U.S. and European Philanthropic Support to Address HIV/AIDS in 2010

Data confidential until 11/10/11

www.FCAAIDS.org
Overview: U.S. & Europe

Total given by U.S.-based philanthropies: approximately $459 million

Total given by European-based philanthropies: approximately $153 million*

TOTAL PHILANTHROPIC FUNDING TO HIV/AIDS IN 2009 (U.S. and EUROPE):
approximately $612 million

Represents a decrease of 7% ($47M) from $659 million in 2009

* Based on 2010 conversion rates – due to fluctuation of Euros/dollars, the above total for EU is still equivalent to a $10 million decrease (total figure for EU & US has been adjusted)
Key Findings: U.S.

Total disbursements: $459,020,191

• A decrease of 7%, or $33 million, from $492 million in 2009

• Disbursements by the Bill & Melinda Gates Foundation, which represent 47% of all disbursements, decreased from 2009-2010 from $244 million to $215 million

• Disbursements by all other funders decreased from 2009-2010, from $249 million to $244 million

• The number of funders disbursing more than $300,000 in 2010 (a total of 60 organizations) was the lowest on record since 2005

• 27% of the funders that provided a forecast for 2011 anticipate increased funding, including the Bill & Melinda Gates Foundation, which represented just under half of all disbursements in 2010
Total HIV/AIDS Grantmaking Disbursements by U.S. Philanthropies 2005-2010

<table>
<thead>
<tr>
<th>Year</th>
<th>Funders other than the Gates Foundation</th>
<th>All Funders</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>$196</td>
<td>$215</td>
</tr>
<tr>
<td>2009</td>
<td>$184</td>
<td>$244</td>
</tr>
<tr>
<td>2008</td>
<td>$180</td>
<td>$316</td>
</tr>
<tr>
<td>2007</td>
<td>$175</td>
<td>$253</td>
</tr>
<tr>
<td>2006</td>
<td>$190</td>
<td>$158</td>
</tr>
<tr>
<td>2005</td>
<td>$146</td>
<td>$138</td>
</tr>
</tbody>
</table>

HIV/AIDS Disbursements (in $ millions)
Top U.S. HIV/AIDS Funders in 2010

1. Bill & Melinda Gates Foundation
2. The Ford Foundation
3. M.A.C AIDS Fund & M.A.C Cosmetics
4. Merck
5. Abbott & Abbott Foundation
6. Johnson & Johnson
7. Bristol-Myers Squibb Foundation & Bristol-Myers Squibb
8. Philip T. and Susan M. Ragon Institute Foundation
9. Broadway Cares/Equity Fights AIDS
10. ViiV Healthcare
11. Open Society Foundations
12. AIDS United
13. Irene Diamond Fund
14. Elton John AIDS Foundation (US)
15. Tides Foundation
16. The Foundation for AIDS Research (amfAR)
17. Robin Hood Foundation
18. American Jewish World Service
19. The Starr Foundation
21. International Treatment Preparedness Coalition (ITPC), a project of the Tides Center
22. The New York Community Trust
23. Pfizer Inc and Pfizer Foundation
24. Elizabeth Glaser Pediatric AIDS Foundation
25. H. van Ameringen Foundation

2010 HIV/AIDS Disbursements by Top 60
$448,614,647

Total 2010 U.S. HIV/AIDS Disbursements (All)
$459,020,191
Concentration of HIV/AIDS Funders

- Gates: 47%
- Funders 2-10: 33%
- Funders 11-25: 12%
- Funders 26-60: 6%
- Funders 61-221: 2%

By percentage of total disbursements
Geographic Distribution of U.S. HIV/AIDS Grants

- International Epidemic (Gates): 46%
- Domestic Epidemic: 22%
- International Epidemic (Non-Gates): 32%
- Unspecified: 0%
Regional Distribution of Domestic U.S. HIV/AIDS Philanthropic Funding in 2010

