

ASSESSMENT OF THE SITUATION IN
THE CIVIL SOCIETY ORGANIZATIONS
(CSOs) SECTOR IN SERBIA
[September, 2011.]

Publisher: Civic Initiatives, Belgrade
For the Publisher: Miljenko Dereta
Prepared by: Dubravka Velat & Civic Initiatives Staff

Cover: Valenčak
Prepress: comma / communications design
Printed by: SGR Original
Printed in: 1000 copies

ISBN 978-86-7408-057-3

The research was conducted by Civic Initiatives in conjunction with the Office for Cooperation with Civil Society of the Government of Serbia, supported by the Business Registers Agency and with direct implementation of the research by IPSOS Strategic Marketing Company.

The research has been made possible by the support of the United States Agency for International Development (USAID) under the “Civil Society Advocacy Initiative” programme, implemented by the Institute for Sustainable Communities (ISC).

The printing of this publication as well as the translation into the English language were made possible by the support of the OSCE Mission to Serbia.

The views and opinions expressed herein are those of the author(s) and do not necessarily reflect those of the ISC, USAID or United States Government, nor of the OSCE Mission to Serbia.

ASSESSMENT OF THE SITUATION IN THE CIVIL SOCIETY ORGANIZATIONS (CSOs) SECTOR IN SERBIA

2019-2020

REPORT

FINAL

1

2

3

4

5

6

7

8

9

10

11

12

13

14

15

16

17



Table of Contents

| | |
|---|----|
| Preface | 7 |
| Summary | 8 |
| Methodology | 11 |
| Basic information and working conditions | 13 |
| Founding year of the organization | 13 |
| CSO locations by geographic regions | 14 |
| Office premises | 14 |
| Equipment | 16 |
| Mission, areas of work and activities | 21 |
| Mission and strategic planning | 21 |
| Area of work | 24 |
| Beneficiaries and target groups | 26 |
| Activities and projects | 28 |
| Need for education | 34 |
| Legal/fiscal regulations | 36 |
| Legal framework for CSO activities | 36 |
| Level of satisfaction with current legal regulations | 37 |
| Interest in taking part in the initiative for changing laws and other regulations | 38 |
| Political context | 39 |
| Political climate and sector development | 39 |
| Impact of institutions on the development of the sector | 40 |
| Evaluation of cooperation between the Serbian Government and CSOs | 41 |
| Evaluation of influence of CSOs on the creation of State policies | 42 |
| The role and participation of CSOs in the electoral process | 44 |
| Structure of CSOs | 46 |
| Membership and active persons in the organization | 46 |
| Decision-making practices and procedures? | 50 |
| Rules and procedures | 52 |
| Need for education | 52 |
| Intersectoral cooperation – CSO cooperation - Networking | 54 |
| Cooperation between CSOs | 54 |
| Networking | 59 |
| CSO Cooperation with the State | 63 |
| Attitude of the State towards the CSO sector | 63 |
| CSO cooperation with the State | 64 |
| The role and contribution of the State to CSO development | 70 |
| CSO Cooperation with the business sector | 72 |
| Reasons for and types of cooperation | 72 |
| Cooperation with commercial banks | 75 |
| Evaluation of cooperation with the business sector | 75 |
| CSO Cooperation with media | 79 |
| Reasons and types of cooperation | 79 |
| Local and national media | 80 |
| Electronic and printed media | 81 |
| Satisfaction with cooperation with media | 82 |

| | |
|--|------------|
| Promotion of the organization in the media | 83 |
| The need for education about the media | 84 |
| Attitude of the media towards the CSO sector | 85 |
| Evaluation of cooperation between CSOs and media | 86 |
| Staff and volunteers | 88 |
| Employing staff | 88 |
| Recruiting volunteers | 88 |
| The most frequent problems in work with staff and volunteers | 89 |
| The need for education | 89 |
| Attitude of the public towards CSOs | 91 |
| Attitude of the community towards the CSO sector | 91 |
| Citizens' level of information on CSO activities | 93 |
| Public relations strategy | 94 |
| The need for education | 96 |
| CSO image | 97 |
| Diversity within the sector/regional standardization | 99 |
| CSOs and the most important problems in the country | 99 |
| Fields in which too many CSOs are active | 100 |
| Fields in which CSO activities are under-represented at the level of society | 101 |
| CSOs and the needs of the local community and society | 101 |
| Fields in which CSO activities are under-represented at the regional level | 103 |
| Financial stability | 104 |
| CSO budgets in 2010 | 104 |
| Methods of CSO financing in 2011 | 105 |
| Financing sources in 2011 | 106 |
| Financing sources in the past three years | 108 |
| CSO business activities | 110 |
| Evaluation of relations with donors | 112 |
| Evaluation of financial situation in own organization | 112 |
| Independent financial audit | 115 |
| The need for additional education | 116 |
| Financial situation in the entire sector | 117 |
| Including the community in CSO activities | 120 |
| Involvement of beneficiaries in the work of the organization | 120 |
| Needs assessment of beneficiaries | 121 |
| Collecting feedback data from beneficiaries | 121 |
| Quality of services | 123 |
| Beneficiaries' satisfaction with work/services of the organization | 123 |
| Project success evaluation | 123 |
| Evaluation of the successfulness of the organization | 124 |
| Training level of staff working in CSOs | 125 |
| Trainings attendance to now | 125 |
| Areas/topics of trainings – basic level | 126 |
| Areas/topics of trainings – advanced level | 127 |
| Satisfaction with the education level | 127 |
| Priority needs for education | 128 |
| Other needed forms of support | 129 |
| The use of other organizations' consultancy services | 130 |
| The most important problems regarding CSO sustainability | 132 |
| Problems important for sustainability of the CSO sector in Serbia | 132 |
| Priorities in solving problems | 133 |
| The International Classification of Nonprofit Organizations (ICNPO) | 135 |

Preface

These are the results of the research “EVALUATION OF THE SITUATION IN THE SECTOR OF CIVIL SOCIETY ORGANIZATIONS (CSOs) IN SERBIA”, conducted by Civic Initiatives, in conjunction with the Office for Cooperation with Civil Society of the Government of Serbia.

This research made it possible, for the first time in Serbia, to make a comprehensive evaluation of the situation in the sector of civil society organizations, owing, first of all, to the information obtained from those organizations. After the Law on Associations entered into force in October 2009, a uniform Register of Citizens’ Associations was established at the Business Registers Agency (BRA), whereby the exact number of associations in Serbia was known for the first time, including their geographic position; this was to serve as the base for a representative sample.

The research will make possible a long-term monitoring of the development of civil society organizations; it will contribute to the design of the future national strategy as well as the creation of future sectoral, governmental and donor strategies aiming at an as efficient as possible resolution of a wide range of problems in Serbia addressed by citizens’ associations. It is especially significant that the international classification of non-profit institutions was used for the first time, because it enables classification of organizations by standardized methodology and in comparison with CSOs worldwide.

The research encompassed 1,650 associations, a sample somewhat exceeding 10% of the total number of associations entered into the SBRA register (16,000 associations in December 2011). It makes the obtained evaluation of the sector complete, reliable and significant, because it shows the readiness of citizens to participate actively in all processes leading to improved conditions of their lives, local community life as well as life all over Serbia.

The research data offer a completely new picture of the sector and discredit many prejudices existing among the public. The data primarily show that a large number of associations base their activities on the voluntary work of their members. Data on the founding year are interesting, and with reference to that, the topics that associations tackle, the technical equipment and geographical spread of associations, the number of so-called big and small organizations, membership, the financing structure, the educational structure of persons working in associations etc.

I would especially like to point to the great expectations CSOs expressed regarding the role of the State both in terms of the provision of an enabling environment for their development (legal and tax frames), and in terms of the financing and promotion and, finally, with respect to the contribution of CSOs to the development of society in Serbia. This is especially important in the context of European integration, within the scope of which cooperation between the State and civil society, as well as intersectoral cooperation, gain additional importance.

This research is a venture that has required the inclusion of a large number of actors. Besides the aforementioned Office for Cooperation with Civil Society of the Government of Serbia, the Civic Initiatives’ research was supported by the Serbian Business Registers Agency, which enabled access to data free of charge. Direct conduct of the research was carried out by IPSOS Strategic Marketing Agency from Belgrade. The research design, its implementation and data analysis were financially made possible by the United States Agency for International Development (USAID) under the “Civil Society Advocacy Initiative” programme, implemented by the Institute for Sustainable Communities (ISC), while the translation into the English language and the printing of publications in Serbian and English were made possible by the support of the OSCE Mission to Serbia. Data analysis was performed by Civic Initiatives employees. And, finally, the most important contribution has been the one made by the associations that were included in the research and agreed to disclose data on their activities. We extend our gratitude to them and to all other actors who made the conducting of the research possible.

Dubravka Velat
Civic Initiatives
Belgrade, December 2011

Summary

The results of the research presented here show that the CSO sector is relatively young, because the majority of organizations were founded after 2000, while only one fourth of organizations were founded before 1990. The majority of CSOs primarily deal with social services, culture, media and recreation, and environment (among which, some associations, e.g. hunters' associations were founded more than 100 years ago). The majority of CSOs are based in Vojvodina, followed by Belgrade, while others are spread evenly by regions. The reasons contributing to the choices CSOs make as to their primary field of work differ widely, although three reasons dominate: an interest in a specific field, the available capacity of the CSO and the priority for finding a solution for a specific problem in society. The results of the research point to the fact that although CSOs themselves recognize the standard of living as the burning problem in society, at the same time they perceive the insufficiency of the sectors dealing with the issue. As regards the dominant types of CSO activities, on average these are education and local community actions, while all citizens are generally specified as intended beneficiaries of CSO services.

Regarding office premises, the situation is better with CSOs established before 1990, among which are the ones performing public authorizations in the domain of social services (disabled persons' organizations, Red Cross, voluntary fire fighters) or public authorities in the domain of environment (e.g. hunters' associations). In the worst position regarding office premises are CSOs whose primary field of work is law, advocacy and politics, many of which were founded after 1990.

In terms of equipment, almost one half of CSOs are dissatisfied with at least some parts of the equipment necessary for work. On average, one third of CSOs do not possess either a computer or a laptop, and in most cases one computer/laptop is shared among a large number of persons within the organization; moreover, one third of CSOs do not have access to Internet. In two thirds of the organizations, the majority (or almost all active members of the organization) are computer literate. In more than one half of organizations, the majority of active members speak at least one foreign language.

According to the official data from the Business Registers Agency, taken from submitted financial statements, the associations employed over 4,500 persons (fulltime employment), in 2010. According to the research evaluations, CSOs had more than 4,500 persons engaged via honoraria, over 150,000 volunteers and hundreds of thousands of members. Among the actively engaged persons in CSOs, the majority are usually middle-aged, between 31 and 50 years of age, and a great majority of men take the position of the director of the organization. The role of the Managing Board is dominant in all aspects of organization's activities, either regarding strategic decisions, daily activities or concrete projects. In the majority of CSOs, except for the Statute, there are no written rules and procedures for decision-making and the overall activities of the organization.

The majority of CSOs have their organization's mission in writing; however, less than one half have a strategic plan. There is generally a document for 2011 and 2012, which is more like an action plan than a strategic plan.

About one half of CSOs is not at all or only partially acquainted with the legal regulations that refer to civil society organizations. The greatest dissatisfaction in the CSO sector refers to the tax policy; however, despite dissatisfaction, the majority of CSOs are not interested in taking part in the initiative for change of the Law and the regulations related to CSO activities (with the exception of organizations dealing with law, advocacy and politics).

Somewhat less than one half of CSOs believe that the political climate in the country is unfavourable for the development of the sector. The majority see cooperation with the Serbian Government as average, and believe that it has not changed in the past 3 years. Among those who think that there have been changes, a larger percentage evaluates that it has changed for the better. The majority of CSOs believe that the impact of the sector on creating State policy is too small. The most frequent problems in cooperation with State institutions are specified to be: lack of funds, lack of interest, overstaffed administration and the major role of informal contacts. CSOs had a large number of ideas regarding what the State could do to stimulate CSO activities. The majority specified activities related to the financial problems of CSOs (budget resources, funds for financing CSOs, tax reliefs), while every fourth organization also specified the need for a campaign for changing the CSO image (the public perception of CSOs). The majority see the im-

provement of legal, strategic and financial frameworks for CSO activities to be the priority of the newly established Office for Cooperation with Civil Society of the Government of Serbia.

A dominant number of CSOs opposed the idea that CSOs take part in elections as political parties, although, at the same time, they believed that the sector should play an active role in the electoral process, where their attitudes depended considerably on the field of work of the CSO.

Although the majority of CSOs had established cooperation with the business sector, it was mainly reduced to two types only: the business sector as donors and, to a smaller extent, CSOs rendering consultant services. As donors, the business sector in most of the cases has supported CSOs sporadically and with small donations, and therefore there is a visible absence of strategically designed and continuous support. The poor conditions that enterprises are confronted with and the non-existence of tax reliefs for assistance to CSOs are the most frequently quoted reasons for not having a stronger cooperation. Getting the business sector acquainted with the significance and role of CSOs is specified as the most important task to bring the CSOs closer to the business sector.

The majority of CSOs cooperated or had contacts with the media, where it was noticeable that it was easier to establish cooperation with the local media than with the national media. CSOs are mainly satisfied with the cooperation and believe it to be the same or better than before.

The great majority of CSOs have cooperated with other CSOs within the same place/town and same region in Serbia; however, as the territorial distance, grows the number of CSOs that cooperate diminishes. This is exceptionally important information in the context of European Integration, since requirements for cooperation with CSOs from the region and with European CSOs and networks will increase in the near future.

Slightly less than one half of CSOs are members of a network, either domestic or foreign. Nevertheless, the great majority of CSOs evaluate that the influence of networks in Serbia is small. What is cause for greatest concern is the assessment of almost one half of CSOs that they do not have sufficient capacities for cooperation on projects with other CSOs.

The attitude of the environment in which CSOs are active regarding the civil sector in general is generally evaluated more positively than is presented by other research on public opinion¹. Also, the attitude of the environment in which they perform their activities is considerably more positive than the attitude towards the CSO sector as a whole. CSOs evaluate that citizens are uninformed of CSO activities and mainly uninterested in the work of the civil sector. Lack of objectivity is noted in the evaluation of their own capacities, quality and work expertise, relations with the media and positions in the local community and with the public in general.

The majority of CSOs see the attitude towards beneficiaries and presence in the media as key factors for creating the public image of the organization. Getting citizens acquainted with the role of the civil sector and better cooperation with the local authorities are generally stated as factors for improving the CSO image with the public in Serbia. At the same time, more than half the CSOs do not have any strategy for public relations.

When considering methods of financing, the highest percentage originates from financing based on projects and membership fees, while the lowest comes from gifts and voluntary contributions; however, there are big variations between organizations engaged in different fields. Financing sources are mainly stated to be self-financing (rendering services with remuneration, membership fees, own assets), financing by local authorities and financing by international donors. Almost one half of CSOs evaluate the financial situation of their organizations as bad, as may be seen from the data that only one third of CSOs have provided funds for activities throughout 2011, while more than three fourths have not provided funds for work in 2012 (according to data as of June 2011). In 2010, the great majority of CSOs had a budget under €20,000, and only 5% had a budget over €100,000.

CSOs see the main problems in the small number of donors and the limited funds of the State and local government, and they believe that the best way of financing would be through special State funds, as well as from EU funds, local government and foreign donors. Great expectations as regards the State and the EU and other foreign sources are evident, in contrast with small expectations regarding domestic private donors, whether foundations, business sector or citizens.

1 „NGO Perception“, conducted in May 2009.

Only one fourth of CSOs have made use of the benefits of the new Law on Associations and registered business activities, while a minimum number have registered a company, mainly in the field of hunting, trapping and game-rearing , as well as in the area of social services. Rendering social services for fees is an opportunity made possible by the new Law on Social Welfare, which opens a space for CSOs to thereby provide income for their work to a greater extent.

On average, the majority of projects implemented by CSOs last less than one year, which has a direct impact on the sector's sustainability. Complex requirements by donors, lack of information on competitions and insufficient experience in project-writing are the most frequent problems faced by CSOs when competing for project financing. When implementing a project, the dominant problem that the great majority of CSOs encounter is lack of financial assets.

