Dashboard: YoY Trends by Health Subject (2006-2025)

Faith-Based

Candid data shows that faith-based giving was low in comparison to other subject giving areas with an average of less than $10 million. More interest in this subject came around 2012 when there was a sudden rise in the number of grants marked for religion giving (*See Figure 3*). This momentum was sustained till 2016 when religious giving went back to the average of less than $10 million. However, from 2019 religious giving improved significantly ranging between $10 million and $50 million and seems this has been maintained up to 2023 (Gates Foundation PowerBI Dashboard).

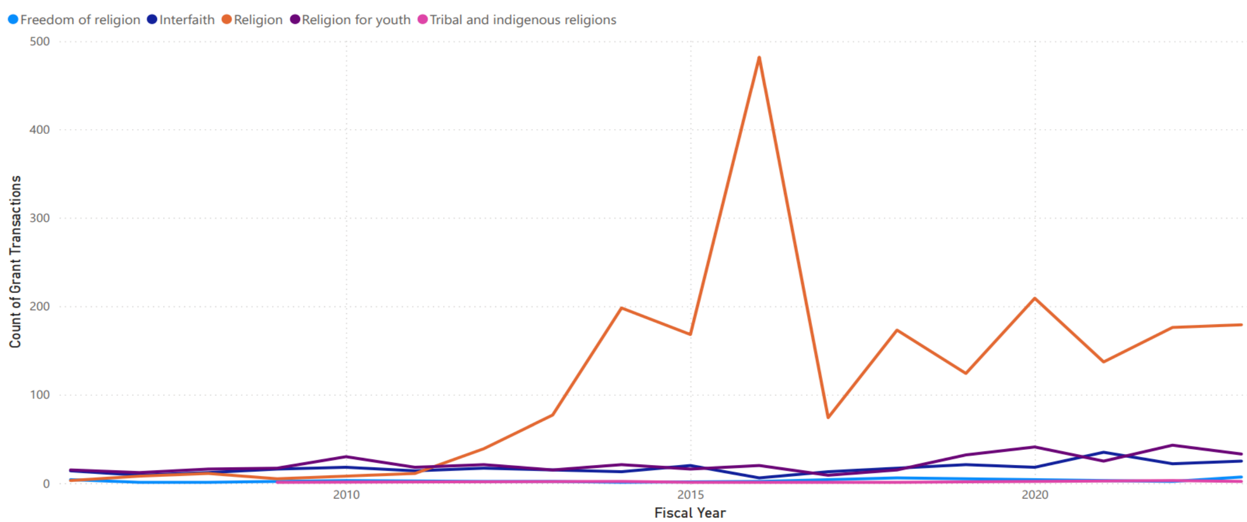

Figure 3: Gates Foundation PowerBI Dashboard: YoY Trends by Religious Subject (2006-2025)

However, some reports indicate that religious giving has significantly declined after COVID-19. Of particular interest is that single women religious giving has declined significantly in comparison to men and married couples (*See Figure 4*).

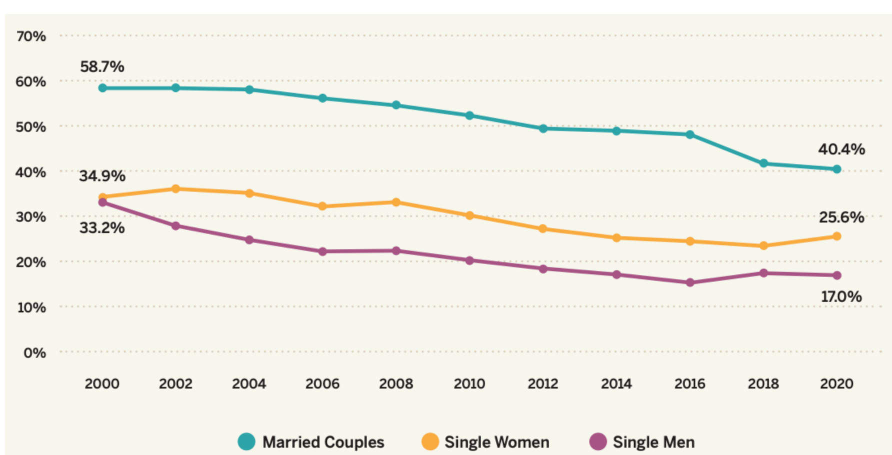

Figure 4: Philanthropy Panel Study, Indiana University Lilly Family School of Philanthropy: Share of U.S. Households Giving to Religious Causes

Climate Change

OVERVIEW

Over the past decade, climate change has moved to the forefront of giving interests as a recognized philanthropic priority. However, despite heightened awareness, climate-related giving still accounts for only a small fraction of global philanthropic flows. There are imbalances in geographic allocation, thematic focus, and mitigation versus adaptation. This section outlines how climate change as a giving interest has evolved, what gaps persist, and how the field is likely to develop.

SHIFTING AWARENESS & TRENDS

The 2025 GPEI highlights that while environmental causes, including climate change, have historically received limited philanthropic attention, they are now more frequently identified as strategic priorities by foundations and high-net-worth donors. Philanthropic engagement in climate action is increasingly recognized as essential, particularly where favorable giving environments align with supportive government climate policies. This is a result of the following:

- Increasing global concern over extreme weather events, biodiversity loss, and climate-driven migration.
- The integration of climate objectives into broader SDG frameworks.

However, the GPEI cautions that climate philanthropy still represents a small percentage of total global philanthropic contributions, echoing findings from AEGN report that climate and environmental causes receive only around 2% of global giving (AEGN, 2025). Giving USA estimates environmental giving slightly higher at 3%, where it has remained since approximately 2005 (*See Figure 5*). This share has remained low even as climate concerns have grown, indicating a large untapped funding potential.

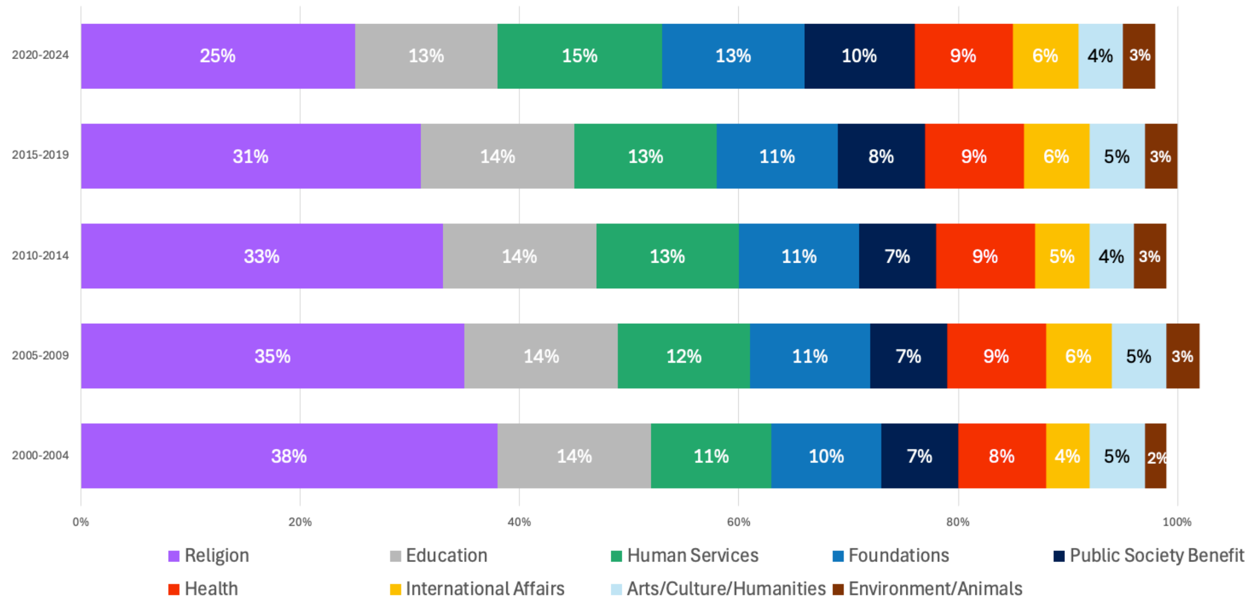

Figure 5: Giving USA Changing Giving Trends (2000-2024).
Data taken from the Benefactor Group's Giving USA 2025 Analysis.

ClimateWorks' Funding Trends 2024 shows that in 2023, philanthropic funding for climate mitigation reached between $9.3 to $15.8 billion, about a 20% increase from 2022. Foundation funding totaled $4.8 billion, nearly triple the 2019 level. Gates Foundation supplied Candid grant data of partner organizations also depicts a steady increase in climate change related grants between 2017-2022. The number of climate related grants peaks in 2022 with an all-time high of 548 grants (*See Figure 6*). The growth in climate-related grants, even without a change in philanthropy's overall share for the environment, underscores that increased attention to climate has not yet displaced other sectors, leaving significant room for future expansion if funders begin to re-balance their priorities.

