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CSO SECTOR IN SERBIA 2019

SUMMARY

Assessment of the Situation in the Civil
Society Organisation Sector in Serbia

CSO Sector in Serbia in 2019

Assessment of the Situation in the Civil Society Organisation Sector in Serbia

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Канцеларија за сарадњу
са цивилним друштвом



Република Србија
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TABLE OF CONTENT

SUMMARY		04
PREFACE		05
GENERAL INFORMATION ABOUT THE CSO SECTOR		06
MISSION, AREAS OF WORK AND ACTIVITIES		06
LEGAL/FISCAL REGULATIONS		08
THE STRUCTURE OF CSOs		09
STAFF AND VOLUNTEERS		10
CSO COOPERATION AND NETWORKING		11
CSOs' COOPERATION WITH LOCAL SELF-GOVERNMENT		12
CSOs' COOPERATION WITH THE MEDIA		13
CITIZENS' VIEW OF THE CSOs		14
CITIZEN PARTICIPATION IN THE DECISION-MAKING PROCESSES		16
DIVERSITY WITHIN THE SECTOR		16
FINANCIAL STABILITY - SOURCES OF FINANCING		17
QUALITY OF THE SERVICES		19
PROFESSIONAL SKILLS OF CSO EMPLOYEES		19
MOST IMPORTANT PROBLEMS OF CSO SUSTAINABILITY		20
GENERAL CONCLUSIONS		21



This is the Summary of the study

**CSO SECTOR IN SERBIA IN
2019, Assessment of the
Situation in the Civil Society
Organisation Sector in Serbia**

It provides a comprehensive evaluation of the situation in the sector of civil society organisations, covering the following 15 topics: general information about the CSO sector; mission, areas of work and activities; legal/fiscal regulations; CSO structure; staff and volunteers; CSO cooperation - networking; CSO cooperation with the local government; CSO cooperation with media; citizens' opinion of the CSOs; citizens' participation in the decision-making process; diversity within the sector; financial stability and sources of financing; quality of the services; professional skills of CSO employees; and sustainability of CSOs.

PREFACE

What does the landscape of the Serbian civil society sector look like today? What are the current potentials and challenges of Serbian CSOs? How strong are their constituencies? How do they interact with citizens and Local Self Governments?

These are just a few questions that we asked ourselves when we started planning “ACT – For an Active Civil Society Together” – a project of the Swiss Agency for Development and Cooperation (SDC), implemented by Helvetas Swiss Intercooperation and Civic Initiatives. Both organisations are CSOs in their own right and values that work and advocate on behalf of their own constituencies for a vibrant and enabling space of civil society.

Recent international reports on civil society activism across the world warn about an increasingly repressive environment for the work of CSOs. Civil society actors are taking the role of mediators in political conflicts, exposing themselves to a field that is often hostile to the civil society itself. The Western Balkan arena is not an exception. In October 2019, CIVICUS Monitor downgraded Serbia to an “Obstructed” country, the only one in the Western Balkans. This proves the importance and high relevance of projects such as ACT supporting the work and sustainable development of the civil society organisations in the region.

This Assessment presents the results of a country-wide and broad research “CSO SECTOR IN SERBIA IN 2019 - Assessment of the Situation in Civil Society Organisations Sector in Serbia”, prepared for the purposes of creating a baseline for the implementation of Project ACT.

This is the second research in Serbia of its kind. The initial study was done in 2011 by Civic Initiatives in cooperation with the Office for Cooperation with Civil Society, carried out after the Law on Associations entered into force in October 2009. The study presented here was conducted with similar methodology so that it gives a comparison of the 2011 and 2019 data. The questionnaire was enriched with new questions in conformity with changes in the environment, as well as to maintain compatibility with the Guidelines for EU support to civil society in enlargement countries.

This Research provides quite a new perspective on the citizens’ views and perception of the role of CSOs that is not always and fully in line with our expectations. It shows that there is a strong belief that citizens generally do not perceive the civil sector as their own. Due to the lack of clear and continuous communication with citizens, through vague concepts, values, missions and visions of CSOs themselves, the main focus is still on donor needs rather than citizens’ needs. This also includes the negative media image of the entire sector. In addition, there is an insufficient number of initiatives implemented by CSOs together with citizens, especially if there is no regular two-way communication with a lack of continued commitment of CSOs to open dialogue and better cooperation with citizens.

ACT Project will assure various kinds of support building on the data obtained in this comprehensive research. By supporting institutional development, by advocating for better public services, by supporting local initiatives and successful networking, ACT aims to ensure further development of a culture of civil and political dialogue.

This research is a venture that required an inclusion of a large number of actors. We are grateful for the support given by the institutions - Office for Cooperation with Civil Society of the Government of Serbia and the Serbian Business Registers Agency. The research was carried out by IPSOS Strategic Marketing Agency from Belgrade with strong support of Dubravka Velat. Finally, extend our gratitude to the associations that were included in the research and agreed to disclose data on their activities, and to all other actors who made the conducting of the research possible and who believe that through ACT, we can make a meaningful contribution to CSOs together.

Sincerely,

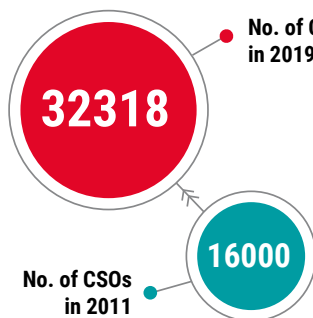
Jens Engeli and Maja Stojanovic



01 | GENERAL INFORMATION

Year of Establishment, Level of Operation, Geographic Area, CSO Income & Employees

With 32,318 associations officially registered as of February 15, 2019, the key feature of the current CSO sector in Serbia is that it is **young and growing**.