When asked how to improve the financial transparency of CSO activities, the majority answered: by simplifying accountancy regulations or by changing the tax policy. Financial statement publishing has become fully public by the introduction of the Financial Statements Register in BRA, which creates a need for providing funds for independent audit controls. In the majority of organizations, no financial audit had been conducted by an independent audit company since the organization was established.

It is worrying that the majority of CSOs have not had any staff training in the past 3 years. At the same time, the majority of CSOs are satisfied with the capacity level of their staff and members. Priority topics that require further education vary with the field of work, but on average it is usually project-proposal writing, skills improvement in the topics addressed by the organization, and financial management.

The majority of CSOs attach the greatest importance for the sector's sustainability to support by the State and relations with donors and local authorities, and the least importance to cooperation with the media and the attitude of surrounding society and citizens. Lack of support by the State is most often specified as the priority problem, both at the level of the entire sector and at individual organization level.

The research was conducted with the aim of establishing the situation in the civil society sector in Serbia, bearing in mind that after the adoption of the new Law on Associations, whose implementation started in October 2009, and the process of harmonization of the legal Acts with the Law, which followed, a uniform Register of Associations in Serbia, kept by the Business Registers Agency, was established for the first time. In this way, an assessment of the “initial” situation was defined, and thereby the basis for a long-term and systematic monitoring of the situation and the development of civil society in the future established. As the basis for the research, questions posed in previous research (in 2005 and 2009) were used, while the questionnaire was enriched by new questions in conformity with changes in the environment. Nevertheless, the data from this research cannot be compared with data from previous researches, because in the earlier research, the basic group was different and primarily referred to organizations founded in the course of the 1990s or after changes occurred on the 5th of October 2000.

Framework for the selection of samples: As the basic group, the Register of the Business Registers Associations (BRA) was used, with the position as of the 15th of June 2011, when the figure amounted to 13,375 associations². Please note that this research did not encompass other forms of association, which are by their character private and non-profit-making, such as political parties, trade unions, churches and religious communities, sports associations, foundations and endowments, since their establishment and activities are regulated by separate laws.

Sample type: A stratified single-stage random sample was used. For sampling, 1,800 associations were selected, while in the survey 1,625 associations took part. The percentage of answers amounted to 91%, whereby replacement was made for associations that physically could not be identified in the field by means of their address. There were 203 such associations. The strata were: **A. Founding year of CSO; B. Budget under annual balance sheets for 2010** (official BRA data on financial statements of associations); **C. Regional affiliation.**

A. Organizations were divided by the **founding year** into four categories, on the basis of turning points in the past, whether related to the change of the legal framework or the socio-political context, which had an essential impact on the establishment and activities of civil society organizations in Serbia. For instance, to the first category belong organizations established up to 1989, because in 1990 the law that introduced political pluralism was passed. To the second category, according to the time of registration, belong organizations founded from 1990 to 2000, at the time of the wars in the former territory of Yugoslavia, which continued with the NATO bombing of Serbia and ended with the changes of the 5th of October 2000. To the third category belong organizations formed since 2001 (after the changes of the 5th of October 2000) until the beginning of the implementation of the new Law on Associations (late 2009); while within the fourth category fall CSOs established after 2010.

B. Budgets were allocated in such a manner as to obtain a picture of sector diversity in terms of the financial assets available, beginning from organizations that did not have a budget for 2010, through the ones with small budgets (up to € 1,000), somewhat higher budgets (from € 1,001 to € 5,000), medium budgets (€ 5,001 to € 20,000), high budgets (from € 20,001 to € 100,000) to the highest budgets (over € 100,000).

C. Regional affiliation was established based on the municipality in which the head office of the organization is situated. In the analysis, we used a division into six regions with their socio-economic special features: Vojvodina, Belgrade, Western Serbia, Central Serbia, Eastern Serbia and Southeast Serbia. The research included organizations from 67 municipalities of Serbia, 127 neighbourhoods, urban, peri-urban and rural environments.

Sample selection: The sample selection was, initially, a simple procedure, because we used the official BRA data, as well as associations' databases and official financial statements. However, in the field we faced difficulties in making contacts with competent persons inside the organizations. Firstly, the process of harmonization of organizations' legal Acts with the new Law was prolonged for two months (till the end of June 2011), as a result of which, the field work started in July, which coincided with the beginning

² In late November 2011 the number of registered associations reached the figure of 16,000 associations.

of the summer holidays and the season of annual leave. Attempts to get in touch with potential respondents required additional efforts, because it turned out that despite the recently conducted re-registration process, not all contacts were updated. One of the reasons is that the head offices of organizations often use the private addresses of their founders or legal representatives, for which reason it is difficult to reach the respondents. Furthermore, due to the lack of a domestic system of classification of activities and the introduction of the international system of classification many respondents were undecided regarding the choice of activities, as a consequence of which a large number of organizations remained unclassified. For that reason, after subsequent verification, corresponding codes were allocated to associations whose choice of activities is indisputable (e.g. the Red Cross certainly falls under the heading of “Social services”, while voluntary fire fighters, hunters and fishermen fall within the category of Environment etc.).

Respondents participating in this research were people in senior positions within organizations, who were familiar with its functioning and able to provide all necessary information and whose opinions were relevant in decision-making processes within their organizations. The interviews were conducted on the premises of the CSOs, by trained interviewers applying standardized questionnaires (on average, an interview lasted for 65 minutes).

Research period: The research was conducted from the 24th of July until the 30th of September 2011.

Primary field of work: The questionnaire offered respondents a choice of 12 given fields of work, according to the International Classification of Activities of Non-profit Organizations (ICNPO), which is attached to the end of this publication. Respondents had the opportunity to choose for themselves in which of the fields of work they wished to classify their organization. Additionally, bearing in mind the context of European Integration and the specificities of our CSO sector, respondents were offered to specify a sub-field within, for example, the field **5 Environment** (sub-fields: energy, agriculture, rural development etc.), then within the field **6 Development and Housing** (sub-fields: local community development, standard of living, unemployment etc.), as well as within field **7, Law, Advocacy and Politics** (sub-fields: development of democracy, civil society development, human and minority rights, struggle against corruption, European Integration etc.). As already stated, there were difficulties in selecting the activities of a specific number of organizations, which were solved through subsequent verification. CSOs falling within fields that have a small percentage representation, owing to the small number of organizations in the sample, are not presented separately in this publication (**Philanthropic intermediaries and voluntarism promotion, 0.2%; Religion, 0.4%; and International cooperation, 0.7%**); however, their participation is present in the total data displayed, within the scope of each graph.

As regards the international classification, 12% of CSOs were not classifiable at all (e.g. Models' Association, Initiative for Monarchy, Association for Partner Selection Assistance etc.).

The size of organization was defined by the total number of active persons in the organization. This number included members of the managing board, coordinators, employees and part-time workers, but not volunteers. This number was divided into 4 categories: small organizations (up to 5 people), medium-sized organizations (from 6 to 10 people), larger organizations (11 to 20 people) and the largest organizations (more than 20 people).

On this occasion, organizations having public authorizations (e.g. Red Cross organizations, the Automobile and Motorcycle Association, hunters' associations etc.) were classified with other CSOs according to their primary field of work, although by their position as regards the activities they are entrusted with by the State, they could be singled out into a special category as well.

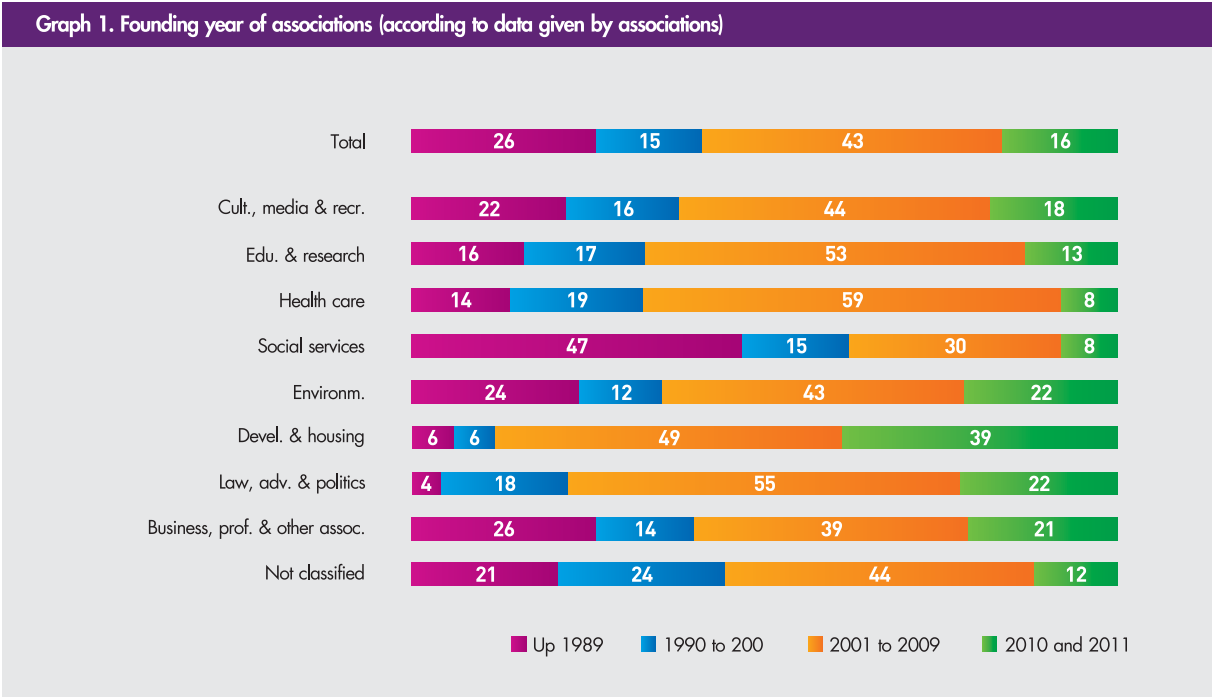
The gathered data were analyzed by Civic Initiatives staff. The data are commented upon from the perspective of CSO persons, i.e. they do not represent an in-depth sociological data study. However, we believe that they represent a valuable input on different aspects of the CSO sector in Serbia for all interested parties.

Web publications are prepared in both Serbian and English versions and may be downloaded from www.gradjanske.org, www.civilnodrustvo.gov.rs, www.iscserbia.org and www.osce.org/serbia/.

In most cases, the graphical analysis of data shows results for the total and then by primary fields of work. The narrative descriptions typically begin with a general analysis of median values at the level of total values, followed by a comparison with data according to variables (founding year, organization size, budget and region). Please note that only data showing major variations compared to the average values on any criterium of measurement are commented.

Basic information and working conditions

Founding year of the organization

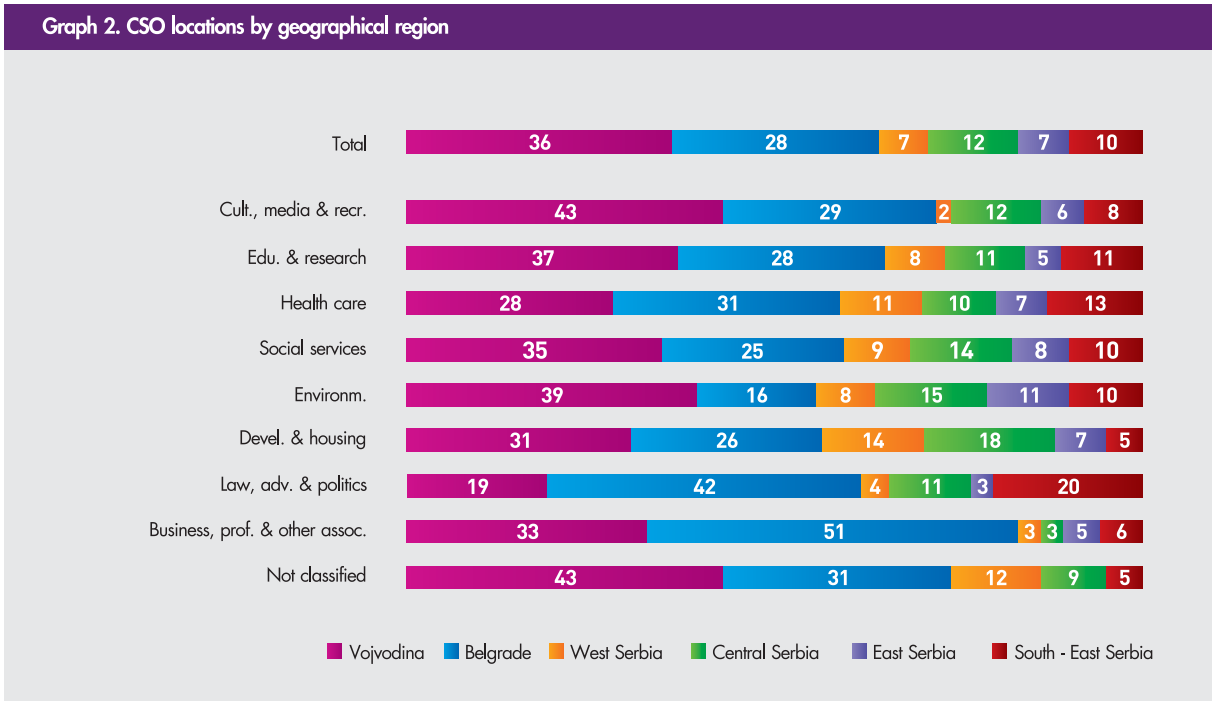


Some 26% of CSOs were established before 1989. The fewest number of organizations were established between 1990 and 2000 (15%), while a marked surge in the registration of organizations occurred between 2001 and 2009 (43%), as well as after the new Law on Associations was passed and started being implemented, from 2010 onwards (16%). Bearing in mind that this evaluation of the situation in the civil sector in Serbia was conducted in the course of June 2011, the number of newly founded organizations has certainly risen in the meantime.

Organizations delivering social services, some of which dating back as far as World War I (47%) and business/professional and other associations (26%) were mostly founded before 1990; taking into account that on average the lowest number of organizations were founded in the period 1990-2000, one may presume that at that time there were no preferences in the primary field of work. The CSOs dealing with healthcare (59%), then law, advocacy and politics (55%), and education and research (53%) were mainly established in the period 2001-2009. More organizations dealing with development and housing were established after 2010 (39%), than was the case with other sectors.

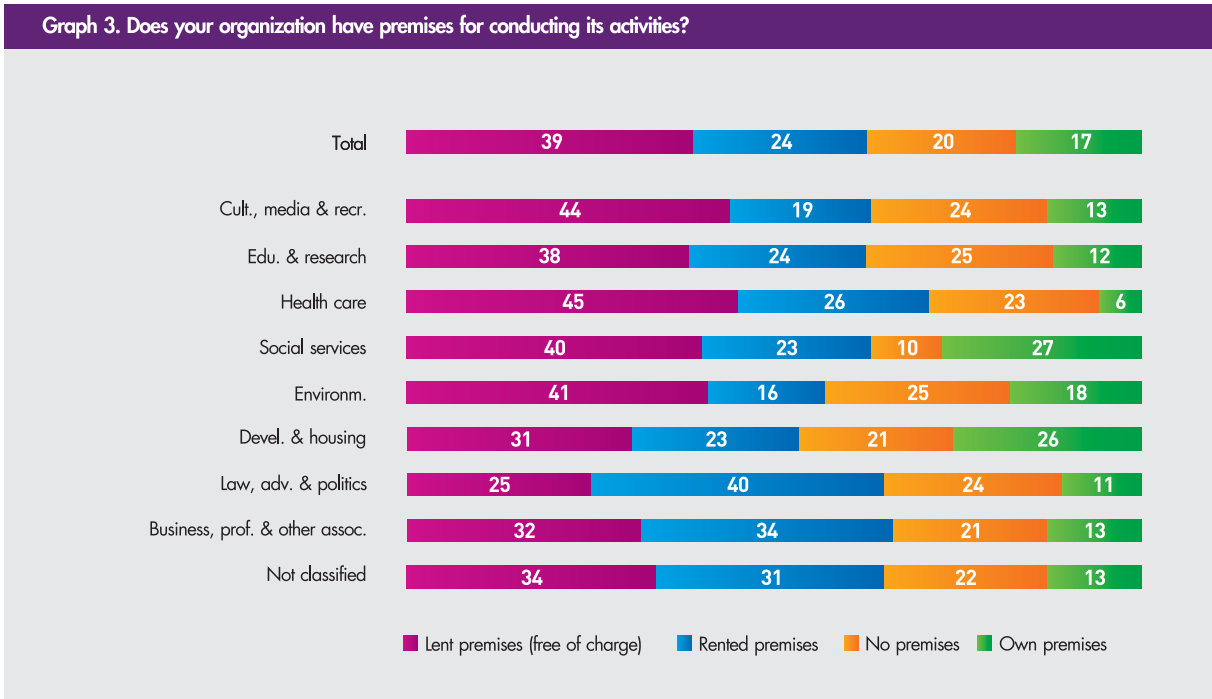
Before 1989, CSOs having 11 to 20 active people (39%) were those mainly being established, and those with a budget exceeding €100,000 (39%); 32% of the total of established CSOs were in Eastern Serbia, and only 18% of CSOs in Belgrade. In the period 1990-2000, too, mainly CSOs having 11 to 20 active people (20%) were established, with a budget exceeding €100,000 (26%). In the period 2001-2009, as much as 50% of small CSOs (up to 5 active people) were registered, 48% of them with a budget of up to €1,000, as well as 49% of CSOs from Belgrade. In the course of 2010 and later, one quarter of small organizations (up to 5 active people) were founded, more than one half (53%) of them without any budget, as well as 22% of the CSOs from Western Serbia.