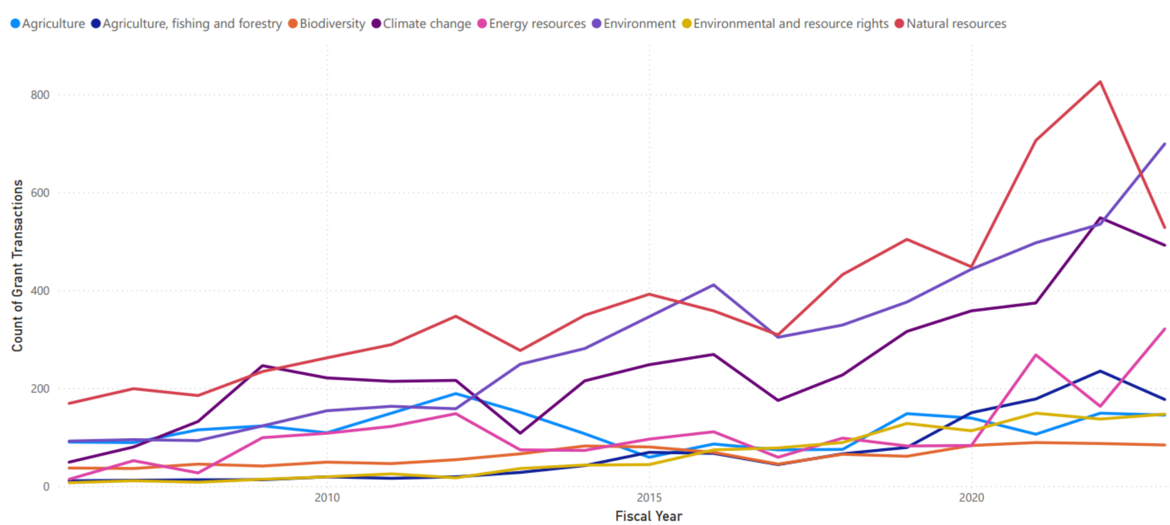

Figure 6: Gates Foundation PowerBI Dashboard: YoY Trends by Environment/Climate Subject (2006-2023)

MITIGATION VS. ADAPTATION

Climate change interventions align with either mitigation strategies, those that focus on reduction of the causes of climate change, or adaptation strategies, those that prioritize helping communities adjust to the changing climate impacts. Globally, climate philanthropy exhibits a persistent mitigation bias, favoring emissions reduction projects over adaptation measures.

ClimateWorks' 2024 report tracked adaptation or resilience funding for the first time, a testament to the global focus on mitigation. In 2023, climate adaptation and resilience initiatives received $600 million from foundation funding (Climateworks, 2024).

Higher income countries have historically focused their funding on mitigation efforts, while climate-vulnerable lower-income countries prioritize adaptation efforts, largely in response to climate events. GPEI's conducted a correlation analysis that indicates a country government's support for climate reform is linked to a favorable philanthropic environment. Figure 7 below demonstrates perceptions of government support for climate change.

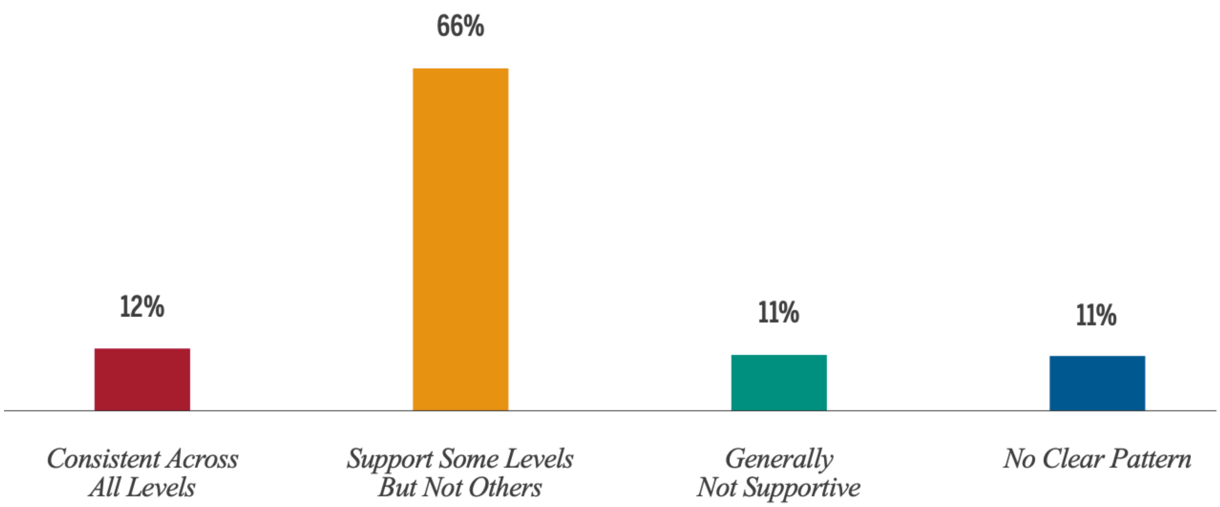

Figure 7: 2025 GPEI Expert Perceptions of Government Support for Climate Change (n=82)
Source: Indiana University Lilly Family School of Philanthropy, 2025 Global Philanthropy Environment Index.

OPPORTUNITIES

Philanthropy has a unique opportunity to address climate change by leveraging its flexibility, risk tolerance, and capacity to fund areas that governments and markets often overlook. Strategic priorities include expanding locally led adaptation in climate-vulnerable regions, particularly in the Global South, where need exceeds current funding (GPEI). By investing in innovation, advocacy, and public engagement, philanthropy can accelerate systemic change and bridge the gap in underfunded areas such as oceans, sustainable food systems, and deforestation prevention (AEGN, 2025).

Collaborative models such as pooled funds can amplify impact, aligning philanthropic funding with public and private resources to create large scale climate solutions, especially in LMICs over multi-year periods. Climate-centered philanthropy can also prioritize solutions at the intersection of public health, human rights, and AI/technology development.

Artificial Intelligence

OVERVIEW

Artificial Intelligence (AI) in philanthropy encompasses a wide range of roles. Philanthropists act as grant makers funding AI-enabled nonprofits, users and developers of AI tools, and increasingly as investors who are influencing the trajectory of AI innovation. (Ugazio, 2025). As a tool, AI is being applied to grantmaking, donor engagement, monitoring, and communications through partnerships with tech firms. However, uptake across the sector remains inconsistent (Ugazio, 2025). Much of this activity is clustered within the broader “AI for social good” movement, with focuses on health care, environmental concerns, education, and public services (Ugazio, 2025).

SHIFTING & EMERGING TRENDS

Philanthropy is moving toward stronger strategies and shared practices in the AI sector. A 2025 study of 38 U.S. funders found rising numbers of AI-related proposals, with about half of organizations having an explicit AI strategy (Di Troia, 2025). At the same time, coalitions are emerging to coordinate action. Ten major philanthropies including Ford, Packard, MacArthur, Mozilla, and Omidyar foundations have pledged more than $200 million toward ensuring that AI advances the public interest. Their focus is on democracy, worker empowerment, transparency, and international norms (Ford Foundation, 2023). AI is advancing at a rapid pace, creating an urgent need for the development and implementation of robust, globally applicable ethical and governance standards.

Another notable trend is philanthropy’s effort to push back against corporate dominance. As venture capital and the tech industry drive much of AI’s rapid progress, philanthropic organizations are positioning themselves to support open research, safety initiatives, and governance efforts that are underfunded by commercial actors (Ugazio, 2025). Sector leaders are also prioritizing ethics by mitigating biases and harm, ensuring nonprofit voices are involved in AI development, backing sector LLMs and AI literacy, and funding advocacy for guardrails (Westrick, 2025). AI is believed to empower small, highly skilled teams to accomplish more, while also motivating philanthropy to focus on long-term, high-stakes issues that cannot easily be reversed (Cowen, 2024).

It is also worth noting that OpenAI, one of the most notable AI began as a nonprofit when it was founded in 2015, with the stated goal of ensuring artificial intelligence benefits all of humanity. In 2019, the organization restructured into a “capped profit” model, creating a for-profit subsidiary, OpenAI LP, still governed by the nonprofit parent entity, OpenAI Inc (OpenAI, 2023). Although the organization has sought changes to this arrangement, there is an active effort within philanthropy and policy circles to preserve nonprofit oversight and to ensure that any financial benefits from the for-profit entity flow back to the nonprofit mission.

OPPORTUNITIES

The emerging landscape creates several opportunities for philanthropic action. Foundations can invest in responsible AI companies and nonprofits that embed fairness, safety, and transparency in their mission. This would generate both social impact and stronger returns on investment (Routledge Handbook, 2025). Shared rubrics and expert capacity can help funders evaluate these opportunities consistently (Di Troia, 2025). Philanthropy also has the ability to fill gaps left by venture capital by funding equity-centered applications, neglected communities, and capacity-building programs to expand who benefits from AI (Herschander, 2025).

There are also opportunities in education and talent development. Major philanthropic gifts to universities such as MIT ($350M+), USC ($261M+), Indiana University, Georgetown, Northeastern, and RIT are already shaping the AI research ecosystem and future workforce (Ugazio, 2025). Philanthropy can also support and launch applied projects by funding both well-recognized initiatives and lesser-known organizations in LMICs, ensuring that socially vital AI research and applications receive adequate support.

Gender Equality

OVERVIEW

Philanthropic interest in gender equality has accelerated over the last decade, but funding remains concentrated in a few sectors and is still a small slice of total giving. Cross-border, gender-related philanthropic disbursements roughly tripled between 2017–18 and 2021–22, yet nearly half (47%) went to women's and reproductive health, while areas like VAWG and the gender–climate nexus received <1% and ~4.5%, respectively; moreover, ~68% of gender-relevant projects were not explicitly gender-marked ("gender-blind"). In the U.S., giving to women's and girls' organizations (WGI) reached $10.2B in 2021, still just 1.9% of all charitable giving, underscoring both momentum and headroom (WPI, 2024).