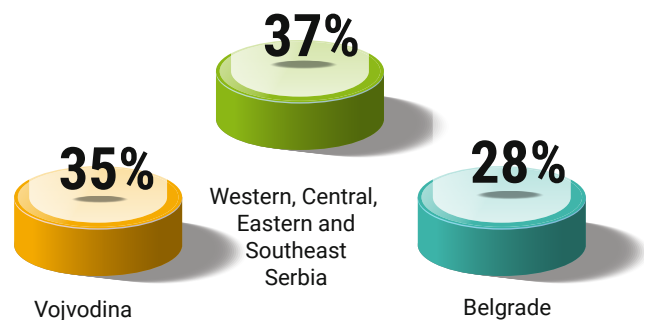


Namely, two thirds of CSOs in Serbia were established after 2010 (65%), following the adoption and the beginning of implementation of the new Law on Associations, while only a few

organisations were established during the period 1990-2000 (7%). About one fifth of the CSOs were established in 2000-2009 (19%), and approximately one tenth of them prior to 1990 (9%). Two thirds (67%) are **operating predominantly on a local level** (except for CSOs that are based in Belgrade), one quarter (24%) on the national, and only 9% on the European/international

level. The **majority of CSOs are based in Vojvodina** (35%) and Belgrade (28%), while others are spread out relatively evenly throughout Western, Central, Eastern and Southeast Serbia, which is similar to the 2011 baseline study. **Most CSOs (52%) have no income**, while only 1% have budgets that exceed EUR 20,001. In comparison to 2011, there has been an **increase in the number of CSO staff**; still, the **number of staff has not been sufficiently increased and is disproportional to the growth of the number of CSOs**.

CSOs GEOGRAPHIC AREA



02 | MISSION, AREAS OF WORK AND ACTIVITIES

Mission and Strategic Planning

Fewer than one third of the CSOs (28%) **have a strategic plan** – a percentage that is much lower than that of 2011 (45%). This is expected, however, given that the majority of CSOs have been established after the year 2010.

Although most do not have a written Strategic Plan created in the form of a document, a great majority

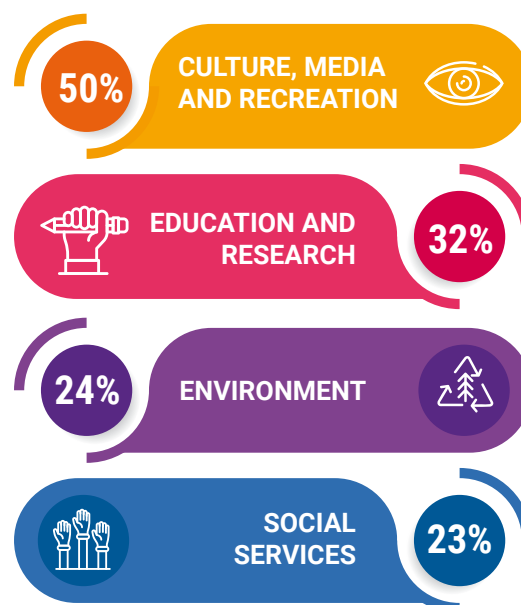
(82%) of CSOs report that they are implementing most of their projects within their main orientation and area of work, and only a small number of CSOs direct and adjust their projects to fit donors' requirements (10%). Some 8% of the CSOs do not have a main orientation, and are entirely oriented towards donors' requests.

CSOs BY AREA OF WORK

Area of Work

Half of the organisations (50%) are involved in culture, media and recreation, while a somewhat smaller percentage of them work in the areas of education and research (32%), environment (24%), social services (23%), etc. The smallest percentage of organisations is involved in agriculture (only 3%). This is similar to 2011, except for the social services, where a drop of 17 percentage points has been noted.

Civil society organisations whose **primary field of work** is culture, media and recreation account for 35%, which is more than in 2011 (24%). CSOs dealing with education/research and the environment account for 14%, while those providing social services account make up 11%.



Beneficiaries and Target Groups

Half of the CSOs specified all citizens as their **primary/direct beneficiaries** (49%), 9% specified youth, 8% - children, 5% - persons with disabilities, etc. This is similar to 2011, except for the fact that persons with disabilities as the primary target group have dropped from 8% (2011) to 5%.

In a wider sense, surveyed CSOs' most frequent **target groups** are: all citizens (58%) youth (31%) and children (19%), followed by women (13%) and the elderly (12%). When this is compared to the year 2011, a significant drop can be noted in the percentage of CSOs that simultaneously deal with a variety of target groups (children, women, elderly, students, the indigent, persons with disabilities).

Activities and Projects

The most frequent type of activity among the interviewed organisations involves **actions in the local community (55%)**, extra-institutional/additional education (34%), networking and cooperation (31%), holding conferences, meetings and round tables (27%), etc. When compared to 2011, it can be observed that there has been an increase in the number of CSOs that organise actions in the local community (from 49% in 2011 to 55% in 2019); however, data presented below

will show that this still does not positively influence citizens' engagement in the work of CSOs and the decision-making processes.

Although the number of CSOs has increased, the activities of these organisations have slowed down: the **majority of CSOs (57%) did not submit any project proposals to donors in 2018**, which is a situation that is significantly different from that in 2011, when only 29% of CSOs answered this question negatively (i.e. in 2011, 71% of the CSOs submitted a project to a donor, compared to 43% in 2018).

Organisations that did submit their proposals, did so mostly concerning the same number of projects as in 2011. However, the **average number of approved projects decreased** from 3.1 in 2011 to 2.5 in 2018. Consequently, the percentage of approved projects fell from 66% in 2011 to 53% in 2018.

In general, most CSOs have projects **that do not last very long, i.e. one year and less (89%)**, which can hardly contribute to solving the problems they deal with, and cannot provide for their sustainability.

As regards applying for funds, there are no issues that are particularly prominent; however, **lack of knowledge/**

information about competitions and possibilities for applying is perceived as the leading obstacle (33%), while high/complex donors' requirements which CSOs are not able to meet (26%) and insufficient experience in project-writing (23%) are viewed as problems that are most frequently faced by CSOs when competing for projects. This is similar to 2011, **except for the fact that lack of knowledge/information about calls has increased by 7 percentage points** and has become the leading obstacle.

Generally, CSOs report **fewer problems** in project implementation (the reply "No problems" went from 4% in 2011 to 9% in 2019). **Lack of funds happens to be the leading problem** (60%) when implementing a project, but the situation is somewhat better than it was in 2011 (73%). In comparison with 2011, **more problems are reported concerning the human capital**, i.e. all problems related to people have slightly increased (including insufficient motivation of beneficiaries for the organisations' services).

03 | LEGAL/FISCAL REGULATIONS

Level of Satisfaction with the Current Regulations

Fewer than one third (28%) of the CSOs are satisfied with the regulations governing civil society organisations (which is two percentage points less than in 2011), some 20% are dissatisfied, while most (39%) have a neutral stand. 13% of CSOs stated that they were not familiar with the regulations (which is better than the situation in 2011, when 22% of the surveyed CSOs reported they were not acquainted with the regulations).

Most of the proposals for the state to stimulate CSO work are related to funding: the **majority of surveyed CSOs believe that the state should secure funds in a transparent way (68%)** and establish a Fund for matching funds of the EU (44%). One third of CSOs (34%) proposed tax relief for companies that finance CSOs, while 33% of the CSOs proposed tax relief for citizens/individuals who donate to organisations such as theirs. Improving legal framework for CSOs' operation was requested by 30% of the surveyed CSOs.

