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Les fondations dans l'espace et dans le temps

Cost Effectiveness from a PVO Perspective

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The purpose of the studies, surveys and information included in this periodical concerning the international and transnational networks of nongovernmental organizations is to promote understanding of the associative phenomenon in a human society which continues to grow and evolve regardless of the consequences.

The programme of the review, in accordance with the principles of the UAI, is intended to clarify general awareness concerning the associative phenomenon within the framework of international relations and, in particular, to inform associations about aspects of the problems which they tend to share or which are of common interest to them.

The columns of this review are open to association officers, research workers and specialists of associative questions. The articles do not of course necessarily reflect the point of view of the oublisher.

Cette publication, éditée par l'UAI, se présente à ses lecteurs sous la forme d'une revue de période bimestrielle.

Son objet associatif d'études, d'enquêtes, d'informations, au service des réseaux internationaux et transnationaux d'organisations non gouvernementales, s'attache aux idées et aux faits d'un phénomène de société humaine en expansion continue et en évolution hâtée.

Son programme, conforme aux principes et aux méthodes de IUAI, vise, en général, à éclairer les connaissances du grand public sur la vie associative dans la perspective des relations internationales et, en particulier, à informer les associations des divers aspects de leurs problèmes propres et d'intérêt commun.

Les colonnes de la revue sont ouvertes à la fois aux responsables d'associations, chercheurs, spécialistes des matières associatives, dont les articles n'expriment pas nécessairement le point de vue de l'éditeur.

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Les fondations dans l'espace et dans le temps*

par Frits W. Hondius

La fondation peut se définir de diverses manières. Je me baserai sur l'expert américain F. Emerson Andrews qui a dit qu'une fondation est un organisme non gouvernemental et non lucratif, doté de son propre capital et géré par son propre organe de direction, qui poursuit un but d'utilité publique.

Aucun exercice n'est plus utile pour découvrir la réalité sociologique d'une institution juridique que l'examen de livres de comptabilité ou des statistiques. Je n'ai pu résister à la tentation d'un tel exercice. J'ai comparé les pages FONDATION du Bottin de Paris avec le «telefoonboek» de La Haye, sous STICHTING.

La Haye (408.000 hab.) dénombre 439 fondations abonnées au téléphones, soit un peu plus qu'une fondation pour mille habitants. Si Paris avait la même densité de fondations, il y en aurait 9.500. Or, le Bottin n'en mentionne que... 126.

Que veulent dire ces chiffres?

Que les gens de La Haye sont 75 fois plus généreux que les Parisiens ? Pas forcément, car il faut tenir compte de plusieurs autres facteurs. Tout d'abord, pour comparer la générosité des Hagenaars et des Parisiens il faut, non seulement compter le nombre des fondations, mais aussi chiffrer leurs capitaux. A cet égard il faut mentionner que le Conseil d'Etat français ne reconnaît une fondation que si elle possède au moins un capital de 5 millions de francs, tandis qu'aux Pays-Bas une somme symbolique - traditionnellement 100 florins - est suffisante pour créer une fondation. Récemment, la jurisprudence néerlandaise a même conclu que, puisqu'il s'agit d'une somme symbolique, l'on pourrait aussi bien ne pas en exiger du tout.

Autre différence entre la France et les Pays-Bas : les fondations françaises sont vouées à des causes nobles telles que la lutte contre le cancer, à la science ou aux beaux arts, alors que le Code civil néerlandais fait uniquement obligation qu'il y ait « un certain but». Par conséquent, les fondations aux Pays-Bas sont un passe-partout.

Cette diversité et multitude des fondations aux Pays-Bas (leur nombre est estimé entre 70 et 80.000) indique une troisième différence avec la France. Les formalités pour leur création sont extrément simples, situation comparable avec celle des associations en France. Il n'y a aucune forme d'agrément ou de tutelle de la part des pouvoirs publics. En outre, une collectivité publique, tout comme les particuliers, peut elle aussi créer des fondations.

Les fondations sont peu connues. Combien de gens savent, par exemple, qu'en Suède il existe 50.000 fondations pour 8 millions d'habitants? Leur patrimoine est estimé à 24 milliards de couronnes. Une seule fondation, la Knut och Alice Wallenbergs Stiftelse, a 5 milliards de couronnes.

Pour la République fédérale d'Allemagne, les estimations de l'année 1984 sont les suivantes. Le nombre des fondations s'élève à un onzième de la Suède: 4.400, mais leur capital est 5 fois plus grand : 25 milliards de deutschemarks. Les revenus net annuels sont estimés à 600 millions de deutschemarks.

La fondation est essentiellement un capital, un patrimoine, consacré à un but. Il s'agit, au moins dans les pays du droit civil, d'un capital sans propriétaire. Les pays Scandinaves caractérisent la fondation comme une institution *«qui possède elle-même» (selvejende).* La fondation est gérée par des personnes, mais elle ne peut pas être possédée, acquise ou vendue. Elle n'appartient à personne. Elle est inaliénable *(res extra commercium).* Il est vrai que le charitable trust du Common Law n'a pas de personnalité juridique et appartient au trustee, mais ses biens sont néanmoins hors du marché comme ceux des fondations de droit civil, car le trustée doit les gérer et les conserver conformément au trust instrument.

La fondation en tant qu'institution sociologique et juridique émerveille, à la fois par son âge et sa jeunesse. Elle est liée étroitement à l'histoire de l'Eglise chrétienne, presque bimillénaire. Mais, déjà auparavant, des formes analogues aux fondations ont été répertoriées dans l'Antiquité grecque et romaine. Il est probable que le concept de la fondation remonte encore plus loin, car il satisfait un besoin existentiel.

La fondation reflète le caractère social et solidaire de l'homme. En outre, l'homme s'est toujours préoccupé de ce qui va arriver après sa mort, d'où l'idée de confier certains biens, de son vivant ou après sa mort, à celui qui dirige le destin de tous les êtres humains, les vivants comme les morts.

La présence de ta divinité se concrétise dans les lieux saints qui n'appartiennent ni au Prince, ni à ses sujets. Ces *venerabiles domus vel loci* doivent être édifiés, entretenus, embellis pour assurer leur bon fonctionnement. Pour assurer leur entretien on leur affecte des biens, de préférence

(*) Conférence prononcée le 26 avril 1988 à Bruxelles, lors d'un déjeuner-débat organisé conjointement par l'Union des associations internationales (UAI) et la Fédération des associations internationales établies en Belgique (FAIB). Docteur en droit de l'Université de Leiden, Frits W. Hondius a occupé depuis 1969 divers postes de responsabilité au Conseil de l'Europe, où il est actuellement directeur des Affaires juridiques. Il est également conseiller juridique de la Fondation européenne pro Venetia Viva, membre de l'UAI et administrateur d'Interphii.

Foundations in Space and in Time*

by Dr Frits W Hondius

A foundation can be defined in different ways. I take as my point of departure the American expert F. Emerson Andrews who said that a foundation is a non-governmental and non-profit making body having an endowment fund of its own and governed by its own board of directors, to serve the common we/fare.

There is no better way for discovering the sociological background of a legal institution than by reading financial accounts or statistics. I could not resist the temptation: I compared the pages of FONDATION of the Paris telephone book with the corresponding pages of The Hague telephone book under STICHTING.

The Hague (population 408,000) has 439 foundations with a telephone, i.e. a little more than one foundation per 1,000 inhabitants. If Paris had the same density, it would have 9,500 foundations. In reality, its phone book lists ... 126.

What do these figures mean ?

That people in The Hague are 75 times more generous than Parisians ? Not necessarily, for several other factors enter into play. First, in order to compare Hague and Parisian generosity, one should count not only the number of foundations but also calculate their endowments. In that connection we should mention that the French Conseil d'Etat will not recognise a foundation which does not own at least 5 million Francs in endowment, whereas in the Netherlands a symbolical sum - traditionally 100 Guilders - suffices for setting up a foundation. Recently, Dutch courts decided that since it is a matter of symbolic value anyway, one might just as well drop any requirement of an initial sum.

A further difference between French and Dutch foundations is that whilst the former are dedicated to noble causes such as fighting cancer or promoting arts and science, the Dutch Civil Code merely requires that they should serve « a certain purpose ». *Consequently, foundations in the Netherlands are a veritable catch-all.*

The diversity and multitude of foundations in the Netherlands (whose number is estimated between 70 and 80 thousand) hint at yet another difference with France. The normal requirements for their establishment are extremely simple, a situation comparable with that of associations in France. There is no procedure of formal approval or supervision by public authorities. Moreover, the State may set up foundations on an equal footing with individuals.

Foundations are little known. How many people know, for example, that in Sweden there are 50 thousand foundations on a population of 8 million ? Their capital is estimated at 24 billion Crowns. One foundation alone, the Knut och Alice Wallenbergs Stiftelse, has 5 billion Crowns.

For the Federal Republic of Germany, the 1984 estimates are as follows. The number of foundations is one eleventh of that in Sweden : 4,000, but their capital is 5 times bigger : 25 billion Deutschmarks. Annual net revenue is estimated at 600 million Deutschmarks.

A foundation is basically a capital fund, a property, dedicated to a purpose. It is, at least in the civil law countries, a capital without an owner. Scandinavian countries characterise a foundation as a body «which owns itself» (selvejende). *It can be managed by persons, but it cannot be owned, acquired or sold. It belongs to nobody. It is inalienable* (res extra cornmercium). *It is true that the charitable trust under the Common Law has no legal personality and belongs to the trustee, but its property cannot be bought or sold, just as that of a foundation under civil law, for the trustee must manage and preserve it in conformity with the trust instrument.*

The foundation is a sociological and legal institution which has both a remarkable age and youth. It is closely linked with nearly two thousand years of history of Christianity. But even earlier, foundation-like bodies have existed in Greek and Roman Antiquity. It is very probable that the notion of foundations goes back further into history, for it responds to an existential need.

The foundation reflects the social and interdependent nature of man. Moreover, people have always been preoccupied by what will happen after their death, hence the idea of dedicating some of their possessions, now or after death, to the One who governs the destiny of all human beings, the living and the dead.

The divine presence manifests itself in holy places which belong neither to the Prince, nor to his subjects. These venerabiles domus vel loci *must be built, maintained and decorated to fit their purpose. In order to ensure their maintenance one may confer property on them, preferably land which guarantees a regular income. Such, for example, is the essence of Islamic foundations. The* Wakf. *The endowment made for the maintenance of a holy place and for worship may be extended to other causes, such as the shelter-*

(*) Address pronounced on 26 April 1988 during a working lunch jointly organised by the Union of International Associations (UAI) and the Federation of International Associations established in Belgium (FAIB).

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des terres qui assurent un rendement régulier. Voilà, par exemple, l'essentiel des fondations de l'Islam, les *Wakf.* La dotation qui est affectée à l'entretien du lieu saint et au culte de la divinité, peut s'étendre à d'autres causes, telles que l'hébergement de pèlerins, le soin des malades, l'enseignement; les *piae causas.*

Nous voyons dans cet archétype des fondations, une dichotomie fonctionnelle qui a gardé son actualité jusqu'à nos jours. Il y a, d'une part, la fondation/établissement *(Anstaltstiftung)* (un monastère, un collège, un orphelinat), et d'autre part, la fondation/capital *(Hauptgeldstiftung)* affectée à des buts d'intérêt public. La terminologie américaine moderne distingue les *operation foundations* (fondations qui consacrent leurs moyens à leurs propres activités, telles la Fondation Pasteur) et les *grant-giving foundations* (fondations qui subventionnent les activités des autres, telles que Ford Foundation ou Volkswagenstiftung).

Les fondations et institutions analogues ont connu un développement inégal dans le temps et dans l'espace. !I y a des pays où elles sont omniprésentes, puissantes et prodigieuses (Etats-Unis, Israël). Il y a d'autres pays où elles sont presque inconnues (Union Soviétique). Il y a des pays où elles sont plutôt rares, mais importantes (Portugal: Fundaçao Calouste Gulbenkian).

Le mouvement cyclique du phénomène des fondations, émergence suivie de déclin, ressemble à celui du ciel étoile. Les biens appartenant aux fondations sont inaliénables et les causes qu'elles servent ont une durée très longue. Il peut en résulter une accumulation de biens soustraits à la circulation. C'est la main morte. Jaloux de ce pouvoir économique parallèle, les souverains ou parlements ont souvent pris des mesures à leur encontre, tels les *capilularia* de Charlemagne ou le Mortmain Act d'Angleterre en 1736. Toutefois, les fondations sont à cet égard comme le gazon: on tond, mais ça pousse à nouveau.

Rappelons trois exemples. La Réforme semblait fournir une occasion idéale aux pays protestants pour abroger la main morte une fois pour toutes en confisquant les biens et les institutions de l'Eglise. Le contraire s'est produit. Les nouveaux pouvoirs, villes et citoyens prospères ont pris plaisir à créer à leur tour d'innombrables fondations. Deuxième exemple: la Révolution française. Elle abolit les corporations, relais inutiles entre l'Etat et les citoyens. Mais les fondations n'ont pas tardé à renaître et dès 1805 le Conseil d'Etat a affirmé leur existence en déclarant que l'Etat a un pouvoir original, «régalien », de reconnaître des fondations. L'exercice de ce pouvoir régalien est devenu, en France, le droit de fondations: institutions privées mais ignorées du Code civil.

Dans les pays de l'Est, l'instauration de régimes communistes semblait mettre fin à toute activité non étatique économique ou sociale, mais les fondations y sont aujourd'hui en pleine effervescence. En Hongrie, leur nombre actuel est estimé à plus de 400 et leur patrimoine à 200 ou 250 millions de florins (environ $ 5 millions). L'Etat hongrois favorise la création de fondations par des privilèges fiscaux. De même, la Pologne a récemment adopté une loi sur les fondations.

M est intéressant de regarder de plus près le cadre législatif et normatif régissant les fondations. Depuis 1980 je m'efforce *de* documenter ce cadre juridique dans une étude pour la *International Encyclopedia of Comparative Law.* Cette étude constate une très grande diversité de systèmes juridiques, même en Europe, allant de modèles très restrictifs (autorisations et contrôles par l'Etat; peu de concessions fiscales; enumeration limitative des buts et pouvoirs de fondations, ec.) a des modèles très libéraux (faible contrôle par l'Etat; concessions fiscales importantes, etc.).

L'on peut diviser et sous-diviser les fondations et entités analogues selon différents systèmes juridiques. Je ne veux pas entrer dans les détails, mais me limiterai à signaler certains points essentiels concernant les fondations d'aujourd'hui.

Premièrement, les gouvernements et les législateurs favorisent presque partout les fondations et leur renouveau. Une explication importante en est le phénomène des privatisations et de la déréglementation. Une autre est le souhait de mobiliser de nouvelles ressources, comme c'est le cas de la récente loi française sur le mécénat culturel. D'ailleurs c'est sans doute aussi le cas des récentes lois yougoslave et polonaise, tendant à combler l'écart entre la vie officielle et la vie réelle et de favoriser les dons privés venant de l'étranger.

En Amérique centrale, le désir d'améliorer le développement économique et social pour et par les peuples, se traduit par la création d'un vaste réseau de fondations socio-économiques, réunies dans un mouvement régional appelé « Solidarios ». Ce mouvement est accompagné par l'adoption de lois modernes en matière de fondations, telle la nouvelle Ley de Fundaciones de Costa Rica.

Un nouveau point culminant a été atteint en Espagne en 1978 par la proclamation - une première mondiale - d'un droit du citoyen à la fondation, pour des finalités d'intérêt général et de conformité avec la loi (Constitution Art. 34 (2)). Un droit fondamental dans le double sens du mot!

Depuis longtemps le droit d'association figure parmi les droits de l'homme et est protégé par les conventions internationales (Art. 11 de la Convention européenne). L'initiative espagnole constitue le début d'un complément à ce droit en érigeant le droit à la fondation en droit fondamental.

En matière législative beaucoup reste à faire. Dans les pays où le droit des fondations est un bric-à-brac de textes épars, adoptés à différentes époques et dans différents sens un travail de «nettoyage» et d'intégration doit être accompli, comme l'ont déjà fait les Pays-Bas et le Danemark qui ont sorti chacun des nouvelles lois coordonnées. D'autres pays pourraient alléger leurs textes et pratiques, telle la France où la pratique kafkaesque du ministère de l'Intérieur défie les grands principes de justice administrative contemporaine. En outre, à côté des fondations « lourdes », reconnues d'utilité publique, on examine en France la possibilité d'une « deuxième voie » pour des fondations moins lourdes, par exemple a des fins locales (ex. un petit festival de musique) et pour lesquelles un régime de simple déclaration pourrait suffire.

En second lieu, on assiste à un réexamen de la façon dont les fondations répondent aux besoins de la société. Il est généralement reconnu aujourd'hui qu'il est préférable de créer des fondations dont les organes dirigeants disposent d'une marge de manœuvre leur permettant d'exécuter leur mandat statutaire en fonction de besoins réels. Dans ce contexte on constate que de plus en plus les responsables et conseillers de fondations se rencontrent, aux niveaux national et international, pour mieux coordonner leur action. Cette coordination se fait de façon nationale (ex. Arbeitsgemeinschaft deutscher Stiftungen ou le Council on Foundations aux Etats-Unis), internationale (Club de La Haye, lieu ing of pilgrims, caring for the sick or teaching : the piae causae.

We observe in these archetypal foundations a dichotomy which remains topical today. On the one hand, there is the foundation /establishment (Anstaltstiftung) (a monastery, a college, an orphanage) and on the other hand there is the capital fund/foundation (Hauptgelstiftung) which serves public purposes. Modern American terminology makes a distinction between operational foundations (which use their means for their own activity, such as the Fondation Pasteur) and grant-giving foundations (foundations which finance the activities of others, such as the Ford Foundation or the Volkswagenstiftung).

Foundations and similar bodies have shown a very irregular pattern of development in space and in time. In some countries they are ubiquitous, powerful and wealthy (United States, Israel). In o' 'er countries they are extremely rare (Soviet Union). There e also countries where they are few but important (Portugal: the Fundação Calouste Gulbenkian).

The cyclical movement of foundations, rise and decline, resembles stars in the night. Property of foundations is inalienable and the causes they serve are long-term. This may result in an accumulation of wealth outside the commercial circuit, the «dead hand». Jealous of such parallel economic power, sovereigns and parliaments often have taken counter-measures, such as the capitularia of Charlemagne or the Mortmain Act 1736 in England. But foundations are like lawns: the more you mow them the faster they grow.

Let me mention three examples. The Reformation seemed to offer an ideal occasion for Protestant countries to do away once and for all with the dead hand, by confiscating Church property and institutions. The opposite happened. The new powers, rich cities and citizens took an immense pleasure in setting up in their turn numerous foundations. Second example: the French Revolution. It abolished corporations which were considered useless intermediaries between the State and the individual. But within a very short time, foundations were back in business. In 1805 the Consul d'Etat confirmed their existence and declared that the State has a «royal» power to recognise foundations. The exercise of this royal power has become in France the law governing foundations: private entities ignored by the Civil Law.

In East European countries, the establishment of Communist régimes seemed to have brought to an end all economic and social activity at the non-governmental level, but today there too foundations are blossoming forth. In Hungary their number is estimated at more that 400 and their wealth at 200 to 250 million Francs (about $5 million). The Hungarian State favours in its fiscal policy the setting up of foundations. Poland likewise recently adopted a law on foundations.

It is worth taking a closer look at the legislative and regulatory frameworks for foundations. Since 1980, I have been engaged in documenting this framework in a study for the International Encyclopedia of Comparative law. My study shows a wide variety of legal systems, even in Europe, ranging between very restrictive models (State controls and authorisations; few fiscal concessions; limitative enumeration of purposes and powers of foundations, etc.) and very liberal ones (little control by the State; important fiscal stimulus, etc).

One may classify and sub-divide foundations and similar entities according to various legal systems. I do not wish to go into detail but should like to highlight some salient features of foundations today.

First, almost everywhere, governments and legislators seem to favour foundations and their renewal. One explanation is the process of privatisation and deregulation. Another is the desire to mobilise new resources. A case in point is the recent French Cultural Patronage Act. Something similar is probably the case with the recent Polish and Yugoslav laws, which encourage private donations from abroad.

In Central America, the wish to improve the social and economic uplift of the people and by the people has given rise to a vast network of socio-economic foundations, cooperating within a regional movement called « Solidarios ». This movement is accompanied by law reform on foundations, as shown for example by the new Ley de Fundaciones of Costa Rica.

A new culminating point was reached in Spain in 1978 by the promulgation - a first - of the citizens' right [to set up a] foundation for purposes of public benefit and in conformity with the law (Constitution Art. 34 (2)). A fundamental right in the double sense of the word!

It should be recalled in this connection that for many years, the right to association belongs to human rights and is protected by international Conventions (eg Article 11 of the European Human Rights Convention). The Spanish initiative is the beginning of a companion right, since it elevates the right to [set up a] foundation - to the status of a fundamental right.