SHIFTING AWARENESS & TRENDS

Foundations are increasingly signaling gender-equity ambitions through intersectional approaches, feminist movements, and gender-lens strategies, and collaborative or pooled funds are gaining visibility. However, the follow-through has been uneven, as flexible multi-year support often lags behind these stated intentions (OECD, 2025). At the same time, the domestic versus cross-border picture highlights an important contrast. While the enabling environment for philanthropy improved in many countries after COVID through digital giving and hybrid operations, cross-border rules remain among the most restrictive aspects of the ecosystem. This challenge is especially significant for gender funding, which frequently flows internationally.

In addition, collaboratives are emerging as a meaningful growth channel. Pooled funds now deploy between $4 and $7 billion globally each year, and about 15 percent identify gender equity as a primary issue. Yet, gender-focused collaboratives remain under-represented among the largest funds, those over $25 million annually, which suggests persistent fundraising headwinds (Collins, 2024). Finally, U.S. donor dynamics provide important context. Total U.S. giving rebounded to $592.5 billion in 2024 amid market gains, creating opportunities for gender fundraisers even as donor participation trends remain mixed (Giving USA, 2025).

FUNDING PATTERNS & GAPS

Cross-border gender philanthropy remains heavily concentrated in reproductive health (*See Figure 8*), while comparatively little funding reaches areas such as violence against women and girls, gender-climate linkages, or power-building for feminist movements. These are precisely the areas that experts and advocates repeatedly highlight as needing greater support, underscoring a persistent gap between identified priorities and actual funding flows.

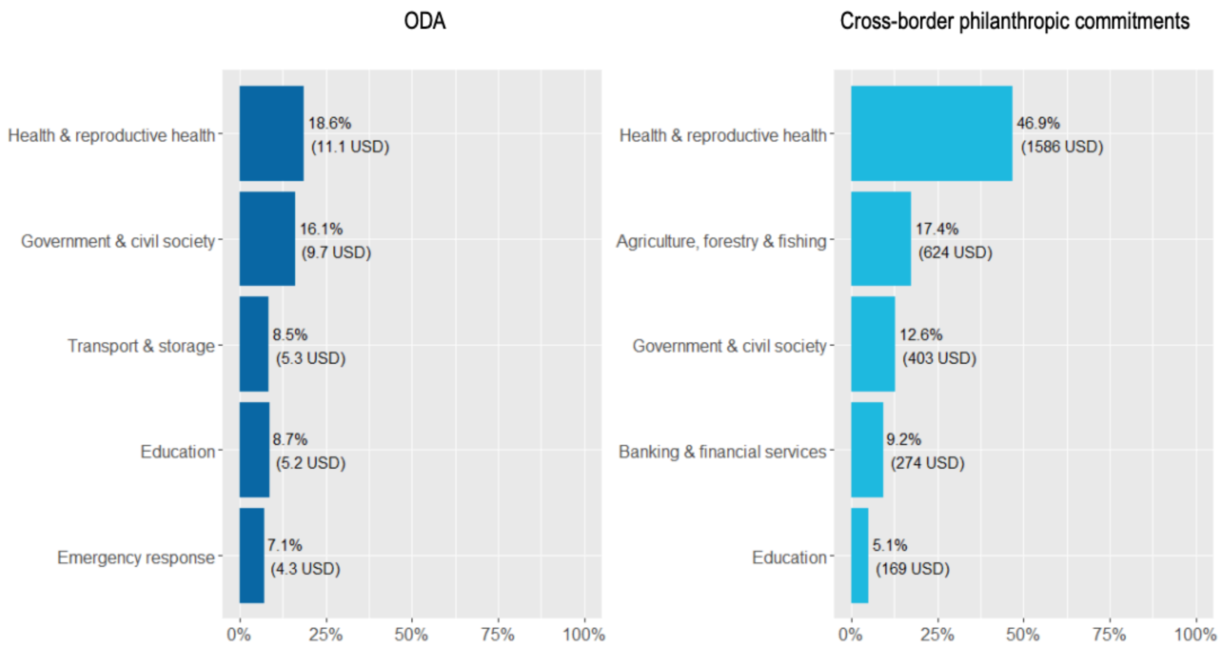

Figure 8: Top Five Sectors Receiving Gender-Related ODA and Philanthropic Flows (2021-2022)
Volume and share of ODA and cross-border philanthropic commitments towards developing countries with gender equality as policy objective by sector, USD million, 2022 constant prices, percentage (2021-22)
Source: OECD, 2024: Private Philanthropy for Development.

Geographically, Sub-Saharan Africa attracts the largest share of cross-border gender-related giving, driven in part by a small number of large funders (*See Figure 9*). At the same time, many regions experiencing rising need face regulatory frictions that dampen philanthropic flows, creating uneven geographic distribution.

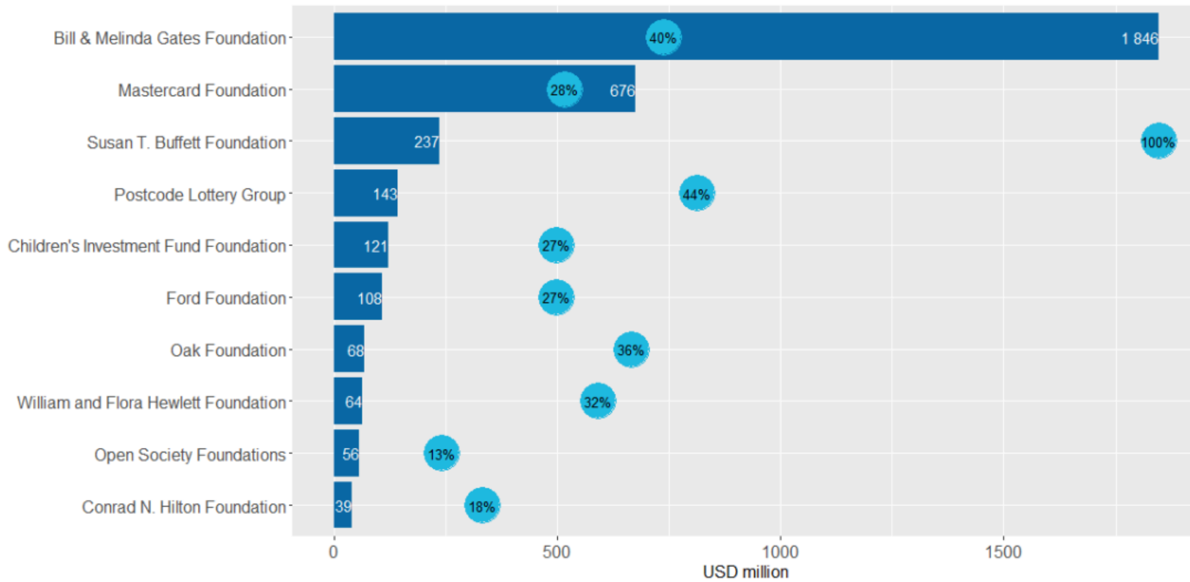

Figure 9: Top Ten Cross-Border Philanthropic Funders for Gender Equality in Developing Countries (2021-2022)
Volume and share of total cross-border philanthropic commitments towards developing countries with gender equality as a policy objective by foundations, USD million, 2022 constant prices, percentage (2021-22)
Source: OECD, 2024: Private Philanthropy for Development.

Despite growth in this field, gender-blind project coding remains widespread. This occurs when projects are not tagged or described as having any gender objective, even when women and girls are among the primary beneficiaries. The persistence of this practice complicates accountability and learning. Wider uptake of clear markers, such as the OECD Gender Equality Policy Marker, would significantly improve comparability across both philanthropy and official development assistance.

Within the U.S. domestic landscape, reproductive health and family planning continue to receive the most support. Civil rights and advocacy funding has seen the fastest recent growth, but it comes from a much smaller base. These shifts signal evolving priorities but also highlight the persistence of imbalances across issue areas within gender-focused philanthropy.

OPPORTUNITIES

To address the gaps stated above, funders should rebalance their portfolios. Reproductive health remains essential, but resources also need to be directed toward violence against women and girls' prevention and response, gender–climate adaptation, and movement-building. Pooled funds and re-granting intermediaries, such as feminist funds, are effective tools for reaching grassroots actors efficiently and equitably. Strengthening the sector requires moving beyond short-term, project-based funding to unrestricted, multi-year grants. Such approaches build organizational capacity and resilience, especially for local women-led groups in LMICs operating under volatile regulatory and economic conditions.

Collaboratives can also play a central role in mitigating risk, aligning due diligence, and scaling systems-level bets. By prioritizing learning practices and measured outcomes, collaboratives can demonstrate impact which may attract larger donors. Mandating and supporting consistent gender-intent tagging and outcome tracking across grants would reduce the persistence of gender-blind projects while sharpening learning across portfolios. Finally, funders should bridge domestic and global strategies. In high-income markets where overall giving is expanding, part of this growth could be intentionally channeled into cross-border gender priorities through compliant intermediaries. This would help mitigate the cross-border frictions flagged by the GPEI and ensure that global gender priorities receive the necessary support.

Education

OVERVIEW

Globally, education is a leading focus of global philanthropy with 35% of almost 30,000 foundations allocating some funding and resources toward education. (Johnson, 2018). Yet data about who funds what, where, and to whom remains inconsistent, making strategic coordination difficult. Education continues to hold strong appeal for funders, but the strategies and approaches have been redefined over the past decade.

SHIFTING TRENDS

In the past 10-15 years, the rationale for funding education has expanded to include systemic transformation, equity and inclusion, and workforce readiness in the context of the digital economy (Ferris, 2021; GPEI, 2025). There has been greater diversification in the education sector where education has shifted from a predominantly higher-education, institution-centric focus toward a more diversified, equity-focused, and systems-oriented field.