Political Climate for the Development of the CSO Sector

An almost equal number of CSOs evaluated the political climate in the country as unfavourable (32%)

and as favourable (31%) for the development of the CSO sector, which is a less critical assessment than that from 2011, when 44% of the surveyed CSOs believed that political climate was not favourable and 22% thought that it was.

Evaluation of Cooperation between the Serbian Government and CSOs

47% of the respondents evaluated cooperation between the Government of the Republic of Serbia and CSOs as average, which is almost the same as in 2011 (45%). 27% of the CSOs assessed it as bad and 26% as good, which is better than in 2011, when this cooperation was assessed as bad by 33% of the CSOs and as good by 22%.

Evaluation of Influence of CSOs on the Creation of State Policies

Three quarters of the CSOs are of the opinion that **their influence on the creation of public policies, on both national and local level, is small**. CSOs believe that increasing the influence on the creation of state policies requires **greater involvement of citizens in CSO activities (60%)**, greater visibility in the media, and better networking and cooperation with other similar organisations (54%, for each issue).

04 | THE STRUCTURE OF CSOs

Membership and Active Persons in Organisations

The number of **members** in CSOs varies greatly. The average number is 100 people (103.2) per one CSO; however, 10 CSOs have more than 10,000 members, while one has all of 60,000. Looking at the total number of people in the Serbian CSOs, **volunteers dominate (83%)**, followed by members of the managing boards (12%). Only 5% of the people are employees (of which only 2% are fully employed).

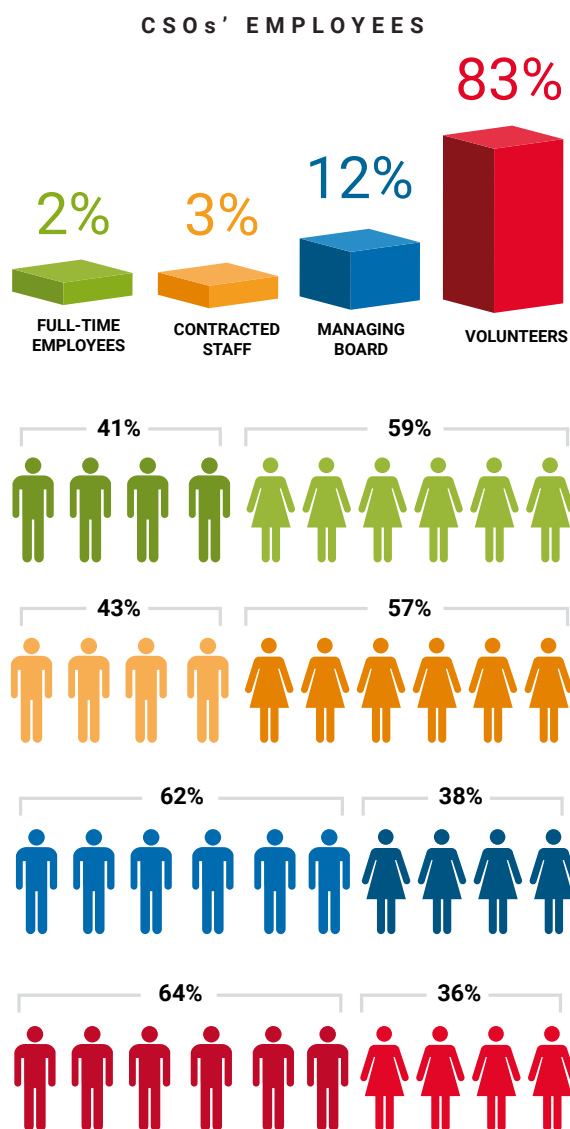
It is worth noting that **men dominate both as members of the managing boards (62%), and as volunteers (64%)**. Women, however, represent a majority, both as fully employed (59%) and contracted (57%) staff members. This is a change in comparison with 2011, when there were slightly fewer women on the managing boards and among the employees (especially the contracted staff), and more among the volunteers.

On average, two thirds of **directors or presidents of CSOs are men, although the number of women in these positions is increasing when compared to 2011**. Similar to 2011, most CSOs are led by presidents/directors who are younger than 45 and have a university degree. **It is worth noting that women directors/presidents are found in CSOs with the largest budgets (45%)**.

As regards age, most CSOs are led by presidents/directors who are under 45 (39%), somewhat less than one third (31%) are led by those aged 46-57, while 30% have presidents/directors who are 58 and older.

The majority of presidents/directors have a university degree (62%), followed by those with secondary

education (37%), while approximately 1% of them have elementary education. In general, these data do not differ from those of 2011.



According to the official data from the Serbian Business Registers Agency, drawn from the financial statements¹ submitted in the course of 2018, **the associations were employing 7,541 persons (full time, employment contract)**, which represents an increase of 39.9% when compared to 2010 and an increase of 13.7% compared to 2011². However, the average number of employees per CSO has dropped, i.e. the number of employees in 2018 is not proportional to the growth of the CSO sector. Since 2011, the number of CSOs has grown 2.4 times, while the number of employees has grown only 1.4 times.

Decision-Making Practices and Procedures

In the majority of CSOs, it is the managing board that makes all the decisions: strategic (63%), operational (52%) and those at the level of the project (58%), which is a growing trend compared to 2011.

A vast majority of CSOs (87%) do not have elected and appointed persons and/or representatives of public administration authorities on their managing boards and/or among the employees.

Rules and Procedures; Transparency of the Work of CSOs

Apart from the Articles of Association, many CSOs (62%) have no written rules and procedures concerning decision-making and the overall activity of the organisation. This percentage is three points higher than it was in 2011, which is expected given the increased number of CSOs that were newly registered after 2010.

The majority of CSOs (70%) do not make information about their managing structure publically available; fewer than one quarter (23%) publicise it on their websites, while around one tenth (11%) do so using Facebook or other social networks.

Similarly, the majority of CSOs (72%) do not publish their Articles of Association; 22% have them on their websites, while 8% share them on Facebook/other social networks.

Most of the CSOs (77%) do not make information on their internal documents/policies publically available; 17% publish them on their websites, while 7% share them on Facebook or other social networks. It is noticeable that such documents are less frequently shared with the public than the Articles of Association or documents relating to the managing structure.