A lot remains to be done in the legislative field. In countries where the law on foundations is a patchwork quilt of unconnected laws, adopted during different periods and in different directions, a cleaning up job has to be done, along the lines of the Netherlands and Denmark, which have brought out consolidated laws. Other countries may wish to alleviate their law and practice, as in France where the kafkaesque procedure in the Ministry of the Interior is at variance with modem principles of administrative justice. Moreover, as well as heavy foundations, recognised as serving the public interest, France now studies the possibility of a «second road» for less weighty foundations, for example for local causes (a music festival, etc), for which a régime of a simple declaration might do.

Secondly, the way in which foundations respond to the needs of society stands to be re-examined. It is generally recognised that it is preferable to set up foundations whose directors have a certain margin of appreciation so that they can carry out their statutory tasks in a way that meets real needs. In this connection, it is to be noted that ever more frequently leaders and counselors of foundations get together in order to better co-ordinate their action. Such encounters may take place at the national level (as with the Arbeitsgemeinschaft deutscher Stiftungen or the Council on Foundations of the United States), or internationally (The Hague Club, clearing house of the big European foundations and Interphil, the « UIA » * of foundations) as well as at a functional level (eg the meeting of foundations around Unesco).

When reinforcing the links between foundations, one must take two closely related fields into account: voluntary action and fund raising.

* Union of International Associations.

de œncontre des grandes fondations européennes et Interphil. « l'UAI » des fondations) et fonctionnelle (ex. la rencontre des fondations autour de l'Unesco).

Ce renforcement des liens entre fondations doit tenir compte de deux domaines connexes : le volontariat et la collecte de fonds.

« Volontariat » signifie qu'une personne exerce son activité au bénéfice de la société sans y être tenue. Elle peut le faire par le biais d'une fondation, mais aussi et plus souvent poar le biais d'une association. Tant le volontariat - don de soi-même - que la fondation - don d'argent - font partie du «Third Sector» qui se caractérise par une action dont la motivation n'est ni le gain économique, (« Marketplace»), ni la recherche du pouvoir («Ballot Box »)

L'action des fondations se situe dans ou près du cadre de collecte de fonds. Une partie seulement des vastes sommes versées annuellement par les particuliers et les entreprises a des causes d'utilité publique passe par les fondations. D'ailleurs il y a, dans de nombreux pays, des fondations qui ont pour but, non seulement de distribuer des fonds mais également de les collecter *(Bettelstiftungen).* Ce phénomène est significatif de nos temps. Les gens veulent que leurs dons soient utilisés visiblement et rapidement. Il est très difficile de collecter de l'argent destiné à être placé sur le compte bancaire d'une fondation laquelle alimentera, par les intérêts, des actions futures.

Dans cet extraordinaire environnement du *fund raising* la pureté et la sérénité de la philanthropie sont rudement mises à l'épreuve. Les fondations doivent rivaliser, ou fraterniser, avec le sponsoring, le parrainage, les public-relations, la publicité, les lotos. Quelques pays ont été amenés à légiférer contre les excès, par exemple contre le colportage philanthropique par téléphone. La ligne de démarcation entre philanthropie et affaires est parfois difficile à tracer. Le caractère altruiste des fondations et de la philanthropie n'exclut pas l'emploi de salariés, ni l'application de méthodes de management moderne ou le recours à de nouveaux professionnels nommés *fund raisers* (bailleurs de fonds).

Le mécanisme régulateur le plus efficace pour faire la distinction entre ce qui est vrai et ce qui est faux dans le monde philanthropique, est la fiscalité. Mais ancrer toute la réglementation juridique des fondations dans le système fiscal - comme le font notamment les Etats-Unis - n'est pas souhaitable non plus (Lord Nathan: «an unholy alliance»). La seule et vraie motivation de la philanthropie est l'amour d'autrui et non pas le désir de diminuer sa feuille d'impôt. En outre, contrairement à la philanthropie, la fiscalité s'arrête aux frontières nationales.

Ceci amène au *troisième* point important, à savoir l'extraordinaire essor international des fondations et, partant, l'extension de leur champ d'application. Les fondations anciennes étaient très localisées : un orphelinat, un fonds de bourses d'études pour des jeunes originaires de telle ou telle ville. Aujourd'hui, des buts privilégiés des fondations sont la paix, les droits de l'homme, l'écologie, l'aide au tiers monde. Mais les Etats ne suivent pas, notamment parce que les possibilités de vérification, contrepartie de privilèges fiscaux, n'existent guère au niveau international. Seules certaines grandes causes internationales telles que l'Unicef ou la Croix Rouge sont reconnues par-delà les frontières. Il est souhaitable de reprendre à cet égard l'examen de la Convention pour le traitement fiscal des organismes sans but lucratif qu'Interphil avait proposée au Conseil de l'Europe en 1970.

Par comparaison avec les associations internationales qui ont inspiré l'UAI, les fondations internationales sont encore peu nombreuses. La International Foundation for the Development and Survival of Humanity, la Fondation Internationale Lyudmila Zhivkova et la Fondation européenne de la science en sont quelques exemples. Il ne s'agit que du nom «fondation européenne» ou «fondation internationale» car il n'existe pas de régime international de fondations. Toute fondation doit être créée selon l'ordre juridique national d'un Etat. Il existe, certes, quelques entités internationales nommées «fondation» (ex. la Fondation européenne) mais il s'agit la en vérité d'organismes de droit international public qui ne sont ni autonomes, ni indépendants des gouvernements. De tels organismes pourraient mieux s'intituler «fonds» (comme le Fonds européen de la jeunesse du Conseil de l'Europe).

L'élection du lieu d'implantation de fondations internationales est guidée par le souci de souplesse et d'absence de règles concernant la nationalité des membres des organes de direction et de respect de la part des autorités nationales à l'égard de l'autonomie interne. Le régime des fondations néerlandaises et suisses répondant positivement à ces critères, plusieurs fondations internationales ont élu domicile aux Pays-Bas (ex. la Fondation Eurodata, créée par les postes et télécommunications) et en Suisse (ex.: Fondation européenne Pro Venetia Viva).

Pour l'instant, et pour une longue période à venir, les régimes nationaux en matière de fondations resteront différenciés. Il est souhaitable que les créateurs de fondations internationales se rendent bien compte des avantages et désavantages de l'implantation dans tel ou tel pays. Et inversement, lorsqu'un pays s'impose d'emblée comme siège, pour certaines raisons, par exemple proximité d'une organisation internationale, ceci peut influencer l'orientation des fondateurs vers le modèle d'association ou de fondation.

Ayant souvent été consulté par des initiateurs de fondations ou associations internationales, je crois qu'il serait opportun de créer, auprès de l'UAI ou auprès d'Interphil, ou peut-être en «joint venture» des deux, un petit centre de consultation. La première tâche qu'on pourrait confier à ce Centre serait de réfléchir sur son propre statut juridique!

Something is voluntary action when people carry out an activity for the benefit of society without consideration. They may do so by means of a foundation, but usually it will be by means of an association. Both voluntary action - giving onesetf - and foundations - giving money - are a part of the « Third Sector» which is characterised by the fact that it is motivated neither by profit (the market place), nor by the quest for power (the ballot box).

The field of action of foundations is located close to the fund raising sector. Only a fraction of the vast sums of money which individuals and companies donate every year to public causes pass through foundations. In fact, there are in many countries foundations whose purpose is not only to give money but also to receive it (Bettelstiftungen). This is a phenomenon typical of our time. People want to see their donations spent visibly and rapidly. It is very difficult to collect money to be added to the bank account of a foundation which intends to use only the income derived from its capital for future action.

In the remarkable environment of fund raising the purity and serenity of foundations are rudely tested. Foundations must rival, or make friends with, sponsorship, patronage, public relations, advertising and lotteries. Some countries have been obliged to introduce laws against excesses, for example against charitable soliciting by telephone. The dividing line between philanthropic and other business is sometimes hard to draw. The non-profit character of foundations and philanthropy does not preclude them from employing staff, nor from applying modern management principles nor indeed from making use of a new kind of professional called fund raiser.

The most efficient regulatory mechanism to distinguish between true and false philanthropy is taxation. But it is not desirable either that the entire legal regulation of foundation is based - as is the case in the United States - on the fiscal system («an unholy alliance» according to Lord Nathan). The only true motive for philanthropy should be the love of one's neighbour and not the wish to diminish one's income tax return. Moreover, unlike philanthropy, taxation stops at the border.

This brings me to my third point, i.e. the extraordinary international expansion of foundations and their scope. Ancient foundations had a very localised scope : an orphanage, a scholarship fund for bright pupils from this or that town. Today, favourite purposes of foundations are peace, human rights, environment, the Third World. But States do not follow this trend for there are hardly any possibilities for international verification, counterpart of fiscal privileges. Only some great international causes, such as Unicef or the Red Cross, are recognised beyond national frontiers. It is desirable that the draft Convention for the fiscal treatment of non-profit organisations, which Interphil prepared in 1970, should be taken up again.

Compared with international associations, which are united in the UIA, international foundations are still relatively rare. Some examples are the International Foundation for the Development and Survival of Humanity, the International Lyudmila Zhivkova Foundation and the European Science Foundation. To be frank, « European Foundation » or « International Foundation » is just a name, for there is no truly international foundation régime. Every foundation must be set up in accordance with some national legal régime. It is true that there do exist some international entities which carry the label « foundation » (eg the European Foundation), but these are in reality public international organisations for they are neither autonomous nor independent from governments.

The selection of a place of residence of international foundations is influenced by their need for flexibility and absence of rules concerning the nationality of the board members and respect by national authorities for internal autonomy. The legal rules governing foundations in the Netherlands and Switzerland meet these criteria. Consequently several international foundations have established their place of residence in the Netherlands (e.g. the Eurodata Foundation set up by the telecoms of different countries) and in Switzerland (eg the European Foundation Pro Venetia Viva).

Today, and for a long time to come, national regimes governing foundations will remain very different. It is desirable that founders of international foundations take well into account the relative advantages and disadvantages of setting them up in this or that country. If, on the other hand, a given country is the obvious seat for certain reasons, e.g. proximity to an international organisation, this may influence the founder's choice of the association or foundation model.

I have often been consulted by persons who are setting up international foundations or associations and I think that it would be very useful to establish, either in the UIA or Interphi/, or perhaps as a joint venture or both, a small consulting service. The first job to be given to this service would be of course to reflect on its own legal status!

America's Wealthy and the Future of Foundations*

Past issues of RESEARCH REPORTS' have reported on a variety of different studies, often with an underlying thematic link. In this issue we deviate from that pattern to present the results of one major research project.[2]

In 1983. the Council on Foundations and the Yale Program on Non-Profit Organizations, faced with information pointing to a significant decline in the rate of creation of private independent foundations, combined the interests and skills of a number of scholars to investigate this apparent decrease. The study focussed on the private independent foundation, a form which is usually created by an individual or a family and constitutes the vast majority of all foundations. The Foundation Project, as it was termed, sought to uncover the factors that influence foundation growth and the reasons why people start - or decide not to start - independent foundations and the factors that influence their growth. The goal of the research team - members of which came from disciplinary bases in anthropology, economics, law, political science, and sociology - was to achieve a greater understanding of foundation development by bringing different perspectives to bear on the apparent decline in popularity of foundations as charitable vehicles of the wealthy.

The research included :

- a survey questionnaire distributed to over 1,000 foundations, designed to investigate foundation creation and growth and the demographic and motivational characteristics of major donors;
- interviews with 135 wealthy individuals about their charitable activities and motivations as well as specific reasons for adopting or rejecting the foundation vehicle for charitable giving;
- interviews with 100 advisors to the wealthy to understand better the process by which donors establish a legal instrument for charitable contributions, and the role and influence of such advisors;
- analysis of IRS data on foundation creation and growth, with particular attention to medium and large foundations; and
- matching estate and income tax returns to compare individuals' lifetime giving patterns with their bequests.

Program On Nonprofit Organizations,
Institution For Social And Policy Studies Yale University, USA.

The full report. America's Wealthy and the Future of Foundations, Teresa Odendahl, editor, was published in the spring of 1987 by The Foundation Center, 79 Fifth Avenue, New York, NY 10003 and can be ordered from the Center (see ad on page 9). The Program and the Council are deeply grateful for support for the Foundation Project from the W.K. Kellogg Foundation, the Andrew W. Mellon Foundation, and the Charles Stewart Mott Foundation, as well as support from the Ford Foundation for Gabriel Rudney's activities.

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Elizabeth Boris, political scientist and vice president for research at the Council on Foundations, and economist Gabriel Rudney, former Director of Research for the Filer Commission and Senior Research Associate at the Yale Program on Non-Profit Organizations, wrote the original proposal for the project and served as coordinators for their respective institutions. Anthropologist Teresa Odendahl, then Associate Research Scientist at Yale, was Project Manager. Other members of the research team included: Ralph Nelson, economist, Queens College; Eugene Steuerle, economist, U.S. Treasury: John A. Edie, Vice President and Genera! Counsel at the Council on Foundations; and Francie Ostrower, a doctoral candidate in sociology at Yale.

Rebecca Friedkin, a doctoral candidate in the Yale Sociology Department, compiled the following summary of selected sections of the book - sections that may be of greater interest to nonspecialist readers. Because of the technical nature of some of the material, a glossary of foundation terminology is provided.

Since the beginning of this century, foundations have been important institutions in American society. These private grantmaking organizations have helped to finance cultural, educational, health, and welfare organizations in the nonprofit sector. The record of foundation accomplishments extends beyond the funding of art museums, libraries, and universities to the cure of diseases, economic development, and the support of new occupations.

When many of us think of foundations we think of the giants: Ford, Rockefeller, Carnegie, and a few others. Although these older, generously endowed, and prestigious foundations capture much of the public's attention, they are far from the typical foundation in existence today. Small foundations make up the bulk of the field (more than 90 percent of all private foundations have less than $5 million in assets). The researchers describe the typical foundation as one that was created by a living donor in 1959 with $100,000 in assets and today has $600,000 in assets and four trustees, often including the donor or family members on the board.

Before addressing these factors in greater detail, we turn first to a discussion of this study's findings concerning the trends of foundation creation and growth.

Creation and Growth Trends

Foundations were begun in this country in the early 1900s by such notable philanthropists as Andrew Carnegie, John D. Rockefeller, and Margaret Olivia Sage. These general purpose charitable institutions gradually gained popularity amond the very wealthy, and there was a fairly steady increase in the number of new foundations through mid-century. Then a decline in the rate of foundation establishment began. The overall results of this study led the research team to identify a variety of forces and events that contributed to this decline. Many of these factors are interactive and appear throughout the chapters of the book, as they do through the sections of this short report. In brief. they are :

- changes in the legal environment directly affecting independent foundations, particularly increased regulation, decreased deducibility of gifts to foundations, increased availability and promotion of other charitable alternatives, and increased reliance on attorneys for charitable advice;
- tax law changes that significantly reduced tax rates of the wealthy, thereby reducing the incentives for charitable giving.
- attitudinal changes regarding charitable giving, especially the desire on the part of younger donors for more personal involvement in giving decisions than is afforded by the institutionalization of grantmaking and the depopularization of foundations as a result of congressional hearings, media and public attacks, and rebellion of succeeding generations against the values of their parents.

Elizabeth Boris's analysis of foundation birth rates indicates a peak in creation rates during the 1940s. The birth rate fell to less than two-thirds of that in the 1950s, declined by more than half again in the 1960s, continued to fall during the 1970s, and showed almost no growth during the early 1980s.

In her overview chapter, volume editor Teresa Odendahl describes this phenomenon as being most marked for the largest independent foundations (with 1983 assets of at least $1 million or annual grants of at least $100,000) - the foundations on which the most data are available. Only six new large foundations had been formed between 1970 and 1982. The researchers found a somewhat different pattern for the smallest foundations. As Odendahl points out, the number of new small foundations peaked in the 1950s and declined in the 1960s. Unlike the pattern for large foundations, however, there was a recovery in the 1970s when the number of new small foundations again increased. Nevertheless, the overall rate of formation of large and small foundations has declined since mid-century.

Data on the increase of women donors after 1969 are seen by Elizabeth Boris as reason for optimism. As women begin to «take greater control of their wealth,... foundations may continue to be vehicles that meet their charitable needs.» Although women created only 20 percent of the foundations started before 1970, they were responsible for 48 percent - nearly half - of those formed since 1970. In discussing trends in foundation formation, Boris comments that the role of women in the philanthropic process probably will be augmented by the passage in 1982 of the unlimited marital deduction, which allows individuals to bequeath all of their property to the surviving spouse without paying estate tax. This is expected to encourage testators to pass their entire estates on to their spouses, rather than give to charity. And, as Boris point out, since the surviving spouse is more likely to be a woman than a man, it will be the woman who makes the charitable decisions.

Foundation asset growth, measured by new contributions and return on investment, has shown a considerable increase since 1960. Teresa Odenndahl, in her synthesis of the research findings, attributes at least part of the relatively modest asset growth since 1960 to poor stock market performance, federal regulations that required foundations to pay out all of their income between 1969 and 1981, as well as the termination of more than 10,000 foundations since 1970. She goes on to point out that a combination of good stock market performance and less stringent regulations since 1981 have favorably affected foundation assets. But, as Ralph Nelson demonstrates in his analysis of the economic history of foundations, despite these more favorable conditions, asset growth since 1982 has still not kept pace with inflation.

Again, smaller foundations have experienced greater growth than have larger ones. Nelson's analysis indicates that the relative asset share of the largest foundations (those with 1982 assets of $75 million or more) declined from 69 percent of all foundation assets in 1962 to 48 percent two decades later. However, more than 60 percent of foundations with 1982 assets of $5 million or more increased their real assets between 1962 and 1982.

The results of the survey questionnaire indicate that, as of 1982, asset growth had been fueled largely by an influx of gifts to established foundations. Elizabeth Boris reports that over half of the foundations surveyed received major contributions after their creation, with older foundations more likely to have received significant gifts. But only about one-quater of foundations, regardless of age, expect to receive significant donations in the future, most of which will be gifts of $1 million or less to small foundations.

The study also revealed a trend toward testamentary giving - that is, making donations as bequests, rather than as a series of gifts during the donor's lifetime. Before 1970, 84 percent of foundations were created during the donor's lifetime, whereas, since then, only 43 percent have been founded by living donors. This trend, and the one mentioned in the previous paragraph, both suggest a leveling off in growth through donations and increased reliance on investment returns for future asset growth.

What accounts for this pattern of decline? In the following sections we discuss several contributory factors, briefly summarized at the start of this article.

Foundation Abuses and Legislative Oversight

According to Gabriel Rudney's analysis of the creation of foundations, several factors supportive of foundation creation coincided in the years immediately following World War II. Wartime accumulation of personal wealth, the tax advantages available to those subject to extremely high income and estate tax rates, the relative lack of government regulation, and the degree to which foundations permitted donors to control assets, in Rudney's opinion, all contributed to the popularization of the foundation as a charitable vehicle.

Ironically, as Rudney also points out, these same factors, particularly the loose legal requirements, were conducive to questionable practices and abuse that contributed to the subsequent decline in foundations' popularity - and to sweeping legislative changes. The abuses Rudney identifies included the payment of extremely high salaries to donors, families, and officers; the use of foundation funds to make low or no interest loans and to buy and sell stock at prices favorable to donors, or make high risk speculative investments; and involvement in business enterprises unrelated to the charitable purposes of the foundations.

Congressional interest in these abuses led to a series of legislative hearings and reports, Treasury Department recommendations, and Internal Revenue Code amendments. John Edie provided a chapter summarizing this part of the foundation history. Edie describes the acceleration of demands for meaningful tax reform and the closing of loopholes in the years leading up to 1969. To many onlookers, foundations and charitable giving were viewed as one way for wealthy individuals to avoid taxation. In addition to this general concern, reports of foundation-financed voter registration preceding the election of Mayor Carl B. Stokes in Cleverland, and of foundation grants to aides of Robert F. Kennedy after his death (to ease their transition from public to private life) particularly angered certain legislators. Therefore, Congress began consideration of tax reform in an atmosphere of, at best, skepticism toward foundations and, at worst, hostility toward them.

The Tax Reform Act of 1969 affected foundations in three major ways.