According to 2014–2024 Candid data provided by Gates Foundation partners, the number of education-related grants from philanthropic partners has steadily increased, following a brief dip in 2016 and 2017 (*See Figure 10*). While the overall dollar value of these grants has fluctuated across the decade, the broad “Education” category has experienced sustained growth, reflecting a more diversified and expansive approach to the field (*See Figure 11*). In contrast, areas such as graduate and professional education and higher education have remained relatively stable in the number of grants awarded, but they have seen a decline in total funding levels by the end of the decade. This shift suggests that funders are increasingly prioritizing systemic and inclusive educational initiatives over more traditional higher education investments.

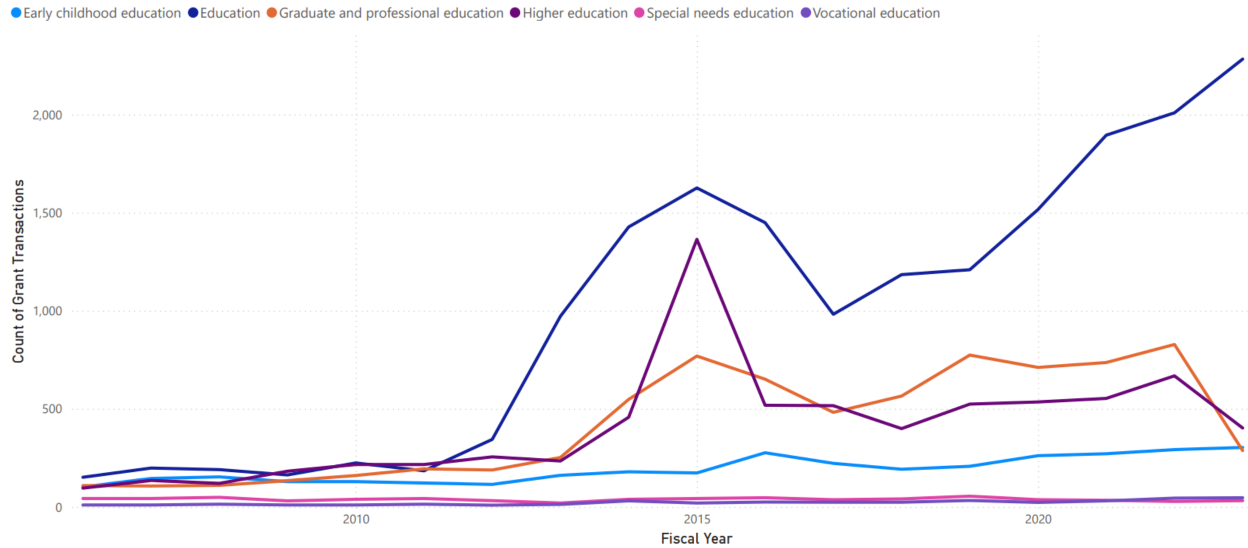

Figure 10: Gates Foundation PowerBI Dashboard: YoY Trends of Number of Grants by Education Subject (2006-2023)

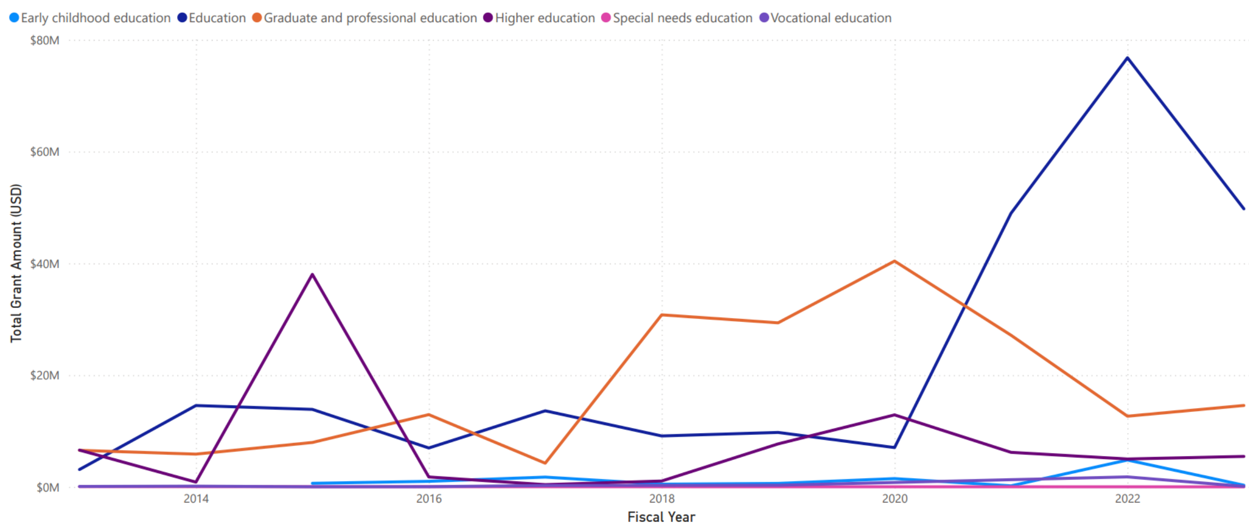

Figure 11: Gates Foundation PowerBI Dashboard: YoY Trends of Grant Amounts by Environment/Climate Subject (2006-2023)

Vocational and skills-based training is increasingly recognized as a philanthropic priority because it equips youth with employable skills, fosters entrepreneurship, and prepares communities for shifting labor markets. The Spotlight Report on Education Philanthropy in Africa highlights that investment in technical and vocational education and training (TVET) is essential for addressing the region's "skills mismatch," where formal education often does not translate into jobs (GPEI, 2025). Similarly, the Generation of Impact study emphasizes that funders can create transformative outcomes by aligning vocational training with local economies and the emerging green and digital sectors, thereby linking education more directly to livelihoods and long-term resilience. (Ferris, 2021)

REGIONAL DIFFERENCES

Large, western foundations tend to dominate the educational giving area but domestic philanthropy in the global south is increasing, allowing local funders to address regional differences (GPEI, 2025). Funding has also become more geographically dispersed, with significant growth in Africa, Asia, and Latin America, though disparities persist. Regional reports note that African education philanthropy is beginning to play a more central role in shaping locally owned solutions, supported by both international and domestic funders. Simultaneously, the field has seen an expansion in the range of philanthropic tools from traditional grants to collaborative funds, advocacy, and innovative finance mechanisms. This diversification reflects philanthropy's shift from project-level interventions to systems-level change, where structural reforms in teacher training, curricula, and data ecosystems are viewed as critical levers of impact.

OPPORTUNITIES

Philanthropy in education now presents a wide range of emerging opportunities. One of the most significant is investing in early childhood development and education, which deliver high social and economic returns but remain underfunded. Funders also have the chance to support systemic reforms such as, strengthening teacher training, curricula, and education data systems. This would ensure sustainability and scalability beyond isolated projects. There is growing recognition of the importance of continued advancement of equity and inclusion, with targeted efforts needed to support girls, rural learners, refugees, and children with disabilities.

At the same time, funders can broaden education's role by linking it more directly to employment, entrepreneurship, and climate resilience. Skills and vocational training for the green economy and climate literacy are natural intersections where education and climate philanthropy align. Vocational Opportunities also exist to scale impact through collaborative and pooled funds, which reduce fragmentation and align donor strategies. Supporting local philanthropy and leadership in Africa, Asia, and Latin America ensures solutions are context-appropriate and sustainable. Finally, education philanthropy can benefit from experimentation with innovative finance mechanisms, such as blended finance and outcome-based funding, alongside greater investment in data and evidence ecosystems to drive accountability and impact.

Social Justice & Equity

OVERVIEW

Philanthropic giving to social justice and equity causes has expanded significantly over the past decade, shaped by major global events such as the COVID-19 pandemic, racial justice uprisings, and growing climate activism. These crises exposed structural inequities and galvanized donors to address systemic disparities across health, economic opportunity, and human rights. Foundations, corporations, and philanthropic intermediaries increasingly adopted the language of equity, inclusion, and rights, often aligning their strategies with the Sustainable Development Goals (SDGs). However, despite visible commitments and public pledges, realized funding flows often lag behind expectations. Grassroots and community-led organizations those most proximate to inequities and often most effective at driving transformational change, remain consistently underfunded, receiving only a fraction of total equity-related disbursements.

SHIFTING TRENDS

Between 2016 and 2020, giving surged, reflecting both heightened public awareness and pressure on donors to act (*See Figure 12*). The peak came in 2020, when racial equity pledges reached $5.8 billion and racial justice $952 million. Yet the distribution of these resources revealed deep imbalances: less than 10% of racial justice funding reached grassroots groups, and only 1.4% of equity-related grants supported community-led organizations. Moreover, the field was highly concentrated, with 20 funders responsible for roughly 60% of all racial justice giving (Racial Justice, 2020). Following this surge, momentum slowed. By 2021 onward, grant flows either declined or plateaued, as funders reverted to reform-focused equity work, such as incremental policy adjustments or institutional diversity efforts rather than deeper investments in systemic or justice-oriented change. LGBTQ+ rights giving has expanded modestly but remains marginal globally. Much of this progress relies on feminist funds and intermediaries such as Mama Cash, AWID, and the Global Fund for Women, which channel resources to local and activist-led organizations often overlooked by mainstream philanthropy.