05 | STAFF AND VOLUNTEERS

Employing Staff and Recruiting Volunteers

Approximately one fifth of the CSOs have a complex system for staff employment, which is a significant improvement compared to 2011, when only 11% of these organisations had a proper system in place.

However, a vast majority of the CSOs still does not have a functioning system and employs staff depending on the project. The situation with volunteer recruitment is almost identical.

¹ SBRA data, <http://www.apr.gov.rs/>

² Comparison with the year 2011 was made when the initial baseline survey was carried out, and there were 13,375 associations registered as of 15 June 2011

Most Frequent Problems in Working with Staff and Volunteers

The most frequently specified problems are: insufficient motivation (26%) or insufficiently experienced/skilled staff (21%), followed by problems with recruiting and retaining volunteers (20%) and staff (19%). **Problems with the recruitment of staff and volunteers have significantly increased (almost doubled) compared to 2011, when each of these issues was reported by 11% of CSOs.**

A very small number of CSOs used subsidies for engaging volunteers or employees (2% each), with the exception of CSOs that deal with international cooperation (including European integration) (11%) and those with budgets exceeding EUR 20,001 (27%), which used employment subsidies much more often than others.

06 | CSO COOPERATION AND NETWORKING

Cooperation between the CSOs

Although most CSOs (63%) have established some form of cooperation with others, their number is significantly lower than it was in 2011 (86%).

The most common motives for establishing cooperation are: common interests and goals (92%), better exploitation of capacities (35%), helping another organisation (31%), and better reputation of the partner organisation (22%) - which is similar to 2011. A great majority of CSOs are satisfied with their cooperation with other CSOs (82%), which represents increase of 6 percentage points when compared to 2011.

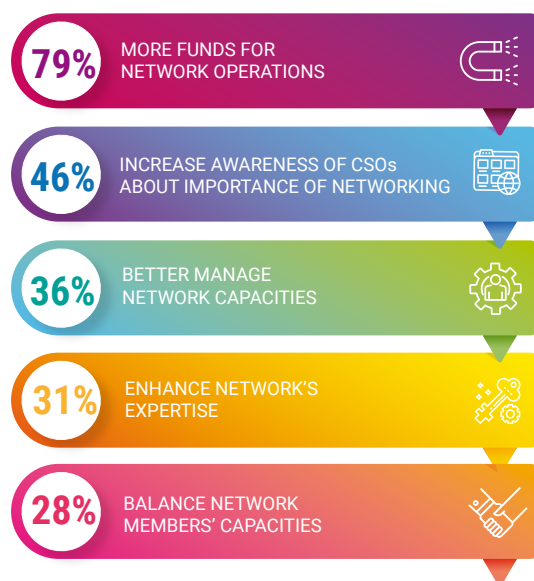
Networking

One third (33%) of the CSOs are members of some CSO network, which is 2 percent points less than in 2011. In most cases, CSOs are members of the national network (20%), and in fewer cases of those that are international (12%), regional (11%) and local (10%).

About one third of the CSOs (35%) have reported a strong influence of the network to which they belong, which is a significant drop (of 16 percent points) when compared to 2011 (51%); 56% of CSOs believe that network influence is weak, while 9% report no influence at all.

The majority of CSOs (79%) think that provision of funds for network operations is the main form of support needed for better CSO networking. Better CSO awareness of the importance of networking was listed by 46% of the CSOs, followed by empowering network managing capacities (36%), enhancing expertise about the area the network is dealing with (31%), and balancing the capacities of network members (28%).

WHAT IS NEEDED FOR BETTER NETWORKING?



07 | CSOs' COOPERATION WITH LOCAL SELF-GOVERNMENT

Types of Cooperation with LGs

Although a majority of the CSOs (63%) did cooperate with their local self-government units, **such cooperation is currently much less present** than it was in 2011 (79%). As regards forms of cooperation, a local self-government unit was a donor in 37% of the cases, 29% of CSOs cooperated on joint projects, 25% exchanged experiences and information with LGs; 14% reported consultations about strategies/regulations at the local level, and 6% that they were engaged as consultants.

LGs as Funders of CSO Work

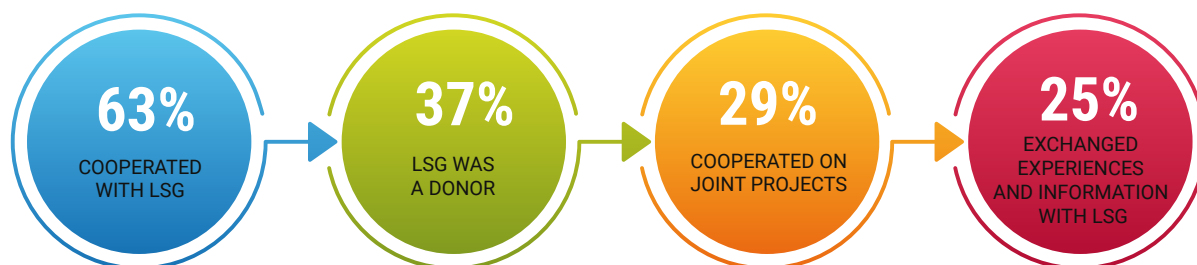
When directly asked about LSG funding, **the majority of CSOs (72%) responded that LGs did not finance their work**. The few CSOs that were funded, reported having received funds from LG units **for five or more years in most of the cases**, (61%), usually in modest amounts. It is worth noting that one fifth of the CSOs (19%) did not know/refused to provide this information.

Satisfaction with LG Cooperation/ Encountered Problems

One half of the CSOs that cooperated with their LG units (51%) gave this cooperation high marks, while every fifth organisation (22%) gave it a low mark - a situation that is almost the same as it was in 2011. **However, focus groups participants have been more critical than surveyed CSOs, and have reported bad or no cooperation with LGs since 2012.**

The **most frequently cited problems concerning cooperation with LGs** are: lack of funds for the support of CSO activities (50%), lack of interest in and understanding of the role of the CSO sector (27%), and importance of informal contacts, "connections" and links with political parties (23%). Difference in competences (20%) and slow administration (18%) are perceived as problems to a lesser degree.

TYPES OF COOPERATION OF CSOs WITH LGs



LGs' Interference with the Work of CSOs

A vast majority of the CSOs reported not having been obstructed in any way – almost 91% did not experience any obstruction/pressure. **However, focus group discussions revealed different information; namely, participants reported that CSOs have been subjected to pressure and disturbance by LGs** in the form of phone calls, text messages, e-mails, insults on social networks, misdemeanour reports, threats, personal data made public, attempts to take away space that was given to CSOs to use, inspections, etc.