A. *New statutory definitions distinguished private foundations from public charities like hospitals or universities and subjected foundations to less favorable deductibility rules.*

Since 1943 there had been a rough separation between public and private charitable institutions, but in 1969 Congress established a specific definition of « private foundation». In addition, Congress increased the significance of this distinction by making several alterations in the charitable contribution limitation to provide greater benefits for gifts to public charities, as compared to private grantmaking foundations. First, the new legislation provided that gifts of cash by living donors to public charities would be deductible up to 50 percent of income, compared to 20 percent for private foundations. Second, and perhaps even more important, the 1969 Act provided that if a gift of appreciated property was given to a public charity for endowment purposes, its full market value could be deducted, whereas the same contribution to a private grantmaking foundation would yield a deduction of only the cost plus 60 percent of the gain." *

B. *The 1969 legislation imposed a series of six excise taxes*. One of them taxed foundation income and the others were established to regulate behavior of foundations and their managers. The first tax mentioned in the legislation, originally set at 4 percent of net investment income, was designed to foot the bill for increased R1S supervision. Although the excise tax has since been reduced, it continues to cover more than costs and has also made private foundations the only tax-exempt organizations whose investment income is taxed.

The other excise taxes were of a regulatory nature, prescribing a variety of behavioral norms and penalizing the foundations - and, in some cases, the foundation managers - who violate these norms :

- Most forms of self-dealing between foundations and « disqualified persons» (donors, trustees, officers, and their families) were prohibited.
- Foundations were required to distribute annually all their net investment income or 6 percent of their endowment, whichever was greater. (The net investment provision has since been eliminated, and the 6 percent requirement reduced to 5 percent).
- Foundations were effectively barred from holding, alone or in connection with «disqualified persons», more than 20 percent of the voting interest in a business entity.
- Speculative or other investments that « jeopardized » the foundation's charitable purposes were prohibited.
- A catch-all provision also prohibited most legislative lobbying, restricted participation in voter registration activity, limited grantmaking for individual travel or study, and required foundations to exercise « expenditure responsibility » over grants to non-« public charities».

C. *The tax Reform Act required considerable public disclosure of private foundation activity*. Foundations were required to file annual reports listing assets at book and market value; grantees, grants, and purposes; and foundation managers who are substantial contributors. And the foundations must produce a public version of this report and advertise its availability.

In Edie's words, *"private foundations were unprepared for what hit them in 1969»*. If not totally «unprepared», they were justifiably apprehensive. The Tax Reform Act included a strict system of regulations backed by a comprehensive system of penalty taxes that caused many in the field to fear that private foundations would never recover. *«But»,* writes Edie, *«private foundations learned to live with the new rules»*. The impact on the emergence of new foundations, however, was another matter, further covered in the following sections.

The Expanding Role **of Advisors to** the Wealthy

Two categories of advisors to the wealthy were interviewed for this study: 1) attorneys, accountants, and bank trust officers, who advise the wealthy on different types of charitable instruments, and 2) foundation employees and personal advisors, who typically have a particularly intimate relationship with donors' on-going charitable activities, and help the wealthy make choices about what and whom to support. Their responses are analyzed and discussed by Francie Ostrower, who describes the advisors as generally finding the impact of the Tax Reform Act of 1969 on the foundation world to be significant. A few of the attorneys interviewed said the primary discouraging effect of the 1969 Tax Reform Act was to create confusion about whether it is legal to create a foundation. Said one:

a A principal disincentive in the mind of the public is not a real one at all, but it's the idea that the private foundations were prohibited by Congress in 1969... The publicity that was given about the problems of foundations and the foundation legislation have created this belief that you can't have foundations anymore».

One particularly important factor in the declining popularity of foundations - the increasing reliance by the wealthy on professional assistance in structuring their charitable giving - seems to be an indirect result of the 1969 legislation. For many advisors, entry into the nonprofit area was directly associated with passage of the 1969 Act. Several attorneys reported that their firms did not have a specialist in the nonprofit field when the legislation took effect. One attorney described his first involvement with nonprofits in this way:

I got into the nonprofit field through a combination of two things. I think. One is... because I've grown up an Eagle Scout, and the other was that I came out of the service in the fall of 1969 and somebody in my firm thrust the Tax Reform Act at me and said, « There's something in here about foundations», and I said, «What's a foundation?" And they said, «After you find out come back and tell us ».

The need to understand and comply with requirements of the Tax Reform Act made professional assistance a virtual necessity both for potential donors who might establish a foundation and for those whose task it was to administer foundations. Donors who were interviewed noted that they need legal advice because the law is complex and changing. As one donor put it, « as *Washington changes the rules you have to keep up with the game »*. And one foundation executive complained, *«Just complying with the Tax Reform Act of 1969 makes it difficult unless you have a foundation large enough to afford expert management »*.

This increasing reliance on attorneys may have contributed to foundations' decline because lawyers - as this study revealed - usually regard a private grantmaking foundation as the last option that a wealthy donor should consider as a vehicle for making charitable contributions. Even when clients propose a foundation, most attorneys encourage them to consider other alternatives, arguing that foundations are costly, time consuming, and a burden to manage. Most attorneys stressed that their role is to provide a legal plan that will realize the goals of the donor in a way that saves the most in taxes. Said one attorney: « *When (clients) come in and they think they want to start a foundation I lay out their options for charitable giving, their charitable tax plan. It's not a responsible thing to say, oh, you want a foundation. Let me just grind one out for you. »*

Attorneys cited two distinct but related sets of disincentives to establishing foundations. First, they feel that certain provisions of the Tax Reform Act of 1969 make the management of a foundation burdensome. Excessive reporting requirements, complicated provisions against self-dealing, and overly severe penalties, often for inadvertent mistakes, were generally mentioned as major disadvantages for a foundation. A typical comment was : *« This is a mine field for somebody who doesn't know what they are doing»*. By contrast, few attorneys mentionned the minimum payout requirement or excise tax as important considerations, and some explicitly said that they did not think these were seen as major problems by donors.

The second major disincentive to forming a foundation is the host of other vehicles that can satisfy the donor's purpose more conveniently and effectively. Attorneys most frequently cited a variety of charitable vehicles - such as charitable lead trusts or charitable remainder trusts, direct contributions to favored nonprofits, and establishing advised funds in community foundations - as options they recommend to their clients. Each of these alternatives offers more favorable tax treatment than does a private foundation and is less cumbersome.

Although most attorneys discourage establishment of private foundations, Ostrower points out that they do recognize that foundations are sometimes appropriate to a donor's goals. When asked to cite the incentives for starting a foundation, three-quarters of the attorneys interviewed mentioned reasons that the researchers classified as reflecting a desire for « control ». After being told of all the disadvantages of a private foundation, according to one attorney, *« the people who decide to go ahead say, 'I'm really so interested in controlling how this organization goes about securing some goal, and being able to direct it... that I'll go ahead' »*. Another attorney identified the type of donor for whom a foundation is a good choice as *«somebody who... really doesn't want to have any issues about who owns this organization"*.

In other words, both donors and their attorneys view the private foundation as the instrument that gives the donor the greatest measure of influence over the disposition of wealth. To achieve that level of control, clients may be willing to forego the tax and administrative advantages offered by other instruments. Even the desire to minimize taxes is often associated with the desire to control one's fortune, in that the donor, not the government, decides where the money will go. As one wealthy person put it :

« I am sure I give away more because it is deductible than if it was not because I am sharing it with Uncle Sam. Instead of a Congressman telling me where my dollars are going to go, I am telling them where their dollars can go ».

Many donors believed that attorneys are particularly concerned with minimizing taxes. Asked whether he sought legal counsel in his philanthropic activities, one donor responded :

«Oh, yes. But that's for tax purposes and the best way to handle my estate. Several times they've come to me and said: You've got to give away more money. The government is taking away too big a part if your income. Why don't you give it to some place where it'll do some good?»

Although some lawyers suggest charitable giving or bequest to their clients, others find the idea presumptuous. Some attorneys who are themselves active in the nonprofit sector or who have strong feelings about philanthropy take a more activist stand. In the words of one:

« *It's awful the way the attorneys fail to recognize appropriate places for charitable giving, and encourage the people to do that. Maybe it's the conservative nature of the beast, maybe it's the failure to be imaginative, and in many, many cases, it's purely (being) underinformed... It's a tragedy. The CPA's are about as bad and the trust officers are no better than anyone else. »*

Even among those willing to suggest charitable giving, the large majority of attorneys feel that it is not their place to tell their clients' which causes to assist. One attorney said : *«People know who they want to support and have relationships with charities, and don't need their advisors to tell them who to give money to»*. Another typical remark : *«Our job is to find a means to achieve the purpose. It's not to tell them that there's something erroneous about the purpose. We're supposed to chip away at the purpose as little as possible »*.

In other words, attorneys and donors agree that the attorney's role is a largely technical one. Attorneys concentrate on the formal aspects of the donor's philanthropy and take the charitable objectives as given. In contrast, personal advisors who are not attorneys offer donors guidance on how to refine their objectives and channel them into a concrete series of contributions to particular institutions and causes.

Personal advisors stress that they offer a type of professional expertise that differs from that of attorneys. One adviser said he had worked with donors who had been frustrated by attorneys and accountants, who seemed *«more interested in the well-being of their assets»* than in what they were interested in doing philanthropically. Advisors often suggest new ideas to donors, but such suggestions are made within a framework of familiarity with the donor's interests and goals.

Personal advisors held somewhat different opinions about foundations than attorneys. Many agreed that foundations are unnecessarily complex and bureaucratic, but their criticisms tended to focus more on foundations' performance than on their technical requirements. For example, one advisor contended that foundations typically ignore certain donor needs such as funds for operating expenses ! Another donor, in conjunction with his advisor and a attorney, decided against creating a foundation because he felt they were not « proactive » enough. Another complaint was about wastefulness, particularly the failure of foundations as a group to coordinate their activities and to share the information from the projects they fund. Another advisor was critical of donors who sought to participate in their foundations' activities without first training themselves to be « good trustess». He argued that as long as foundations are subject to the « pet interests » and « influence » of donors, there will not be «a foundation universe that is defensible in our kind of society».

With respect to incentives for creating foundations, one advisor believed that gifts to foundations provide maximum « leverage » in terms of setting an example to other funders and that a foundation is a good vehicle for a donor who wants to bring together professional staff to support a particular cause. Another advisor stressed the foundation's flexibility and capacity for systematic program development. This respondent also suggested that attorneys have encouraged an erroneous perception that foundations have become too complicated to administer. *« There was a lot of psychological confusion and anxiety created by the 1969 Act... It made some things a little more difficult for people, but what — a few hours more paperwork?»* This advisor advocates a pass-through foundation, and feels that if attorneys and donors were more familiar with that option it would become more popular.

Charitable Motives of the Wealthy

In this section, we summarize an important dimension of the study - a general inquiry into the charitable behavior of the affluent. Unlike the sections that precede and follow it, this section does not purport to explain the declining foundation birthrates. It does however present information that may well have a bearing on that phenomenon as well as providing background for the succeeding section on attitudes toward foundations.

Personal interviews with 135 millionaires explored their charitable attitudes and motivations as well as their views on foundations. A brief description of the sample provides an important key to understanding this part of the study. Those interviewed included 79 men and 59 women; twenty-six were younger than 40, 51 were between 40 and 60, and 53 were over 60. Eighty-eight percent were currently married and had children. All but ten were college graduates, over one-half from Ivy League universities. One-third were « self-made», first generation millionaires and these were wealthier and older than the remaining two thirds who had inherited at least some of their wealth. Of the 98 who reported religion, 34 were Jewish. Although, as Teresa Odendahl is careful to point out, this sample is not statistically representative, «these interviews help to illuminate decision making processes among a broad range of wealthy charitable givers».

Respondents were asked to describe the history of their philanthropic work and their reasons for charitable giving in general, as well as why they had chosen to form a foundation or had rejected a foundation in favor of other charitable instruments. The vast majority of the respondents regularly make substantial contributions to nonprofit organizations.

Many respondents described their philanthropic motives as mixed. One said:

« Some *people really want to get out there and do a lot of work and make some kind of contribition. I did that with the fund a lot, but I do not do it with a lot of this other stuff... There is some of just writing checks to friends. And there is some sort of feathering your nest in the hospital in your area or whatever. And there is just giving because you have the money to give away, just giving to organizations that you think are doing the kind of things that you want to see done or you think are important»*.

And another offered the following characterization of motives for charitable giving:

« Very little of it, to me, is motivated by a genuine understanding and commitment to philanthropy. Most of it is motivated by either the harassment of a friend who is trying to solicit money, the status, or... to benefit them in their business ».

Most participants, however, presented themselves as concerned citizens who are generous, rational, thoughtful, and committed to their communities. Many regarded expensive cars, yachts, and airplanes as ostentatious and incompatible with philanthropy. One put the matter this way :

« I think that one of the big differences between people is whether they want to spend their money living lavishly, are they throwing their money away, or do they want to put their money where it will amount to something and to the greatest good for the greatest number of people».

Although the motives for philanthropy are complex, informants believe altruism is at the core of most giving. For many rich people, giving to charity is a way of life. Many wealthy persons give of their time as well as of their money by serving on boards and engaging in fundraising and other volunteer activities. Such a philanthropic lifestyle can range from considering charity an obligation - as did one respondent who said *«Giving to charity is an expense. It is not an optional thing. It is something you have got to do, like paying taxes»* - to full-tirne involvement in charitable work.

In describing the involvement of particular groups in philanthropy, Odendahl describes the philanthropic lifestyle as particularly evident among women, Jews, and southern fundamentalists. She writes that *«women have always been involved in charitable work as donors, employees, and volunteers».* In the case of the married participants in this study, if was the wife who was responsible for the family's charitable activities. Both Jews and non-Jews commented on the extent and strength of Jewish giving to all types of causes.

Several of the respondents were young millionaires, in most cases with inherited wealth, who grew up during the 1960s. Although social responsibility was mentioned by donors of all ages, one young man's explanation for his philanthropy illustrates the influence of social and political conditions on charitable behavior:

« I think my motives are almost purely political. I am a classic case of someone who came of age in the late 60s. The fact that I have a good deal of inherited wealth does not match my politics. But the fact is that I have it. That left me with a

problem of what to do, and it really was easy then to decide to try to use the money politically to somehow bring those two realities into a kind of congruence, so I could at least use the money in ways that matched my politics».

A more common expression of political ideology was the belief that individual giving is preferable to government involvement in the provision of services. Many participants focused on the value of private nonprofit organizations, contending that they are integral to the American way of life. One person stated :

« I think nonprofits are fascinating. I love the creativity. What I find meaningful is doing something to improve the world... Maybe it is arrogant to feel that way, but I feel that I have the ability to do that with foundation dollars... It is also a tough time in the U. S. Private dollars to help people out are becoming scarce and in higher demand».

Another respondent made the following comparison:

«I think the philanthropie tradition in the United States is very important. It is different from Europe... Europe does not give tax decuctions for charitable giving[4]*. Individuals are not encouraged to give money there. So when they do, they give less. As a result, that throws most applicant type organizations, the needy organizations, under the government and the attendant bureaucracies. And as a result, I think those societies move more slowly and individual initiative is not rewarded as fully».*

Many wealthy people are committed to promoting particular causes through their philanthropy. As one New York donor put it, « My major giving is associated with major personal involvements ». Another donor explained :

«I picked up the newspaper and on the frontpage there was a story about two wonderful things that I had funded, and I just was filled with joy. My gosh, I'm on the right track. That was such a good feeling».

Another respondent commented on the sheer pleasure of charitable activities. *«Sure, there is a lot need, but it is fun giving. It is exciting to give. »*

Family tradition was often cited as a factor motivating participants to give. Many had inherited both their wealth and their attitudes toward philanthropy. For wealthy people such as these, a family history of responding to community needs is an important motivating force. One individual said :

« This was a philosophy that I learned, as many of us do, from our families. My father particularly was involved in the community both from a tradition of donation and of service. I continued that. I think in a larger measure all of us have had that history... We have followed our parents and grandparents ».

Creating a foundation was sometimes mentioned as a particularly effective means of imparting a philanthropic lifestyle to a donor's children. One study participant said:

«I think if a person starts a foundation there is a certain philosophy that goes with it... I think that if there is any way of influencing children and grandchildren and so forth, a family foundation attitude is good... I also feel that is important to remember what the donor did»,

Although most of the wealthy surveyed and interviewed did not cite tax savings as the primary reason for giving, tax considerations are clearly important in shaping the modes of philanthropic behavior. Fewer than 10 of the 130 interviewed said that tax considerations were unimportant, and another 10,said they had only moderate influence. For example, one person made the following comments :

« I give very seldom on the theory that it somehow is a tax saving. I do not understand how you save money by giving. I understand how you reduce the cost of giving because of tax considerations. We try to plan our giving to be consistent with tax goals... but as far as giving on the theory that it avoids taxes, it doesn't».

Most informants said they contribute up to the maximum for which they can take a tax deduction. A typical comment was that *« In very general terms I try to give away as much as I can to get a bigger deduction. But I don't do it for that purpose. I do it because I want to help something. »*

Attitudes About Foundations

When asked about the advantages and disadvantages of foundations relative to other charitable vehicles, wealthy individuals respondend in very different ways. Odendahl found few widely shared views on foundations among the interview sample; rather, rich people seem to have very persona! preferences and they either like foundations or they do not. For example, the most frequently mentioned incentive for starting a foundation was tax advantage - by which respondents often meant to direct founds to charities rather than to the government through taxation - even though the tax treatment of foundations is less favorable than that of other forms of charitable giving. (The less generous tax benefits were also high on the list of *disincentives to* foundation formation). Some said that a private foundation is the best vehicle for exercising control over the disposition of funds, while others said that one loses control when one starts a foundation. Some touted the flexibility of the institution; others claimed to have greater flexibility by giving directly to charitable causes. Many wealthy people felt that the possibility of creating an organization that might last into perpetuity was a positive factor; others saw this as fraught with pitfalls. Several individuals who had created staffed foundations spoke of the value of professionalism in the field; others cited the need to hire staff as a disincentive. Some people started foundations because they wanted to involve their families in giving; others did not want family participation.

Although most charateristics of foundations were cited as both advantages and disadvantages, the administrative burden was generally agreed to be excessive, and government regulation was the factor most frequently mentioned as discouraging creation of a foundation. One wealthy person described «the legal nonsense» as the greatest disincentive to foundation formation.

Closely related to this view is the perceived uncertainty created by past changes is regulation. Another respondent put the issue this way : « *The change in the government laws is a kind of dirty trick. On the other hand, no realist would expect the governement laws to stay unchanged for a lifetime, or forty or fifty years. »*

One particularly well informed rich person felt there were good reasons for much of the current regulation:

« A lot of foundations that went down the tube should not have been there in the first place. There were enormous abuses, and I know some of the abusers. My tax lawyer, for example, was put through school by his father's best friend.

They reversed, each one giving money to the other's foundation, and they put their kids through Harvard, which is pretty nifty. But, each one of them are millionaires. I think that is an abuse of the tax system. Local doctors set up their own foundations and hired themselves, and that sort of thing irritates me. I think a lot of the decrease in foundations after 1969 represented foundations which were not honest-to-God charitable foundations in the first place... I would just as soon see the laws be almost as tough as they are now. I think there are some rough edges where they could clean it up and make it easier... The one part that I think needs changing is the limit on the amount of money you can put into a private foundation, vis-a-vis your gross income ».

Those who favored foundations often stressed the ability of foundations to plan systematic programs of giving. A unique strength of the foundations structure is that it permits a donor to set aside funds for philanthropy when they become available and to pay them out over a lengthy period of time. This factor was perceived as more important by donors to large foundations that by donors to smaller foundations, who were more attracted by the flexibility they felt the foundation form offered.

Some wealthy respondents viewed having professional staff to investigate funding opportunities as a distinct advantage of foundations. One foundation donor remarked that:

« The more you have to give away, the tougher it is. The more intelligent your decisions have to be because the amounts you are giving away can have a great deal more effect and leverage. Therefore you would want to make sure it is done very wisely... We have an organization of expert project people in here who have the time, the responsibility, and the talent to analyze in great depth a number of institutions».

On the other hand, many of the philanthropic wealthy - especially younger and more change-oriented respondents - prefer to give their money directly to charitable organizations. One politically progressive philanthropist said: « There are very few things that you can do with a foundation that you cannot do by yourself, easily, without added responsibility. » And a young women reported that she had decided against forming a foundation because:

« I think that individual funding is important. If it is done intelligently, it can be very effective. You have a lot more flexibility if you are not a foundation. You have much less administrative burden. And, I think you can play a very creative role, because your timetable is your own. You have complete independence. You can respond to requests almost as a kind of 911 number».

Some of those interviewed reflected on the role of ego gratification in the desire to establish a perpetual institution. One wealthy person said :

« There is ego, in that people, especially as they are knocking on death's door or knowing that their days are numbered, look for ways of perpetuating their person. They say you cannot take it with you, but I think that a lot of the very wealthy feel that is a means of living beyond their mortal time and insuring that things that they are interested in will benefit from the money».

Finally, one respondent offered a particularly compelling assessment :

« One of the benefits of the foundation is the incredible education that I have gotten. I think anyone who forms a foundation would get it. I can hardly say in words what I have been exposed to in the variety of situations and conditions of life. I have really been changed as a result of the foundation. So, I start of thinking about the effect I am going to have on others, but it comes back in full force and has an effect on me».