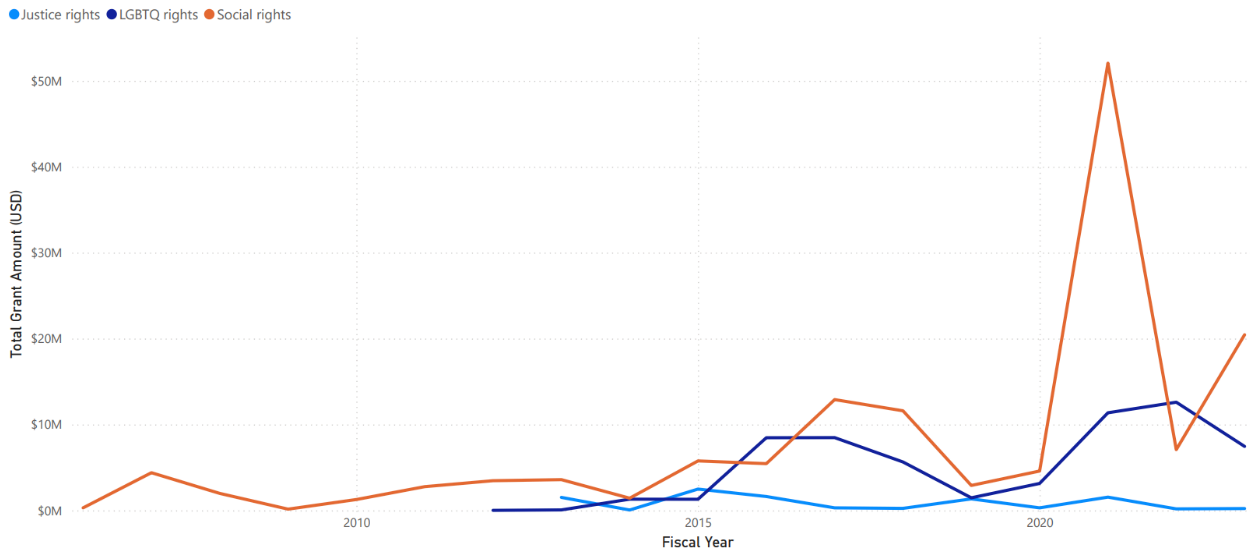

Figure 12: Gates Foundation PowerBI Dashboard: YoY Trends of Grant Amounts by Social Rights Subject (2006-2023)

REGIONAL DIFFERENCES

Patterns of social justice philanthropy vary significantly across regions. In North America, large foundations such as Ford, Gates, and MacArthur dominate the space, with growing attention to equity but a tendency to favor climate adaptation and institutional reforms over transformative justice. LGBTQ+ support exists but is underfunded compared to areas like reproductive health and education.

In Sub-Saharan Africa, philanthropy is shaped by diaspora giving and indigenous traditions such as harambee and communal savings systems. While these forms provide crucial resilience, formal justice philanthropy remains constrained by regulatory tightening (e.g., FATF and KYC restrictions) and political barriers, especially for LGBTQ+ rights.

Latin America and the Caribbean rely heavily on informal giving and diaspora remittances, but political polarization limits the growth of equity and rights-based philanthropy.

Europe benefits from stronger institutional infrastructure: Western Europe anchors social justice philanthropy, Northern Europe sustains civic engagement despite declining youth participation, and Southern Europe, the Balkans, and Baltics support climate and minority rights in fragmented but evolving ways.

Asia is innovation-rich but shaped by state constraints: South and Southeast Asia prioritize disaster relief and gender justice, East Asia fosters philanthropic technology but restricts rights funding in China and Hong Kong, and Central Asia remains fragile under authoritarian regimes.

In Oceania, philanthropy is notable for strong commitments to First Nations rights and climate justice, supported by favorable tax and regulatory frameworks in Australia and New Zealand.

OPPORTUNITIES

Despite progress, the field faces persistent challenges: overreliance on a small number of major funders, a recurring gap between pledges and realized disbursements, and chronic underfunding of grassroots and community-led organizations. To build more durable momentum, philanthropy must deliberately expand gender–climate nexus funding, recognizing the interconnected vulnerabilities faced by marginalized groups in the face of climate change. It should also strengthen intersectional feminist and LGBTQ+ funds, which are often best positioned to reach underserved communities. Investments in community-led and trust-based giving models are essential for shifting power dynamics and building sustainable local capacity. Finally, addressing restrictive regulatory and cross-border barriers is critical to enable rapid and equitable flows of resources, especially in times of crisis. Without such deliberate shifts, social justice and equity philanthropy risks retrenchment and the loss of post-2020 momentum. With them, the sector could evolve into a more inclusive, systemic, and impactful force for global equity and rights.

Health

GENERAL TRENDS IN FUNDING FOR HEALTH

Over the years, health has consistently received more funding, though amounts have varied depending on specific interests. According to Candid data, at least $78 billion has been given to health-related subject areas, including specialized fields. Since 2006, communicable disease control and public health have received more funds than any other subjects within the health sector ($25 billion and $19 billion respectively). On average, communicable disease control received about $1 billion annually. However, since 2020, public health has received more funding than any other health-related subject area. It has averaged no less than $0.5 billion, with a steady increase from 2015 until 2023, when it peaked at $2.5 billion before beginning to decline (Gates Foundation PowerBI Dashboard).

Malaria, HIV, general health, and tuberculosis remain well-funded after communicable disease control and public health, with total allocations ranging from $6 billion to $9 billion. Notably, in 2015 there was a surge in funding for health care administration and health financing, which jumped from below $0.2 billion on average to $2.7 billion (*See Figure 13*). In the U.S., much of this increase was tied to health insurance investments in health care administration and financing. Funding for tuberculosis, HIV, and malaria has fluctuated over the years but has remained relatively stable overall, likely due to ongoing investment from major philanthropic funders.

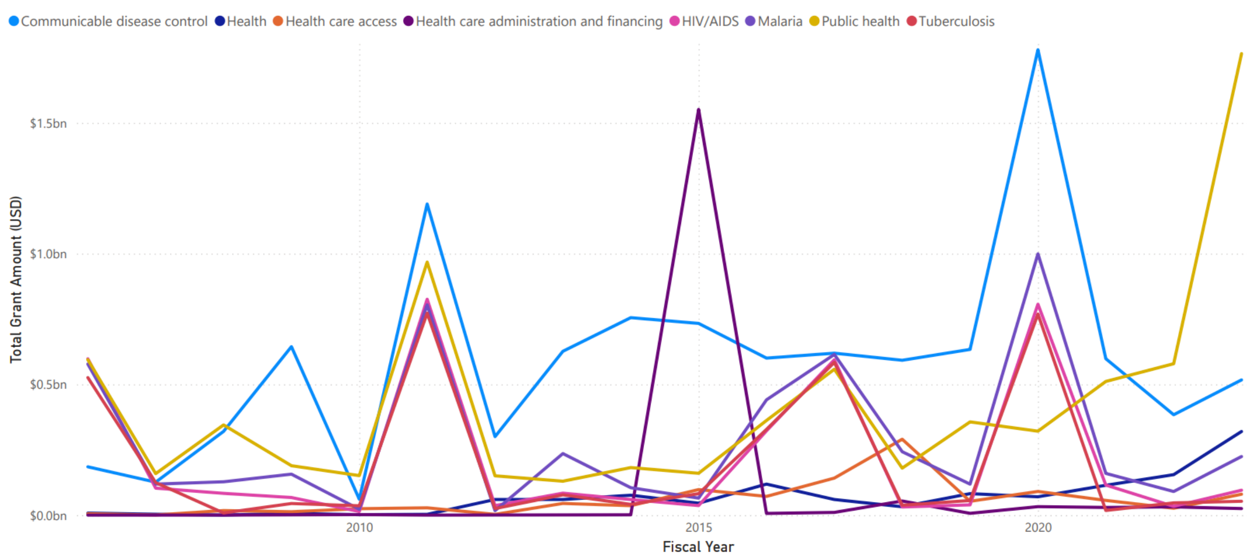

Figure 13: Gates Foundation PowerBI Dashboard: YoY Trends of Grant Amounts by Health Subject (2006-2023)

TRENDS IN FUNDING BY RECIPIENT SUBJECT AND POPULATION

Between 2006 and 2025, a total of $78 billion was spent on the health sector (Gates Foundation PowerBI Dashboard).. Of this, about 30 percent was directed to low-income populations. More than half of the total went to three main groups: low-income people, children and youth, and women and girls (*See Figure 14*). In contrast, during the past ten years, 58 percent of health sector funds were allocated to these same groups, though approximately 22 percent of this amount went to non-specified populations.

The remaining funds were distributed across a wide range of other groups, including people with substance use disorders, survivors of abuse, individuals with disabilities, people living with terminal illness, and people affected by HIV and AIDS. It is important to note that these population groups are not mutually exclusive. Individuals may be classified under more than one category, which means that some groups that appear to have received only a small share of grants may in fact have benefitted from significant funding overall.

