POLICY BRIEFING FOR FUNDRAISERS & NGOS

European Philanthropy: What the Numbers Mean for Your Fundraising

Key findings from Philanthropy in Europe 2026 — ERNOP's first pan-European giving study in nine years

Based on: Philanthropy in Europe (ERNOP, 2026). Edited by Barry Hoolwerf & Johan Vamstad. Data covers 20 European countries, 2022. Lower-bound estimates throughout.

Why This Report Matters to You

For the first time since 2017, ERNOP has mapped philanthropic giving across Europe — all five major sources, 20 countries, with consistent methodology and transparent data-quality ratings. The result is the most reliable cross-national picture of European philanthropy available. This briefing distils what fundraisers and NGOs need to know: where the money comes from, how it flows, where the gaps are, and what is changing.

€104.5bn	€52bn	€8.4bn	20
Total European philanthropy (2022, lower bound)	From individual donors (largest single source)	From bequests (fastest-growing where measured)	Countries mapped by ERNOP researchers

Individual Giving: The Backbone — But It Is Not Growing Everywhere

At €52 billion annually, donations from individuals are the largest and most stable source of philanthropy across Europe. They are present in every country in the study. But stability at the aggregate level masks important divergence at the national level.

→ **Donor base erosion is real in some markets.** In Portugal, the share of the population making charitable donations fell from 54% to 38% over the study period — total amounts held, but fewer people are giving. This pattern of concentration (more money from fewer donors) is visible in the UK data too.

→ **Crisis giving spikes, then fades.** Ukraine-related giving added over €1 billion to German donations in 2022 alone. Portugal saw a surge during COVID-19 driven by a small number of large corporate donors. Emergency campaigns can distort baselines significantly — fundraisers should not budget around exceptional years.

→ **Cause preferences vary sharply by country.** Health dominates in the Netherlands (63% of households). Social benefit leads in Austria (50%). International aid is strong in France and the Netherlands. Animal welfare ranks unusually high in Austria, Switzerland, and Germany. If you operate across borders, do not assume your strongest cause travels.

→ **Eastern and Southern Europe remain undercaptured.** Serbia's best available estimate derives from roughly 1,000 individual donations. Romania has two major surveys that diverge by 39 percentage points on participation rates. Low figures for CEE countries reflect data gaps as much as lower generosity.

Bequests: The Biggest Untapped Opportunity in European Fundraising

The UK benchmark is instructive: bequests represent nearly €5 billion per year — approximately 25% of all individual giving. No other European country approaches that ratio. Most do not even measure it systematically. This is not because the money is not there.

> **The structural opportunity**
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> Bequest fundraising infrastructure barely exists in Central and Eastern Europe. No systematic records are maintained in Slovakia despite legal provision. In the Netherlands, bequests are exempt from inheritance tax, so organisations have no obligation to report them — making the sector invisible in official data. Austria's recent growth in bequest giving is attributed to two factors: the Baby Boomer cohort reaching legacy-giving age, and targeted fundraising campaigns. Where professional legacy fundraising exists, growth is strong. Where it does not exist, the data gap itself is the opportunity.

For organisations operating in CEE or Southern Europe: competition in this space is minimal, demographic conditions are favourable, and the primary investment required is professional legacy fundraising capacity — not large budgets.

Corporate Giving: €21.5 Billion — Concentrated, Volatile, and Country-Specific

Corporate philanthropy is the third-largest source at a minimum of €21.5 billion — though the report flags this as one of the least reliably measured sources. What the data does show clearly is that corporate giving is neither uniform nor predictable.

→ **Germany alone accounts for €9.35bn.** The Netherlands outgives Italy and Spain despite its smaller economy. Croatia records fewer than 1,000 corporate donations per year. The variance is enormous.

→ **Cause priorities do not travel.** Education and youth are most consistent across markets. Sports dominates in Belgium and Slovakia. International aid leads in France. If you are seeking corporate support across multiple countries, you need country-specific strategies, not a single pan-European pitch.

→ **ESG framing is opening doors — in some markets.** Germany shows a structural shift toward climate and health causes, with ESG language evident in how corporate foundations frame their giving. Ireland and Hungary also show ESG influence. But this is not yet a pan-European trend — do not assume it translates everywhere.

→ **Volatility is structural, not cyclical.** Giving is concentrated among a small number of large donors. Single initiatives — a matching campaign, a high-profile emergency — can move national totals. Portugal's corporate giving was disrupted by COVID-19, then partially recovered through a small number of large donors. Plan accordingly.

Foundation Giving: €20.6 Billion — Strategic, Stable, and Harder to Access

At €20.6 billion, foundation giving is the fourth-largest source — and the one most characterised by long-term, strategic orientation. It is also less responsive to crises than individual or corporate giving, by design.

Germany leads at €6.4bn. Switzerland — far smaller — outgives France. Sweden's foundation sector, driven primarily by research funding, exceeds the Netherlands. Education, social services, and health dominate across the markets with the best data. But foundation giving is the source with the widest variation in data quality: some countries have near-complete coverage; others (Belgium, Croatia, Serbia) have almost none.

> **Note for fundraisers**
> The boundary between corporate and foundation giving is messier than it looks. In Germany and Poland, corporations channel giving through dedicated corporate foundations, which appear in foundation statistics. When approaching corporate foundations, understand whether you are dealing with a genuinely independent entity or a corporate CSR vehicle — the relationship dynamics differ significantly.

A Note on What the Data Can and Cannot Tell You

All figures in this report are lower-bound estimates. The report is transparent about where data is robust (the Netherlands, UK, Germany for individuals) and where it is fragmentary (bequest data almost everywhere, corporate data in Croatia, Romania, and Slovakia). Observed differences between countries reflect both genuine differences in giving behaviour and differences in measurement quality. Countries with poor data infrastructure do not necessarily have less generous populations.

For fundraisers: the most operationally useful data is in national studies — Giving in the Netherlands, the UK Giving Report, the French Panorama national des Générosités. This report provides the cross-national context and benchmarks that those studies cannot.