CSO locations by geographic regions



The majority of CSOs are based in Vojvodina (36%), and then in Belgrade (28%), while others are spread relatively evenly over Western, Central, Eastern and Southeast Serbia. The data that stand out refer to organizations involved in culture, media and recreation (43%) and to the unclassified ones (43%), which are most numerous in Vojvodina; also, in Belgrade most numerous are the business/professional and other associations (51%) and CSOs involved in the field of law, advocacy and politics (42%).

Office premises

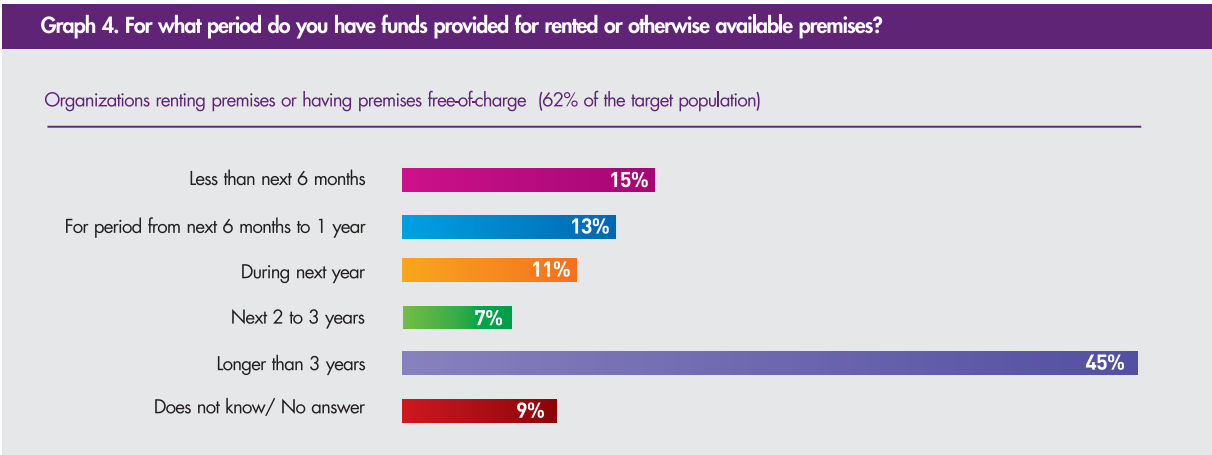


The situation regarding office premises is very diverse. 39% of CSOs are given office premises free of charge, 24% lease their office premises, every fifth organization has no office premises at all, and as much as 17% own their office premises.

The best situation is in CSOs involved in social services (67% either have office premises free of charge ceded to them, or they own them), while in the worst position regarding office premises are CSOs dealing with law, advocacy and politics (64% either rent them or do not have any kind of office premises).

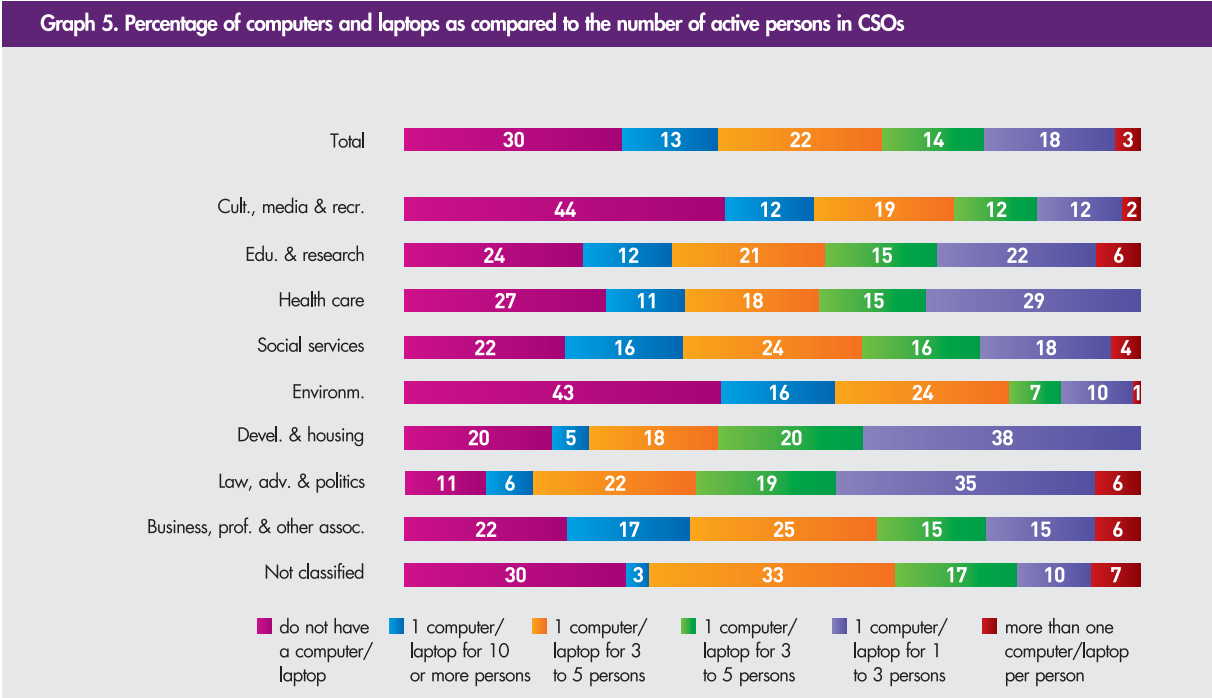
The situation regarding office premises is better for the older CSOs, since as much as 79% of the CSOs founded before 1989 have either ceded office premises free of charge or own their office premises, while the younger the organization, the worse the situation. CSOs established between 1990 and 2000 rent their office premises (32%) to a greater extent than any others, while those recently registered show a greater tendency to have no office premises at all. The space status is in direct correlation with the size of the organization. CSOs of up to 5 members have no office premises in 32% of cases, while the largest ones, with more than 20 active persons, rent their premises (33%) or own them to a greater extent than the others, or are given office premises free of charge (29% each). The situation is similar with the organization's budget: the lower the budget, the more the organizations do not have office premises at all (28% without a budget and 30% with a budget of up to €1,000). As the budget grows, the share of organizations renting office premises also grows (35% of those having a budget from €20,001 to €100,000 and 45% of those having a budget over €100,000), as well as of those owning office premises.

The best situation is in Vojvodina, where 44% of CSOs have ceded office premises free of charge, and as many as 20% own their office premises, and in Eastern Serbia, where 44% also have the use of office premises free of charge. The worst situation is with Belgrade CSOs, which rent their office premises (29%) to a greater extent than CSOs from other regions, or do not have office premises at all (24%).

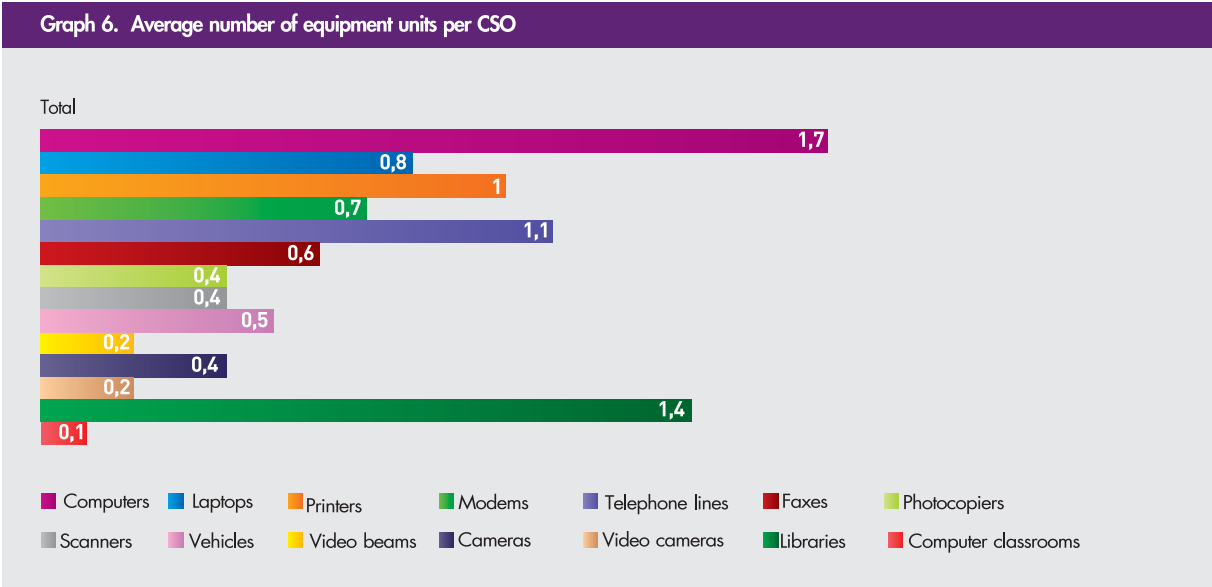


When asked “For what period do you have available premises or funds provided for renting office premises?” 15% of CSOs answered that they have premises secured for a period shorter than the next 6 months; 13% for a period between 6 months to one year, 11% for the next year, and some 7% for a period of two to three years. As much as 45% of CSOs have secured office premises for a period longer than the next 3 years. CSOs dealing with the environment are in the most favourable position, because as many as 55% of these CSOS have secured office premises for a period longer than 3 years, as have 50% of CSOs involved in the field of media, culture and recreation; while in the worst position are CSOs dealing with law, advocacy and politics, because merely 23% of these CSOs have secured office premises for the same period.

Secured office premises and the year of foundation are directly connected: the older the CSO, the more secure it is regarding the premises issue; thus 63% of CSOs founded before 1989 have office premises secured for more than the next 3 years, while only 27% of CSOs registered since 2010 are in the same position regarding this issue. At the same time, the CSO size does not have an impact on the period of securing office premises, therefore the share of the smallest CSOs (45%) and the largest (40%) is about equal as regards funds secured for office premises for the next 3 years and longer. In respect to the budget, in the best position are CSOs of up to €5,000 (52%) and €1,000 (51%), while in the worst position are CSOs that have no budget (19%), as well as CSOs with the highest budget, which have secured funds for long-term office premises in 28% of cases only.

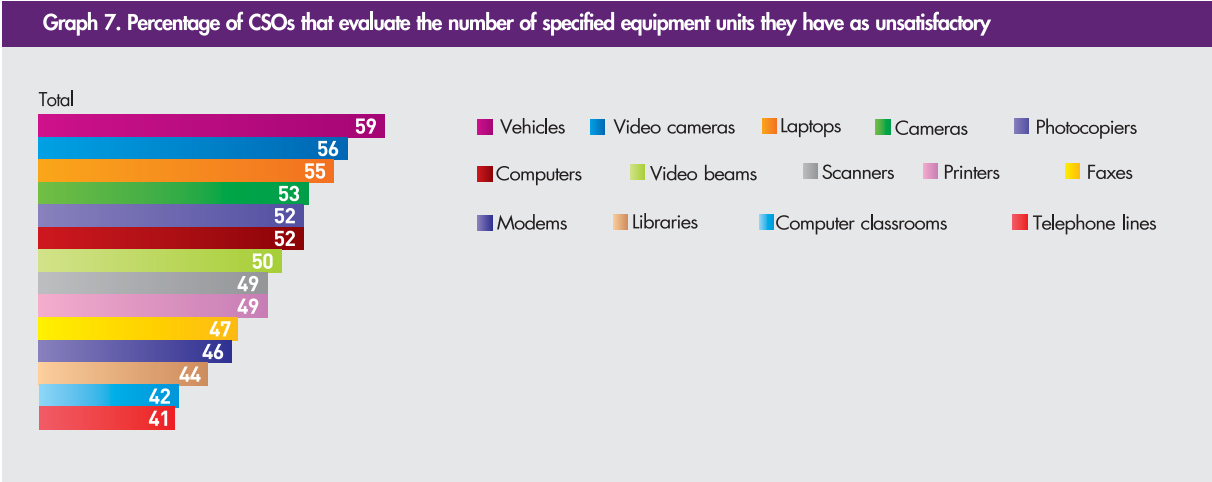


The situation in terms of equipment is rather poor, so that on average 30% of CSOs have neither a computer nor a laptop, and in most of the cases, one computer/laptop is shared among a large number of persons in the organization. The worst situation is in CSOs involved in culture, media and recreation, where as many as 44% have no computer/laptop, similarly to CSOs dealing with the environment (43%). The best situation, with an average of one or more computers/laptops per person, is in CSOs involved in development and housing (38%) and in CSOs dealing with issues of law, advocacy and politics (35%).



The average number of equipment units ranges from 1.7 computers, 1.4 libraries to 1.1 telephone lines per CSO. All other values are below 1, whereby the relatively best situation is in CSOs dealing with health-care, while the worst is in CSOs involved in the field of culture, media and recreation. It is interesting that most of the CSOs involved in the field of law, advocacy and politics have libraries (7.3 on average).

As expected, on average the best equipped are the big CSOs and the ones with the highest budgets, and Belgrade-based – except as regards libraries, where the largest average number is for CSOs in Southeast Serbia (11%).

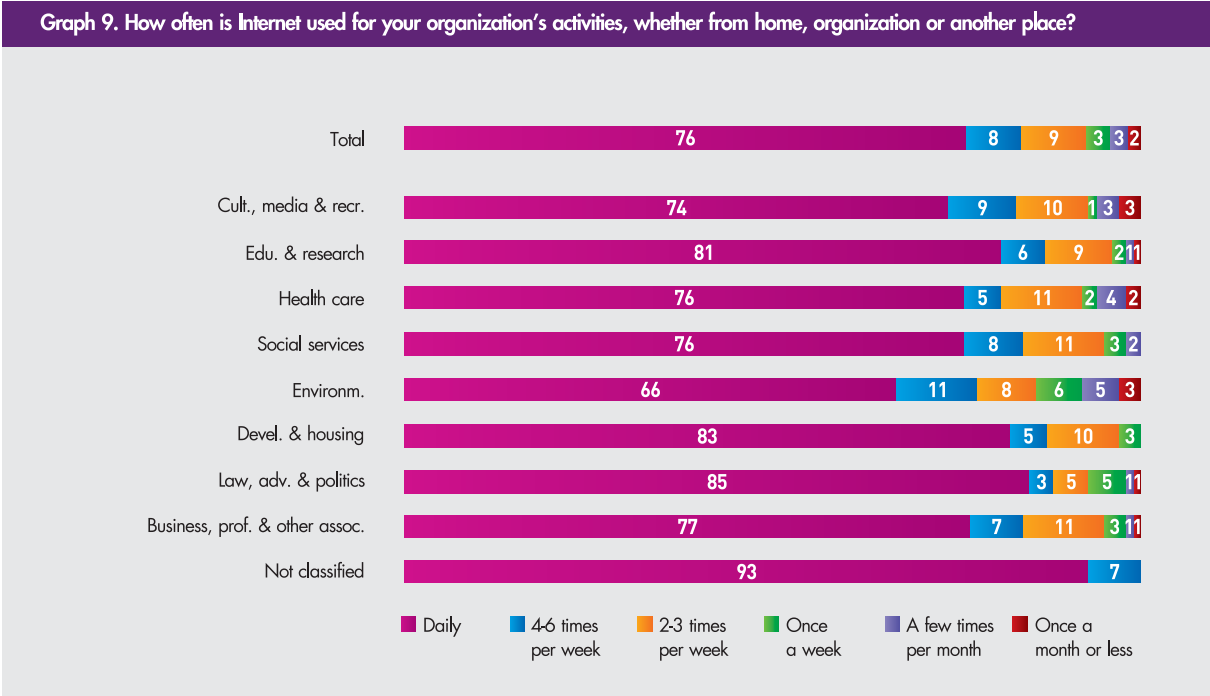


Regarding equipment, on average between 40% and 60% of CSOs are dissatisfied with at least some items of the equipment needed for their work. They are mostly dissatisfied because of lack of vehicles (60%), video cameras (56%) and laptops (55%). Most dissatisfied with lack of vehicles are CSOs involved in the field of healthcare (72%) and law, advocacy and politics (71%); CSOs that are not classified show the highest level of dissatisfaction with reference to video cameras and laptops (68% each). On average, the best equipped are business/professional and other associations, given that their level of dissatisfaction regarding all the aforementioned equipment parts is the lowest.