- Northeast: 46%
- South: 25%
- West: 18%
- Midwest: 9%
- U.S. Territories: 1%
- Unspecified: 1%
Private Funding (2010) vs. Estimated New Infections (2009)*


U.S. Domestic Intended Use Disbursements
(in $ millions)

- Prevention
- Treatment
- Social Services
- Advocacy
- Research
- OVC
- Human Resources
- Administration (no 2008 data)
- Other

2008
2009
2010
Private Funding (2010) vs. Estimated New Infections (2009)*

Regional Distribution of International U.S. HIV/AIDS Philanthropic Funding in 2010

- Eastern & Southern Africa: 40%
- Eastern Europe & Central Asia: 1%
- Western & Central Africa: 10%
- U.S. for International: 11%
- Caribbean: 4%
- Canada: 1%
- East Asia & Southeast Asia: 9%
- South Asia & Pacific: 13%
- North Africa & Middle East: 1%
- Latin America: 5%

U.S. International Intended Use Disbursements (in $ millions)

- Prevention
- Treatment
- Social Services
- Advocacy
- Research
- OVC
- Human Resources
- Administration (no 2008 data)
- Other

2008
2009
2010
Private Funding (2010) vs. Estimated New Infections (2009)*

Key Findings: EU

€107 million
($153 million)

• A decrease of 6% from 2009 among the same set of funders

• The top 10 funders accounted for 86% of all HIV/AIDS-related expenditures in 2010 (up from 83% in 2009)

• 38% of funders (10 of 26) forecast increased funding in 2011, including five of the top 10 funders
# 2010 Snapshot: EU

## Total $ = $153 million

<table>
<thead>
<tr>
<th>Top Geographic Distribution (by % of disbursement)</th>
<th>Top Intended Use (by $)</th>
<th>Top Target Populations (by % of funders)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Eastern &amp; Southern Africa</td>
<td>1. Research</td>
<td>1. PLWHA</td>
</tr>
<tr>
<td>2. Western &amp; Central Europe</td>
<td>2. Treatment</td>
<td>2. Women</td>
</tr>
<tr>
<td></td>
<td></td>
<td>4. Youth</td>
</tr>
</tbody>
</table>
## Top EU HIV/AIDS Funders in 2010

| 1.       | Wellcome Trust                               |
| 2.       | Sidaction                                    |
| 3.       | Children’s Investment Fund Foundation        |
| 4.       | Elton John AIDS Foundation, UK               |
| 5.       | ViiV Healthcare                              |
| 6.       | Comic Relief                                 |
| 7.       | STOP AIDS NOW!                               |
| 8.       | Aids Fonds                                   |
| 9.       | FXB International (Fondation Francois-Xavier Bagnoud) |
| 10.      | The Monument Trust                           |
| 11.      | The Diana, Princess of Wales Memorial Fund  |
| 12.      | Deutsche AIDS-Stiftung                       |
| 13.      | Fondation de France                          |
| 14.      | Fundacion La Ciaxa                           |
| 15.      | Oak Foundation                               |
| 16.      | Fondazione Cariplo                           |
| 17.      | GlaxoSmithKline                              |
| 18.      | HOPEHIV                                      |
| 19.      | St Stephen’s AIDS Trust                      |
| 20.      | Fondation Merieux                            |
| 21.      | King Badouin Foundation                      |
| 22.      | Egmont Trust                                 |
| 23.      | Cecily’s Fund                                |
| 24.      | Sigrid Rausing Trust                         |
| 25.      | Mama Cash                                    |
| 26.      | One to One Children’s Fund                   |
| 27.      | Aga Khan Foundation                          |
| 28.      | AVERT                                        |
| 29.      | Barry & Martin’s Trust                       |
| 30.      | AIDS & Child                                 |
| 31.      | Calouste Gulbenkian Foundation               |

**Total 2010 European Philanthropic HIV/AIDS Expenditures**

€106,901,059 ($153,413,709)