Conclusion

The portrait of the foundation vehicle that emerges from this study is, in Elisabeth Boris's words, on of a *«resilient institution that has served a number of purposes. »* Early foundations were by and large not formed in response to tax incentives or designed to control businesses. Rather, according to Boris, most were an expression of the underlying religious and cultural belief that problems are solvable and that those who are financially able should therefore seek to solve them.

As taxes became an important feature of American life, tax- deductibility reinforced the use of foundations as a practical instrument for meeting the obligations of philanthropy. Again quoting Boris, *«the jump in the creation of foundations during the high tax and profit years of the 1940s and 1950s underscores the use of foundations as means of reducing the tax burden and avoiding the break-up of family fortunes that hight inheritance taxes sometimes required. »* She describes wealth as being «devoted to good causes, » and yet it was the donors, not the government, controlled where the money would go. Foundations were, for some, a symbol of status and leadership in the community.

Some of the wealthy used foundations to inculcate the values of philantrophy and responsiveness to community needs in their children. Many donors interviewed for this study seem to have had an ingrained sense of service and philosophical or religious sense of stewardship. In addition, strong regional identity and community allegiance seem to have resulted in the creation of many foundations set up to benefit particular locales.

The researchers attribute the decline in the rate of foundation formation to a number of developments. The congressional investigations of foundations in the 1950s and 1960s, for instance, seem to have influenced the creation of foundations in the 1960s and 1970s. Although the values and ideology that support the giving of personal wealth to charity seem to have remained intact, the 1969 Tax Reform Act reduced tax incentives for giving *through a foundation* while at the same time increasing administrative burdens and opening up a wide variety of alternatives for institutional philanthropy, some of which, with less complex administrative structures, permitted realization of goals previously available only to foundations.

Despite the reduced incentives, however, people still form foundations. Although the *rate* of foundation formation declined, the *number* of foundations still increased up to 1980. The new foundations, however, tended to be smaller, and more important, were much more likely to be formed by bequests. As Boris points out, new foundations founded by bequest, unlike those created by living donors, will not be enriched by subsequent donations from the original donor.

And finally, looking ahead. Elizabelth Boris describes the future of foundations as mixed. She concludes that:

** The core of foundations that exist will continue to exist. There will be growth, thought at a slower rate, and most new foundations will continue to be small ones. New trends will have to be played out before the impact can be evaluated. While there is reason for optimism among those who value private grantmaking foundations, there is also reason for concern. Altruism and concern for others is still apparent, and foundations are still being formed, but the creation of large foundations has dropped off. Other less restrictive mechanisms may better fill the needs of some potential donors, but the unanswered question is whether donors are finding appropriate mechanisms for their large gifts, alternatives that provide funding for creative approaches to broad social needs. If not, philanthropy may be moving to a local and regional orientation, with little capacity to tackle issues at the national level».*

Notes

(3) Published by the institution for Social and Policy Studies, Yale University, USA.

(2) The full report. America's Wealthy and the Future of Foundations, Teresa Odendahl, editor, was published in the spring of 1987 by the Foundation Center, 79 Fifth Avenue, New York, NY 10003 and can be ordered from the Center (see ad on page 9). The Program and the Council are deeply grateful for support for the Foundation Project from the W.K. Kellogg Foundation, the Andrew W. Mellon Foundation, and the Charles Stewart Mott Foundation, as well as support from the Ford Foundation of Gabriel Rudney's activities.

(3) Recent tax reform legislation increased the deducibility of foundations gifts to 30 percent of income and permitted deducibility of the full value of gifts of publicly traded stock. On the other hand, as a result of 1986 changes, the appreciation portion of a property gift to a foundation for endowment purposes, if not publicly traded, is now not deductible at all; the deductible portion of the appreciation has thus dropped from 60 percent to nothing.

(4) In fact, this perception is not accurate. See « The Deed of Covenant: Britain's alternative to the charitable deduction» in *RESEARCH REPORTS, Number 5, Fall 1985.*

A 1980's Postscript

The latest (1987) edition of *The Foundation Directory répons* that in the period 1980-1985 the annual rate of foundation formation increased modestly over the rate for the 1970's, although still far below the rate for the 1960's and 1950's. This slight upturn may reflect a renewal of the visibility and acceptability of private foundations. It would be premature, however, to conclude that the trend reported in *America's Wealthy and the Future of Foundations* - and in these pages - has been reversed. Even for the present decade, the outcome is uncertain: the 1986-1989 data may not point in the same direction as the 1980-1985 data. Moreover, three special circumstances, of limited or unknown duration, may have contributed to the modest birthrate rise in the 1980-1985 period : (a) an upsurge in personal wealth as a result of a « bull » stock market that turned sharply down in late 1987; (b) the creation of U.S. foundations by foreign corporations and individuals - a phenomenon that may or may not persist; (c) sales of hospitals by non-profit organizations to for-profit chains with the sale proceeds being used to endow medical research foundations - again, a possibly transitory phenomenon.

- Glossary -

Trusts and other Charitable Vehicles

Testamentary giving : Making provisions for charitable giving in one's will, as opposed to during one's lifetime.

Split-interest trust: A trust that has both charitable and private beneficiaries.

Charitable lead trust: A split-interest trust that distributes income to charities and thereafter the remainder interest to private beneficiaries.

Charitable remainder trust: A split-interest trust that distributes income to private beneficiaries and thereafter the remainder interest to charities.

Public Charities: Schools, churches, hospitals, medical research entities, publicly-supported organizations, and certain «supporting organizations. » Public charities avoid the Tax Code restrictions imposed on most foundations.

Types of Foundations

Independent foundations are typically formed with contributions to an endowment that generates income for giving. Foundation portfolios are invested mainly in stocks, bonds, and real estate.

Pass-through foundations are independent foundations with no endowment. Donors make periodic gifts to the foundation, which are then disbursed as grants. Donors to pass-through foundations enjoy greater deductibility privileges than donors to endowed independent foundations.

Company-sponsored foundations award grants with funds donated by parent corporations. Most are «flow-through» foundations that receive their annual contributions budget from the parent company; some also hold endowments contributed by their corporations.

Operating foundations are independent, pass-through or company-sponsored foundations that provide direct services or conduct research; grantmaking is not a primary activity. These include endowed museums, research institutes, and multipurpose service-providing programs. For tax purposes, operating foundations are treated more favorably than non-operating (grantmaking) foundations but less favorably than « public charities. » Roughly two-thirds of all the assets of operating foundations are held by the Getty Trust, which is an art museum.

Community foundations are grantmaking organizations that receive contributions from a variety of donors, and serve regions or towns. Most community foundations are treated like « public charities » for tax purposes and therefore have a more favorable tax status than private foundations. Many community foundations promote the use of «advises funds, » where donor recommendations are influential.

Insights Into Cost Effectiveness from One Private Voluntary Organization's Perspective

by Thomas W. Dichter*

Introduction

This paper offers an inside view of the issues surrounding cost-effectiveness of PVOs, primarily from the perspective of one organization-Technoserve.

In the spring of 1987, Technoserve committed substantial resources to a long term internal exercise - the aim of which was to come to grips with some internal questions about the overall cost effectiveness of the organization's work. Because of the work that has gone into this effort - an effort which is by no means complete - we are in a position to complement the subject of the Advisory Committee's March meeting. This paper attempts to make some of those concrete by illustrating how one organization has been tackling an inherently problématique matter.

At the same time however, one organization's perspective is not enough. Therefore some attempt is made in the paper to extrapolate a few more broadly applicable propositions and recommendations which may be of use to others and to the work of the Advisory Committee.

Contexts and Caveats

The Context of the development endeavor as a whole: Starting with the largest context - the broad aims of the entire development industry - we should keep in mind that what we are all trying to do has never been done before in history. A deliberate attempt to foster and instigate economic social development (some would say «to speed up modernization ») by one part of the world on behalf of another part of the world, is a late 20th century phenomenon. It is still such a new kind of endeavor that we have as yet no broad norms of any kind, much less norms which lend themselves to quantification of effectiveness measured against costs.

However, because increasingly scarce money is involved in development assistance aid some large donors are moving towards such norms and standards. This is inevitable. A recent example comes from USAID, which in December, 1987, cabled its missions in Africa regarding small scale enterprise credit projects. The cable stated: *«A review of ongoing and completed A.I.D. projects [in small scale enterprise credit] indicates that most never become self-sustaining, even in their pure credit functions. Even more rarely does any project totally cover the costs of its non-financial components».*

Because of this situation, the cable sets out «draft performance standards » for these kinds of projects, and asks the missions for review and comment. Many of the standards are quantitative ones. It is significant that such standards are being asked of credit projects. It is to be expected that projects which deal directly in business-related components (such as money) will be asked to lend themselves to quantification. It is also significant that sustainability has entered the picture. We believe that it is, correctly, the key driving force behind the entire concern about development effectiveness.

In any case, while broad gauged norms and standards for the industry are still lacking, the process of developing those, in specific sectors, is already underway. The fact is that while someday we may all have well-tested norms and standards to measure our work against, we are far from that today. For all we know, it may be possible that a 20% «success » rate for development projects world-wide will come to be seen as highly respectable and perhaps even considered wildly successful. Given the magnitude of what we are all trying to do - change societies, institutions, economies and ultimately people - such results would not be surprising.

The Context of PVOs in the U.S. : PVOs are only now entering a period of professionalization, of greater sophistication, and hence have only recently begun to think about the overarching issue of effectiveness, much less grapple with something as problematic as cost-effectiveness.

Also, many PVOs engaged in development (as opposed to relief) until recently could legitimately use what detractors might call the « Pilot Project Gambit ». Development-oriented PVOs are among the youngest of the players in development. Until the early 70s there were no more than a handful which were not involved in some form or another of direct provision of things, money, food, or services. As our sophistication grew about fostering long term development and change, it was obvious that a period of experimentation would be in order.

* Technoserve, inc. This paper was presented to the Advisory Committee on Voluntary Foreign Aid (USA). March 29, 1988. Major contributions have been made by Margaret Bowman, Jorge Baanante, Steven Londner, and Peter Railing, all of whom are staff members of Technoserve, 148 East Ave, Norwalk, Connecticut 06851-5721, USA.

Therefore most projects, indeed most programs were « pilot » programs. Today, understandably, given the ambitiousness of our task, most remain pilot programs. It is legitimate to ask then «why bother with cost effectiveness measures at all? » In industry, no one asks about the cost-effectiveness of research. Research by definition is an investment in learning that is expected to be experimental and faith (based on past experience) is maintained that research will lead to new products, processes, and eventually profits. Ought not the more complex goals of development, at this stage in history, be given the same benefit of the doubt? In the ideal world, the answer would be yes, but in the real world, we do not have that luxury. Because of new pressures, because we are non-profit, and not incidentally, because of our new professionalism, we must tackle the issue.

PVOs who dealt with cost-effectiveness at all have taken one of two stances in relation to it.

a) Their efforts have been driven by fund-raising needs. Thus, we have seen figures that look good, or even too good to be true, usually couched in simple terms such as « For each dollar you contribute to the XYZ fund, the following number of (families, clinics, immunizations, birth control devices, food packages, jobs...) are (helped, built, given, distributed, created...). A recent annual report of a PVO stated unequivocally that the profit produced (not just the gross income) by all enterprises assisted by the organization was 3 times the total cost of the program.

There is nothing inherently wrong with using such data for fund-raising purposes - it is natural to do so. The concern to be raised is whether such data are carefully derived and represent the true nature of the development endeavor.

b) The second stance which has been prevalent in PVO efforts to present cost-effectiveness data, has been a defensive one. Many of us have become more visible to public scrutiny in recent years and a current impetus behind cost-effectiveness measurement is the need to prove a point to an often adversarial constituency.

Neither of these stances is an appropriate beginning point for an attempt to deal seriously with the measurement of cost-effectiveness.

The context of the individual PVO: Within PVOs as a group, there is great diversity. Different kinds of development sectors are worked on by different PVOs. Within the same kinds of sectors, each PVO may use a different approach, or use different kinds of staff; some may employ volunteers, some paid staff, some expatriate staff, some national staff etc. And within the single PVO, there may be significant differences in types of projects so that assessing the overall cost-effectiveness of the PVO as a whole may not tell the story.

Given this diversity, and because there are no industry norms in development, it is especially important at this point that PVOs wishing to do cost-effectiveness measurement take the general literature on the issue with a grain of salt. No cost-effectiveness « system » or formula is likely to be applicable or adaptable to any single PVO. As a result, the best course to take is to custom-tailor the exercise to the specifics of each organization. While it may seem counter-intuitive, at this point in our evaluation the best route to credibility is the custom-tailored route. Reasons for this will become clear later in this paper.

The context of the general literature on cost-effectiveness : There is a substantial body of literature on the subject of cost-effectiveness measurement. That in itself is a sign that there is no single way to approach it and that there is debate within the profession of those who study and teach it.

The context of the for-profit world: We need finally to keep in mind that even on the « mainstream » playing field of cost-effectiveness measurement) the for-profit corporate world) there is evidence of doubt about how meaningful the figures are. The message in all this is: cost-effectiveness measurement is not a science.

Finally, we note that one of the first things Technoserve discovered in its attempt to ensure credibility of its efforts was that cost-effectiveness measurement is not high on the list of priorities of one of the major players in development - the World Bank. The Bank, having tried at different times in the past to deal with the issue, has found that it is in essence too fraught with problems. This was both humbling and enlightening for us.

Broad principles

Technoserve, around 1975, made early attempts to quantify its impact. This was in effect an attempt at cost-effectiveness measurement. Being in the entreprise development business and focusing only on that sector, and being then a very small organization with straightforward accounting, it seemed we were in a relatively easy position to come up with some numbers.

However, we fell into some common traps in spite of these small advantages. The moment one tries to move from the abtract to the concrete case problems of definition arise immediately. These have been outlined in Stark Biddle's paper; things like how to handle indirect costs are only the tip of the iceberg. We ran immediately (and still do today) into questions about inflation, local currency, changing rates of interest, not to mention the headier issues of unintended consequences, or being stymied by not knowing how to count the value of work by other organizations which may have preceded us in a project.

Our early work in this area was strongly driven by a decision to keep the effort manageable - to keep it simple enough to be do-able. *In short cost-effectiveness measurement must in itself be done in a cost-effective way.*

We looked for a fundamental principle to guide us. What were we measuring ? Because we worked with enterprises we quickly concluded that we had built-in standard criteria like income, jobs created, wages paid, profits, and inevitably we ended up in what we might call the internal-return frame of mind. Because we worked with enterprises the common sense logic - that what corporations use was natural for us to use as well - seemed inescapable.

As a result, when it came to measuring cost-effectiveness we did not look beyond the enterprise. This was a mistake, but a common one. Many organizations today tend to think about cost-effectiveness measurement in a more or less static input-output frame of mind; what does a dollar spent produce?

The problem is that this approach skips over the very thing that makes our overall endeavor so formidable. We (PVOs) are in the business ultimately of helping others improve their lives. Thus everything we, as a community, do is an instrument - a vehicle of change and not an end in itself. To put it mildly, this complicates matters.

There are two positions PVOs tend to take on the instrumentality issue, one might call them the direct and the indirect positions. They are basically matters of faith. Some PVOs feel strongly that the trickle - down theory is wrong - that development projects must directly tackle poverty and its associated problems. Therefore they want and need to measure a whole host of benefits that are assumed to be associated with poverty alleviation.

Other PVOs are more agnostic about trickle down and more open to the possibility that some things - mostly at the local level - will lead more indirectly to poverty alleviation. These organizations tend to see certain things as proxies for the eventual benefits we all wish to see. For example, technoserve assumed (and still basically does) that increased income to poor people is a good proxy measure for a whole host of benefits (e.g. if people have more income they can «buy» better health, better housing, better education and so on). Likewise, other organizations who are in primary health care assume that better health leads to overall economic growth and broad improvement in a developing nation. These are not unreasonable assumptions, but they are in the end, still matters of faith more than fact since we do not yet know enough about where all our work leads.

In any case, technoserve, 10 to 12 years ago, did not look beyond the enterprise, assumed it was a sufficient end in itself (that is we took it as a proxy) and assumed further that if the enterprise was healthy (profitable) that was pretty much all we needed to know. This is the most plain sort of input-output measurement - one that still prevails in our industry. X dollars in, Y clinics built; X dollars in, Y profits made.

As our organization evolved and learned, we did not abandon enterprises as our focus; on the contrary, we strengthened our capability in this regard. However we did finally remember that the enterprise is after all very much an instrument. Sustainability became more of an issue as the critical principle in PVO cost-effectiveness measurement. *Somehow we needed to come to terms with the time element and relate it in a more complex way to impact.*

Impact in the corporate sector (and hence effectiveness) is a matter of profit, sales, market share. Its measurable in the present. You have achieved it at the end of the fiscal year or you haven't. Impact (effectiveness) in the PVO business is a matter of *time*. If you are in Primary Health Care, how do you quantify in cost-effectiveness terms a clinic built at low cost that is unused and abandoned or broken down after one year of operation?

In Technoserve's case we saw that an enterprise can be profitable while the low income people, who are participants in it, are not making more money. On the other hand, it is possible that an enterprise which is not profitable still has the effect of enabling low income farmers to increase their income. But more important, we had to find a way to see whether the enterprise was instrumental in producing a *stream of benefits over time* to the people we intend to be reached by that enterprise.

Once we began asking that question, we abandoned our « internal return » thinking which tended to look at one point in time. This was the beginning of our confidence that while we had to be up to date on the literature on cost-effectiveness, we had to be free to think about the matter taking our own purposes, strategies and understandings into account.

We of course jumped from the frying pan into the fire at that point. Because one thing leads to another, stream of benefits demanded the question For how long ?, What benefits? To whom and how widespread? etc.

Intuitively we guessed that there is (and can be)no firm answer to any such question. It will always be an «it depends » answer. Nonetheless we felt an arbitrary number, given what we (Technoserve) know about the countries we work in, and given the focus of our organization, that a reasonable period for a stream of benefits emanating from the enterprise would be 10 years. The principle of custom-tailoring the cost-effectiveness formulae was taking shape.

Next we stepped back and again asked ourselves why we were making the effort and how the data would be/could be used. This involved some soul-searching because there was not universal agreement about whether to undertake this kind of effort, much less about its usefulness. Still, there was agreement about our desire to manage better, to be better stewards of the monies entrusted to us, to learn from our experience, and to enable us to choose projects which would be more sustainable.

We concluded that we could only make significant progress if we made this an internally oriented exercise initially. For several reasons. First we felt if we separated the PR potential from the cost-effectiveness exercise we would be free to let the chips fall where they may. Second, we needed to fully involve our field staff and felt that they would be reluctant to be critical if this was not intended for internal consumption. Third we knew from earlier efforts that this would involve a process of trial and error and that as the formula was tested it would need to be refined several times.

We also discussed some dangers - most important among them that the results could cause us to significantly alter our strategy over the long term. We had to decide at the outset that we would live by the results.

Finally, we confirmed for ourselves again that this kind of exercise, no matter how sophisticated it gets, is useless unless it fits within a defined strategy and conception of where it is the organization wants to go. For without a well-conceived broad strategic framework, any cost-effectiveness exercise will be stunted, if not useless. In order to measure the relationship between impact (benefits) and cost in an even remotely meaningful way (that is, taking many factors into account) an organization needs to have the broadest conception of its hoped for long range impact in mind at the outset.

The Process

What follows is a narrative account of Technoserve's experience with our cost-effectiveness exercise to date.

* Should the non-quantifiable weighting factors be the same for all projects and all programs ? Our African programs have

distinct aims from our Latin American programs. How should this be related in our assignment of weights for these benefits ?

* How should different ratings of the non-quantifiable benefits be combined? Should certain people's ratings receive priority ? Should all values be averaged ? What is gained and lost?

* Who should fill out the very subjective non-quantifiable rating sheets ? Is it more appropriate for home office staff or for field staff to evaluate the projects ? How will our decision skew our end result?

* How often should projects be run through the formula? What are the costs/benefits of the process itself» * How seriously should interim evaluations be taken?

* Can this process assist us in determining when to discontinue assistance to a project?

6. Implications for Technoserve of using the formula

Positive :

* Embarking upon this exercise indicates a willingness on the part of the organization to take a serious critical look at our projects. Some of the projects may not come out looking as good as was previously thought.

* The process will allow us to learn more from past projects and will identify areas where we have been especially effective. It will confirm what we already know about the success of some of our projects and will test what we think against a relatively objective measure.

Negative :

* The numbers we derive can be used out of context. Because our process was designed for internal management use, we have made decisions to include and exclude certain information from our formula. Our figures are generally very conservative, only including directly related benefits, and including some overhead program costs. Other organizations can over estimate benefits and underestimate costs by making other assumptions and come up with much higher benefit/cost ratios. However, these results might not be as useful for managerial decision making.