One third of CSOs have no access to Internet, which corresponds to the finding that one third of CSOs do not have a computer/laptop in their organization. CSOs involved in the field of law, advocacy and politics have the highest access to Internet (87%), while those dealing with the environment have the lowest access (53%).

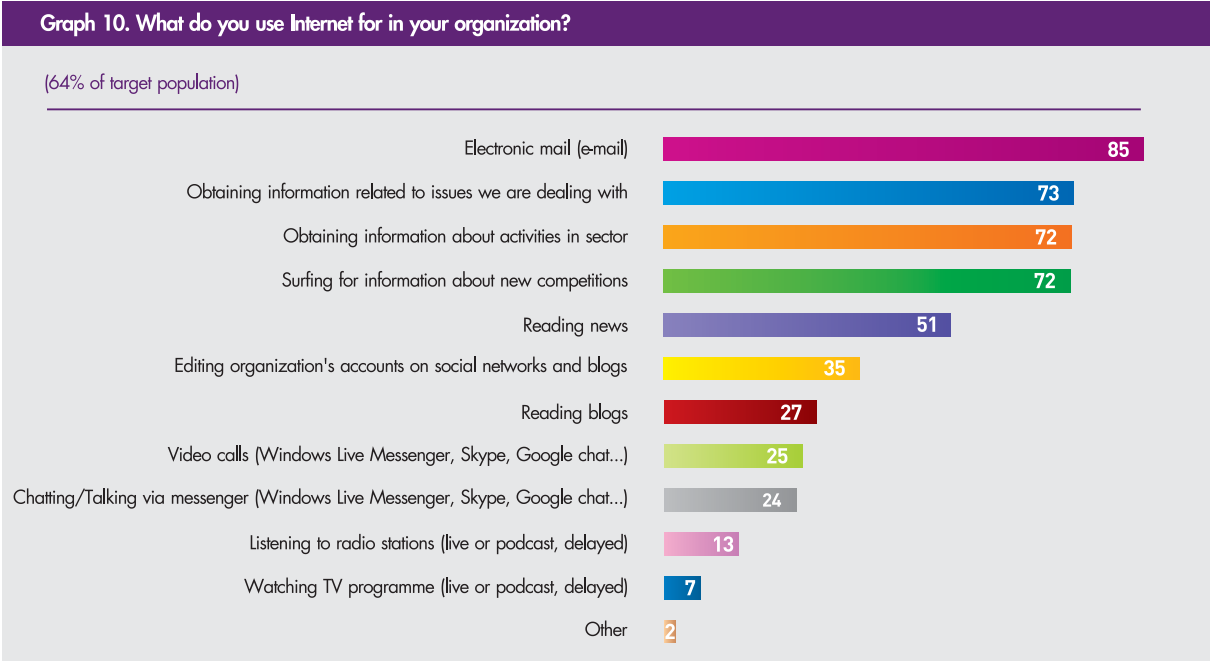
As expected, the access to Internet grows proportionally with the age of the organization, its size and budget. The oldest CSOs have access to Internet in 54% of cases, while the newest ones have it in 74% of cases, while some 61% of the smallest and 85% of the biggest CSOs have such an access, along with 66% of those without a budget and 90% of those with a budget over €100,000. With reference to regions, the largest number of CSOs having access to Internet is in Belgrade (83%), and the smallest in Central Serbia (46%).



The majority of CSOs use Internet daily for the business activities of their organization; however, this is often carried out at some place outside the organization (76% use Internet daily for work, and 64% have access to Internet).

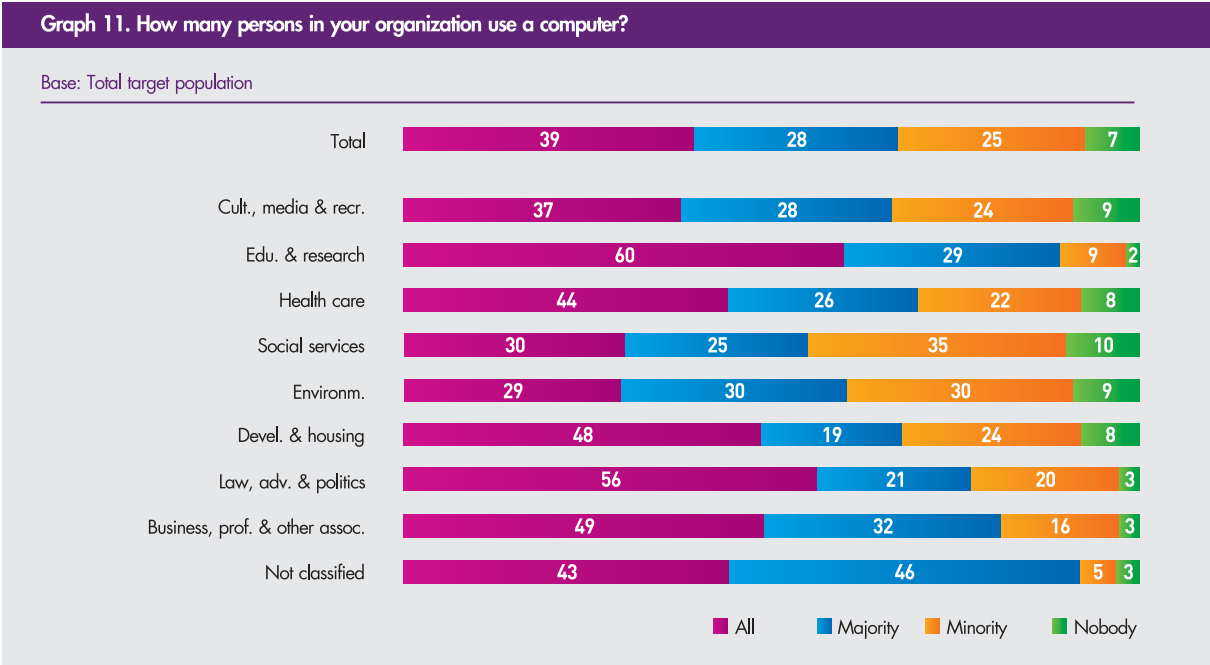
In the forefront of Internet usage are the unclassified CSOs (93%), as well as the ones involved in the field of law, advocacy and politics (85%), while CSOs dealing with environmental issues fall within the category of the lowest usage (66%).

Daily use of Internet is directly connected to the founding year, with from 67% of the oldest CSOs to 81% of the newest; other characteristics (size and budget) do not have an essential impact on daily use of Internet, except in the regions; thus in Vojvodina, only 67% of CSOs use Internet daily, unlike 85% of CSOs in Belgrade or 80% in Central Serbia.



Internet is mainly used for e-mail communication (85%), informing on topics addressed by the CSO (73%), informing on activities in the sector (72%), as well as surfing through information on new Calls for Proposals in application for Grants (72%).

There are no significant deviations with regard to the specified primary use of Internet between different fields of work. However, certain differences are present in the use of new technologies (social networks or blog reading). It is noticeable that CSOs involved in culture, media and recreation blaze the trail in using these media (45% manage accounts on social networks and 36% read blogs), as well as CSOs involved in the field of law, advocacy and politics (45% and 38%), unlike CSOs involved in the field of social services (26% and 20%) and environment (25% and 16%), which use social networks and blog reading less than other CSOs.



In 67% of organizations, at least the majority (if not all) of the people use the computer. Out of that percentage, the computer is used to the greatest extent by all or the majority in CSOs involved in the field of education and research (89%), or in CSOs that are not classified anywhere (89%), while it is to the smallest extent used in CSOs dealing with social services (55%) or environment (59%).

The newer the CSO the more people use the computer; all or the majority in 46% in the oldest CSOs and 85% in the newest ones. The size of the CSO has no significant impact on the number of people using the computer, so that it is used evenly both in very small organizations (71%) and in the biggest ones (73%). It is interesting that the computer is used to the greatest extent or by the majority in CSOs without budgets (83%); while, by regions, computers are used by the most people in Belgrade CSOs (84%), as well as in Southeast Serbia (72%).

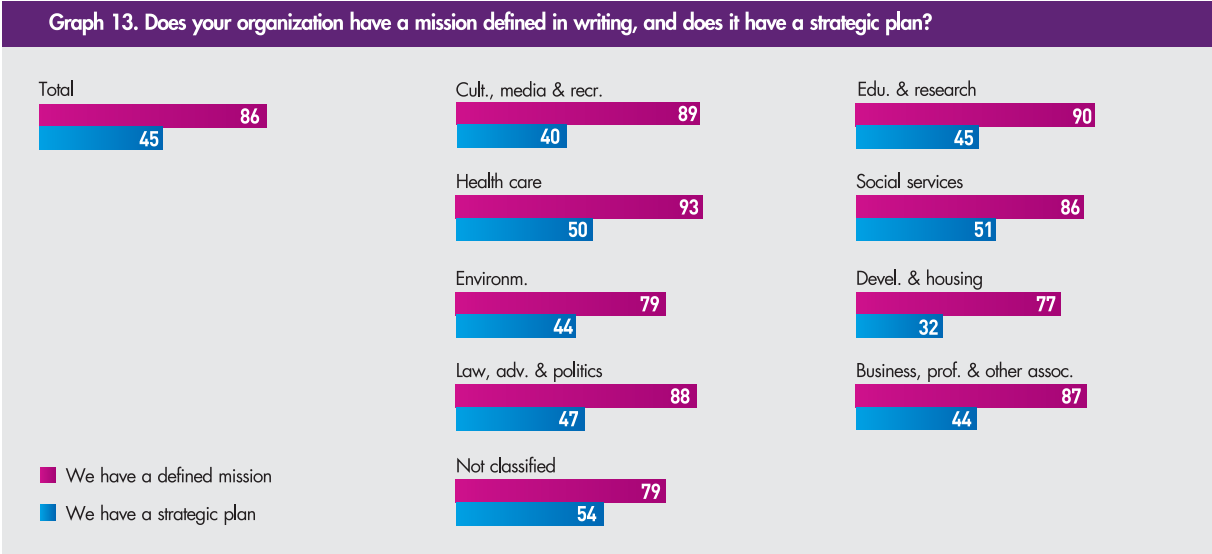


In more than one half of organizations (51%), at least the majority (if not all) of the people in the organization speak at least one foreign language. In CSOs involved in the field of education and research, 77% of people (all/majority) speak at least one foreign language, followed by CSOs involved in the field of law, advocacy and politics (63%) and in business/professional and other associations (63%); in CSOs rendering social services and dealing with environmental issues, 35% or 39% of people (all/majority) speak at least one foreign language.

The number of people speaking at least one foreign language (all/majority) grows proportionally with the age of the organization, from 33% in the oldest ones to 65% in the newest ones; the size of the CSO by number of active people does not have an essential impact on this characteristic, but it is interesting that, regarding this issue, CSOs without a budget are in the forefront, where definitely the largest number of persons speak a foreign language – no less than 70%, which is far more than, for instance, in CSOs having a budget over €100,000 (54%). In terms of region, in 74% of CSOs in Belgrade and 25% CSOs in Western Serbia, all/majority speak at least one foreign language.

Mission, areas of work and activities

Mission and strategic planning



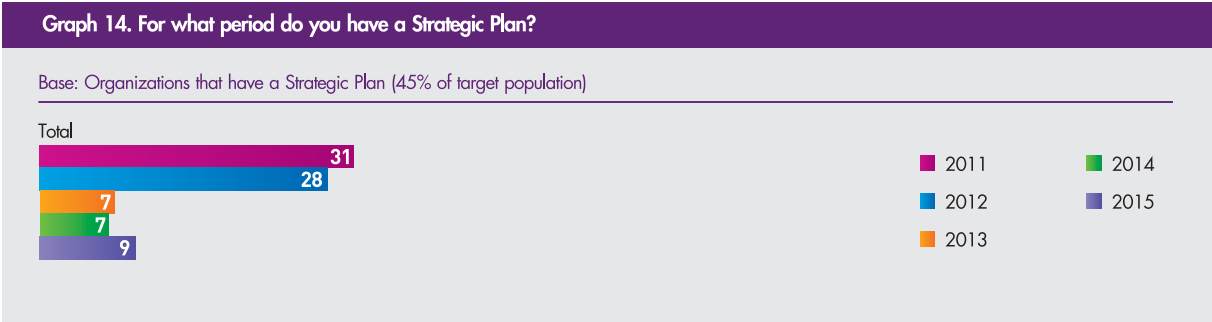
The majority of CSOs (86%) have the mission of their organization in writing. However, on average less than one half (45%) have a strategic plan. Regarding the primary field of work, the largest number is profiled in the field of healthcare (93%), while the smallest number is in the field of environmental issues, among which 14% do not have a defined mission.

The majority of CSOs with a defined mission belong to those founded in the period between 1990 and 2000 (91%), having 6-10 active people in the organization (89%), with a budget from €20,001 to €100,000 (89%), and among CSOs in the territory of Belgrade (89%).

Less than one half of the interviewed organizations (45%) stated that they have a documented strategic plan in document form. Among them, the majority are those not classified anywhere (54%) as well as those rendering social services (51%), while the lowest percentage of those in possession of a strategic plan is to be found with organizations dealing with development and housing (32%).

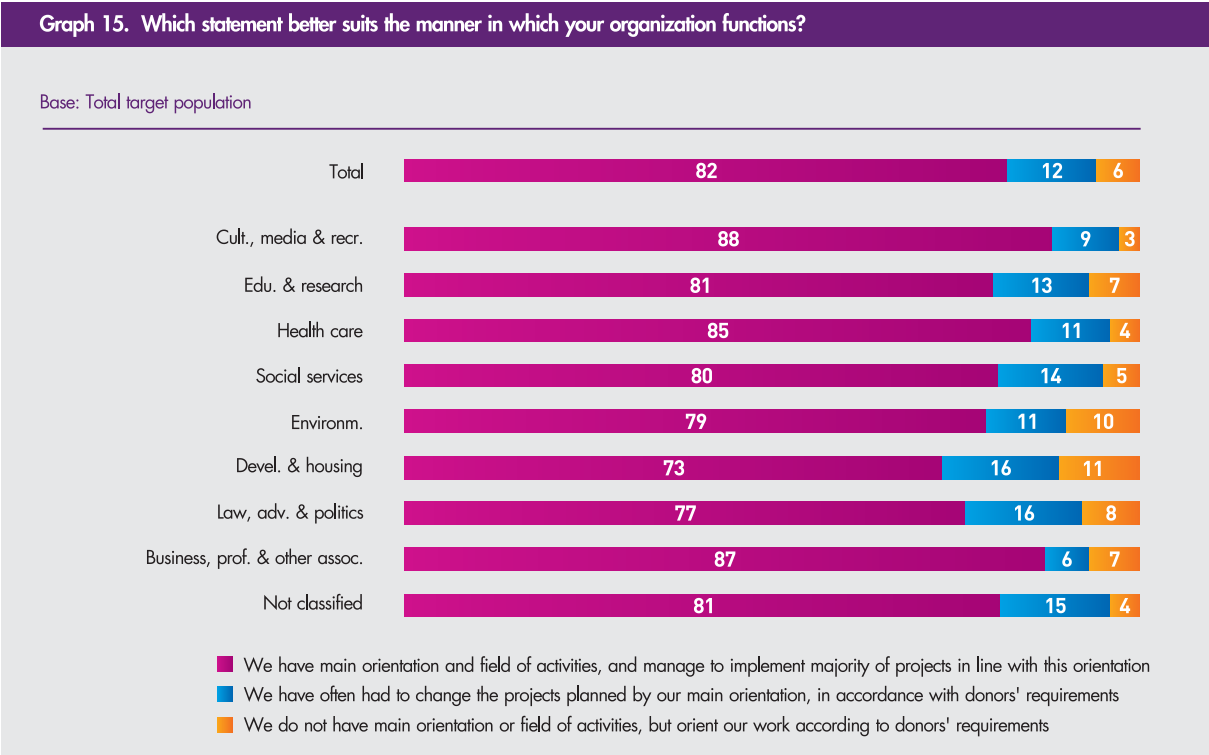
The majority of organizations having this document are the oldest ones (56%), CSOs with 11-20 actively engaged persons (53%), CSOs with a budget over €100,000 (58%) and CSOs based in the territory of Eastern Serbia (51%).