Among the surveyed CSOs whose work was obstructed in some way, most reported unreasonable limitation of organisations' activities (5%), followed by the

obstruction of freedom of expression and interference in the work of the organisation (4% each). Excessive supervision of work/frequent inspections was reported by 3% of the CSOs, while 2% reported obstruction during the organisation of meetings.

Out of those CSOs that stated that the authorities and the state apparatus have thwarted their organisations' activities, most (56%) reported that there have been no related investigations or sanctions; 38% did not know, while only 6% reported that investigations were carried out and sanctions imposed.

08 | CSO COOPERATION WITH THE MEDIA

Satisfaction with Cooperation with the Media

A significant decrease has been noted in the number of CSOs that were satisfied with their general cooperation with the media in 2019, compared to 2011. CSOs are especially dissatisfied with their cooperation with **media outlets that broadcast at the national level (43%), although 32% are satisfied**. The local media situation is different. Half the surveyed CSOs (50%) are satisfied with their cooperation with the local media, while 27% are not. In 2011, the majority of the surveyed CSOs reported general satisfaction with their cooperation with the media (71%); only 8% expressed dissatisfaction.

Dissatisfied CSOs most often believe that **media are not interested in reporting about their activities (45%)**. A journalist from the focus group confirmed that media

are not interested in reporting about the work of CSOs, saying that "there are three things that attract media attention: 1) crime, arrests and accidents, 2) political scandals, and 3) Belgrade-related news."

Attitude of the Media toward the CSO Sector

The level of positive perception of the general attitude of the media toward the CSOs has decreased compared to 2011. One third of the CSOs (35%) believe that the attitude of the majority of media is positive (41% in 2011), while 16% feel that most media outlets are completely disinterested (14% in 2011). Some 6% believe that their attitude is negative (3% in 2011).

09 | CITIZENS' VIEW OF THE CSOs

Community's Opinion of the CSO Sector

The attitudes of communities toward CSOs that operate within them have received high marks (68%) – 5 percentage points higher than in 2011 (63%). Only 6% of the CSOs viewed the attitude of citizens as negative, which is lower than in 2011, when 8% reported a negative attitude.

A much different picture appears when we look at the opinion of citizens, i.e. negative opinion of the CSOs is much higher (22%) and fewer people express a positive attitude (32%). Furthermore, very often citizens do not have an opinion that is either positive or negative (46%). **It is obvious that CSOs see the attitude of the community toward themselves in a much better light than the community itself.** When it comes to CSOs, the opinion of the citizens of Belgrade is the most negative, whereas the attitude of citizens from Southeast Serbia is the most positive. People living in Eastern and Central Serbia know the least about CSOs (have no opinion).

Citizens' Engagement in the Work of CSOs

Most citizens (95%) are not involved in the work of any citizen association. Some reported to be members of associations (in 3% of the cases), volunteers or members, or just volunteers (1% each).

When citizens were asked about their engagement in the work of specific CSOs (without being their members or volunteers), only 6% reported to be engaged in some CSO work. There is a slight difference among them in terms of age and education: citizens aged 30 to 39 tend to engage in CSO activities more than others (11%), as well as those with higher education (12%).

Interviewed citizens were engaged mostly in humanitarian activities (51%) and public events (35%).

Women were involved in humanitarian activities (59%) much more than men (37%), while men (60%) participated in public events much more frequently than women (21%).

ENGAGED CITIZENS IN CSO WORK



At the same time, the majority of CSOs (58%) did not have any activities in 2018 in which they invited citizens to participate. Among those CSOs that organised activities engaging citizens, most (71%) included them in public events, while much less citizen engagement was related to humanitarian activities (28%), voluntary cleaning and maintenance of public areas (20%), and donating money for humanitarian purposes (12%).

In general, activities related to human rights and/or those that serve to voice citizens' concerns managed to engage citizens to a much lesser extent: activities focused on the fight against discrimination and protection of vulnerable groups (8%), signing petitions (5%), and taking part in street walks and protests (2%).

CSO Communication Strategy

The majority of CSOs (55%) communicate with the public directly, which represents a 5 percent decrease in comparison with 2011 (60%). On the other hand, Facebook has become the second most used channel of communication (38%), and it is currently used much more than in 2011 (15%). Websites are used just slightly more than in 2011 (26%).

Use of all other forms of communication has decreased significantly compared to 2011 (printed materials, public announcements, media campaigns, annual reports, press conferences...). New channels of communication - which did not exist in 2011 - are Instagram, used by 7% of CSOs, and Twitter (3%).

Citizens' Perception of the Work of CSOs

The vast majority of interviewed citizens (79%) consider themselves **uninformed** when it comes to CSO activities (women are more uninformed than men). This opinion is shared equally among the citizens, regardless of the region. The older and less educated the citizens, the less they are informed about CSOs and their work (87% of the citizens aged 66+ and 91% of the citizens with elementary and lower levels of education are uninformed).

Those citizens that are informed **frequently list media** (50%), friends (38%) and their own social networks (37%) as most common sources of information. Women, more than men, use media (44%) and social networks (25%) to obtain information about the work of CSOs, while men more often receive information from friends (25%) and relatives (8%).

Getting citizens acquainted with the role and importance of the CSO sector (56%), direct contact with citizens (50%) and better cooperation with local authorities (43%) are most frequently stated as factors that influence greater citizen participation in the work of the organisations. **There are no variations in the area of more adequate reaction to the needs of beneficiaries, i.e. it is perceived by all CSOs not to be a priority.**

CITIZENS' ATTITUDE TOWARDS CSOs



10 | CITIZEN PARTICIPATION IN THE DECISION-MAKING PROCESSES

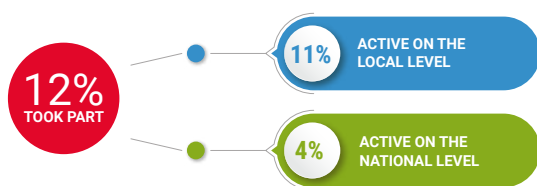
Participation of Citizens in Decision-Making

Only 12% of the citizens took part in any sort of activity related to decision-making, on either local or national level. Citizens seem to be more active on the local level (11%), as almost three times fewer people are taking part in national-level activities (4%).

Citizen Participation in Decision-Making at the Local Level

Most of the citizens (86%) did not take part in any decision-making activities related to their local community in the past year, regardless of the fact that some 15% of them proclaimed themselves as active, which most often meant attending citizens' gatherings

CITIZEN PARTICIPATION IN DECISION MAKING



(5%) or taking part in local initiatives (4%). Citizens aged 30 to 44 (22%) and those with higher education (24%) notably more often state that they take part in such activities, while men seem to be slightly more active than women.