* Each country appears to have its own range of acceptable C/E numbers. Therefore, a considerable number of projects must be evaluated to determine those ranges before the end result will have any meaning. This process requires investments of time and money - which may limit the extent to which other organizations can undergo the process.

* Since not all projects are alike, special effort must be made in designing the cost-effectiveness model (including spreadsheet templates) most suitable to each particular case. This will require considerable time investments by knowledgeable programmatic staff to produce a tool that will be useful at the different stages of the development of a project.

7. Reactions among different management levels to the process

Perspective from the home-office management :

Positive :

* The resulting spreadsheets are very useful summaries of our projects to have in the home office. Until now, such financial information has not been collected in one place.

* The home office already thinks in terms of streams of costs and benefits. The process will get the field offices thinking in the same terms. The field office will also see how expenditures in US dollars for equipment and expatriate staff can upset the resulting ratios. These issues need to become more a concern of the field offices.

* Technoserve has a long term perspective on projects. This « stream of benefits » approach captures the long term nature of the benefits of our projects and justifies the up-front costs.

* The process can be used as a training tool for new staff. Using a spreadsheet, managers can show staff how inaccurate estimations and certain expenditures can affect the formula results - and project results.

Negative :

* Some of the information that we require is either not presently collected by our offices or is unknown by our project participants, (e.g. before they learned to keep records and accounts, they did not know what their salaries were, so calculating accurate «net» change is not possible).

Perspective from the field :

Positive:

* The non-quantifiable aspect of the formula provides another way for the field staff to communicate their reasons for pursuing projects which may not seem to warrant assistance on a financial basis alone.

* The spreadsheets will help them to compare year by year changes in costs and benefits and can help project managers make future projections. The spreadsheets are a handy tool.

* Allows field to communicate concretely how they feel future benefits to the project participants will increase. Helps them to make decisions on whether to pursue a project or not.

" Although it is not expected that participants learn to use spreadsheets, the field advisors can use printouts of various scenarios of their production costs and yields to train participants to evaluate the effects of their decisions on future income streams.

Negative :

* Adds yet another layer of data collection and reporting. If existing information reporting systems are not revised, field staff may have to complete yet another report indicating much of the same information as is currently reported. Therefore information systems should ideally be revised.

* One field office director developed his own method of measuring cost effectiveness. Although he is already sold on the concept, it will be difficult to convince him that the method developed for the home office is « better for him ». Field staff must be brought into the process and the system should allow for adapting the formula to fit field office needs.

Lessons learned

1. The process revealed much about our management information systems. We now know that we must invest in revamping parts of the system.

2. Undergoing the process requires a commitment on the part of the entire organization because of the time and detail of information to carry out the process. Because of the complexity of the formula and the simplifying assumptions that have been made, it is necessary to carry out training sessions to introduce the formula to field staff. It seems a mistake to try to introduce the process with only written instructions from the home office. Also, in order for the process to

feed back into the management processes of the field offices, they must be involved with the process of collecting and analyzing the data. It appears that the process is equally as important as the results. However, this will require training of field office staff so that they fully understand the purpose of the formula (in order for them to adapt the process and the spreadsheet templates to individual projects and to suggest improvements to the system.) This implies considerable lead time and budget commitments.

3. We see more clearly the need to re-evaluate and test the appropriateness of the formula - to be in control of its meaning and uses and not to let it override our better judgement. We used other forms of evaluating the same projects to test the validity of the formula results against our common sense. Based on these evaluations, the formula has already been altered. We must continue to do this over time as our programs change.

4. The financial component of the formula must be kept separate in order to preserve the integrity of the resulting numbers. The spreadsheet assumptions are conservative and use generally accepted methods of financial analysis. The non-quantifiable component is subjective and is much more likely to change as Technoserve priorities change. It therefore is more useful if kept separate.

5. The subjective component of the formula was limited in the affect it could have on the financial ratio. Because Technoserve focuses on work with enterprises which quantify their output and productivity, we wanted to limit the ability of the non-quantifiable multiplier to increase the financial results. Otherwise, the «bottom line» of assisting low-income people to manage sustainable and productive enterprises might become lost. The multiplier was therefore limited to 2 (the cost/benefit ratio could be doubled if non-quantifiable benefits warranted.)

6. Interpreters of the Technoserve formula need to be briefed on the purpose and context of the results. Our formula was designed for internal purposes and assumptions were made on that basis. It was not designed for donor purposes or for comparisons with other PVOs. As we have learned from comparisons between our own projects, the raw numbers in themselves cannot be compared and have meaning out of their country and institutional contexts. To compare the end figures with entirely different organizations would be even less appropriate.

7. The process will generate financial data necessary for donor and PVO purposes. In the process of gathering information for use in the Technoserve cost effectiveness formula, we have gathered standardized information which had not been previously available in the home office which can provide a basis for comparison with other programs.

8. The non-quantifiable multiplier provided a novel means of communicating priorities to the field. As the weights on the non-quantifiable multiplier are decided upon and revised over time, they provide expressly stated objectives of our programs. This increases the communication between the home office and the field offices and provides non-financial guidelines for chosing new projects.

9. Instituting a cost-effectiveness process is an expensive proposition.

Conclusion

Is cost-effectiveness measurement a useful tool for PVOs ?

If properly done and carefully qualified, the answer would seem to be YES. Its highest usefulness would seem to be as an internal tool, rather than as a promotional one. There is little question that such an analysis triggers important questions within an organization that probably otherwise would not be raised. It would seem that the discipline fed back to the organization by the process would have positive reverberations in all aspects of the organization, and especially in strategic planning.

However, the greatest danger in using such a tool is that, because we tend to ignore what we cannot see, and because we are acculturated to believe in numbers more than words, it might be tempting to conclude that if certain benefits are not (or cannot be) calculated, it is as if they did not exist at all.

The need for perspective, and a constant renewal of perspective is essential. One of technoserve's field directors made this comment:

« This attempt to corne up with a formula will never do justice to our efforts, because we are trying to compare the cost of assistance to units of improvement in socio-economic conditions in the short run (in development terms) after Technoserve's intervention. The problem with this is that no matter how positive the results look, almost any other alternative (to what we as a PVO does) will be more cost-effective, since the core of our work is really directed at changing the way people think about themselves, their future, creating initiatives, and developing new skills in people, rather than simply improving their socio-economic condition, even if for ten years or more».

In what situations are PVOs most Cost-effective ?

This is a very difficult question. We can only answer this on the basis of our initia! analysis (note our analysis to date is based on a sample of 10 projects run through the formula). We would tentatively suggest that the following elements may be extrapolated to apply in general :

- When feasibility of project or program over the medium term is done as systemically as possible (casting a broad rather than a narrow net over the field of variables).
- When a sector strategy or focus is maintained. This enables the learning curve to be taken advantage of.
- When a conception of the stream of benefits over a long time period is built in at the beginning of the program.
- When the organization's efforts are concentrated in a region or sector rather than spread thinly.
- When there is a reasonable relationship between expatriate costs and local staff costs.

What are the institutional characteristics which would seem to enhance cost-effectiveness ?

These are characteristics which will seem self-evident once stated. However, our exercise so far seems to reinforce them :

- In the broadest sense, the main characteristic would seem to be to concentrate on what the organization does best. Use comparative advantage.
- Persistence and staying power within a sector or region are critical.
- Related to the above is the importance of experienced staff who can maintain a presence in a program.
- The importance of management information which is accurate and geared to flexible decision making is critical.

NGO Management Development and Training Programmes in Southeast Asia*

This paper describes NGO Programmes on management development and training for their staff, member organizations and other NGOs in primarily in Southeast Asia and other countries. NGOs are categorized into :

A. International/Regional NGOs
B. National Coordinating Bodies
C. NGOs with Strong Training Programmes
D. Institutions

A Internatinal/Regional NGOs

a) ANGOC

The Asian Non-Governmental Organizations Coalition for Agrarian Reform and Rural Devlopment (ANGOC) is an apex regional organization of indegenous and autonomous NGOs in South and Southeast Asia which aims to promote NGO involvement in rural development and to initiate selected programs for strengthening the capabilities of NGOs and grassroots communities.

Its training programs come in the form of intercountry development education field visits which promote linkages on a people-to-people level. In this regard, it organizes a 30-day Southeast Asian Study Tour which is participated in by NGO development workers from Indonesia, malaysia, the Philippines and Thailand. ANGOC also organizes NGO Management Training for supervisors which focuses on project development, management and supervision as well as proper development orientation.

In addition, ANGOC engages in collaborative training with other NGOs in terms of capability building. Specifically, the Work Study method of Training initiated by SARRA with cooperation from IIRR and FIT, is projected to be held in mid-1987 in five counhtries of Southeast Asia, Bangladesh, India, Pakistan, Nepal and Sri Lanka.

Other possible development management programmes will include exchange of experiences of network managers as well as staff development programmes for staff members of development networks at country level.

* Report presented at the Seminar for Southeast Asia on *«NGO Management Development and Training: Recent Experiencies and Future Possibilities»*, Tagaytay City, Philippines, 18-23 January 1987, organized by the International Council of Voluntary Agencies OCVA) and the Asian NGO Coalition for Agrarian Reform and Rural Development (ANGOC).

b) APPROTECH ASIA

The Asian Alliance of Appropriate Technology Practitioners (APPROTECH ASIA) is a regional appropriate technology service mechanism that promotes cooperation and sharing among its members and with other relevant organizations. It was formed in recognition of the significant work currently underway in Asia to increase the access of the poor to processes and technologies appropriate to their needs and expanding capacities.

It aims to aggregate regional appropriate technology experiences, expertise and resources; encourage a sense of community among appropriate technology practitioners; and promote technology transfer among developing countries.

Appropriate Technology Promotional Services include technology transfer activities, trainings, seminars and workshops. Among the management training programmes which it has organized dwelt on organizational strategy and planning and management training seminar for Asian women NGO leaders.

c) CENDHRRA

The Center for the Development of Human Resources in Rural Asia (CENDRHRRA) is a regional secretariat which serves as a contact group and resources center for DHRRA Secretariats in Southeast Asia and the Pacific, Information and Documentation and Evaluation of NGO Projects and Advocacy Role for NGO interests.

CENDHRRA collaborated with ANGOC and SEARSOLIN in the a training programme on NGO Supervision of Rural Development Initiatives in Asia.

d) ICVA

The International Council of Voluntary Agencies (ICVA) has launched a series of management training workshops designed for senior NGO executives from regional or national coordinating bodies. Called Management for Development Programme, the goal is to promote and facilitate management services for NGOs throughout the world. Primarily, the programme is designed to act as a facilitator and catalyst in support of local initiatives in the field. It is intended for all NGOs, especially in the Third World, and is not limited in any way to the needs of ICVA member agencies.

Activities include the provision of national Management Service Units as well as Management Services within International/Regional organizations. ICVA along with InterAction. IRED and ICSW held a seminar on *«NGO Management Development and Training: Recent Experiences and Priorities».from* this evolved the NGO Management Network which would serve as the focal point for bringing together organizations concerned with NGO management development.

ICVA is also coordinating the NGO participation in Management Training programmes on specialized fields. It also organizes seminars for NGO managers and trainers among which was the «Management Training for NGO Emergency Programmes » which took up NGO collaborative action to improve the management of their emergency programmes, priorities and trainings. Collaborating with other NGO coordinating bodies, it is currently developing a planning model and management manuals, i.e. financial planning, and fund-raising techniques for self-sufficiency.

ICVA, in consultation with the Federation des institutions internationales établies à Genève (FIIG), is organizing a series of workshops to provide an opportuynity for NGO managers to share their own experiences on specific management issues affecting their organizations.

In addition, a management training programme has been started which covers such areas as: supervisory management, preparation of project proposals, computerization, fund-raising and donor relations.

e) IIRR

The International Institute of Rural Reconstruction (IIRR) is basically a research and training center whose mission is to generate and disseminate knowledge among rural people in developing countries to enable them to release and use their inherent potentials and capabilities in improving their lives. To fulfill its mission, IIRR pursues three major programmes; field operational research, international training, and international extension.

On training, it offers different types of training courses every year. These include two regular, on campus international training courses, off-campus collaborative training with rural development agencies in other countries and special local courses as requested by various organizations and groups.

Regular On-Campus

1) Middle-Level Managers' Course

A six-week course which aims to develop participants technical and social know-how in and commitment to people-oriented development. To bring together middle-level managers, project coordinators, field supervisors or practioners and other individuals responsible for the planning and implementation of rural development projects in Asia, Africa and Latin America to meet and discuss vital issues on rural reconstruction development strategies and approaches, project planning, implementation and evaluation, among others. The course also includes village study and agency visits. More, focus is made on participatory approaches to rural development programs and projects.

2) Senior Managers' Seminar

A four-week seminar which aims to broaden and reinforce the participants' skills and knowledge necessary for effective management of rural development agences and programs. To bring together senior managers and directors of rural development agencies also in Asia, Africa and Latin America to meet and address concerns of organizational and program management, macro issues and trends in development, rural reconstruction and its implications to current rural development approaches and other special interests, i.e., funding, linkages and human resource development.

Common to both Middle level and Senior Managers' Training programmes are the following core topics: Third world Issues and trends in Development, Interlocking Nature of Poverty, and the Rural Reconstruction History, Philosophy and Principles.

For Middle Level Managers the focus is on participatory planning, implementation, and evaluation of rural development programs/projects. This includes tools and techniques in working with the rural poor. With Senior Managers heavy emphasis is places on organizational management approaches and issues. Among the topics included are funding, linkages and human resource development.

Rural Reconstruction Seminars and Content Specific Training Courses are available on a contractual basis, usually to groups of participants who work for one agency or for one rural development program. As far as possible, curricula are jointly planned with the contracting agency.

Rural Reconstruction Seminars have been conducted for periods of five to ten days. These development education seminars are primarily designed for people with great interest in rural development but with little practical experience. Donor agencies, relief organizations, missionaries, volunteers and other groups working in rural areas are attracted to such courses.

Content-Specific Training Courses are offered in all areas of IIRR's four-fold program of rural reconstruction. These include rural health, livelihood (including financing people's organizations), education and culture (including leadership development and group building). Courses in the four-fold integrated program or rural reconstruction are also arranged.

A recent development is the Institute's collaborative training program with local NGOs in other countries such as Bina Swadaya and Yayasan Indonesia Sejahtera in Indonesia. Sarvodaya Shramadana Movement in Sri Lanka and the Voluntary Agencies Development Assistance in Kenya.

f) IRED

The Development Innovations and Networks (IRED) is an international network of NGOs rendering support servides to local development.

It organizes with partners (grassroots groups, support organizations and financing agencies) technical support in the following fields : training, management/organization, appropriate technologies, etc.

Recent management programmes include a seminar on *«Management tools for NGOs in Development»* and two workshops on management issues with emphasis on *«Alternative Finance for Development Activities »* and « *Strategies for Effective networking for NGOs »*.

Other activities include: exchange programmes, sharing of management tools through IRED Forum and publication of the training material *«Management Manual for Rural Development Associations »*.

g) PACT

The Private Agencies Collaborating Together (PACT) is a consortium of private agencies involved in development projects. PACT has a particular interest in assisting in the formation and strengthening of consortia of private agencies in developing countries.

PACT seeks to assist consortia to develop and carry out activities and services to benefit their member organizations. PACT grants are intended to supplement other sources of income and are limited in size, duration, and as a proportion of a consortium's budget.

In addition to providing support to established consortia, PACT makes small grants to groups of private agencies engaged in forming a consortium. PACT support can be used to cover some of the expenses encoutered in establishing a consortium, such as: procurement of legal registration, meetings of agencies, needs assessments, planning of activities, employment of an administrator, and communications among members.

h) SARRA

The Southeast Asia Rural Reconstruction Association (SARRA) is an informal network which aims to make available various critical support services like training and documentation to small indigenous NGOs which otherwise may not have access to them. Initial priority is given to filed supervisory or middle-level workers. Second in priority are training for field or grassroots workers preferably at the national or sub-national levels. Notably, however, focus has been on leadership training rather than management. Nevertheless, its Regional Leadership Training (RLT) program has produced a cadre of people who are committed to promoting social laboratories in different regions.

i) SIT

The School for International Training (SIT) is the academic arm of the Experiment in International Living (EIL), the oldest international citizen exchange and language training organization in the United States.

Among the programs of the School is the Masters Program in Intercultural Management, a fully accredited graduate program which has prepared over 700 mid-career professionals to assume management and training positions in a variety of development, para-statal, and government agencies worldwide.

In addition, SIT has a participant training unit which conducts short-term technical training courses for mid - and senior - level professionals from Africa, Asia and Latin America.

Among the courses offered in 1987 include: Training of Trainers for Rural and Community Development, Managing People in Growing Organization, Skills for Managing Effective Training Organizations, Project Monitoring and Evaluation.

B. National Coordinating Bodies

a) ADAB

The Association of Development Agencies in Bangladesh (ADAB) has initiated the Development of Local NGOs Programmes where it establishes chapters in various districts to bring together small, local-level NGOs for information sharing and cross fertilization of ideas as well as provide various support services in the areas of program development consultancy, training support, research and evaluation, etc., to make them more operationally effective.

ADAB has also provided necessary support services on the basis of needs expressed by NGOs in its chapters. Among the specific areas on which training services have been provided include Human Development, Skills Development, Finance Management, Basic Research Methodology, Organizational Development and Management, Programme Planning, Finance Management, etc.

b) CWAFPI

The Council of Welfare Agencies Foundation of the Philippines, Inc. (CWAFPI) aims to assist and facilitate the efforts of its member agencies to effectively and collaboratively attain social development through study and analysis, advocacy, project demonstrations, staff training, clearinghouse services, and information dissemination as well as other measures within the context of its function as an inter-agency representative body.

Through its Human Resource Development Program, it has conducted a series of workshops on program development, social development mangement, monitoring and evaluation as well as social advocacy with technical assistance from the Philippine Business for Social Progress (PBSP). Also, a seminar-workshop on management in social welfare for middle managers, systems approach, and finance management as well a management by objectives and results evaluation.

In addition, it has offered various learning modules for top-level executives of social welfare and development agencies, social workers, community leaders and volunteers as well as parishes. These modules include program development and management, monitoring and evaluation, social advocacy and a series of educators' seminars on street children.

c) INDHRRA

The Indonesian Development of Human Resources in the Rural Areas (INDHRRA) was established to improve and strenghten local groups' capacities and elements especially to develop their independence and self-reliance in their pursuit of raising their living standards.

Through its extension service and training, teaching and learning processes which open opportunities for local community self-improvement is continually developed with the end in view of utilizing human resources to the utmost and attaining community self-reliance. INDHRRA also has study and research, consultation and communication programmes in its thrusts and activities.

d) NNGOC

The National NGO Council of Sri Lanka (NNGOC) has for its training facility a collaborative Development NGO Service Center which seeks to train cadres of NGO development workers who will in turn train youth and women in rural leadership and income-generating activities.

Specifically, it aims to provide training facilities to NGOs engaged in promoting rural or urban development, undertake and promote training, education, and dissemination of knowledge towards the improvement of people's abilities to promote development programmes; as well as provide skills training for the youth to develop their capabilities for self-employment.

Areas of activities identified include: agriculture, rural welfare and field programmes. Among some of the concerns are on management, appropriate technology, marketing, production and income generation.

e) PHILDHRRA

The Philippine Partnership for the Development of Human Resources in Rural Areas (PHILDHRRA) has its goals and objectives translated into various programs and services. Recent thrust has been given to Organization Development and Management Training (ODMT) which is a program designed to assist member NGOs along this line to effect a more responsive delivery system. The major intervention of the program is the training of NGO heads or officers who shall, after their training, implement an organizational development and management program suitable to their organization.

The program has three phases. Phase I covers a two-week classroom training or theoretical inputing. Phase II covers a four-month practicum whereby participants implement action plans developed in Phase I. Phase III covers a one-week integration at the end of the practicum.

The training phase (Phase 1) covers seven modules touching on the following major concerns: role of NGOs in Philippine development, values and organization, organization objective setting and developing programs and strategies.

NGO representatives from Luzon, Visayas and Mindanao participate in the program. The activity is a joint undertaking with the International Labor Organization (ILO).

Concurrently, PHILDHRRA is actively involved in the following : Capability Building among NGOs, Resource Accessing for NGOs. Liaison with Governmental Organizations. Advocacy Program on Agrarian Reform and Rural Development, Visitation and Exchange Program.

f) THAIDHRRA

The Thai Foundation for the Development of Human Resources in Rural Areas (THAIDHRRA) was organized by Thai grassroots workers of rural development projects to serve as a clearinghouse for coordination of selected development activities, as information center for rural development study, analysis and appraisal and as a voice for promoting self-reliance and self-sufficiency among the rural poor.

Activities and programmes include information services, consultative regional workshops and leadership training programmes relating to project management, implementation, appraisal and evaluation, and promotion of self-help groups at grassroots level.