Regarding organizations that do not have this document, the majority are CSOs registered in the period 2001-2009 (60%), very small organizations (60%), those that did not have a budget for 2010 (69%) and CSOs based in the territories of Belgrade and Eastern Serbia (60% each).



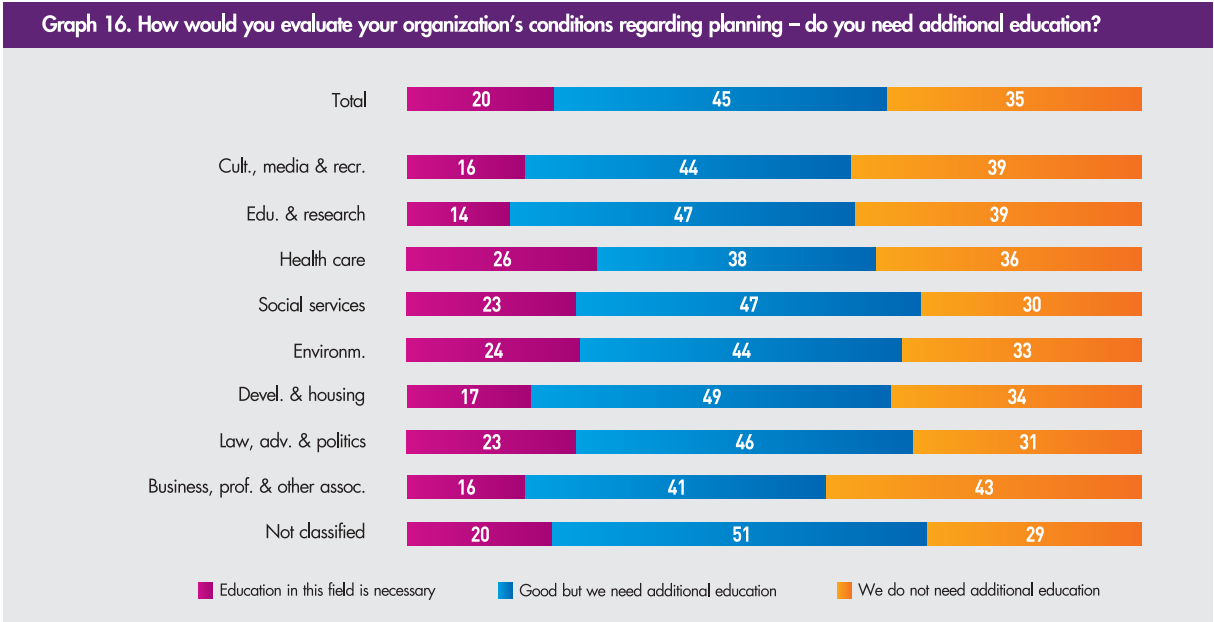
The majority of organizations having a strategic plan (45%) have it for 2011 and 2012, while only a small percentage have a plan for any of the following years.

The greatest percentage (31%) was concerned with strategic planning until 2011 and a somewhat smaller percentage until 2012 (28%), while long-term strategic planning was a concern of less than 10 % of CSOs (7% until 2013 and 2014; 9% until 2015 etc.), whereby the CSOs most concerned with strategic planning till 2014 are those dealing with social services (13%), while organizations dealing with the environment (14%) had made strategic plans up to 2015.



The great majority of CSOs (82%) implement 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 donors' requirements (12%), while 6% do not have a main orientation and are entirely oriented towards donors' requests. Among those having a main orientation and area of work are mostly CSOs involved in culture (media/recreation (88%); CSOs dealing with the field of development and housing or law, advocacy and politics (16% each) often adjust to donors' requests; among those who do not have a main orientation, the majority deal with development and housing (11%).

Among organizations having a main orientation, the majority belong to old CSOs that are large both in number of active people and in budget (90% each); they are mainly based in the region of Central Serbia (89%). The majority of organizations that often adjust their projects to donors' requirements are CSOs from Southeast Serbia (19%), while the brand new CSOs (10%) mostly do not have a main orientation, along with the smallest ones (6%), those without budget (12%), and CSOs from Eastern Serbia (18%).



When evaluating their organizations with reference to planning, the majority of CSOs (65%) stated that they needed education in this area. The majority of them are organizations that are not classified anywhere (71%), as well as those rendering social services (70%). Among those claiming that they do not need additional education, the majority are business/professional and other associations (43%).

The greatest percentage of organizations claiming that they do need education are those founded in the period 2001-2009 (23%), while the smallest percentage belong to those registered in the period 1990-2000 (13%). Most often, it concerns very small organizations (24%), and those without a budget (27%). Expressing a need for the necessary education, it was mainly organizations from Eastern Serbia (30%), while the fewest were those from Vojvodina (18%), which tells us about the civil sector capacities in these regions.

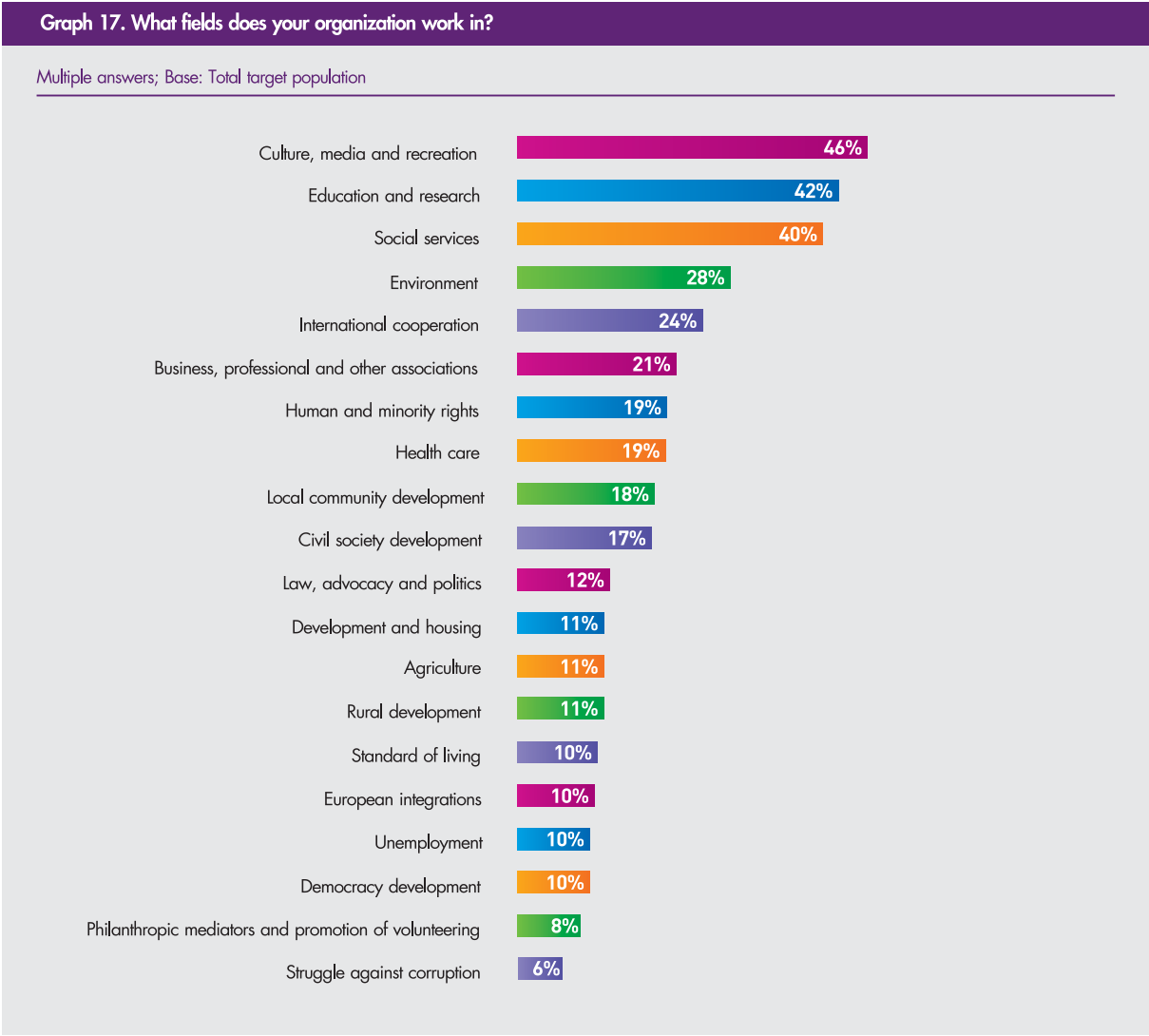
Regarding CSOs that evaluated their situation in this matter as good but still expressed the need for additional education, the majority were established in the period between 1990 and 2000 (49%). These are mainly big organizations (61%) and organizations with budget over €100,000 (49%), as well as CSOs from Eastern Serbia (55%).

CSOs claiming not to have a need for this type of education are mainly the oldest organizations (40%), the medium-sized ones (39%), with high budgets (42%), as well as Belgrade-based CSOs (39%).

Area of work

As already stated in the introductory section, this is the first research on civil society organizations in Serbia using the International Classification of Nonprofit Organizations (ICNPO). Due to the lack of domestic classification, the main problem in previous research was how to classify associations, because target groups, general fields of activity and particular activities were often confused. Additionally, the Law on Associations refers to a similarly vaguely defined “area of goals achievement”, whereby associations may formulate quite freely that binding part of the Statute, which certainly further complicates any attempt at standardization. By introducing the international classification, we have made possible not only standardization but also comparability with data from other countries, and ipso facto gaining insight into the level of the development of the civil sector in Serbia as compared to those in other countries.

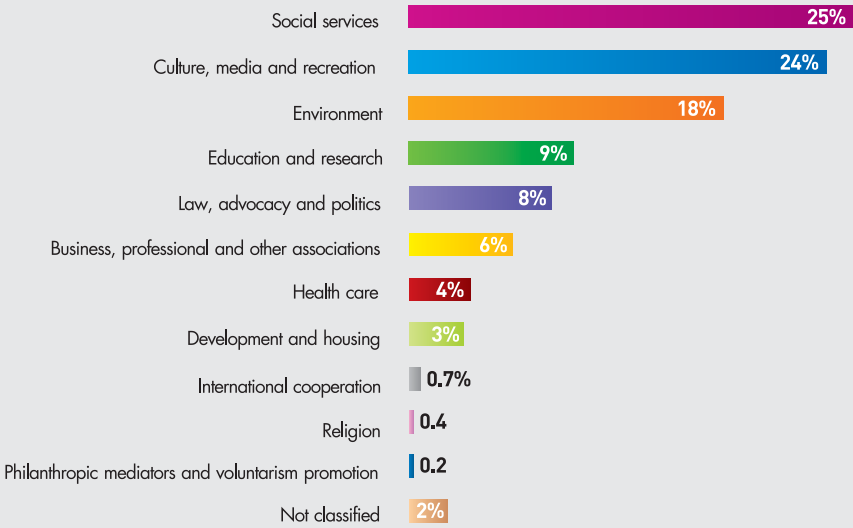
Please find below the graph outlining data on all areas of the work of organizations.



The majority of organizations (46%) are involved in culture, media and recreation, while a somewhat smaller percentage of organizations deal with education and research (42%), social services (40%), environment (28%), etc. The smallest percentage of organizations is involved in the struggle against corruption (6% only).

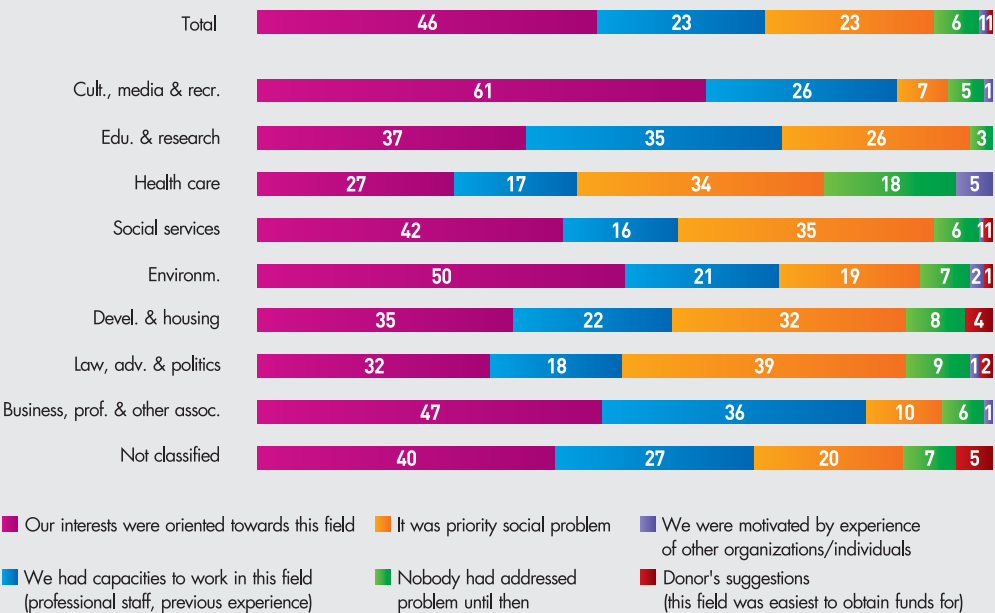
CSOs involved in culture, media and recreation at the same time deal with education and research (44%), as well as international cooperation (30%). Among CSOs dealing with education and research, a large number of CSOs also deals with culture, media and recreation (39%), social services and international cooperation (27% each). CSOs dealing with social services often deal with healthcare as well, and vice-versa, while CSOs involved in the field of law, advocacy and politics often deal with human and minority rights (75%) or education and research (55%).

Graph 18. Primary activity area: Percentage of CSOs that specified the given area as primary



Civil society organizations, whose primary fields of work are social services, culture, media and recreation, and the environment, account for more than 65% of registered CSOs. Social services are mainly dealt with by organizations established before 1989 (45%), those having 11 to 20 active people (33%), and those with a budget from €20,001 to €100,000 (34%), as well as CSOs from Western Serbia (33%). Involved to the greatest extent in culture, media and recreation are some quite new organizations, registered after 2010 (26%), with a maximum of 5 persons (27%), organizations with very small budgets (up to €1,000, 28%), and those from Vojvodina (28%). Environmental issues are dealt with mainly by quite new organizations, registered since 2010 (24%), with up to 5 active people (22%), without budget (26%), from Eastern Serbia (30%). It is interesting that only 5% of organizations with a budget over €100,000 had environmental issues as their primary field of work. Between organizations dealing with education and research there are no significant differences. Dealing with the field of law, advocacy and politics is a relatively new activity, because before 1989 only 1% of organizations specified this area as primary, while on average 10% to 11% of organizations registered since 1990 up till now deal with the issue as primary.