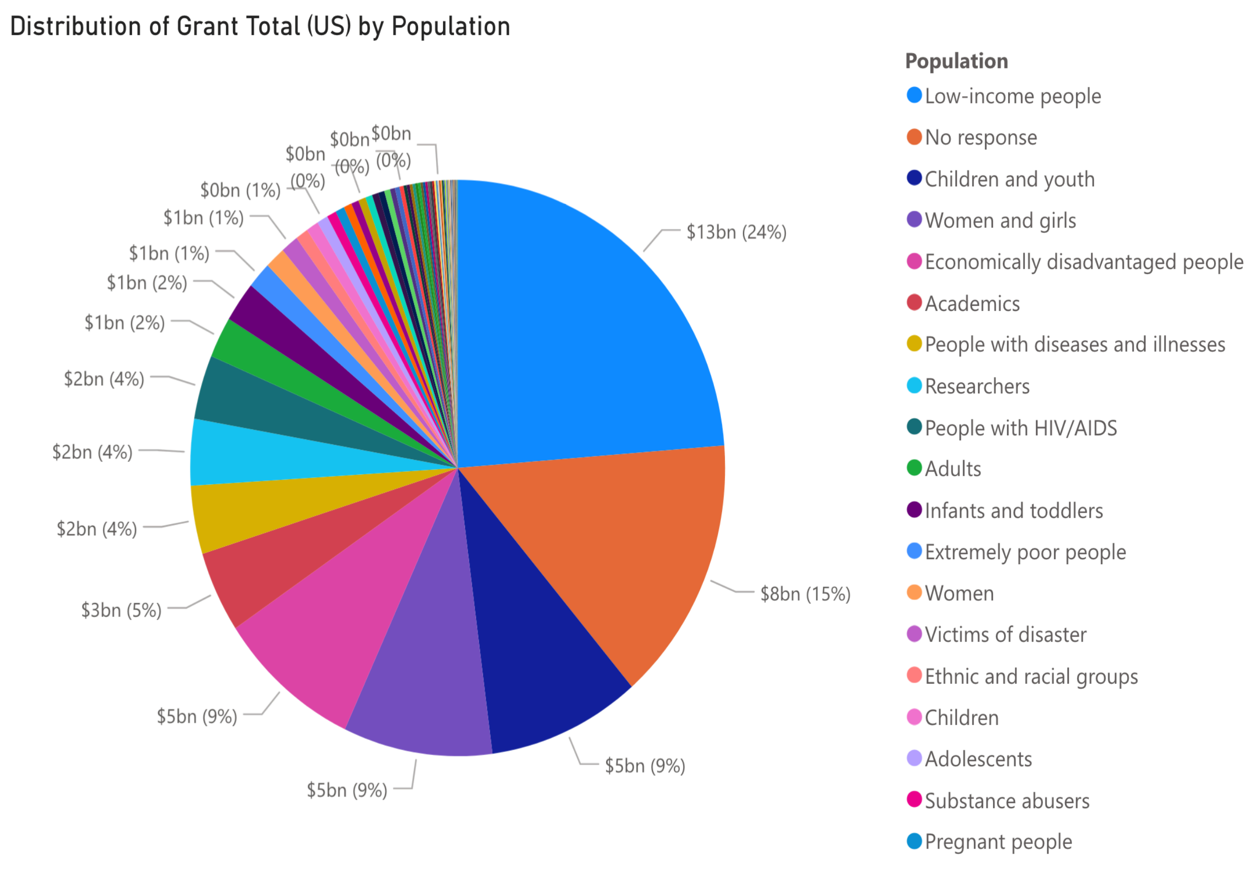

Figure 14: Gates Foundation PowerBI Dashboard: Distribution of Grant Total (US) By Population for Health Subjects

TOP RECIPIENTS FOR HEALTH

Across all recipients, the top five grantees are from the health sector. The World Health Organization, which focuses on global health, disease control, and international development, is the largest recipient with $5.2 billion across 869 transactions. The GAVI Alliance, which supports low- and middle-income countries in health care administration, financing, infant care, and vaccine delivery, is the second-largest recipient with $4.9 billion through 12 transactions. The Global Fund, which funds HIV, tuberculosis, and malaria programs in LMICs, ranks third with $3.7 billion across 44 transactions (Gates Foundation PowerBI Dashboard)..

PATH received more than $2.5 billion in over 600 transactions, primarily supporting health care management, public health, HIV, malaria, and therapeutic development. Rounding out the top five is UNICEF USA, which received more than $1.7 billion. Within the U.S. context, UNICEF USA directs its funding toward health, disaster relief, and human services.

COMMUNICABLE DISEASE CONTROL

About $25 billion has been allocated to the communicable disease control subject area. Between 2006 and 2023, annual funding for this area never fell below $0.5 billion. Notably, 60 percent of communicable disease control grants between 2006 and 2025 were directed to low-income people, children and youth, and economically disadvantaged populations. Since 2016, however, the concentration of funding has increased, with about 80 percent of grants going to five population groups: low-income people, economically disadvantaged people, children and youth, people with diseases and illnesses, and an unspecified category (Gates Foundation PowerBI Dashboard).

Although COVID-19 was not explicitly coded in the data, trends suggest that pandemic-related support influenced the rise of the unspecified category, which grew from 13 percent in 2018 to 19 percent in 2019 and beyond. This increase may reflect grants that were intended to support COVID-19 control and mitigation efforts but were not categorized under a specific population group.

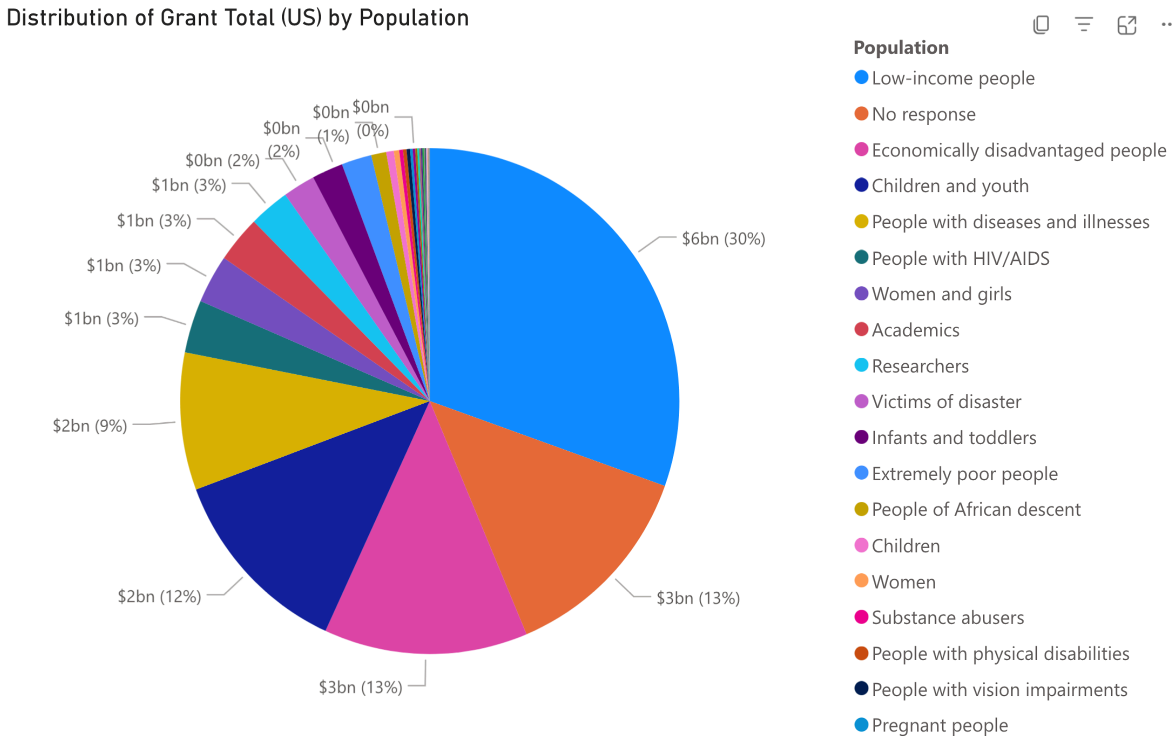

Figure 15: Gates Foundation PowerBI Dashboard: Distribution of Grant Total (US) By Population for Communicable Disease Control

COVID-19 PANDEMIC GIVING

Philanthropic giving played a critical role in the global COVID-19 pandemic response. Between 2020 and 2022, an estimated $3.3 billion in COVID-19-related aid was provided. Overall philanthropic flows rose rapidly, increasing from $8.2 billion in 2019 to $10.7 billion in 2021. Five foundations alone accounted for 86 percent of all aid: the Mastercard Foundation ($1.3 billion), the Gates Foundation ($1.1 billion), the Wellcome Trust ($204 million), the Rockefeller Foundation ($142 million), and the LEGO Foundation ($92 million) (*See Figure 16*). Roughly 80 percent of this funding went to the health sector, particularly for infrastructure, testing and contact tracing, vaccine development, and vaccine deployment. Sub-Saharan Africa received 55 percent of these resources, with a focus on protecting poor and vulnerable populations (*See Figure 17*).

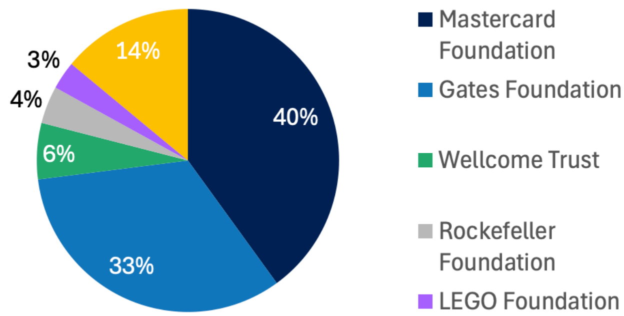

Figure 16: Distribution of Major Foundations Involved in COVID-19 Giving

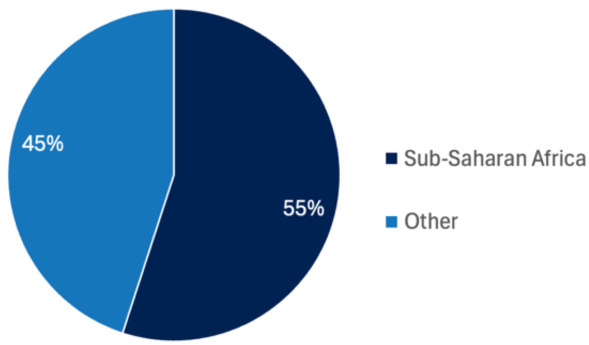

Figure 17: Distribution of Sub-Saharan Africa Focused COVID-19 Giving

Philanthropic organizations worked closely with local governments to align with national priorities and to reach marginalized communities, particularly in rural areas. At the global level, foundations coordinated effectively with multilateral organizations. For example, the Gates Foundation was the second-largest funder of the World Health Organization. Public-private partnerships also played a key role in the creation of COVAX, Gavi, and CEPI, which coordinated the global vaccine supply. Additional forms of collaboration included technology transfer, such as the Carlos Slim Foundation's role in AstraZeneca production in Argentina and Mexico; knowledge sharing through virtual meetings and collaborative networks; and resource pooling to maximize impact.