C. NGOs with String Training Programmes

a) BINA SWADAYA

Bina Swadaya has basically four major areas of NGO management training program. These include: management workshop for regional NGOs, workshop for middle-level managers of self-reliance community development, management training program of Indonesian NGOS and training workshop on area management program.

1) Management Workshop for NGOs within a Regional Area

The workshop aims to develop the management of regional NGOs based on the requirement and problems encountered; develop a consultative forum for exchange of *ideas, experiences and alternatives to solve specific problems; and provide opportunity for mutual cooperation. Content areas include community self-reliance development principles and strategies, organization, management and inter-agency collaboration,*

2) Workshop for Middle-Level Managers of Self-Reliance Community Development

A joint program of Bina Swadaya, YIS and IIRR, the workshop aims to increase the managerial capability of middle-level managers to plan, implement and evaluate development programs to foster greater participation of the rural people and enhance their potential for self-reliance development; increase the capability of both government and NGOs to develop effective inter-agency linkages and collaboration for the implementation of integrated self-reliance development program. Content areas include human resources development and strategies, management skills and functions, field study and inter-agency collaboration.

3) Management Training Program for Indonesian NGOs

A joint program of Bina Swadaya, PKBI, P3M, WALHI, YIS and MIM, the program aims to develop the management capabilities and leadership skills of NGO managers. Content areas include organization, management, leadership, team-building, problem solving, training, fund accessing and other concerns.

4) Training Workshop of Area Management Program

A joint program of Bina Swadaya, Bangda and Unicef, the workshop aims to strengthen management capacity for area-based decentralized planning and development; to assist area staff to acquire skills in improving existing systems and procedures for expediting local implementation with better standards of performance. Content areas include national policies of area development program, area management in local government, project planning, budgeting and implementation, inter-agency collaboration and community participation.

b) PBSP

The Philippine Business for Social Progress (PBSP) has established the Social Development Management Institute (SDMI) to upgrade social development management capabilities. The Institute's training courses are based on the theories and principles of social development as well as practical experiences of social development practitioners.

SDMI is a training resource available to local, provincial, regional and national non-governmental organizations and government organizations. It seeks to develop agencies and professionals who will be committed to social development work.

Among the courses offered are Social Development Management, Cooperatives Development, Organizational Development, Management Reporting ad Accounting System, Basic Training for Technical Assistant/Loan Officer, Community Organizing, Resource Management, Appropriate Agricultural Technical Training and Specialized Training Programs.

c) PDA

The Population and Community Development Association (PDA) through its Asian Center for Population and Community Development offers a series of international training courses each year on the Development and Management of Community Development Programs. Other special courses include Human Resources Development, Women's role in Development and Fertility Management, Social Marketing and Monitoring and Evaluation of Community-Based Programs. Over 800 participants from 37 nations have so far attended these courses with an additional 5,000 visitors from 52 nations receiving briefings on the PDA development model. The Center also provides technical assistance and consulting services for Thai Governmental Ministries, national and international development organizations, and family planning and health agencies in other Third World nations.

Specific programs have been set up by PDA to enhance and encourage growth of the NGO sector within Thailand. The «Southern Thailand Appropriated Resources and Technical Support» (STARTS) Project and the «Management Exchange and Support Service Network for Rural Thai NGOs » (MESSNET) Project are two such programs offered by PDA. STARTS offers training courses to small private family planning agencies operating in Southern Thailand. Funds from an international donor have allowed PDA to operate as a clearinghouse for these smaller agencies. The success of the project has led to a recent expansion of the operational area to Northeast Thailand. MESSNET is a similar project that offers training in the areas of proposal writing and planning, budgeting and financial issues, and management for small NGOs and cooperatives operating in the rural areas of Thailand.

A final step of PDA is the encouragement of the villagers to play a more active role in their own development. Newly established Tambon Development Associations (TDAs) are providing training and seed money for the villagers to invest in their own development programs at the grassroots level. Training in the areas of management, accounting, and planning are helping the villagers to better understand their own abilities to create better lives for themselves and their families. These TDAs will serve as a new force in the local administration of development of Thailand.

d) P3M

The Perhimpunan Pengembangan Pesantren Dan Masyarakat (P3M) or the Indonesian Society for Pesantren and Community Development is a network of Pesantren associations organized as a private non-profit service center to serve a network of around 4,700 Pesantrens (Islamic Boarding Schools) all over Indonesia. P3M's strategy is to build up the capability of six Pesantrens in different parts of the country with each Pesantren becoming a service center for the entire Pesantren network. At the present, there are six such service centers as follows : village leadership development, enterprise development and management, agriculture and technology development, documentation and information, research and social religious study and alternative education.

P3M participates in the Indonesian Forum on Management Development and has assisted in editing a management training manual in the local language.

e) RDFP

The Rural Development Foundation of Pakistan (RDFP) stimulates and promotes activities aimed at improving the quality of life of the rural people through education and training, consciousness-raising, research, organization and development of human and material resources. Along these lines, The Foundation organizes various interest groups and assists them in formulating and implementing small self-heip projects by stimulating group actions and transfer of technology. It also organizes regular forums to study and to hihglight the rural problem with a view to enlist the Support of government and other agencies by sharpening the focus on their target group. This comprises small and marginal farmers, landless labourers, artisans, craftsmen, drop-outs, women and youth.

Areas of interest include: integrated human development, agriculture and rural development, microlevel socio-economic planning and development, projects planning, formulation, monitoring and evaluation and training of rural workers, women and youth. The Foundation primarily works through Village Development Committees (VDCs) and Rural Development Corps (RDCs).

f)TVS

The Thai Volunteer Service (TVS) is an organization which aims to provide an opportunity for socially committed people to take part in social development; promote the search for effective strategies of development; and encourage coordination and cooperation among Thai NGOs and between NGOs and government agencies.

TVS training courses on management so far have been designed for the less experienced managers of Thai NGOs whose management/administration experience is not longer than two th three years. The courses consist of a set of basic management concerns on planning, project writing and reporting, evaluation, personnel management, etc. Methodologies used include group discussions, lectures and skills practice.

g) UVAGRAM

The UVAGRAM Foundation is an intermediate level non-governmental organization which promotes local community change based on people's participation and self-reliant village level development. In particular it is geared towards the empowerment and participatory development of rural communities in the Uva Province of Sri Lanka.

Programme priorities concentrate on village level people's participatory projects to effect local-level planning initiatives and community management. As such, it has embarked on group leader training at the local farm level, bee-farming management for women groups, cottage industry management for village groups as well as training programme for local youth as village agents and community servants.

h) YIS

The Yayasan Indonesia Sejahtera (YIS) provides training services for policy-makers, community-level workers and community leaders in terms of needs assessment or problem identification, problem-solving, and planning for implementation of new or improved community programs.

Regular Training Programs
Orientation for Decision Makers

YIS has been conducting Orientation Programs for decision makers in government and non-governmental agencies since 1975. This orientation primarily aims to introduce philosophies and approaches to participatory community-based development.

Training Program for Community Field Workers

This program is offered each year at the YIS Training Center in Solo and at other locations upon request. The seven-week program is aimed at equipping the trainees with the understanding, motivation and skills needed for planning and implementing community-based development programs.

Training of Trainers Program

This is a five-week training program at the Solo Training Center and at other location when requested. Participants are expected to be able to plan and conduct training programs in their respective areas of expertise for cadres or community workers.

Specially-Designed Training Programs

YIS also helps groups and organizations establish regional training centers for community development workers and cadres. It has cooperated with WAPI, a local community development organisation, in the development of a regional training center in South Sulawesi. This is used for training local community leaders and development workers.

Short-Term Workshops

In addition to its regular training programs, YIS also conducts short-term workshops on areas such as communication, leadership and training for village cadres and community leaders.

D. Institutions

a) AIM

The Asian Institute of Management (AIM) has for its thrust a Rural Development Management Program (RDMP).

Along this, RDMP works to disseminate its findings and share its expertise with development managers and educators in the region; introduce rural development management concepts and materials in its regular degree and non-degree programs; as well as expand its action research activities to include other countries in Southeast Asia.

Towards these goals, AIM through RDMP offers various academic and continuing education programs in the field of management. On top of these is the Program for Development Managers (PDM) which is designed for middle and upper-level executives of organizations, decision-makers, managers and leaders who are involved in planning and implementation of development programs in Asia. Participants come mainly from government agencies, non-governmental organizations, funding agencies, and private business firms operating in the rural areas.

AIM also through RDMP has offered a one-week, top level program on development management for executives of the Malaysian Ministry for Land and Regional Development. Entitled «Top Management Seminar on Strategic Planning, Organization and Control », the seminar aimed to develop participants' skills in using key management concepts and tools; establish goals and strategies for the Ministry; and work toward developing appropriate and effective organization and management systems within the Ministry.

Notably, AIM is now receiving a larger proportion of students who hold positions in governmental, non-profit or development organizations which has resulted in a «more balanced mix» of students.

The RDMP team has - kewise participated in a joint AIM-Khon Kaen University (KKU) Project which seeks to enhance the abilities of educators in Northeast Thailand to offer local training in development management, to use the case method as an alternative approach to teaching and research, arid to assist development practitioners in the region through management consultancy.

b) AIRD

The Asian Institute for Rural Development (AIRD) conducts training and education programs for rural development workers of various types as well as orientation programmes for specialists and high-level persons in the field of public administration, agriculture, forestry, fisheries, agro-industries, etc.

Its training programmes aim to impart proper attitudes, motivations, capabilities and knowledge for the animators and development workers of the government as well as non-governmental organizations, and training the rural poor in various skills. AIRD's training programmes fall into two main categories (1): regional programmes and (2) country programmes.

The regional programmes are: Asian Rural Service Corps, Agrarian Reform and Rural Development and, On-the-Job Training Programme for UN Volunteers.

One of the country programmes is Training in Development of Skills which covers sericulture development, land and water use management, animal husbandry, fisheries development and cooperation and credit management.

Though governments have training programmes of this kind, it is felt that they alone could not handle the task. Hence, there is a need for NGOs to step in. AIRD with the financial support of the Development Innovations and Networks (IRED) in cooperation with the Geneva Federation for Cooperation continue to implement the programmes recognizing the benefit accruing to NGOs.

c} CCS

The Center for Community Service (CCS) undertakes relevant scientific and simplified studies of problems and issues in rural communities as wel as documents people's efforts in attaining genuine social economic and political self-reliance. Its major concerns are education, organization and training. CCS units include the following: office for social concern and involvement, office for rural development, workers' college, and LIKAS, for primary health care.

d) DMSF-IPHC

The Davao Medical School Foundation - Institute of Primary Health Care (DMSF-IPHC) aims to improve the quality of life of the rural and urban undeserved communities through a holistic development approach; develop the community residents' capabilities to plan, implement, monitor and evaluate their own development activities through volunteer training of volunteer health workers, farmers and community leaders; and forge strong and sustained linkages between government, non-government and local community organizations to foster cooperation and understanding as well as maximize utilization of each other's resources.

At the organizational level, DMSF-IPHC regularly conducts staff development sessions on matters such as community organizing, training designs and modules, participatory research, planning and management, monitoring and evaluation. At the municipal and barangay level, it conducts mini-workshops on PIME for GOs-NGOs and volunteers.

It also offers a yearly four-week course on Planning, Implementation, Monitoring and Evaluation of Social Development Projects to which mid-level workers of both GDs and NGOs are invited.

e) MIM

The Manitoba Institute of Management (MIM) is a Canadian NGO which provides management training courses for NGOs worldwide. It offers its trainings and consulting materials, tool and techniques, etc., to organizations that provide management services to NGOs.

In Southeast Asia, MIM has worked with the Indonesia Forum on Management Development to provide consultancy on organization development and training for large Indonesian NGOs.

d) SAIDI

The Southeast Asiah Interdisciplinary Development Institute (SAIDI) has been founded (1) to serve as a graduate center of research for new innovation in organization development through the maintenance of a progressive institute of learning with quality standards and (2) to improve and develop dynamic and effective professional educators, organization managers and community developers in the Philippines in order to provide trained men and women with the knowledge and skills needed for key positions in educational, community or industrial sectors.

SAID1 offers the following academic programs: Masteral Programs in Organization Development and Planning and in Instructional Development and Technology.

A Post-Graduate Program in Organization Development and Planning is also offered.

Participants to the programs include educators such as administrators, curriculum specialists, and other potential leaders of schools, colleges, and unversities; organizational leaders and managers involved in or committed to human and community organization and development; and industrial managers or executives interested in organization development.

g) SEARSOLIN

The Southeast Asia Rural Social Leadership Institute (SEARSOLIN) is a leadership institute aimed at developing rural social development leaders and practitioners especially from Asia, the Pacific and Africa by equipping them and sharpening their skills in working with people using a holistic development approach.

To archieve this, it has an annual six-and-a-half month study program (September to mid-March) which includes a variety of management and leadership modules in te general curriculum as well as specific areas on agricultural extension, introduction of innovation, appropriate technology, development communication, project planning, implementation, evaluation, etc.

SEARSOLIN graduates are normally from organizations whose nature of work involve community development and organizing, credit cooperatives and unions, church-related work and social services, research and extension. The programs include training, serninars/conscientization, income-generation, organization management, financial and technical assistance.

h) FIT

The Foundation for International Training (FIT) is a Canadian organization that provides training, consulting, and institution-building to Third World countries. FIT has published various training manuals with regard to management and technical subjects. It has conducted programmes in the Carribean, Eastern and Southern Africa, the Middle East, and Southeast Asia, where it has organized programmes in Malaysia and the Philippines.

Une nouvelle étude réalisée par des ONG

Comment la sécheresse de 1984/85 a affecté la manière dont l'Europe perçoit l'Afrique*

par Charles-Henri Foubert

«C'est l'aube, le soleil troue le froid perçant de la nuit dans la pleine de Korum et éclaire une famine biblique, aujourd'hui, au vingtième siècle. Cet endroit, disent les gens qui travaillent ici, est ce qui se rapproche le plus de l'enfer sur la terre. ». Michael Burke, lors de l'émission *«Six O'Clock News»* de la BBC du 23 octobre 1984.

Trois ans ont passé depuis que ces mots furent prononcés par une froide nuit d'automne, à Londres, pour introduire les images émouvantes de Mohamed Amin illustrant les effets de la famine éthiopienne en 1984. Ce court métrage de 9 minutes a été ensuite diffusé dans le monde entier par 425 réseaux de télévision. On estime à 470 millions le nombre de personnes qui ont vu ces images de désespoir, de souffrance et de mort: les dizaines de corps éparpillés autour du camp; les chants funèbres déchirants des survivants; les visages émaciés d'enfants mourant de faim; le sentiment d'impuissance que révèlent les propos du personnel de secours local et étranger.

Tout cela déclenche en Europe une campagne de solidarité internationale comme on n'en avait encore jamais vue et qui dura presque deux ans. L'émotion provoquée par ce spectacle se traduisit par une explosion de générosité. Djibril Diallo, chef de l'information du Bureau des Nations Unies des opérations d'urgence en Afrique, a déclaré: *"C'est cette horreur, ce traumatisme, que l'on a réussi à maîtriser partiellement grâce aux médias. Au moins trois millions de personnes ont été sauvées par les efforts conjoints des Africains et d'une communauté internationale galvanisée par ce qu'elle a vu et lu sur la tragédie».* Les médias ont donc bien joué leur rôle et ont usé de tout leur pouvoir pour soutenir une opération de sauvetage de grande envergure.

Cl Article repris de *Idées et Action.* 1987/3, CMCF/FAO.

Le point de vue manquant

Toutefois, M. Diallo, relève une certaine ambigufté dans ces images et mentionne qu'«un *certain mécontentement a été exprimé en Afrique »* sur la manière dont les médias ont rendu compte de la tragédie. Il a souligné notamment que:

- l'attention a été presque entièrement dirigée sur les efforts extérieurs déployés pour venir en aide à l'Afrique. Les initiatives des ONG africaines, des associtions villageoises et même des gouvernements ont été passées sous silence ou déformées;
- les médias n'ont pas fait allusion ni laissé la parole, comme il eut été juste de le faire, à une nouvelle génération d'Africains qui réclament une évaluation critique de ce qui doit être fait par les habitants du continent; c'est-à-dire qu'on n'a pas parlé des nombreuses études africaines qui critiquent le modèle de développement et les politiques agricoles dominantes, et le type de projets de développement mis en œuvre après l'indépendance;
- finalement, la présentation de l'indépendance de l'aide étrangère, des héros de la lutte contre la faim tend à promouvoir un nouveau genre d'interventionnisme en Afrique. Comme le dit Diallo: *« Il y a plus d'expatriés en Afrique maintenant que durant la période coloniale. Et la facture est salée. Plus de la moitié des 7 milliards de dollars dépensés chaque année en Afrique sert à payer les salaires et les dépenses de ces expatriés».*

Il conclut donc : « L'information internationale n'a en général pas réussi à faire connaître le point de vue de l'Afrique sur la crise».

Se rend-on compte à quel point il est humiliant pour un peuple de se voir constamment comme des mendiants attendant, le bol à la main, que le salut vienne d'ailleurs, sans avoir la possibilité d'expliquer la réalité complexe qui a engendré cette situation? N'est-ce pas comme si on attaquait la richesse de leurs traditions et de leur vie? Et n'est-ce pas doublement humiliant de voir ces images projetées par une autre société dont le passé africain est ponctué d'actes d'asservissement?

Ces images montrées hors du contexte dans lequel le «développement» se déroule - ou ne se déroule pas - peuvent être profondément choquantes pour les Africains et être ressenties comme un affront à leur honneur et à leur dignité et aux efforts qu'ils ont faits pour résoudre leurs problèmes. *«Est-il suffisant»,* demande un article de *Earthscan, « de se borner à compter les morts et à décrire les dégâts ? Ou le métier de journaliste de consiste-t-il pas aussi à aller au-delà des scènes de destruction pour expliquer comment les personnes, les politiques et les systèmes sociaux sont responsables d'une calamité?»* Et Andrew Timpson, directeur sur le terrain de Save *the Children Fund* au Soudan, ajoute: *«Je suis préoccupé par le fait que la télévision ne puisse se détacher un instant des images d'enfants affamés pour faire des reportages sur les opérations de redressement et de développement agricoles propres à empêcher la famine* [(2)].

Mais le journalisme a ses fois et sa logique qui ne correspondent pas nécessairement aux besoins de l'action et de l'éducation pour le développement, telles que les ONG les comprennent. Il est même légitime de se demander s'il n'y a pas une contradiction fondamentale entre la logique médiatique, qui cherche à susciter dans l'ensemble de la population, sans distinction, des sentiments violents mais éphémères à propos d'événements très spectaculaires, et celle des organismes de développement qui tendent à orienter leurs programmes éducatifs pour toucher des groupes sociaux ciblés, afin de discuter de problèmes socio-économiques complexes qui ne se laissent pas réduire aisément au sensationnalisme.

Il est indéniable que la couverture médiatique de la récente crise alimentaire africaine a diffusé des images que les ONG trouvent assez douteuses, même si elles leur ont apporté, ainsi qu'aux organisations internationales, un très vaste public soudainement intéressé et personnellement impliqué dans les questions de développement. Ces images forment encore le cadre de toutes les émissions d'information ou des articles sur l'Afrique. Il est donc très probable que leur impact sur la perception qu'à l'opinion publique européenne de l'Afrique et de ses problèmes est d'une énorme portée.

Les images de l'«autre» sont toujours sélectives, a-t-on dit, et ne servent souvent qu'à confirmer l'image que l'on a de soi-même. Aussi, la perception du « sous-développement » des autres correspond-elle à l'idée que les «développés» se font d'eux-mêmes et de leur société.

Cela pourrait expliquer l'impact inattendu d'images montrant une Afrique indigente; par leur truchement, les Européens se sont vus comme des bienfaiteurs ouverts et prêts à combler le monde entier de leur aide et chargés d'une mission d'aide sans devoir remettre en question leur propre style de vie. Pourtant l'une des préoccupations de nombreuses ONG européennes est de faire du travail d'éducation en matière de développement pour convaincre le public de la nécessité de restructurer les relations internationales - faute de quoi leurs activités de développement risquent fort de ne pas dépasser les limites de l'action charitable. Les images qui ont dominé l'information sur l'Afrique, ces deux dernières années, sont

non seulement ambiguës mais aussi potentiellement dangereuses.

Compte tenu d'une campagne médiatique menée de façon très simpliste depuis deux ans, les ONG européennes se sont efforcées de transformer une réaction émotive en un engagement ferme de solidarité avec l'Afrique. La plupart d'entre elles ont essayé d'influencer les journalistes. Les résultats obtenus dans ce domaine varient d'un pays à l'autre. Outre le fait que les médias sont plus ou moins perméables selon les pays, la mesure dans laquelle les ONG ont réussi ou échoué a dépendu du rôle que l'opinion publique leur reconnaît dans la société; s'il est important, il est évident qu'elles sont alors habilitées à parier avec autorité des politiques de développement. Dès qu'il est question de l'Afrique, il faut considérer l'histoire des relations de chaque pays avec le continent, car c'est la un élément qui détermine le niveau de l'intérêt du public au-delà de l'actualité sensationnelle.