Citizens who have taken part in some activity in the last twelve months have done so **mostly by way of**

consultation, 41% in the case of citizen's assembly and through information, and 31% through a local citizens' initiative. Citizens who have taken part in public debates were the only ones who claimed to be included **more often through direct involvement (44%)** than other types of participation (information, consultation).

Citizen Participation in Decision-Making at the National Level

In the past year, participation in activities at the national level was even lower – **just four out of 100 citizens said that they have somehow taken part in the legislative process or a public policy creation initiative.** Additionally, citizens took part in these activities mostly through the information and consultation process.

Citizens' Reasons for Not Taking Part in the Decision-Making Process

The most often mentioned reason for not taking part is **lack of interest, proclaimed by more than half (53%)** of those who have not taken part in any activity in their local community, or on a national level, in the past year. Apart from this, **one in five of these citizens states lack of time as reason**, while **one out of ten considers him/herself insufficiently informed to take part in any action.** Women, the elderly and pensioners show less interest than men. Citizens aged 18 to 29, as well as those from Belgrade, claim that they have not taken part in the activities due to lack of information more often than others.

11 | DIVERSITY WITHIN THE SECTOR

CSOs and the Most Important Problems in the Country

CSOs mainly list **education (33%)** as the most important problem in the country, as well as

environmental protection/ecology (26%), the problems of young people (25%), culture and social life (24%), and social protection issues (22%).

As regards the most important field in which CSO activities are under-represented at the local level, CSOs again most often mention education (26%), followed by young people and their problems, and the development of civil awareness (25% each).

Citizens' Perception of the Fields in Which the Work of CSO is Under-represented

When interviewed directly, **citizens mostly do not know what it is that CSOs do (36%)**. There are only two areas where they are aware of their work: human rights (24%) and environmental protection (21%).

Citizens most often do not know which CSO areas of activity are missing (30%). In addition to human rights and environmental protection, which are recognised by the population as areas in which CSOs are most active, they also emphasise unemployment (17%), social problems and social protection (14%) and fight against corruption (13%) as areas in which CSO involvement is lacking.

12 | FINANCIAL STABILITY SOURCES OF FINANCING

CSOs' Total Income in 2018

According to the latest available SBRA data,³ total income of associations in 2018 has been RSD 33,248,989,000, which is slightly less than in 2017. At the same time, a minor increase can be noted if figures are presented in EUR (due to the oscillation in the RSD/EUR exchange rate). Thus, total income of associations in 2018 was EUR 281,124,031.

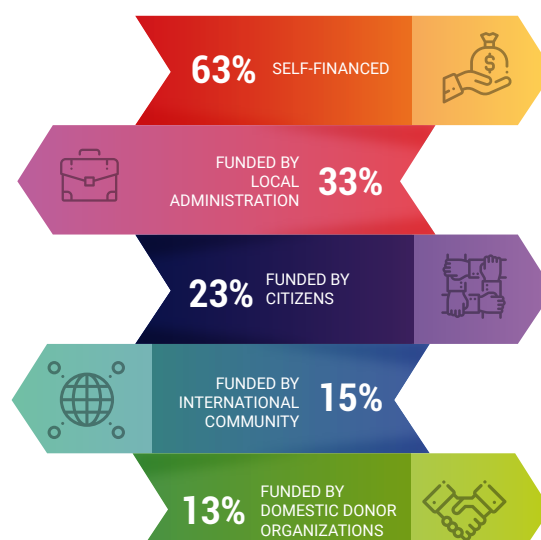
Methods of CSO Financing

There are three main methods of financing CSOs, and they are represented almost equally: financing based on projects (42%), volunteer work (41%) and financing based on membership fees (40%). The newer the organisation, the more its funding is based on projects. Similarly, the older the organisation, the more its members work as volunteers.

Sources of Financing

Data on the sources of funding are shattering the myth of CSOs as organisations that are funded mostly by the international community: only 15% of CSOs

CSOs' SOURCES OF FINANCING



reported being funded from these sources (including 4% of EU funding). The majority of them are self-financed (63%), followed by those funded by the local administration (33%), the citizens (23%) and domestic donor organisations (13%).

³ <https://apr.gov.rs/>

There is a **significant difference in the sources of funding when compared to 2011** - funding by local self-government (from 33% in 2011 to 42% in 2019) and the citizens has increased (from 11% in 2011 to 23% in 2019), while a decrease has been noted in financing provided by domestic donor organisations (from 21% in 2011 to 13% in 2019) and the ministries (16% in 2011 to 10% in 2019).

As for the CSOs that are financed by the ministries, funding most often comes from the Ministry of Labour, Employment, Veteran and Social Affairs (29%), followed by the Ministry of Culture and Information (28%) and the Ministry of Environmental Protection (10%). **Distribution of funds is in line with the CSOs' areas of work (for example, most of the funding from MLEVSA goes to CSOs that provide social services - 54%).**

CSOs' Evaluation of their Own Financial Situation

50% of CSOs assess the financial situation in their organisation as bad, and only 19% as good. When compared to 2011, currently there are more CSOs that are both satisfied and dissatisfied, meaning that the number of those that are neutral has decreased (from 35% in 2011 to 30% in 2019).

The majority of CSOs see insufficient funds from the state and local governments dedicated to financing CSOs as the main problem (46%), followed by a small number of donors (45%), while 31% think that donors finance only big organisations, which results in insufficient funds for small ones.

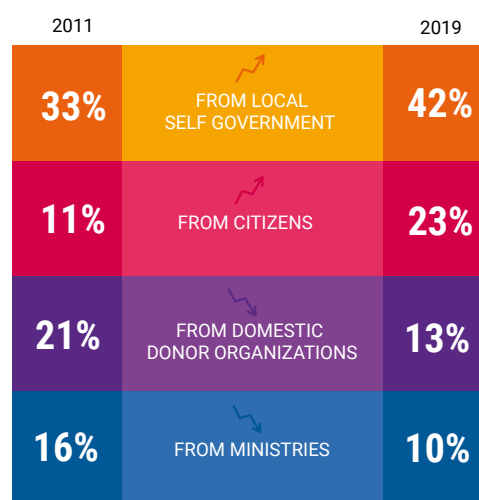
A significant change has been noted regarding the main issues listed in connection with CSO financing when compared to 2011. All issues visibly decreased; however, two issues that were not listed among the top five in 2011 appeared high in 2019: insufficient experience in fundraising (26%) and lack of information about potential donors (24%).