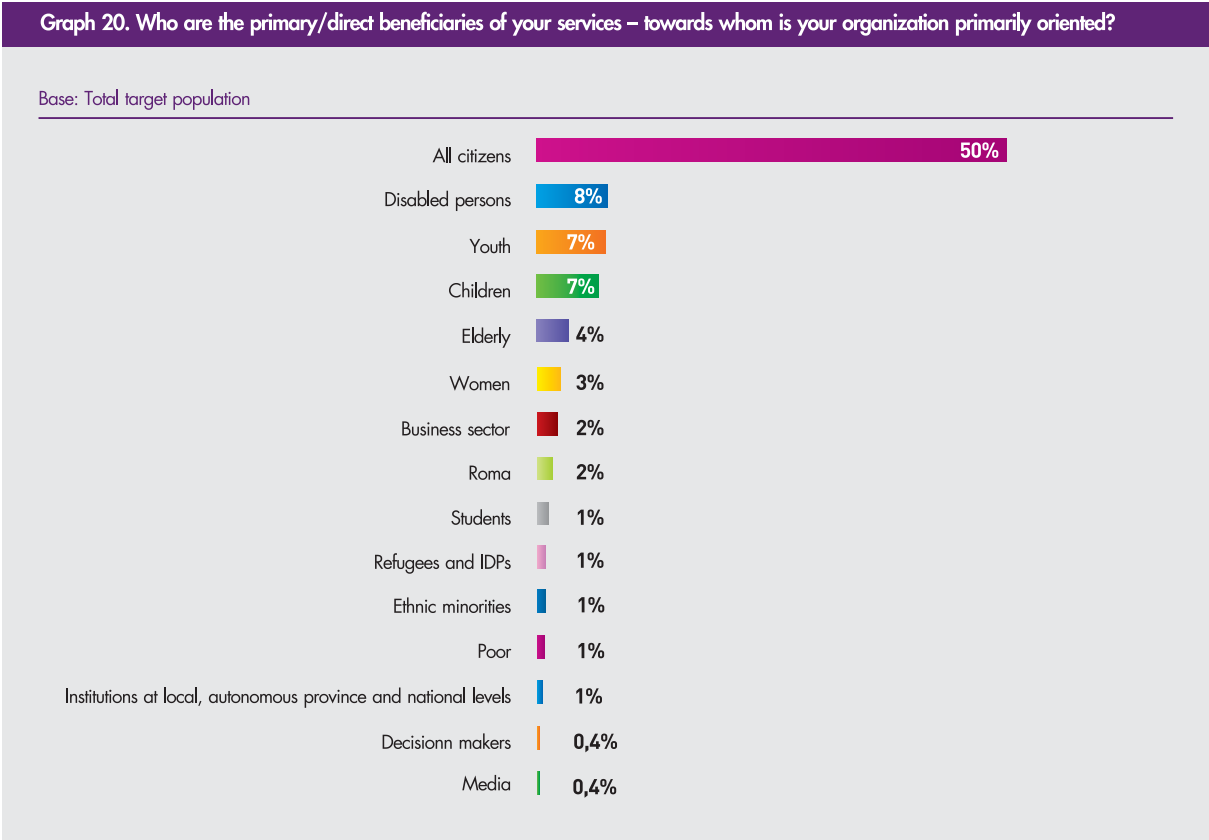
Graph 19. What was your main reason in deciding for this field of activity?



Reasons for selecting the primary field of work vary among CSOs, but there are three dominant reasons: the largest number of CSOs (46%) answered that it coincided with their sphere of interest, 23% said that the selection was in conformity with their capacities, while 23% of CSOs recognized their field as a priority social problem.

CSOs involved in culture, media and recreation followed their interests to the greatest extent (61%); business/professional and other associations (36%) and those dealing with education and research (35%) decided for the primary field of work in conformity with their capacities; CSOs dealing with law, advocacy and politics for the most part chose their primary field of work because they recognized it as a priority social problem (39%), similarly to those rendering social services (35%).

Beneficiaries and target groups

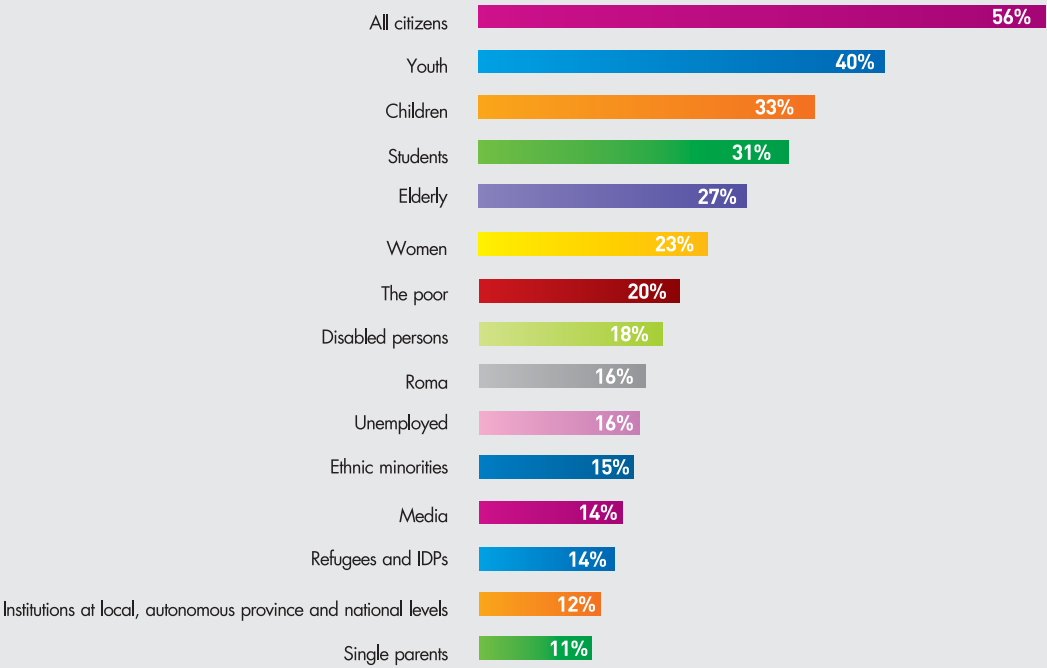


One half of CSOs specified all citizens as their beneficiaries, 8% specified disabled persons, 7% specified youth or children (the same percentage for each of them), 4% specified the elderly, etc. Those who specified all citizens as their primary beneficiaries are mainly involved in the environment (78%). CSOs dealing with the field of social services, besides all citizens (32%), specified as primary beneficiaries disabled persons (26%) and the elderly (10%). Children and youth as direct beneficiaries are to the greatest extent specified by CSOs involved in education and research (16% each).

There are no significant differences between CSOs, except for the fact that CSOs whose direct beneficiaries are all citizens are most represented in the territory of Vojvodina (60%); also, dealing with disabled persons are mainly CSOs founded before 1989 (11%), and those with budgets from €5,000 to €20,000 and over €100,000 (11% each).

Graph 21. Who, in a larger sense, are the beneficiaries of your services – target groups?

Multiple answers; Base: Total target population



The most frequent target groups are all citizens (56%), youth (40%), and children (one third of CSOs).

If one considers areas of work, CSOs that have all citizens as their target group are mainly those dealing with development and housing (74%), while the fewest are those involved in education and research (42%). As expected, their target groups, in wider terms, are youth (55%), children (44%), and students (48%). Mainly oriented towards elderly persons are the CSOs rendering social services (39%), which are equally involved with disabled persons (39%), and the poor (30%). It is interesting that the Roma are a target group of CSOs dealing with law/advocacy/politics (30%), education and research (24%), and social services (23%), which proves how sensitive are the issues involving this marginalized group. Organizations dealing with law/advocacy/politics deal much more than others with the unemployed (28%) and members of national minorities (34%), as well as institutions (25%). The business sector is to the greatest extent a target group dealt with by business/professional and other associations (34%).

There are no major differences between CSOs regarding the founding year, size and budget. In terms of region, organizations having all citizens as their target group are most represented in the territory of Eastern Serbia (63%). Those whose target group are mainly students are most represented in the territory of Belgrade (40%), which is in line with Belgrade being the largest University centre in Serbia. Organizations whose target group are women are mainly based in the territory of Southeast Serbia (30%), which may serve as an indicator of the position of women and the volume of discrimination against women in that region. The Roma are in most of the cases a target group of CSOs in Southeast Serbia (29%).

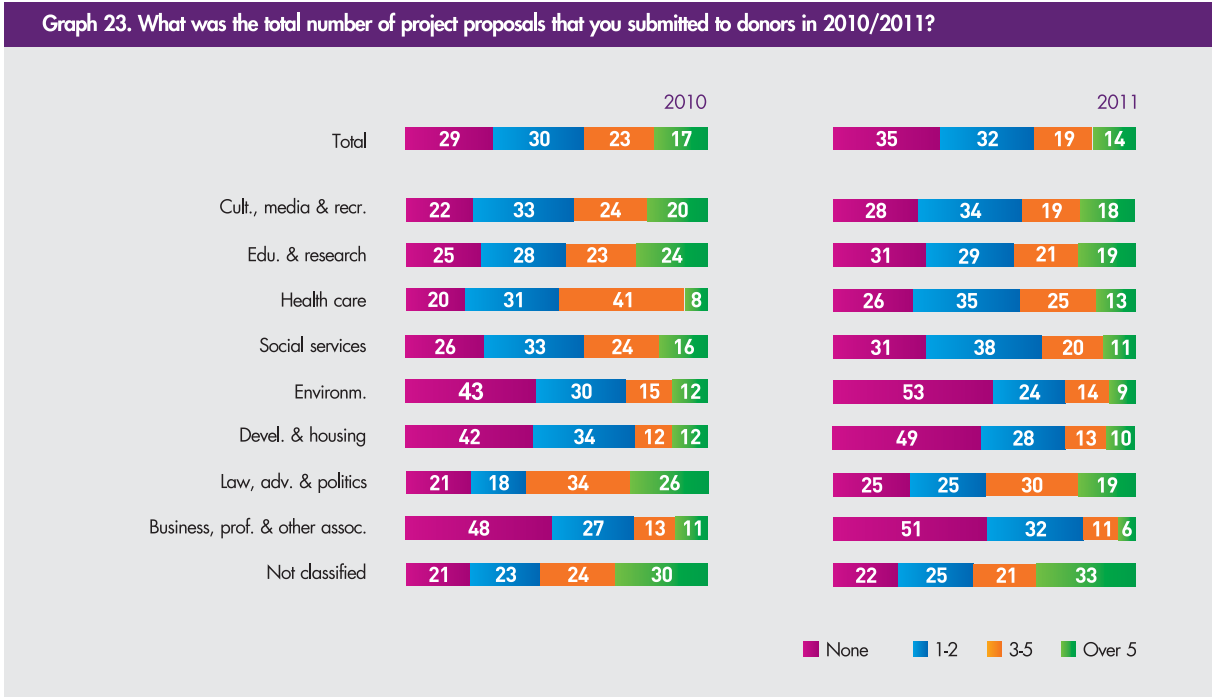


The most frequent type of activities among the interviewed organizations is extra-institutional/additional education – seminars, trainings, workshops, courses (50%), actions in the local community (49%), advising and rendering different professional services (33%), networking and cooperation (28%), etc.

Regarding primary fields of work, mostly dealing with extra-institutional/additional education are CSOs involved in education and research (77%), healthcare (62%) and law/advocacy/politics (59%).

Actions in the local community are the most frequent activity of organizations dealing with environmental issues (56%), while advising is mainly dealt with by organizations whose primary field of work is healthcare (65%). Networking and cooperation are most represented in CSOs dealing with law/advocacy/politics (43%).

The majority of CSOs dealing with extra-institutional/additional education (60%) are in Belgrade. Actions in the local community are the most current type of activity of CSOs in the territory of Vojvodina, Eastern and Southeast Serbia (55% each), while they are least organized by large CSOs and those without a budget (36% each). Mainly involved in advising and rendering different professional services are CSOs having a budget of over €100,000 (46%), and those which are Belgrade-based (43%). Networking and co-operation are the least dealt with by organizations founded before 1989 (17%), and the most by those having a high budget (37%).



30% of organizations stated that they submitted 1 or 2 projects in the course of 2010, 23% of organizations submitted between 3 and 5 projects, and 17% of organizations submitted more than 5 projects, while 29% of organizations answered that they did not submit any projects to donors.

The number of projects submitted to donors varies between CSOs, depending on their fields of activity. However, on average, the smallest number of projects was submitted in the field of professional associations (48%) and the environment (43%). Among organizations that submitted more than 5 projects, the majority deal with law/advocacy/politics (26%), or are not classified (30%). CSOs dealing with healthcare mainly submitted 3-5 projects (41%).

In terms of the founding year, CSOs that did not apply for any project funding in 2010 are mainly in the group of those who registered that very year or in 2011 (40%). These are mostly small organizations (34%) that did not have a budget for 2010 at all (57%). In terms of territory, such CSOs are mainly based in Western Serbia (44%).

Among CSOs that applied for more than 5 projects are mainly those with experience, or those established between 1990 and 2000 (24%); these are principally large organizations with more than 20 persons (31%), with a budget over €100,000 (46%), and to the greatest extent based in the territory of Belgrade (23%).

In the course of 2011, 35% of interviewed CSOs answered that they did not submit any project, 32% applied for 1 or 2 projects, while 33% of organizations applied for 3 and more projects.

Among those that did not apply for any project, the majority are CSOs dealing with environmental issues (53%), while the fewest are not classified organizations (22%). However, these organizations are the most represented ones among CSOs that applied for 3 or more projects (54%).

In the category of CSOs that did not apply for any project during this period, the founding year does not play any significant role, but the size does: no less than 41% of small CSOs (having up to 5 people), or 52% of those without a budget, did not apply for any project in 2011, which may point to the lack of people or of project-writing abilities in those CSOs. These organizations are mainly based in the territory of Western Serbia (47%).

Among CSOs that were more productive in this period, i.e. that applied for 3 or more projects, the majority are experienced organizations established between 1990 and 2000 (42%). Also, these are CSOs with developed capacities and resources, or big CSOs (with more than 20 people, 44%) and with high budgets (over €100,000, 59%). The majority of these organizations are Belgrade-based (38%).

The number of projects submitted to donors decreased considerably in 2011 as compared to 2010. The percentage of organizations that did not apply for any project increased, on average, by 7%, while the percentage of organizations that applied for 3-5 projects decreased, on average, by 4%, and those that applied for 5 or more projects decreased by 5%. Nevertheless, these data may to a certain extent be explained by the fact that the survey was conducted in the middle of the year, so there still remains enough time to write and apply for more projects.



The percentage of organizations that were not granted any project increased, on average, from 20% in 2010 to 29% in 2011.

In 2010, the largest number of interviewed organizations declared that they were granted 1 or 2 or 3 projects (30% each), while 20% of interviewed organizations declared that they were granted 4 or more projects. The same percentage (20%) answered that they were not granted any project.

Among organizations that were granted 4 and more projects, the most successful ones are CSOs that deal with law/advocacy/politics (28%), unlike CSOs dealing with development and housing, the majority of which were not granted any project at all (33%).

The majority of CSOs that were granted 4 and more projects were established in the period 1990–2000 (28%), or have more than 20 actively engaged people (37%), or a budget higher than €100,000 (52%), or their head office in Belgrade (27%). CSOs that were not granted any project are mainly the newest ones (29%), or the smallest ones (up to 5 people, 27%), or without a budget (49%), or from Southeast Serbia (28%).

Regarding projects applied for in 2011, 29% of organizations answered that not one was approved, and 32% answered that only one was approved. One quarter of organizations (25%) answered that they were granted 2-3 projects, and 14% answered that they were granted 4 or more projects.