Le projet «Image de l'Afrique»

Avec ces considérations présentes à l'esprit, un groupe d'ONG européennes sont en train de soumettre à une évaluation leur stratégie d'information et leurs programmes d'éducation pour le développement durant la période d'urgence. Cette entreprise est menée conjointement par les ONG de sept pays : le Comité français contre la faim en France, la Danchurchaid au Danemark, la Deutsche Welthungerhilfe en République fédérale d'Allemagne, Oxfam au Royaume-Uni, SOS-Faim en Belgique, Trocaire en Irlande et, en Italie, un groupe de trois ONG : CRIC, Crocevia et Terra Nuova qui sont également responsables de la coordination du projet. Ces organisations ont prié la CMCF/AD de se joindre au groupe de coordination en raison de son expérience en Afrique et des liens solides qu'elle a avec les ONG tant africaines qu'européennes. Le projet est financé conjointement par la Communauté économique européenne et le Ministère italien des affaires étrangères.

Dans tous les pays cités les organisations participantes ont lancé une enquête sur les médias et procèdent à une analyse du matériel d'information produit par les ONG. Elles essaieront ensuite de déterminer l'impact de cette information en identifiant les sources de la connaissance et de la perception qu'a le « citoyen moyen » du développement en Afrique.

Cette recherche, dont le but est de tirer des enseignements de la récente campagne en vue de futures actions des ONG dans des circonstances analogues, ne peut évidemment pas être exécutée par les seules organisations européennes. Les opinions et la participation des Africains sont essentielles. Le projet « Image de l'Afrique » comprend donc deux volets: une recherche européenne et une recherche dans un groupe de pays africains qui ont été récemment victimes d'un déficit alimentaire à des degrés divers : le Burkina Faso, l'Ethiopie, le Mozambique, le Niger, le Sénégal et le Zimbabwe.

Les enquêteurs africains explorent actuellement l'impact de l'énorme effort humanitaire en faveur des victimes de la famine sur leur société; ils étudient le type de projets mis en œuvre et comment ces projets se rattachent à des initiatives villageoises prises pour s'entraïder, comment l'afflux massif d'aide étrangère a affecté non seulement les individus, mais aussi les relations sociales au niveau national et surtout local. Les chercheurs étudient aussi les villages qui n'ont pas subi le sort de leurs voisins et ont réussi à empêcher que la sécheresse n'entraîne l'extermination massive des populations par la faim. Ils s'efforcent de repérer les mécanismes de la solidarité africaine en temps de besoin et le dynamisme et esprit d'initiative qui ont permis de minimiser les effets de la famine, de façon à recueillir une image dynamique de l'Afrique.

Une réunion finale des participants européens et africains aura lieu en décembre prochain en vue de comparer les résultats, de tirer des conclusions qui seront intégrées dans les politiques d'information et dans les programmes d'éducation pour le développement des ONG, et d'identifier des domaines communs d'action.

... es identifiant /es cources de la connaissnace et de la perception qu's le "citoyen moyen "...

L'enquête en République fédérale d'Allemagne

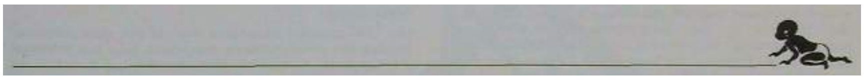
Les premiers résultats des enquêteurs sur les médias en Europe semblent confirmer les hypothèses émises au début de cet article. Dans ce pays, l'enquête a été confiée à un organisme spécialisé de Sarrebruck, l'Institut fur Entwicklungsforschung, Wirtschafts - und Sozialplanung (Institut de recherche pour le développement et de planification économique et sociale), ou ISOPLAN. L'Institut a analysé 706 articles parus dans la presse sur une période de six mois au sujet de la « Journée de l'Afrique», campagne nationale de collecte de fonds qui a eu lieu le 23 janvier 1985. Voici quelques données extraites d'un rapport provisoire publié par ISOPLAN en novembre 1986:

- Seulement 187 (26 pour cent) des 706 articles ont recherché les causes fondamentales de la crise et plus de 60 pour cent croient les identifier dans les structures des économies africaines, tandis que moins de 40 pour cent mentionnent les facteurs internationaux.
- Seulement 41 articles (5,8 pour cent) mentionnent les initiatives africaines pour surmonter la crise.
- L'Afrique est présentée globalement: on ne trouve mention de pays particuliers que dans 300 articles et, parmi ceux-ci, l'Ethiopie tient une place prépondérante (c'est pourquoi beaucoup de commentateurs ont déclaré que plus que d'une "Journée de l'Afrique», il s'agissait d'une «Journée de l'Ethiopie»).
- Sur 200 articles illustrés (sur un total de 700), 60 photos seulement se rapportaient à l'Afrique. Les autres illustraient les activités déployées en République fédérale d'Allemagne pour recueillir des fonds. L'analyse de contenu des articles eux-mêmes le confirme: après une

Les images de l'Afrique qui ont été projetées en Europe peuvent évidemment avoir un impact sur les Africains. Selon Tapio Varis, spécialiste finlandais des politiques d'information et de communication, plus de 55 pour cent des heures d'émissions télévisées en une année sont occupées par des programmes importes. La situation varie naturellement d'un pays à l'autre: «La télévision ougandaise offre le pourcentage le plus élevé de programme importés (83 pour cent) et la télévision nigériane le plus faible (31 pour cent)». *Le Nigeria avec ses 21 émetteurs TV semi-autonomes, produit le plus grand nombre de programmes nationaux.*

Tapio Varis note, en outre, que, à l'exception du Nigeria, « le contenu importé dans la sous-catégorie des journaux télévisés est de 46 pour cent; en ce qui concerne les documentaires, il s'élève à 82 pour cent». *Presque tous les réseaux de télévision africains dépendent de sources multinationales pour les nouvel/es internationales.* « La dépendance est telle dans ce domaine», *souligne le rapport,* «que pour couvrir un événement qui se passe seulement à quelques kilomètres dans un pays voisin, il faut recourir au service-information d'un consortium multinational dans un autre continent... ». *D'où les programmes importés proviennent-ils ? Le rapport indique que presque les deux tiers sont produits aux Etats-Unis et au Royaume-Uni: ces deux pays sont la source de 47 et 25 pour cent respectivement de toutes les importations.*

Quand on interprète ces chiffres, il faut tenir compte évidemment du fait qu'en Afrique, la télévision n'est pas aussi répandue que dans les pays du Nord. « La distribution des postes de TV est concentrée dans les zones urbaines et dans les classes relativement aisées. Les postes sont trop coûteux et pas à la portée du salarié moyen, en ville comme à la campagne». *Il y a actuellement en Afrique 9,9 postes de télévision pour 1000 personnes, la plus faible distribution du monde. La plupart des Africains seront donc moins touchés par les images qui ont déclenché la campagne de collecte de fonds en Europe que par les projets de terrain qui en ont déclen-ché la campagne de collecte de fonds en Europe que par les projets de terrain qui en ont été le résultat.*



première vague de reportages sur les horreurs de la famine, l'intérêt s'est déplacé vers les initiatives prises par le Gouvernement, les particuliers, les hommes politiques, les organismes de secours, les groupes qui se sont formés spontanément, etc.

- En conclusion, l'ISOPLAN, estime que moins de 10 pour cent des articles ont traité de l'aide au développement comme l'auraient souhaité les organismes de secours quand ils ont décidé de lancer la «Journée de l'Afrique». Quant aux ONG, l'Institut a constaté qu'elles considéraient comme très positif le fait que, pour la première fois dans l'histoire de leur pays, l'attention du public ait été attirée sur le problème de la faim, mais que la majorité d'entre elles étaient déçues de la façon dont les médias avaient couvert la crise. Elles se sont rendu compte qu'elles avaient eu tort de ne pas préparer un matériel adéquat pour la presse. Elles pensent également que les lois de la concurrence régissant les médias dans une économie de marché, excluent fa possibilité de publier des articles de fond. Elles concluent donc que les médias n'ont *qu'«une simple fonction de soutien et de motivation »,* ce qui semble donner plus d'importance encore à cet aspect de la tâche des ONG consistant à fournir un flux continu d'informations de fond, et à l'amélioration de leurs stratégies d'information.

Cent vingt millions de deutsche mark (environ 67 millions de dollars E.U.) furent recueillis grâce à la «Journée de l'Afrique». Mais, durant le reste de l'année 1985, les organismes de secours enregistrèrent une baisse de 20 pour cent des dons par rapport aux années précédentes. Selon l'ISOPLAN, cela semble indiquer la «saturation» du public durant cette campagne d'un jour. Les ONG estiment que le public a été bouleversé mais pas informé. Les gens ne pouvaient réagir qu'avec générosité aux images de la misère et de la souffrance, mais certaines questions sont demeurées sans réponse ; pourquoi la famine est-elle un phénomène cyclique qui demande l'intervention de la générosité publique presque tous les dix ans? Comment les fonds de l'aide sont-ils employés? Le public voulait que son argent aille directement aux victimes de la sécheresse que la télévision leur montrait. Et i! n'était pas facile aux organisations d'expliquer la logique des projets à long terme. Le genre d'images qui a déclenché la campagne a créé aussi des attentes bien définies concernant le type d'action à mettre en œuvre pour résoudre le problème. Et c'est là où commencent les désaccords entre le public, les ONG européennes et les organisations africaines qui essaient de mobiliser et d'organiser la population locale pour qu'elle puisse résoudre ses propres problèmes.

En fait, les ONG européennes elles-mêmes font partie du problème; elfes n'agissent pas, en effet, indépendamment du contexte culturel qui détermine l'image globale de l'Afrique en Europe. Dans un article destiné au projet « Image de l'Afrique», Peter Davies. d'Oxfam, écrit: *« Lorsque nous examinons la réaction des organisations à la crise africaine, il convient de ne pas oublier que les ONG ont une vue très incomplète des événements. Dans n'importe quel pays pendant une période d'urgence il y a des observateurs ne joussant pas d'un très bon poste d'observation et que leur manque d'accès, leur culture, leur langue, leurs traditions, leur histoire et leur orientation politique empêchent de comprendre à fond une situation qui les effraie. Leurs interprétations seront très probablement eurocentrées et le conditionnement qu'ils ont hérité du passé colonial exercera encore une influence considérable dans le choix des «faits" à publier».*

Le pouvoir des médias et le rôle des ONG

Le problème ne concerne pas seulement le contenu de l'information. Plus centrale pourrait être la capacité de croissance des organisations (gouvernementales ou non gouvernementales, nationales ou internationales), qui ont une expérience directe et une connaissance de première main de la situation internationale, pour informer l'opinion publique mondiale et l'alerter quand il le faut lorsqu'une crise est sur le point d'éclater.

Les ONG estiment généralement que la diffusion de l'information sur des thèmes de développement est l'une de leurs tâches les plus importantes et fait partie de leur responsabilité dans leur pays; il leur incombe d'exercer des pressions sur les pouvoirs publics, afin que soient mises en œuvre des politiques propres à instituer des relations internationales plus équitables.

La plupart des organisations étaient au courant de la situation critique qui se préparait en Afrique longtemps avant que les médias n'en parlent en termes dramatiques. Durant toute l'année 84, elles avaient essayé d'émouvoir l'opinion publique. La situation était suivie en permanence par la FAO et l'information était à la disposition de qui la voulait. Des organismes de secours privés en Europe avaient publié des communiqués de presse et des articles où l'on faisait le point sur la question; certaines ONG avaient également mobilisé des aides d'urgence, convoqué des réunions et des consultations auxquelles des journalistes avaient été invités et avaient même produit des films pour la télévision. En somme, les ONG avaient mis tout en œuvre pour mâcher le travail aux médias. Mais la réaction fut minime. Seuls les journaux «sérieux" ou les revues spécialisées couvraient les événements. Le grand public ne fut informé que lorsque Michael Burke et Mohamed Amin trouvèrent les images « justes » - tragiques et horrifiantes - et lorsqu'un concours de circonstances permit à leur documentaire de passer à la télévision aux heures de grande écoute.

Si la réaction du public fut d'une générosité extraordinaire - au Royaume-Uni deux millions de livres sterling furent donnés en deux jours, et les organisations utilisèrent ces images pour collecter des fonds en vue de financer leurs propres opérations - le contenu échappait au contrôle de la communauté internationale du développement.

Aujourd'hui, la presse considère sans doute la sécheresse comme un «fait de 1985». Il est exact que le pire de la crise est passé. Mais le problème de fond demeure: la dette étrangère africaine, la détérioration des termes de l'échange, l'exode rural et autres facteurs qui contribuent à la crise économique chronique du continent et expliquent pourquoi de mauvaises conditions climatiques peuvent si facilement faire basculer la situation et rompre un équilibre précaire entre survie et catastrophe.

Mais ces facteurs ne fournissent pas les éléments d'une «bonne histoire»; ce ne sont pas des «nouvelles». Et aujourd'hui l'Afrique recommence à être du domaine exclusif de la presse « sérieuse » et des revues spécialisées.

Les ONG peuvent cependant tirer de ces trois dernières années des enseignements importants pour leur stratégie d'information. Surtout si cette dernière est formulée de concert avec des organisations sœurs en Afrique, attentives à encourager le développement rural sur la base de la maximisation des ressources locales et de la capacité des popultions locales à s'organiser et à résoudre elles-mêmes leurs problèmes.

(1) *A year in the death of Africa,* par Peter Gill, Paladin, Londres, 1986.

ASEAN NON-GOVERNMENTAL ORGANIZATIONS

ASEAN defines a non-governmental organization (NGO) as a non-profit making association of ASEAN persons, natural or juridical, organized to promote, strenghten and help realize the aims and objectives of ASEAN cooperation in the political, economic, social, cultural, scientific, medical and technological fields.

ASEAN was conceived as an intergovernmental organisation, but if the aims and aspirations of ASEAN are to be realized, it should not only involve governmental bodies but should allow private organisations to articulate their views and hopes. By the early 1970s, non governmental organisations with similar interests in the various ASEAN countries had begun to develop a regional awareness and were joining hands to forge an ASEAN identity. Perhaps, one of the most important NGOs established in the early formative years of ASEAN was the ASEAN Chambers of Commerce and Industry (ASEAN-CCI) which became the spokesman of the ASEAN business community since 1972 with the blessing of the ASEAN Foreign Ministers.

Currently, there are 31 affiliated ASEAN NGOs. Their organisations are wide ranging. They included, among others, lawyers, bankers, employers, medical practitioners, valuers, engineers, shipowners, businessmen, youth, women, sport clubs, economists, port authorities, and contractors. Through such organisations, the ASEAN message is being carried to a vast level of ASEAN society. Their activities help give expressions, meaning and substance to the ASEAN idea.

Affiliation to ASEAN is useful and beneficial to both NGOs and ASEAN. For ASEAN the objectives of affiliation are to draw the NGOs into the mainstream of ASEAN activities so that they are kept informed of major policies, directives and decisions of ASEAN and are given the opportunity and the privilege of participating in ASEAN activities and to ensure interaction and fruitful relationship between the existing ASEAN bodies and the NGOs.

On the other hand, an affiliated NGO enjoys certain privileges and benefits which include the use of the name «ASEAN » and display the official ASEAN emblem in corespondence and communications and its official meetings so long as the displaying of such emblem is non-commercial in nature. It may submit written statements or recommendations and views on policy matters or on significant events of regional or, international concerns, to the ASEAN Standing Committre through the ASEAN Secretariat. It may initiate programmes of activities for presentation to its link body for appropriate action. It may submit its own project proposals for third party funding to be channeled through the ASIAN Secretariat to the Standing Committee for approval. For purposes of doing research for its projects, it may be allowed access to the SEAN documents on a selective basis in consultation with the ASEAN Secretariat and or its link body. And subject to rules and regulations, it may be allowed the use of the facilities of the ASIAN Secretariat for its official meetings and other official activités in Jakarta.

FINANCE, TRADE AND INDUSTRY GROUP

1) ASEAN Bankers Association/ Banking Council
2) Federation of ASEAN Shipowners Association
3) ASEAN Federation of Furniture Manufacturers Association
4) ASEAN Insurance Council
5) ASEAN Chambers of Commerce and Industry
6) ASEAN Confederation of Employers
7) ASEAN Handicraft Promotion and Development Association
8) ASEAN Music Industry Association
9) ASEAN Constructors Federation

ENGINEERING GROUP

10) ASEAN Federation of Engineering Organization
11) Southeast Asian Association of Seismology and Earthquake Engineering
12) ASEAN Federation of Electrical Engineering Contractors
13) ASEAN Federation of Mining Association

MEDICAL GROUP

14) Medical Association of Southeast Asian nations
15) ASEAN Association of Radiology
16) ASEAN Federation for Psychiatric and Mental Health
17) Rheumatism Association of ASEAN
18) ASEAN Orthopaedic Association
19) ASEAN Neurosurgical Society
20) ASEAN Pédiatrie Federation

SERVICES GROUP

21) Federation of ASEAN Public Relations Organisation
22) ASEAN Association for Planning and Housing
23) ASEAN Law Association
24) ASEAN Valuers Association
25} ASEAN Port Authorities Association
26) Federation of ASEAN Economic Association

YOUTH, SPORTS & COOPERATIVE GROUP

27) ASEAN University Sports Council
28) Committee for ASEAN Youth Cooperation
29) ASEAN Football Association
30) ASEAN Cooperative Organization
31) ASEAN Confederation of Women Organization

(Asean Newsletter, Jan-Feb. 1988)

WACC-Asia launches newsletter

WACC's Asia Region (AR-World Association For Christian Communication) has launched a quarterly newsletter as part of its initiative to encourage more cooperation beween members through the sharing of information and products.

« This is your newsletter and it had to reflect you and your work », write AR-WACC secretary Augustine Loc thusamy. He asks readers to send in their insights, experiences and fe; ture articles on communicatic themes.

The first issue reviews some of the resolutions passed at the region's assembly last September. Training was given high priority and members will be urged to make contact with like-minded organisations in other WACC regions that have already developed training programmes.

Another decision from the assembly is to develop relations with Christian communicators in the People's Republic of China.

The eight-page newsletter also carries a report on the recent southeast Asian conference on Women and Media, held in Manila, Philippines. It outlines plans for future activities in three areas of concern: the strengthening of alternative media for and by women; the consciousnessraising of women, and creating change in mainstream media.

Asia Region newsletter, Augustine Loorthusamy (AR-WACC secretary), Asian Social Institute, 1518 Leon Guinto Street, Malate, Manila, Philippines. Tel (2) 595613 and 594376.

International Meetings in 1987

by Ghislaine de Coninck*

Introduction

For the past 39 years, the Union of International Associations has undertaken, for the benefit of its members, statistical studies on the international meetings that took place worldwide in the preceding years. The detailed figures for 1987 have just been finalized and we are giving them here under some additional comments.

The statistics are based on information collected by the UAI Congress Département and selected according to very strict criteria maintained for the last years, this enabling meaningful comparisons. Meetings taken into consideration include those organized and/or sponsored by the international organizations which appear in the *Yearbook of International Organizations* and in the *International Congress Calendar,* i.e.: the sittings of their principal organs, congresses, conventions, symposia, regional sessions grouping several countries, as well as some national meetings with international participation organized by national branches of international associations.

Are excluded from the UAI figures : purely national meetings as well as those of an essential religious, didactic, political, commercial, sportive nature such as religious gatherings, courses, party conferences, fairs, sales meeting, contest etc... Are also excluded: meetings strictly limited in participation such as committees, groups of experts etc... most of those being held at an intergovernmental level and taking place mainly at the headquarters of the targe IGO's in New York, Geneva. Rome, Brussels, Vienna...

General Picture

The total number of international meetings organized in 1987, compared with 1986, indicates a steady worldwide increase of 9.3%, this including a 3.5% increase of international organizations meetings and 5.8% of national meetings, to be divided as follows:

Table 1. Worldwide breakdown of the 1987 increase

Continent	Total	Meetings of int. org.	National meetings with int. participants
Europe	+ 3.30%	+ 0.95%	+ 2.25%
North America	+ 2.65%	+ 1.60%	+ 1.05%
Asia	+ 1.80%	+ 0.25%	+ 1.55%
S. America	+ 1.05%	+ 0.50%	+ 0.55%
Africa	+ 0.55%	+ 0.50%	+ 0.05%
Australasia	+ 0.10%	- 0.30%	+ 0.40%
Total	+ 9.35%	+ 3.50%	+ 5.85%

(*) Head of UAI Congress Department.