Only 15% of CSOs obtained funds required for their work during the entire year 2019, while almost half

the CSOs (46%) failed to obtain any funds (according to data from April 2019). **This is significantly lower compared to 2011, when 34% of the CSOs managed to secure funds for the entire year, and only 23% were unable to do so. This is most probably the result of the constant increase in the number of newly registered CSOs.**

The income situation differs in the CSO sector; the **majority of CSOs report that the situation is the same (56%), 14% state that their annual income has increased, while 27% state that it has decreased.** When compared to 2011, the biggest difference can be noted in the number of CSOs whose budget has remained the same (from 38% in 2011 to 56% in 2019). The majority of CSOs (67%) do not publish their financial reports on their websites, or share them on Facebook

DIFFERENCE IN SOURCES OF FUNDING OF CSOs



or any other social network. One fifth (21%) mentioned the Business Registers Agency (although all financial reports are officially published on the SBRA website); 8% publish such reports on their websites, while 2% do so on their Facebook page/other social media. **These data show that the transparency of CSOs' financial reporting is very low.**

13 | QUALITY OF SERVICES

Involvement of Beneficiaries in the Work of the Organisation

The majority of the CSOs (62%) reported that they do include beneficiaries in their work. They most often do so by accepting them as members (57%), by recruiting them as volunteers (48%), by analysing their needs (47%), and by consulting them when making plans (42%). To a somewhat lesser extent, they also check how satisfied beneficiaries are with the work of the organisation (32%). **Given that all responses are more widely represented in 2019 than they were in 2011, it is obvious that CSOs use multiple ways of including beneficiaries in their work.**

Beneficiaries' Satisfaction with the Work/ Services of the Organisation

The vast majority of CSOs (89%) give high marks to their beneficiaries' satisfaction (although only 32%

state that they have conducted formal evaluations of clients' satisfaction, and 42% do not evaluate their projects at all).

Project Success Evaluation

The majority of CSOs (58%) conduct success evaluations of their projects, but the percentage is significantly lower than it was in 2011 (73%). CSOs most often conduct only internal project success evaluations (30%), while 4% conduct external evaluations. One quarter conduct both external and internal evaluations (24%), and 42% most often do not conduct any evaluation at all.

The greatest number of CSOs use adequate data/arguments occasionally (43%), one third never use them (34%) and less than one quarter (23%) use data regularly in their public advocacy activities.

14 | PROFESSIONAL SKILLS OF CSO EMPLOYEES

Training Attendance in 2018

The fact that the majority of CSOs (72%) had no staff training in 2018 is worrying. Among the CSOs whose staff did attend trainings, these were attended mostly by the management as well as some members (30%), by all members (25%), by volunteers (23%), and by management only (22%).

At the same time, the majority of CSOs are satisfied (81%) with the capacity level of their staff and members; only 4% are dissatisfied, which represents a significant difference compared to 2011, when 58%

of surveyed CSOs expressed satisfaction and 8% expressed dissatisfaction. 65% of them do not allocate any share of their budgets for the development of human resources. **These data do not correspond with all the listed challenges and problems CSOs face in their everyday work, especially those related to staff/human resources.**

When asked to name several priority topics, the majority of CSOs (57%) listed fundraising, which was followed by writing project proposals (32%), project management (25%), strategic planning and financial management (24% each), platforms and networking (20%), etc.

Other Needed Forms of Support

It is worth noting that as many as 43% of the organisations stated that they did not need any other form of support - significantly (twice) more than

in 2011 (20%). 26% of the CSOs did not know what type of support they required. On the top of the list - although mentioned by a small percentage of CSOs - were: space (7%), cooperation with government institutions/regulations (5%), and media support (3%), while vehicles/equipment, public support, education, professional assistance, human resources etc. were mentioned by only a few (2% each).

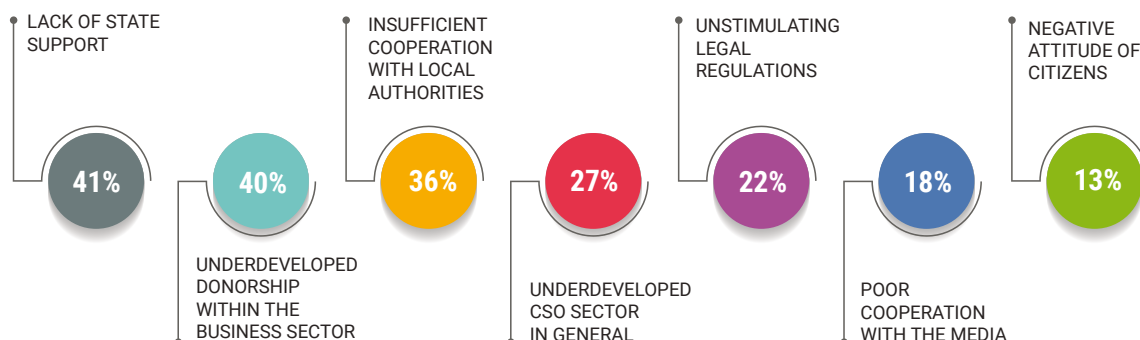
15 | MOST IMPORTANT PROBLEMS OF CSO SUSTAINABILITY

Problems Important for the Sustainability of the CSO Sector in Serbia

Most CSOs (41%) are of the opinion that lack of state support is a problem that is significant for the sustainability of their organisations. This is followed by underdeveloped donorship within the business sector (40%), insufficient cooperation with local authorities

(36%), underdeveloped CSO sector in general (27%) and unstimulating regulations (22%). On the other hand, they see poor cooperation with the media (18%) and the negative attitude of the citizens (13%) as issues that are least important for the sustainability of their organisations.

CHALLENGES FOR CIVIL SECTOR SUSTAINABILITY: PERCEPTIONS OF CSOs



CONCLUSION

The research data show a **significant change in the key sector features**, primarily due to its growth in the last 8 years and changes to the context which affected many of the aspects of CSO work: CSO organisational structure, the funding situation, the level of staff competence, the level of citizens' engagement, attitude of the media toward CSOs, the level of CSO networking and cooperation with the local self-governments.