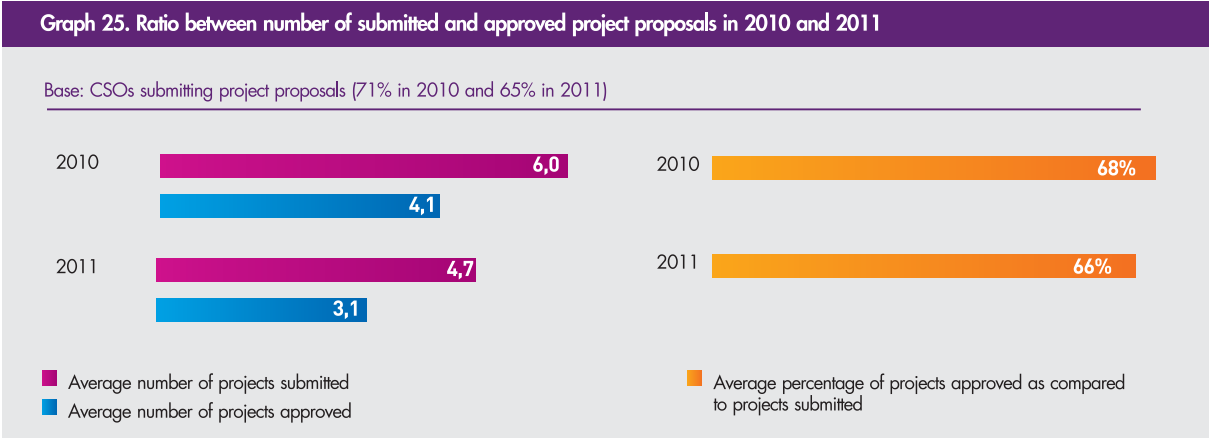
As regards the primary field of work, the most successful CSOs in 2011 were those involved in education and research (18%), and the least successful those CSOs dealing with healthcare (9%). In the category of organizations that were not granted any project in 2011, the most represented are CSOs dealing with the environment (38%) and non classified (42%) and the least represented, CSOs dealing with development and housing (18%).

As might be expected, new organizations that were formed in the past two years usually do not have any approved project in 2011 (39%). This is mainly the problem of small organizations with up to 5 actively engaged persons (33%), with low budgets (up to €1,000, 37%) and chiefly from the territory of Eastern Serbia (45%).

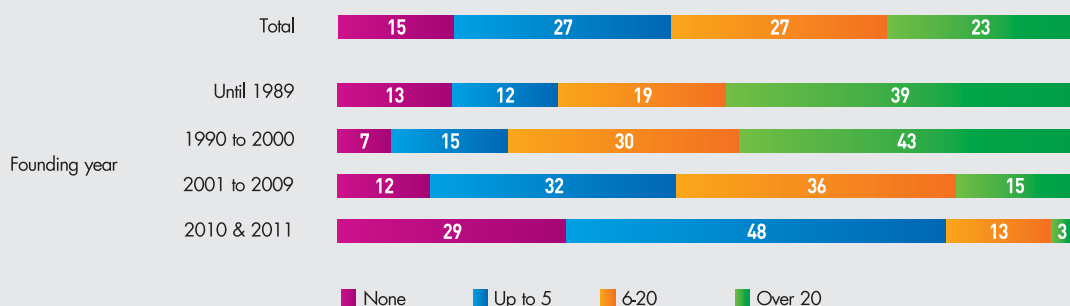
The most successful are the older CSOs (18% of CSOs established before 1989 were granted 4 and more projects), the ones that have a large number of actively engaged persons (over 20, 28%), and a high budget (over €100,000, 32%), with their head office in the Belgrade region (17%).

Just as in the case of projects submitted, the number of projects approved considerably decreased in 2011 as compared to 2010; the percentage of organizations to whom no project was approved has increased by 9% on average, while the percentage of organizations for whom 2-3 projects were approved decreased by 3%, and the percentage of organizations for whom 4 or more projects were approved decreased by 8%. This decrease, too, may to a certain extent be explained by the fact that the information refers to the middle of the current year, so that more new projects, written and applied for, and in consequence, possibly approved, may be expected.

The ratio between the projects applied for and those approved in 2010 and 2011 may be seen on the graph below, which outlines median values.

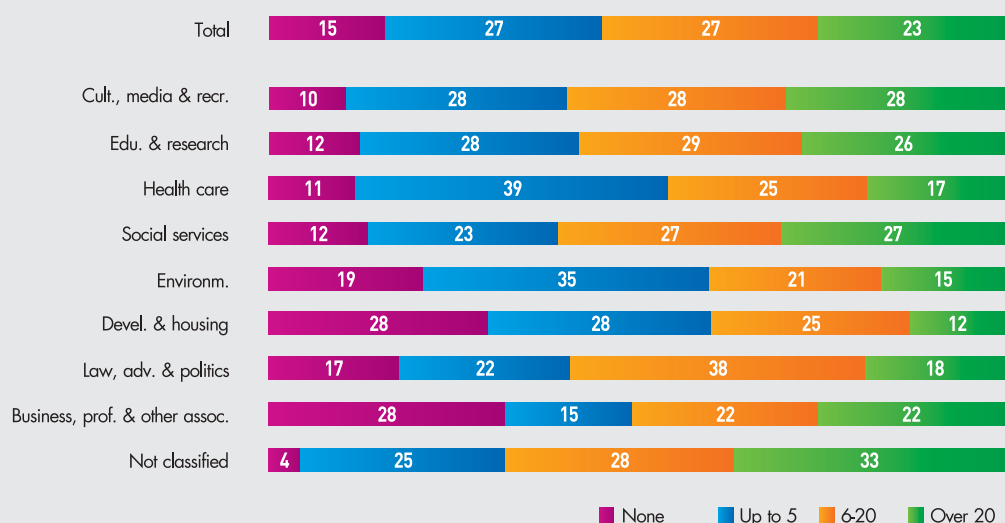


Graph 26. How many projects have you successfully implemented since the date of your foundation?



Graph 27. How many projects have you successfully implemented since the date of your foundation, according to primary area of activity?

Base: Total target population



The number of successfully implemented projects is related to the length of existence of the CSOs, but it is also striking that among CSOs founded ten or more years ago, there are some which have not produced one single successfully implemented project.

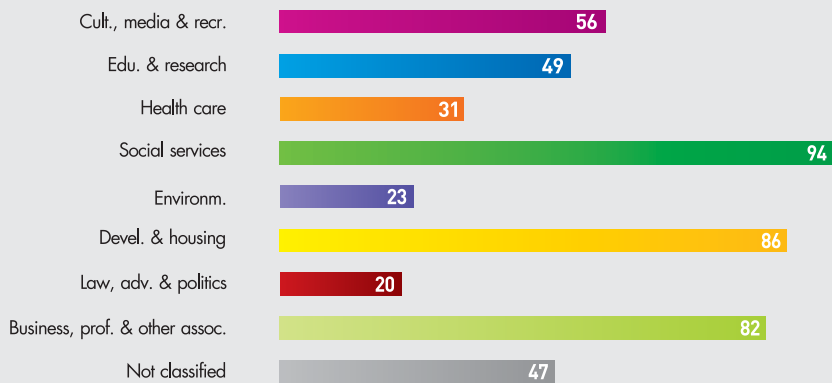
The majority of interviewed organizations (27% each) stated that since their foundation they had successfully implemented 6-20 projects and up to 5 projects, while 23% of CSOs had been successful in implementing over 20 projects. 15% of organizations answered that they have not implemented any project so far.

The most successful were unclassified organizations (33%), as well as those involved in the field of culture, media and recreation (28%), with 20 or more projects implemented. Regarding CSOs that have not implemented any project since their foundation, the majority of these organizations deal with development and housing; in this group are also business/professional and other associations (28% each).

The older and larger CSOs are the most successful ones as regards the number of implemented projects. Over 20 projects were implemented mainly by CSOs founded in the period from 1990 to 2000 (43%), which was to have been expected, because they are financed on the basis of projects to the greatest extent; here also belong CSOs with more than 20 active people in the organization (38%), with a budget exceeding €100,000 (43%), as well as CSOs from Vojvodina (31%).

Among organizations that have not implemented any project so far, the most represented are the brand new ones (29%), very small ones (18%), those with no budget (37%), and those based in Eastern Serbia (25%).

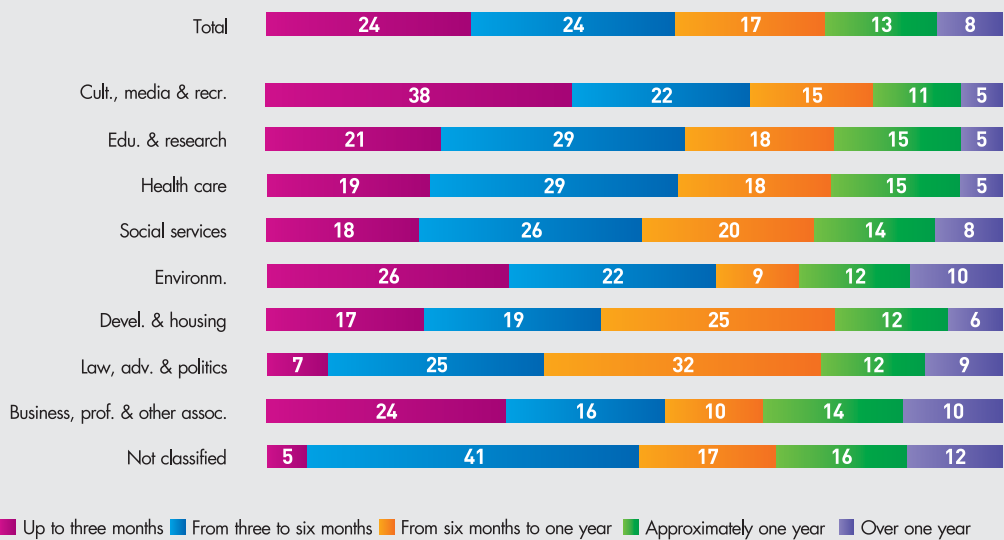
Graph 28. Average number of successfully implemented projects per CSO since foundation date



On average (taking into account absolute values), the majority of projects were implemented by CSOs in the fields of social services, development and housing and business/professional and other associations.

Graph 29. What is the average duration of the majority of projects implemented by your organization?

Base: Total target population



24% of organizations answered that their projects lasted for up to 3 months, or 3-6 months; 17% answered that they lasted from 6-12 months, and 13% said that they had one-year projects. Hence, on average, the majority of projects last for less than a year, while only 8% have projects lasting more than a year.

Among CSOs having projects that last up to one year, the largest number of organizations are involved in culture, media and recreation (75%), while the smallest number of CSOs deal with the environment (57%) or are business/professional and other associations (50%). Projects lasting one year and beyond mainly derive from CSOs that are not classified anywhere (28%), along with business/professional and other associations (24%).

In organizations whose projects last up to one year, there are almost no significant deviations with regard to the founding year, number of active persons and budget size. It is to be noted that CSOs from Western Serbia are least likely to implement projects of up to one year (50%). As expected, projects lasting about a year or longer than a year are to the greatest extent implemented by the oldest CSOs (27%), with 11 to 20 active persons (26%), with a budget of over €100,000 (35%). It is interesting that long-term projects

are implemented equally between CSOs from Belgrade (25%) and those from Western and Eastern Serbia (23% each).

Regarding ongoing CSO projects, the majority of organizations answered that they are not implementing any project (30%), 27% of CSOs are implementing one project, 17% of CSOs are implementing two projects, while 19% answered that they have 3 or more ongoing projects.

Among organizations not having an immediate ongoing project are those dealing with environmental issues (45%) are the most numerous, as well as business/professional and other associations (41%), while the fewest are unclassified organizations (16%). CSOs that have 3 or more ongoing projects are mainly unclassified CSOs (35%), as well as organizations dealing with law, advocacy and politics (27%), while the fewest are CSOs that deal with the environment (8%).

As expected, the newest CSOs (38%), the smallest (with up to 5 actively engaged people, 38%), and those without a budget (45%) are the ones that have no ongoing projects. In terms of regions, the majority of CSOs without ongoing projects are in Western (45%) and Southeast Serbia (40%). Among CSOs currently implementing 3 or more projects, the majority are organizations founded between 1990 and 2000 (28%), big organizations with more than 20 engaged persons (31%), with a high budget exceeding €100,000 (42%). These organizations are most represented in the territory of Belgrade (26%).



Complex donors' requirements (27%), lack of information on Calls for Proposals/competitions (26%) and insufficient experience in project-writing (22%) are the most frequent problems faced by CSOs when competing for projects.

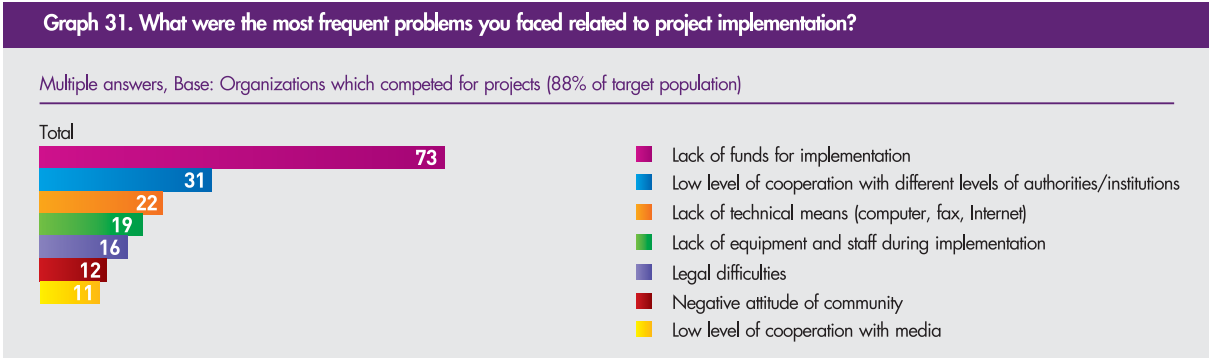
Organizations dealing with law, advocacy and politics are the most numerous among CSOs that see their problem as demanding and complex donors' requirements (40%). The fewest references to difficulties with demanding and complex donors' requirements come from CSOs dealing with environmental issues or business/professional and other associations (16% each). Lack of information on competitions is most evident among unclassified CSOs (35%), as well as CSOs rendering social services (30%). The latter also believe, to a greater extent than other CSOs, that they do not have sufficient experience in project writing (26%). CSOs involved in culture, media and recreation see the main problem as lack of technical assets (29%). It is interesting that among CSOs that have never applied for projects the majority are business/professional and other associations (25%).

The CSOs that to the greatest extent find that their biggest problem lies in demanding and complex donors' requirements were mainly founded in the period 2001-2009 (29%), or have more than 20 persons (29%), or a budget between €20,000 and €100,000 (32%). This is somewhat surprising, because one would not expect a large and experienced organization to encounter that type of problem, owing to the size of their budgets and the number of people they can afford to engage. In terms of regions, this problem is recognized to the greatest extent among CSOs in Southeast Serbia (31%) and Vojvodina (30%).

There are no significant differences between CSOs regarding lack of information on competitions and possibilities to apply. The problem with insufficient experience in project writing is, as expected, mainly experienced by new organizations (26%), small ones (up to 5 persons, 27%), with a budget of up to a €1,000 (26%). This problem was especially recognized by CSOs in Eastern Serbia (31%).

Lack of technical equipment (computer, fax, Internet) is more or less equally present in all CSOs, regardless of their characteristics, with the exception that it is more noticeable in the regions of Eastern (36%) and Central Serbia (34%).

It is interesting that the problem of lack of professionalism or professional staff was mainly encountered by CSOs founded in the period between 2000 and 2009 (15%), those having more than 20 engaged persons (15%), with budgets exceeding €100,000 (15%). This problem was especially recognized by CSOs in Southeast Serbia (22%).