These efforts generated significant outcomes. Health infrastructure expanded, including 626 field hospitals built in Mexico, the distribution of more than 120 million rapid antigen tests to LMICs, the procurement of 17 million modern vaccines, and the upgrading of 80 hospitals in India. Philanthropy also supported innovation and scale, with digital platforms for COVID-19 reaching 7.5 million users and vaccine production capacity expanding in Latin America. Research advancement was another notable outcome, along with financial innovation, as approximately $2.9 billion was raised through social bonds to sustain the pandemic response.

The foundations excelled in providing support because of speed and agility and less bureaucratic processes in comparison to governments. They leveraged existing relationships, drew on specialized knowledge in health, supply chain, technology, efficiency, and flexible funding approaches. Furthermore, they were willing to take risks by funding unproven approaches that governments could not risk (OECD, 2023)

OPPORTUNITIES

Funders have a range of opportunities to expand their impact in the years ahead. One area is financial innovation, where philanthropy can provide flexible funding and risk capital to support bold, experimental initiatives that may be too uncertain for traditional investors. Equally important is operational innovation, including the development of new partnership models such as private–public collaborations, which allow governments, businesses, and civil society to align their strengths and deliver solutions at scale.

Funders can also maximize their effectiveness by building on existing relationships, institutional knowledge, and technical expertise, acting as conveners who connect local partners with global institutions. Looking forward, philanthropy has a critical role to play in strengthening disaster preparedness. Strategic investments in next-generation vaccines, improved disease surveillance, and early warning systems can help build resilience and reduce the costs of future crises, ensuring that vulnerable communities are protected before emergencies arise.

Global Giving Key Findings

Intersectionality

SUBJECT AREAS

Philanthropic giving interests are rarely distinct categories. Instead, they intersect and overlap in complex ways. Education provides a clear example. Funding streams for nature education, nursing education, sexual education, or secondary education may appear to be separate fields, yet they are all captured under the broader umbrella of education. This shows how broad categories can obscure the distinctiveness of subfields while still connecting them under shared themes.

The same dynamic emerges when examining grant recipients. Populations are often categorized in overlapping ways. Terms such as “low-income people,” “economically disadvantaged,” and “extremely poor people” essentially describe the same group, yet they may be coded separately. These categories also intersect with identities such as youth, ethnic minorities, LGBTQ+ communities, homeless populations, and other at-risk groups. The result is significant complexity in interpreting data, since recipients may fall into multiple overlapping categories. This underscores the importance of using philanthropy data with caution and of recognizing both the richness and the ambiguity created by intersectionality in subject areas and beneficiary groups.

Intended Giving vs. Realized Giving

ALIGNMENT AND MISALIGNMENT

Philanthropic organizations frequently articulate strong intentions across a range of priorities yet realized giving often falls short of these commitments. Climate change, artificial intelligence, social equity, and gender equity are increasingly prominent in philanthropic discourse, but remain comparatively underfunded relative to stated ambitions. Many funders pledge to expand unrestricted and flexible multi-year support, yet in practice short-term and project-restricted grants continue to dominate.

By contrast, disaster response and pandemic recovery represent areas where intended and realized giving have aligned more closely. COVID-19 and the war in Ukraine prompted rapid and substantial flows of funding that matched the urgency of donor commitments. In other domains, however, external funding flows often fail to reflect local priorities, particularly in cross-border contexts. While African philanthropic institutions are becoming more visible, they remain underfunded compared to actors in the global North, and much philanthropy in the Global South continues to be channeled through informal or diaspora networks rather than the structured vehicles funders say they intend to build.

Growing Complexities

EVOLVING MECHANISMS AND INTERESTS

The philanthropic landscape is becoming increasingly complex as both mechanisms of giving and donor interests evolve. Traditional vehicles such as private foundations remain influential, but new models are rapidly expanding. Donor-advised funds, collective giving platforms, impact investing, and digital or hybrid approaches are widening participation and creating greater flexibility in how resources flow. At the same time, giving interests are shifting. Health and education continue to dominate philanthropic portfolios, yet there is rising donor attention to climate change, social justice, and artificial intelligence. These developments point to a sector that is broadening in scope while becoming more fragmented in focus, creating both opportunities and challenges for funders who seek to align strategies in a changing environment.

RECOGNIZING THE NUANCES

Philanthropy is expanding and becoming more nuanced. Funders today are asked to navigate overlapping roles as grant makers, investors, advocates, and partners. They also often work across sectors and geographies. This complexity reflects the growing interconnectedness of social challenges, where issues like climate change, health equity, and economic justice cannot be solved in isolation.

Rather than shying away from this layered landscape, it is best to lean into the complexity. The funding landscape must acknowledge that effective philanthropy now requires systems thinking, collaboration, and an openness to experimentation. By helping funders better understand the spaces in which they operate and the broader impact of their decisions, philanthropy can move beyond transactional giving and become a more strategic force for long-term, systemic change.

THEMATIC LENSES

To make sense of this complexity, it becomes necessary to clearly detail out giving interests and overlay them with thematic lenses through which funders may be motivated to act. These lenses such as advocacy, climate, AI, and equity can help create a more holistic framework for understanding philanthropy. That includes where capital flows, how it aligns with funders' values, and what long-term impact it can have. By adopting this structured approach, philanthropy can move beyond transactional giving and become a more intentional force for systemic and sustainable change.

Philanthropic Resilience

ADAPTABILITY

Philanthropy has demonstrated resilience in the face of global uncertainty. Despite repeated shocks from health crises, economic volatility, and shifting political environments, overall giving flows have remained steady rather than contracting. Funders have adapted by experimenting with new mechanisms, adopting more flexible practices, and reorienting priorities in ways that allow them to respond to immediate needs while sustaining long-term commitments. This adaptability has strengthened the sector's role as a stabilizing force during times of disruption. At the same time, there is significant uncertainty about how recent policy changes will affect funding trends; in particular, cuts to U.S. international aid in 2025 could reshape both the volume and direction of cross-border philanthropy and beyond.

Recommendations

Redefining Taxonomies

METHODS

As part of the initial project ask, the UW START Team spent time redefining the Giving Interest Taxonomy List used by the Gates Foundation Philanthropic Partnerships Team (PPT). The analysis was guided by an original list (*See Appendix 2*) of philanthropic giving interest areas provided by Gates PPT.

We reviewed this list alongside emerging trends in the philanthropic landscape and recent patterns in funding flows. The process was iterative and collaborative. We engaged in a series of discussions with the client and additional team members to review, test, and refine the proposed taxonomy of giving interests. Using these reference points, we redefined and reorganized the categories of giving interests with the aim of making them more aligned to contemporary practices in the field and more functional for future tracking.

The resulting Giving Interest Taxonomy List can be found in Appendix 1 and reflects both field-wide developments and the client's practical needs, ensuring that it can be applied consistently to track philanthropic funding partners over time.

OVERARCHING LENS

The UW START Team also recommends applying broad, thematic lenses that can be applied across giving interest areas to better capture the interwoven nature of the philanthropic landscape. We recommend incorporating advocacy, artificial intelligence, climate, and equity as overarching lenses.

Applying these perspectives helps make sense of the complexity of philanthropy by showing how funder interests often cut across traditional categories. For example, artificial intelligence may be an overarching priority for a funder who wishes to apply AI innovations to primary education or to climate forecasting. By tracking AI as a lens and documenting how it connects with other interest areas, philanthropy can more effectively align strategies and support funder priorities. Similarly, integrating advocacy, climate, and equity lenses highlights the cross-cutting dimensions of these issues and creates a clearer picture of how they shape funding trends.

NOTABLE CHANGES

Several changes have been made to the Gates Foundation's original focus area list. Major adjustments are summarized below, and both the original list and the newly refined version are included in the Appendix.

- **Artificial Intelligence:** Now identified as its own category, separate from technology. As AI continues to evolve, funders are showing strong interest in related themes such as ethics, innovation, and "AI for good." These elements reflect a growing concern with ensuring AI is applied responsibly and equitably, while also driving social benefit.
- **Climate, Environment, and Sustainability:** Expanded into the largest category, encompassing essential components of climate and environmental giving. Aligned all environmentally related components under one category.
- **Economic Development:** Broadened to include pay equity, based on recommendations from a meeting with Gates Foundation partners. Also, it was expanded to capture rural development.
- **Emergency Relief:** Moved this category from a focus area under Human and Social Services to its own Interest Area. Two new focus areas were added: Wars & Conflict and Natural Disasters to capture emergency funding shifts toward major world events.
- **Gender & Family Welfare:** Renamed to be more inclusive of the focus groups centered around family support.
- **Health: Disease and Conditions:** Broadened by removing "COVID-19" as a standalone category, ensuring flexibility to address current and emerging global health needs. Health was separated into two categories to try to capture the nuances across global health interests.
- **Health: Population Health:** Redefined to reflect global health needs that are non-disease focused and instead, more structural and population based. Health was separated into two categories to try to capture the nuances across global health interests.
- **Heritage and Public Spaces:** Revised with a clearer and more inclusive name.
- **Higher Education:** Updated to include academic research as well as vocational and technical training, aligning with emerging priorities highlighted in recent research.
- **Human Rights and Social Justice:** Expanded to explicitly include Indigenous rights and LGBTQ+ issues.