The worldwide breakdown by main regions is as follows:

Table 2. Worldwide breakdown of the total number of international meetings in 1987

Continent	Total	Meetings of int. org.	Meetings of nat. org.(*)
Europe	60.20%	39.20%	21.00%
North America	14.90%	11.50%	3.40%
Asia	12.80%	8.30%	4.50%
North America	5.45%	4.10%	1.35%
Africa	4.35%	4.10%	0.35%
Australasia	2.30%	1.50%	0.70%
	100%	68.70%	31.30%

Table 3. Increase	in % 1987 versus 198	*3* - Continent per Continent	
Continent	Total	Meetings of int. org.	Meetings of nat. org.(*)
Europe	+ 5.10%	+ 1.50%	+ 3.60%
North America	+ 19.60%	+ 11.80%	+ 7.80%
	+ 14.40%	+ 2.00%	+ 12.40%
North America	+ 21.30%	+ 9.50%	+ 11.80%
Africa	+ 13.60%	+ 12.20%	+ 1.40%
Australasia	+ 1.30%	- 15.70%	+ 17.00%

The analysis of the leading countries indicates the following situation :

Table 4. Leading countries hosting international meetings in 1987 (% of the worldwide total)

Countries(**)	Meetings of int. org.	Meetings of nat. org.	Total
USA	8.00%	2.60%	10.60%
UK	5.20%	4.40%	9.60%
France	4.30%	3.60%	7.90%
Germany FR	3.50%	2.60%	6.10%
Italy	3.50%	1.00%	4.50%
Switzerland	3.20%	0.50%	3.70%
Canada	3.10%	0.80%	3.90%
Belgium	2.50%	1.10%	3.60%
Netherlands	2.20%	1.90%	4.10%
Spain	2.00%	1.70%	3.70%
Austria	1.70%	0.50%	2.20%
Finland	1.30%	0.60%	1.90%
Japan	1.10%	1.30%	2.40%
Denmark	1.00%	0.60%	1.60%

number of meetings sponsored/organized by International organisations and the

cases of national type, and are due to initiatives independent from those of interna-

different.

As far as the leading cities are concerned the results are as follows :

Table 5. **Leading cities hosting meetings from international organizations (% of the worldwide total**

City (*)	Meetings of int. org.	Meetings of nat. org.	Total
Paris	2.40%	2.40%	4,80%
London	2.30%	1.40%	3.60%
Geneva	1.80%	0.20%	2.00%
Brussels	1.80%	0.40%	2.20%
Vancouver	1.10%	0.20%	1.30%
Rome	1.10%	0.20%	1.30%
New York	1.00%	0.10%	1.10%
Vienna	1.00%	0.20%	1.20%
Strasbourg	0.90%	0.20%	1.10%
Bangkok	0.80%	0.30%	1.10%
Washington	0.80%	0.10%	0.90%
Amsterdam	0.70%	0.60%	1.30%
Madrid	0.70%	1.30%	2.00%
Berlin West	0.70%	1.10%	1.80%

(*) As far as the «TOTAL» figures are concerned, the classification is of course, different.

Breakdown by Continents /Regions

AFRICA

In Africa the most important country hosting international meetings is Kenya with, as in 1986, an 11 % share of the African market, followed by Egypt with 7.5%, Senegal and Zimbabwe 7%, Morocco and Tunizia with 6%. Senegal and Morocco are the two African countries showing the best increase versus 1986.

Among other countries, with increasing figures are: Ivory Coast, Ethiopia and Nigeria.

NORTH AMERICA

In North America (USA. Canada and Mexico) the results are very positive with a 2.65% of the worldwide increase. The meetings taken into consideration in the survey are mostly meetings from international organizations; it is a well known fact that the number of national meetings organized in those countries are much higher than the figures mentionned in the analysis (especially in the USA) the survey of this specific market is not within the scope of activities of the UAL

On a worldwide level, USA is leading with a 10.6% share of the worldwide total. The important increase in Canada now ranking on the 7th place among leading countries, is due mainly to the fact that a large scientific organization has its quadrennial meeting in Vancouver which led to the organization of a large number of satellite meetings.

SOUTH AMERICA

The development of international meetings is mostly noticeable in Brazil which is now the leading South American country with a 33% share of the market. Argentina follows with an 11 % share. Among the countries with increasing figures are in order of importance: Ecuador, Colombia, Chile, Venezuela, Peru and Uruguay.

ASIA

The increase in this area is not as significant as in previous years; the international association market is almost statu quo; the worldwide increase is due to the increasing number of national meetings with national participation.

The highest increase took place in Japan (appearing now in the list of leading countries), Thailand and India who have respectively 19%, 10.5% and 10% of the Asian market followed by Singapore 9.7%, South Korea 8%, Israel 8%, Philippines 6.7%, Hong Kong 5.5%, China 5.5%, Malaysia 4%.

AUSTRALASIA

In this part of the world the situation seems to be consoliating further to the important increase which took place in 1986.

EUROPE

1987 was a very successful year in Europe. A 3.20% of the worldwide increase was registered. More over the international associations meeting market which was decreasing in 1986 is now showing a positive result (see Table 1).

The United Kingdom is now taking the lead amidst European countries with respectively 9.6% of the worldwide market and almost 16% of the European market. UK being followed by France with 13%, West Germany including Berlin West 10%, Italy 7.5%.

Significant increases have been recorded in Finland, Netherlands, Poland, Portugal. USSR, Norway, Czechoslovakia and Hungary. Statu quo: Belgium, Denmark, Luxembourg, Iceland and Spain. The other countries recording decreasing figures.

BREAKDOWN BY CITIES

Table 5 gives the list of leading cities which is driven by European Cities.

As far as the meetings of international organizations are concerned, the ranking within the continents is as follows:

Africa: Nairobi, Cairo, Harare, Tunis.

North America: New York, Washington, Vancouver and Montreal.

South America: Rio de Janeiro, Buenos Aires, Quito and Caracas, Mexico City and Sao Paulo.

Asia : Bangkok, Singapore, Manila, New Delhi, Tokyo, Seoul, Beijing, Jerusalem, Kuala Lumpur.

Australasia: Brisbane, Sydney, Auckland.

Europe: Paris, London, Geneva, Brussels, Rome, Vienna. Strasbourg, Amsterdam, Madrid and West Berlin.

The Participants

The analysis of information available concerning participants attending meetings shows as in previous years that the majority of meetings have participants numbering between 100 and 500.

Table 6. Breakdown by participants

less than 100 participants	- 16,60%
100 to 500 participants	- 56,40%
500 to 1000 »	- 14,20%
1000 to 3000 »	- 9.60%
3000 to 5000 »	- 1.60%
5000 to 7000 »	- 0.60%
7000 and more »	- 1.00%

Exhibition

Exhibitions were organized jointly with 10% of the meetings reported.

Conclusion and future trends

The overall evaluation of international meetings held in 1987 is indicating a steady increase all over the world.

However, as usual, some countries/cities are recording either very good or rather poor results due to exceptional circumstances such as the celebration of a special event/ anniversary; i.e. if the special event took place during the year concerned the effect is positive, if the event had happened in the previous year to take place in the next year, the effect is negative.

The number of participants is showing a slight increase as well as the number of exhibitions organized jointly with international meetings.

For 1988 the upward trends is still noticeable.

Brussels, March 1988.

40 années de publications de l'UAI

1 Bulletin de l'Office central des associations internationales: rapport sur les travaux de l'année 1907: notice sur l'organisation des associations internationales et les bases d'une coopération à établir entre elles. - Bruxelles: Office central des institutions internationales, 1908. - 42 p, 21 cm.

2 Actes du congrès mondial des associations internationales: Bruxelles 1910. - Bruxelles: Office centrai des institutions internationales: . - ler vol., 1911, 830 p.; 2me vol., 1912, 415 p.

2A Actes du Congrès mondial des associations internationales tenu à Bruxelles en 1910. - Bruxelles : UAI, 1911. - 1246 p.

3 Annuaire de la vie internationale: tome I/Fried A., La Fontaine H. et Otlet P - Bruxelles: Office central des institutions internationales, 1908. - 1370 p. - Publié avec le concours de l'Institut international de bibliographie et l' Institut international de la Paix.

4 Annuaire de la vie internationale. - 48 p. - Extrait de la publication 3.

4A Annuaire de la vie internationale, 1908. - 112 p. - Extrait de la publication 3.

5 Revue internationale des congrès: . - Publiée sous les auspices du Groupe des congrès et des conférences de l'Exposition de Bruxelles de 1910. 11 numéros parus du 22 avril 1910 au 21 septembre 1910. Bruxelles, in-4, 132 p.

6 Pour conserver à Bruxelles, le Parc de l'Exposition universelle et affecter un de ses palais aux œuvres internationales (6 août 1910). - Bruxelles : Office central des institutions internationales, 1910. - 4 p.

7 Musée international : notice et catalogue sommaire. - Bruxelles: Office central des institutions internationales, 1910. - 39 p, 21 cm. - (Catalogue 1).

8 Musée international: catalogue du Musée administratif international: fonds de la participation du gouvernement espagnol. - Bruxelles: Office central des institutions internationales, 1910. - 104 p - (Catalogue 2).

9 Musée international: notice et catalogue sommaire du Musée international de la route. - Bruxelles : UAI, 1910. - 40 p. ill, 21 cm. - (Catalogue 3).

10 Bulletin de l'Office central du 10 janvier 1911. - Bruxelles: Office central des institutions internationales, 1911. - 6 p.

11 Recueil des résolutions et vœux votés par les associations et congrès internationaux en 1910. - Bruxelles : Office central des institutions internationales 1910.

12 Service collectif de librairie des institutions internationales (Catalogue général). - Bruxelles: Office central des institutions internationales.

13 Liste chronolgique des conférences : réunions et congrès à partir de 1911. - Bruxelles: Office central des institutions internationales.

14 Liste des associations internationales : noms et adresses. - Bruxelles: UAI, 1912. - 47 p. - (AB).

15 Office central des institutions internationales: son organisme, ses travaux et ses services. - Bruxelles : Office central des institutions internationales, 1911. - 72 p. ill, 21 cm.

16 Office central des institutions internationales: listes des publications. - Bruxelles : Office central des institutions internationales, 1911. - 6 p, 21 cm.

17 Extraits des actes du Congrès mondial.

18 L'association internationale pour la protection légale des travailleurs et l'Office international du travail (1901-1910): origines - organisation - œuvre réalisée - documents/Bauer Etienne. - Bruxelles: Office central des institutions internationales, 1910. - 112 p.

19 Internacia muzeo: notice, catalogue en espéranto du musée international de langue espérantiste organisé par l'Office central espérantiste. - Bruxelles : Office central des institutions internationales, 1910. - 23 p - (Catalogue 4).

20 Central office of international institutions : notice anglaise. - Bruxelles : Office central des institutions internationales. - 11 p. 21 cm.

22 Le musée international: notice sommaire. - Bruxelles: Office central des institutions internationales, 1911. - 4 p. ill :.

23 Musée international : catalogue sommaire de la section de bibliographie et de documentation. - Bruxelles: UAI, 1912. - 18 p. ill - (Catalogue 5).

24 Musée administratif international : catalogue : fonds de la participation du Gouvernement espagnol. - Bruxelles: Office central des institutions internationales. 1910. - 104 p, 21 cm.

25 Union des associations internationales: constitution d'un centre international : déclarations et opinions sur l'organisation internationale, les associations internationales, documents et notices. Bruxelles: UAI, 1912.- 162 p. ill, 21 cm.

26 La Vie internationale: revue mensuelle des idées, des faits et des organismes internationaux. - Bruxelles : UAI. — 26 fascicules parus de 1912 à 1921. 100 à 120 p. par fascicules.

27 Catalogue général sommaire/Musée international. - Bruxelles: UAI, 1912. -31 p. ill.

27A Catalogue général/Musée international. - Bruxelles: UAI. 1914. - 41 p. ill.

27B Supplément numéro 1 au catalogue général/Musée international. - Bruxelles: UAI, 1914. - 8 p. ill.

28 La vie internationale et l'effort pour son organisation/La Fontaine Henri et Otlet Paul. - Bruxelles: UAI, 1912. - 34 p. - Extrait de la Vie internationale, 1912, **fasc.** 1.

29 Grande-Bretagne et Allemagne : étude sur les caractéristiques nationales/Haldane. - Bruxelles: UAI, 1912. - 26 p. - Extrait de la Vie internationale, 1912, **fasc. 1.**

30 Coordination et coopération dans le domaine du mouvement international de la paix/Lange Ch L. - Bruxelles : UAI. - 22 p. - Extrait de la Vie internationale, 1922, fasc. 1.

31 Conséquences politiques mondiales de la Révolution chinorse/Tao Wang Mou. - Bruxelles: UAI, 1912. - 8 p . - Extrait de la Vie internationale, 1912, fasc. 2.

32 l'Union économique internationale et la Conférence de Bruxelles/Changy, Eugène de. - Bruxelles: UAI, 1912. -22 p. - Extrait de la Vie internationale, 1912, fasc. 2.

33 Compte-rendu de la Commission internationale du 15 et 16 avril 1912/Union des associations internationales. - Bruxelles : UAI, 1912. - 23 p. - Extrait de la Vie internationale, 1912, fasc. 2,

34 La documentation internationale et l'ethnographie/Van Overbergh Cyr. - Bruxelles : UAI, 1912. - 25 p. - Extrait de la Vie internationale, 1912, fasc. 3.

35 L'air et l'avenir: considération sur le trafic aérien/ Staël-Holstein L de. - Bruxelles: UAI, 1912. - 28 p. - **Extrait** de la Vie internationale, 1912, fasc. 3.

36 Le régime juridique des associations internationales. - Bruxelles : UAI, 1912. -12 p. - Extrait de la Vie internationale, 1912, fasc. 4.

37 L'Institut international d'agriculture/Dop Louis. - Bruxelles: UAI, 1912. - 26 p. - Extrait de la Vie internationale, 1912, fasc. 4.

38 Syndicalisme et internationalisme/Marinus Albert. - Bruxelles: UAI, 1912. - 27 p. - Extrait de la Vie internationale, 1912, fasc. 4.

39 Sur le caractère international de l'économie politique contemporaine/Brentano Lujo. - Bruxelles: UAI, 1912. - 10 p. - Extrait de la Vie internationale, 1912, fasc. 5.

40 Syndicalisme et internationalisme : le Secrétariat international des fédérations syndicales nationales, la Fédération internationale des métiers/Organisation ouvrière internationale. - Bruxelles: UAI. - 250 p.

41 Le 8ème Congrès universel d'espéranto/Bourlet Cari. - Bruxelles : UAI, 1912. - 10 p. - Extrait de la Vie internationale, 1912, fasc. 5.

43 La formation de l'Amérique latine et la conception internationale de ses fondateurs/Oliveïra Lima M D'. - Bruxelles : UAI. 1913. - 23 p. - Extrait de la Vie internationale, 1913, fasc 1.

44 Les métèques/Counsoun. - Bruxelles: UAI.

45 La Conférence internationale de l'heure de Paris/Lecointe. - Bruxelles: UAI.

46 Actes du Congrès mondial des associations internationales, tenu à Bruxelles du 15 juin au 18 juin 1913 - Bruxelles: UAI, 1914. - 1264 p.

47 Annuaire de la vie internationale. - Bruxelles : UAI, 1911 - 2652 p. - Publié avec le concours de **la Fondation Carnegie** pour la paix internationale et de l'Institut international de la paix. 1910-1911, 2e série, vol. II,

48 Le droit des auteurs et des artistes et les unions internationales/Rothlisberger E. - Bruxelles : UAI, 1912. - 46 p. - Extrait de la Vie internationale, 1912, fasc. 7.

49 Le chèque postal international et les résultats de virements postaux en Autriche, en Hongrie, en Suisse et en Allemagne/Mez John. - Bruxelles: UAI, 1912. - 13 p. - Extrait de la Vie internationale, 1912, fasc. 7.

50 Les crises générales et la solidarité des marchés économiques nationaux et internationaux/Lescure Paul. - Bruxelles : UAI, 1912. - 21 p. - Extrait de la Vie internationale, 1912, fasc. 8.

50A Les problèmes internationaux et la guerre, les conditions et les facteurs de la vie internationale. Organisation de la Société des Nations/Otlet Paul. **-** Genève, 1916. - 593 p.

51 La mission essentielle du droit international/Schucking W. - Bruxelles: UAI, 1912. - 9 p. - Extrait de la Vie internationale, 1912, fasc. 8.

51A Constitution mondiale de la Société des Nations: le nouveau droit des gens/Otlet Paul. - Genève, 1917. - 253 p.

52 Les systèmes de mesures et l'organisation internationale du système métrique/Guillaume Ch. Ed. - Bruxelles : UAI, 1913. - 39 p. - Extrait de la Vie internationale, 1913. fasc. 9.

53 La concentration des organismes internationaux publics/Myers Denys P. - Bruxelles: UAI, 1913. - 25 p. - Extrait de la Vie internationale, 1913, fasc. 10.

54 L'influence littéraire envisagée au point de vue international/Huszar G. - Bruxelles: UAI, 1913. - 17 p.- Extrait de la Vie internationale, 1913, fasc. 11.

55 De la nécessité d'une conférence internationale sur le coût de la vie/Fisher M. Irving. - Bruxelles : UAI, 1913. -16 p. - Extrait de la Vie internationale, 1913, fasc. 12.

56 Congrès mondial des associations internationales: compte rendu sommaire de la deuxième section: Gand-Bruxelles, 15-18 juin 1913. - Bruxelles : UAI, 1913. - 35 p, 21 cm. : . - Extrait de la Vie internationale, 1913, fasc. 14.

57 Ce que l'Amérique peut enseigner à l'Europe/Jordan David Starr. - Bruxelles: UAI. 1913. - 20 p. - Extrait de la Vie internationale, 1913, fasc. 15.

58 Le sionisme/Valensi Alfred. - Bruxelles: UAI, 1913. - 22 p. - Extrait de la Vie internationale, 1913, fasc. 13.

59 L'histoire de la science et l'organisation internation-ale/Sarton Georges. - Bruxelles: UAI, 1913. - 13 p. - Extrait de la Vie internationale, 1913, fasc. 15.

60 A world center/Union des associations internationales. - Bruxelles: UAI, 1914. - 60 p. ill.

61 Le Musée international et l'enseignement/Otlet Paul. - Bruxelles: UAI, 1913. - 11 p.

62 Théorie des unités/Ostwald. - Bruxelles: UAI.

63 Unification des termes dans la désignation des divers degrés de l'enseignement/Peeters Edward. - Bruxelles: UAL 1913. : 4 p. - Extrait de la Vie internationale, 1913, fasc.

16. U.A.I.

64 Centre international. - Bruxelles: UAI. - 15 p.

64A La Belgique et le mouvement international: pour la création à Bruxelles d'un Palais international. - Bruxelles: UAI. 1913. - 45 p. ill.

65 La statistique internationale du commerce/Marinus A. - Bruxelles: UAI.

66 Cours international d'expansion économique/Van Caenegem F. - Bruxelles : UAI, 1913. - 8 p. - Extrait de la Vie internationale. 1913, fasc. 18.

67 La révision internationale de la technologie médicale/ Biondel. - Bruxelles: UAI. - Extrait de la Vie internationale.

68 Une législation internationale en Egypte/Eeman Albert. - Bruxelles: UAI, 1913. - 10 p. - Extrait de la Vie internationale, 1913, fasc. 19.

69 Terminologie du potentiel et de l'élasticité/Korn A. - Bruxelles : UAI, 1913. - 9 p. - Extrait de la Vie internationale, 1913, fasc. 19.

70 Les congrès internationaux de San Francisco 1915: procès verbal de la réunion des délégués des associations internationales, tenue au siège de l'Union à Bruxelles, le 21 février 1914. - Bruxelles: UAI, 1914. - 19 p. - Extrait de la Vie internationale, 1914, fasc. 20.

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220 Yearbook of international organizations (1970-71)/ed. by Hall R A. - Bruxelles : UAI, 1971. - 13th ed. -1053 p. 26 cm

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D7401 Les réunions internationales: tableaux comparatifs sur leur développement, répartition géographique et saisonnière, nombre et participants = International meetings: comparative tables on their development, geographical and seasonal distribution, number of participants/Union des associations internationales. - Bruxelles : UAI, 1974. - s.p, 21 cm - Etude préparée par le Département Congrès.

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228 La nouvelle société ouverte: un séminaire sur le rôle à venir du réseau des associations internationales. - Bruxelles: UAI, 1973. - 152 p, 22 cm.: FB 100.

229 The open society of the future : report of a seminar to reflect on the network of international associations. - Bruxelles : UAI, 1973. - 148 p, 22 cm. (Documents for the study of international non governmental relations 19) : FB 100. - Existe également en langues française (228), néerlandaise, allemande, espagnole et italienne; annexe: loi belge sur les associations internationales.

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