To illustrate the scope of change in numbers, it is worth mentioning that in 2011 the majority of CSOs (58%) were those that were established during the period 1990-2009. In this survey, however, they represent just 26% of all CSOs, while 62% are those that are newly registered. The year of establishment is important because it is related to the origin of a CSO⁴, its performance, focus and attitude toward politics and problems in the society:

A. CSOs created in the 1990s were focusing mostly on combating human rights violations, disbursing humanitarian aid for refugees and displaced persons, promoting peace and reconciliation, fighting poverty, and promoting democratic values and principles. Many of them developed into professional, modern CSOs that are engaged in advocacy and capacity building in a number of areas of social policy, good governance, human rights and economic development. Usually, they are socially progressive and well-versed in international influences and socio-political agendas, both within the region and in the context of European integration. They rely on international support more than other organisations, and have a weaker constituency base and relations with citizens. Most of these organisations are based in Belgrade and have been passing through transitional processes,

introducing new leadership, and adapting to the changed external context and environment.

B. The other group emerged as a new wave after political and social changes in October 2000, joining the previous group. In addition to strong CSOs dealing with democratisation, human and women's rights, youth and children, think-tanks, a number of such organisations is related to smaller, community-based initiatives and organisations that focus on variety of issues in the community - social, environmental, economic, etc. They are undertaking smaller-scale projects, have smaller capacities and are more turned to mobilising local resources from communities and municipalities.

With the increased number of newly established CSOs, features of the above mentioned CSOs have been absorbed, giving place to an entire new range of organisations, whose characteristics are colouring the picture of the overall sector. The motivation for the establishment of these CSOs significantly differs from the previously described. One explanation may be the diminishing role of the state in various aspects of life, except the economy and media, in the last several years. This vacuum has been filled by small, local CSOs whose primary role is neither "political" nor "activist". It might be said that CSOs nowadays have two new roles to play – one as a tool to help bring people together so they can take part in various mutually beneficial activities, and the other as a means of surviving in the new economy by using CSOs as their main source of income. In addition, there is a tendency of creating more and more of the so-called GONGOs, as confirmed by focus group participants, which are founded and/or supported by the government with a view to representing its political interests and imitating civil groups and societies.

⁴ 2016 CSO Needs Assessment Report, May 2016

Based on the survey data analysis, it is evident that there are three areas in which the CSO sector in Serbia needs to develop further, requiring additional support: strengthening overall capacities (including constituency building and competencies), increasing cooperation and networking, and improving relationship with LGs. All three areas are elaborated in greater detail below.

Constituency, Capacities, Competencies

Because of the reasons mentioned above, the general impression is that the work of CSOs has become silent. Previously active and recognisable organisations are shutting down, left without resources despite the fact that they have been working for 20 years and that they are professional organisations with proven success. In the meantime, GONGOs, which are abundantly financed from the budget, keep expanding. Problems in society have accumulated to such an extent that CSOs cannot resolve them without a stronger inclusion of citizens.

New organisations seem to be less “political” and less critical (compared to those established during the 1990s and in the period 2000-2009) and they are more satisfied with almost all aspects of their work and its context, with the exception of cooperation with the media. In addition to the change caused by the increase in the number of CSOs, there is also a visible change in their structure.

Although most of them focus on citizens as their primary and overall target groups, CSOs also seem to be detached from them - almost half do not include citizens in their activities. At the same time, citizens are very rarely engaged in CSO work; they do not trust them, they are not informed of their work, and they are not interested at all (which could be attributed also to the overall apathy in the society). Furthermore, CSOs have a much more positive perception of their own work than the citizens; in general, they believe

that what they do is exactly what is missing in the local community, which significantly differs from the opinion of citizen; namely, the only areas CSOs are dealing with that citizens recognise are human rights and environmental protection. What is needed is direct contact with citizens instead of excessive reliance on social media.

The impression is that most people in today’s CSO sector in Serbia **“don’t know how much they don’t know”**. These are completely new people, with insufficient knowledge of CSO work. They did not have opportunities to attend trainings (like CSOs in the 1990s/2000s), or they are completely new organisations that do not have even the basic knowledge of the roles of CSOs in the society and its functioning.

Findings are full of contradictions: for example, satisfaction with the political context for the work of CSOs has increased (compared to 2011) and there is a more positive attitude toward cooperation between the state and CSOs. At the same time, 75% of the CSOs think that organisations such as theirs have little influence on public policy (in 2011, CSOs were more critical, and believed they were more influential than today); there is a decrease in funding, fewer projects are written and approved, there is lack of information on funding opportunities (in the era of social media!), there are problems with the recruitment of staff and volunteers, and at the same time, there is minimal investment in human resources and a high level of satisfaction with the professional level of staff. Also, an unexpectedly high number of surveyed CSOs reported that they do not need support, and that they do not know what sort of support they might need.

The entire sector needs to be revitalised; however, “one size does not fit all”. CSOs established before 1990 need to be modernised; those founded from 1990 to 2009 need consolidation and stronger constituency relations, while the new ones need to go “back to the basics”, i.e. to learn about the essence of the role of a CSO in a democratic society and different aspects of CSO functioning.

CSO Cooperation and Networking

Survey data show that the majority of CSOs have established cooperation with other such organisations; however, it is significantly lower than in 2011, at all levels. There is lack of solidarity and synergy, with CSOs acting isolated and disconnected. Membership in networks has decreased, followed by a decrease in the perception of their influence. This was to be expected, given that the number of CSOs has doubled since 2010, and that establishing cooperation/networking requires time, knowledge, contacts with other CSOs, and funding (the latter is missing, as funding trends for initiating networks by a variety of donors has decreased).

There is a need to bring people together, to re-connect, to break the isolation and create the spirit of cooperation and synergy. It is a concept that is pretty much similar to that of the 1990s (when “breaking barriers and building bridges” was one of the approaches to better networking), but under new circumstances (again, social networks are useful, but direct contact and peer support is recommended).

Relationships between CSOs and LGs

Cooperation with LGs is weak or non-existent, due to the poor capacity/competence of LGs, understanding cooperation only as LG funding, or refusal of CSOs to cooperate with the authorities for various reasons (especially well-established CSOs) since 2012. There are different views regarding interference with the work

of CSOs - surveyed CSOs did not report any significant interference, but focus groups’ participants listed a number of challenges: phone calls, text messages, e-mails, social network insults, misdemeanour reports, threats, personal data made public, attempts to take away space that was given to CSOs to use, inspections and so on. It seems that different CSOs are exposed to different types of interference (environmental CSOs, CSOs that provide social services...). This may be explained by interlocutors providing socially acceptable responses.

Although joint forces of CSOs and LGs are the best way to meet the needs of the citizens, in the given circumstances this may prove to be a challenge. In addition to fostering cooperation and joint activities between CSOs and LGs, it is also important to support CSO watchdog/monitoring activities on the local level.