Conclusion

Over the last decade and beyond, global philanthropy has transformed. While traditional mechanisms such as private foundations and faith-based giving remain influential, the sector has diversified with donor-advised funds, pooled collaboratives, and impact-driven vehicles that expand participation and flexibility. This has enabled philanthropy to respond with agility to crises such as COVID-19, while also laying the groundwork for long-term systems change.

At the same time, giving interests have broadened and become more nuanced. Health and education continue to dominate overall flows, yet climate change, artificial intelligence, gender equality, and social justice have emerged as increasingly visible priorities. These interests are not siloed but intersect in ways that reflect the interconnected nature of global challenges. Importantly, while philanthropy has demonstrated resilience and adaptability, gaps persist. This is particularly apparent in the alignment between stated donor intentions and realized funding, as well as in the chronic underfunding of grassroots, community-led initiatives.

Regional distinctions remain critical in shaping how philanthropy takes form. From diaspora-led giving in Latin America and South Asia, to feminist regranting in Sub-Saharan Africa, to Indigenous rights advocacy in Oceania, the global landscape illustrates both the power and the complexity of local context. These regional patterns underscore the importance of cross-border tools, intermediaries, and collaborative approaches that respect local priorities while advancing global goals.

Looking ahead, philanthropy's capacity to serve as a stabilizing and catalytic force will depend on its willingness to embrace complexity, invest in underfunded priorities, and sustain commitments beyond moments of crisis. By adopting systemic perspectives, supporting equity-centered approaches, and strengthening linkages between global and local actors, the sector can move beyond transactional giving and shape a more intentional, inclusive, and impactful future.

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Appendix

APPENDIX 1: REFINED GIVING INTERESTS TAXONOMY LIST

Interest Area	Focus Area
Adolescent Learning	Charter Schools
Adolescent Learning	K-12 Education
Adolescent Learning	Learning Disability
Adolescent Learning	Parochial Schools
Adolescent Learning	Public Schools
Adolescent Learning	STEM
Advocacy & Governance	Leadership & Capacity Building
Advocacy & Governance	Left Wing
Advocacy & Governance	Right Wing
Artificial Intelligence	Adoption & Capacity Building
Artificial Intelligence	AI For Good
Artificial Intelligence	Ethics & Governance
Artificial Intelligence	Innovation & Technology Development
Arts, Culture	Art
Arts, Culture	Dance
Arts, Culture	Film
Arts, Culture	Museum
Arts, Culture	Music
Arts, Culture	Theater
Civic Engagement	Libraries
Civic Engagement	Media & Journalism
Climate, Environment, & Sustainability	Agriculture Development
Climate, Environment, & Sustainability	Animal Welfare

Climate, Environment, & Sustainability	Climate Change Adaptation
Climate, Environment, & Sustainability	Climate Change Mitigation
Climate, Environment, & Sustainability	Energy
Climate, Environment, & Sustainability	Environmental Preservation
Climate, Environment, & Sustainability	Gender Responsive Climate Action
Climate, Environment, & Sustainability	Sustainable Food
Climate, Environment, & Sustainability	Water Preservation
Climate, Environment, & Sustainability	Wildlife Preservation
Early Childhood Education	.
Economic Development	Employment
Economic Development	Microloans
Economic Development	Pay Equity
Economic Development	Rural Development
Economic Development	Social Entrepreneurship
Emergency Relief	Natural Disasters
Emergency Relief	War & Conflict
Gender & Family Welfare	Domestic Violence & Safety
Gender & Family Welfare	Economic Empowerment
Gender & Family Welfare	Family Leave
Gender & Family Welfare	Family Planning
Gender & Family Welfare	Gender Equality
Gender & Family Welfare	Girl's Education
Health: Disease & Conditions	Cancer Centers
Health: Disease & Conditions	Non-Communicable Diseases
Health: Disease & Conditions	NTDs
Health: Disease & Conditions	Pandemic Preparedness
Health: Disease & Conditions	Vaccine Preventable Diseases
Health: Disease & Conditions	Specific Disease *(Specify in notes)*

Health: Population Health	Health Equity
Health: Population Health	Health Promotion
Health: Population Health	Health System Strengthening
Health: Population Health	Healthcare Systems and/or Hospitals
Health: Population Health	Maternal, Newborn & Child Health
Health: Population Health	Mental Health
Health: Population Health	Nutrition
Health: Population Health	Substance Use Disorder
Health: Population Health	Vulnerable Populations
Health: Population Health	WASH
Heritage & Public Spaces	Historic Preservation
Heritage & Public Spaces	Parks & Public Spaces
Higher Education	Academic Research
Higher Education	Business school
Higher Education	Scholarships & Fellowships
Higher Education	Vocational & Technical Trainings
Higher Education	Specific University *(Specify in Notes)*
Human and Social Services	Gun Violence Prevention
Human and Social Services	Housing
Human and Social Services	Law and Order
Human and Social Services	Poverty Alleviation
Human and Social Services	Veterans
Human and Social Services	Youth
Human Rights and Social Justice	Criminal Justice
Human Rights and Social Justice	Indigenous Rights
Human Rights and Social Justice	LGBTQ+ Rights
Human Rights and Social Justice	Racial Justice
Medical & Biomedical Research	Autism Research

Medical & Biomedical Research	Biomedical Research
Medical & Biomedical Research	Brain Research
Medical & Biomedical Research	Cancer Research
Medical & Biomedical Research	HIV Research
Medical & Biomedical Research	Research & Development
Medical & Biomedical Research	Specific Research *(Specify in notes)*
Religious and Faith-based Philanthropy	Buddhism
Religious and Faith-based Philanthropy	Christian Causes
Religious and Faith-based Philanthropy	Islamic Causes
Religious and Faith-based Philanthropy	Jewish Causes
Religious and Faith-based Philanthropy	Mormon Causes
Religious and Faith-based Philanthropy	Specific Religion *(Specify in notes)*
Science and Technology	Basic Science Research
Science and Technology	Engineering
Science and Technology	Genomics
Science and Technology	ICT (Information, Communication, Technology)
Science and Technology	Space

APPENDIX 2: ORIGINAL GIVING INTERESTS TAXONOMY LIST

Interest	Focus Area
AI	
Advocacy and Governance	Left Wing
Advocacy and Governance	Right Wing
Arts, Culture, Humanities	Art
Arts, Culture, Humanities	Dance
Arts, Culture, Humanities	Film
Arts, Culture, Humanities	Museum
Arts, Culture, Humanities	Music
Arts, Culture, Humanities	Theater
Charitable Sector Support	
Community Improvement and Development	Animal Welfare
Community Improvement and Development	Historic Preservation
Community Improvement and Development	Parks & Public Spaces
Community Improvement and Development	Youth
Covid- 19	Diagnostics
Covid- 19	Education
Covid- 19	Gender
Covid- 19	Therapeutics
Covid- 19	Vaccines
Covid- 19	Vulnerable Populations
Early Childhood Education	
Environment and Climate	Climate change
Environment and Climate	Energy
Environment and Climate	Environmental Preservation
Environment and Climate	Sustainable Food
Environment and Climate	Water Preservation
Environment and Climate	Wildlife Preservation
Financial Services	Employment
Financial Services	Microloans
Gender Equality	Domestic Violence & Safety

Gender Equality	Economic Empowerment
Gender Equality	Family Leave
Gender Equality	Family Planning
Gender Equality	Girl's Education
Gender Equality	Maternal - Newborn & Child Health
Global Development	Agriculture Development
Global Development	NTDs
Global Development	Nutrition
Global Development	Polio
Global Development	Specific Disease (specify in notes)
Gun Violence Prevention	
Health	Cancer Centers
Health	Children's Health
Health	Healthcare Systems
Health	Mental Health
Health	Specific Disease (specify in notes)
Health	Substance Abuse
Higher Education	Business school
Higher Education	Scholarships
Higher Education	Specific University (Specify in Notes)
Human and Social Services	Emergency Relief
Human and Social Services	Law and Order
Human and Social Services	Poverty Alleviation
Human and Social Services	Veterans
Human Rights and Social Justice	Criminal Justice
Impact Investing	
K-12 Education	Charter Schools
K-12 Education	Learning Disability
K-12 Education	Parochial Schools
K-12 Education	Public Schools
K-12 Education	STEM
Leadership and Capacity Building	

Media and Journalism	
Medical Research	Autism Research
Medical Research	Brain research
Medical Research	Cancer Research
Medical Research	HIV Research
Medical Research	Specific Disease (specify in notes)
Prizes & Challenges	
Racial Justice	
Religious and Faith-based Philanthropy	Buddhism
Religious and Faith-based Philanthropy	Christian Causes
Religious and Faith-based Philanthropy	Islamic Causes
Religious and Faith-based Philanthropy	Jewish Causes
Religious and Faith-based Philanthropy	Mormon Causes
Science and Technology	Artificial Intelligence
Science and Technology	Basic Science Research
Science and Technology	Computer Science
Science and Technology	Genomics
Science and Technology	Space
Social Entrepreneurship	Entrepreneurial Competitions