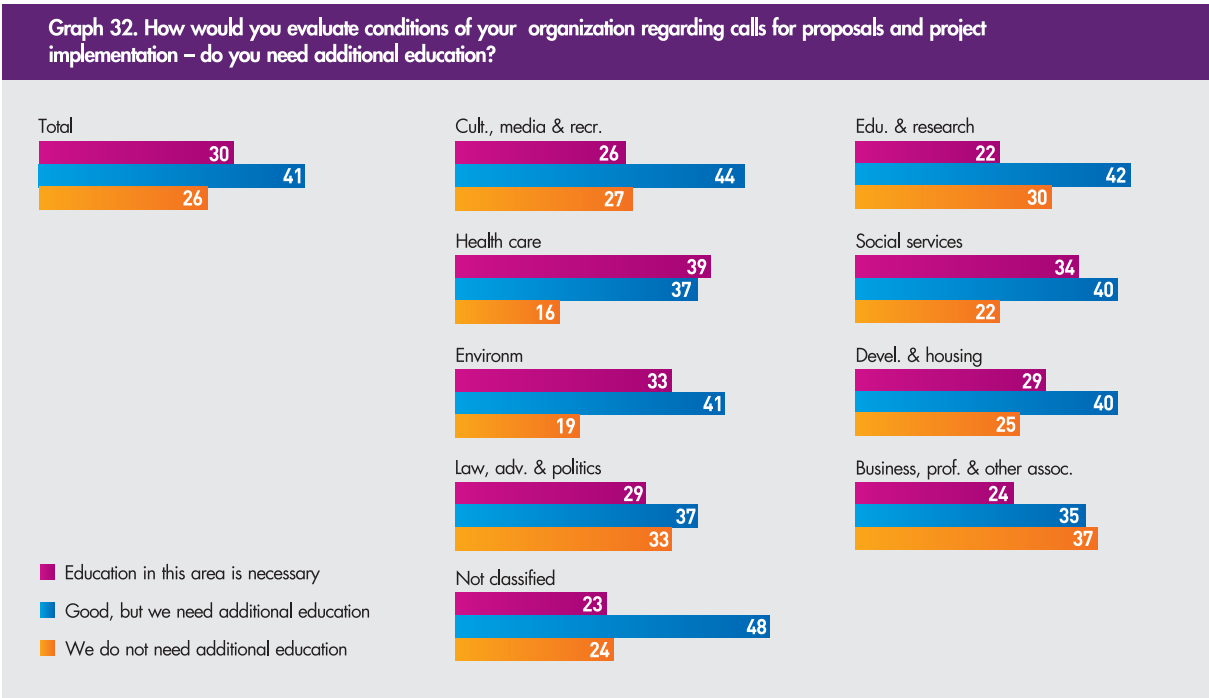


Lack of financial assets is a dominant problem that the great majority of CSOs (73%) encounter when implementing a project. Among them, the majority are CSOs dealing with media, culture and recreation (82%). Among the 31% of CSOs that have most often faced the problem of low level cooperation with institutions, the largest number are unclassified CSOs (58%), as well as those dealing with law, advocacy and politics (36%). Among the 22% of CSOs whose main problem has been lack of technical assets, the most represented are CSOs dealing with media, culture and recreation (30%).

The negative attitude of the environment was specified as a dominant problem in project implementation by 12% of organizations. Among them, organizations involved in healthcare (24%) and CSOs dealing with law, advocacy and politics (23%) are in the forefront. CSOs rendering social services are the most likely to have a problem with the lack of professional staff (12%), while lack of motivation of members is a problem most represented in business/professional and other associations (21%).

Each and all CSOs encountered the problem of lack of finances. A low level of cooperation with institutions was mainly encountered by CSOs founded between 2001 and 2009 (35%), those with small capacities both regarding the staff (up to 5 persons, 32%) and regarding budget (without budget, 37%). All these problems were mainly encountered by CSOs from Belgrade (39%).

Need for education



The majority of CSOs need education in the area of competing for and implementing projects, whereby 41% of CSOs evaluated their condition in this respect as good, but with the remark that they needed additional support. 30% of CSOs said that they needed support in this area, while 26% of organizations stated that in this respect they did not need additional support.

Among CSOs claiming that they need support in this area, the most represented are organizations dealing with the field of healthcare (39%). CSOs evaluating their condition as good but in need of additional education are mainly the unclassified ones (48%), as well as CSOs involved in the field of culture, media and recreation (44%). Among organizations not needing additional education, the most numerous are business/ professional and other associations (37%), which is interesting when taking into account previous data, which show that these associations have the largest number which have never written/applied for a project.

As expected, the organizations that mostly need this kind of support are most numerous among new CSOs which were registered in the past 2 years (35%), the smallest CSOs (35%), and those without resources (39%). In terms of regions, this kind of support is mostly needed by CSOs in Southeast (38%) and Eastern Serbia (36%).

Organizations that evaluate their condition as good but in need of additional support in this area are mainly found among CSOs established between 2001 and 2009, or with more than 20 persons (52%) or with a budget between €5,000 and €20,000 (47%). They are also most numerous among CSOs from Eastern Serbia (52%).

Among CSOs not needing additional education, the most numerous are organizations founded in the 1990s (32%), those having between 6 and 10 active persons (29%) and those whose budget ranges from €20,001 to €100,000, mainly Belgrade-based (33%).

Legal framework for CSO activities



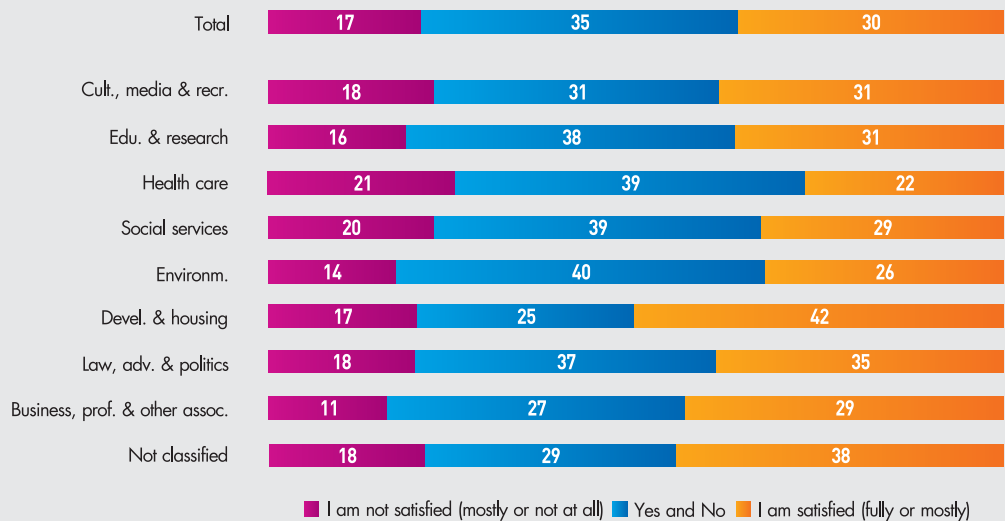
The majority of CSOs (48%) declared that they are to a certain extent or fully acquainted with the legal regulations, while 22% answered that they are in general not acquainted with legal regulations related to CSO operations.

The CSOs mainly acquainted with legal regulations for civil sector operations are those dealing with development and housing (63%), as well as CSOs dealing with law, advocacy and politics (61%); the least acquainted with these legal regulations are business/professional and other associations (34%).

There are no major differences in being acquainted with legal regulations related to the civil sector with regard to the founding year or region. Differences emerge with regard to the size and budget, since this topic seems to be mainly unknown to very small CSOs (27%) and those without a budget (28%). Among organizations claiming to be generally acquainted with the legal framework for CSO operations, most numerous are CSOs having between 11 and 20 active persons (60%), those with a budget ranging from €20,001 to €100,000 (67%), and those based in Western Serbia (61%).

Level of satisfaction with current legal regulations

Graph 34. To what extent are you satisfied with the present legal regulations referring to the CSO (Civil Society Organizations) sector?

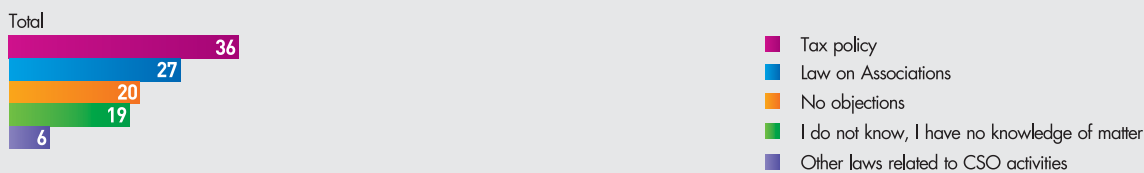


About one third (30%) of CSOs are satisfied with the legal regulations related to civil society organizations, and 17% are mostly dissatisfied, while one third have no comments. CSOs dealing with the field of development and housing are satisfied to the greatest extent (42%), while most dissatisfied are CSOs involved in the fields of health care (21%) and social services (20%).

Among CSOs mainly satisfied with the current legal regulations there are no significant differences, except that CSOs from Western Serbia (44%) are satisfied to a greater extent. In the category of CSOs mainly dissatisfied with the current legal regulations related to CSOs, in the forefront are CSO having more than 20 active persons (28%), those without a budget (26%), as well as Belgrade-based CSOs (23%).

Graph 35. What are you dissatisfied with, what do you think should be changed regarding legal regulations?

Multiple answers



Regarding legal regulations, the greatest dissatisfaction in the CSO sector is caused by the tax policy (36%) the Law on Associations (27%), while 6% of CSOs are dissatisfied with other laws relevant for the work of CSOs. 20% of organizations have no comments, while somewhat fewer CSOs (19%) say that they do not know about and are not acquainted with them.

Among organizations most dissatisfied with the tax policy, the largest number of CSOs deal with health care (52%), and the smallest number are business/professional and other associations (27%). The most dissatisfied with the Law on Associations are CSOs rendering social services (34%), while with other laws referring to CSO activities the most dissatisfied are CSOs dealing with law, advocacy and politics (12%), as was expected. Among organizations that do not know about and are not acquainted with legal regulations, the majority are business/professional and other associations (33%).

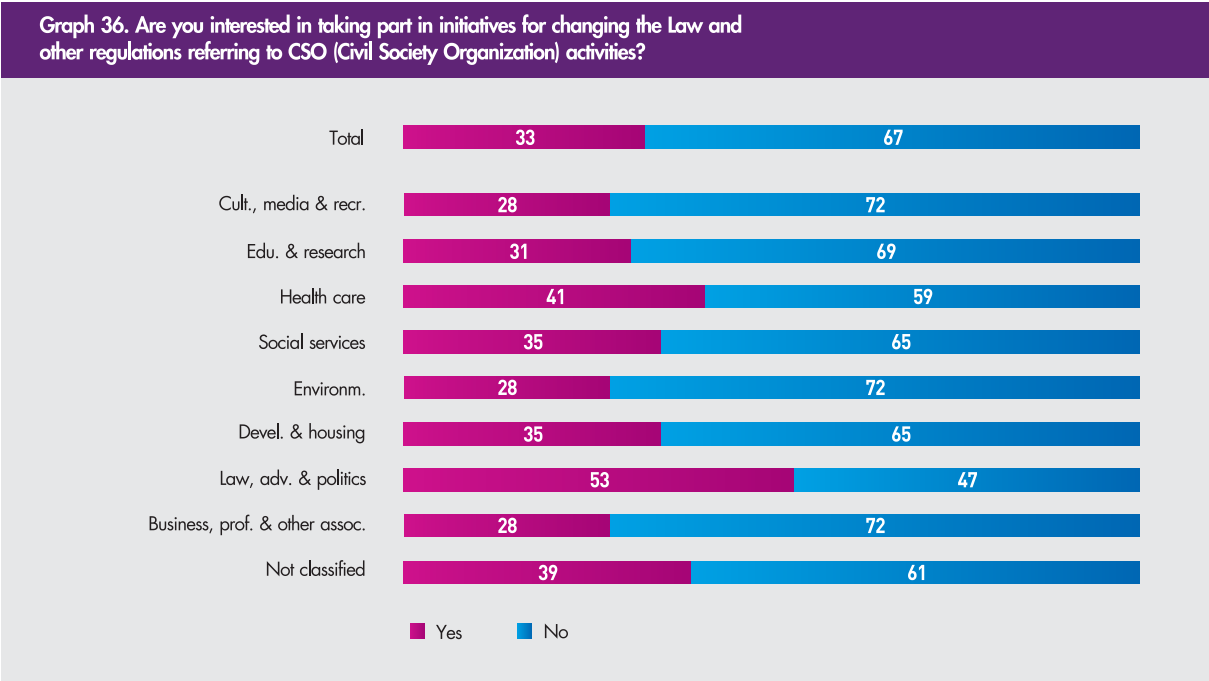
Dissatisfaction with the tax policy increases proportionally to the age of the organization and its size; so that the most dissatisfied with the tax policy are CSOs registered in 2010 and 2011 (41%), and CSOs

having more than 20 engaged persons (54%). As regards budget, the same percentage is found among those without a budget (43%) as among those with a high budget over €20,000 or over €100,000 (43% each). The most dissatisfied with the tax policy are CSOs in the territory of Belgrade (49%), which is understandable, because taxes are highest in the capital. There are no significant deviations regarding dissatisfaction with the Law on Associations.

Among organizations that do not know about, i.e. are not acquainted with, the legal regulations, the most numerous are small CSOs (25%), and those with a budget of up to €1,000, while the least numerous are those whose budget exceeds €100,000 for the same period (8%).

Among organizations that pointed to other laws related to the work of CSOs as the reason for their dissatisfaction, the most numerous are the ones dissatisfied with the “law on financing” (51%), with regard to which one probably has in mind the regulation of transparent financing from public sources, since such a law does not exist in Serbia, although a Decree related to this area has been prepared. To a considerably smaller extent, organizations are dissatisfied with the Law on Volunteering (13%) and the Law on Social Welfare (9%).

Interest in taking part in the initiative for changing laws and other regulations

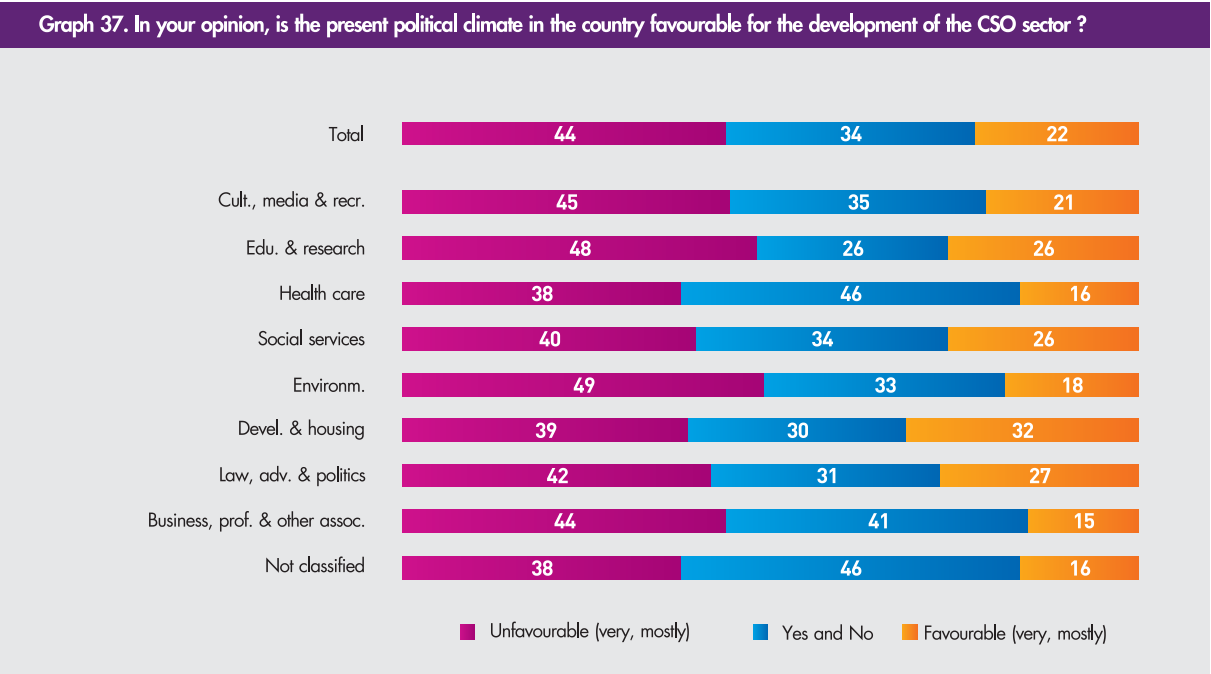


Despite the declared dissatisfaction with the current legal regulations, it is interesting that the majority of CSOs (67%) are not interested in taking part in the initiative for changing laws and regulations related to CSOs. As expected, CSOs dealing with law, advocacy and politics (53%) are the most interested in participating in this initiative, while CSOs involved in the fields of culture, media and recreation, environment and business/professional and other associations are in comparison only slightly interested (28% each).

There are no significant differences between CSOs in this respect, except that CSOs having a budget over €100,000 (51%), with head offices in Belgrade or in Eastern Serbia (47% each), show more interest in taking part in initiatives for changing laws and regulations related to the work of CSOs, while the least interested are CSOs from Vojvodina (22%).

The CSOs that would join the initiative for changing laws and regulations would to the greatest extent support the change of the tax policy (21%). Among them, CSOs in the field of development and housing (48%) take the lead, as well as CSOs established in the 1990s (31%), those ones having more than 20 active persons (32%), with a budget between €5,001 and €20,000 (32%), and those based in the territory of Belgrade (34%).

Political climate and sector development



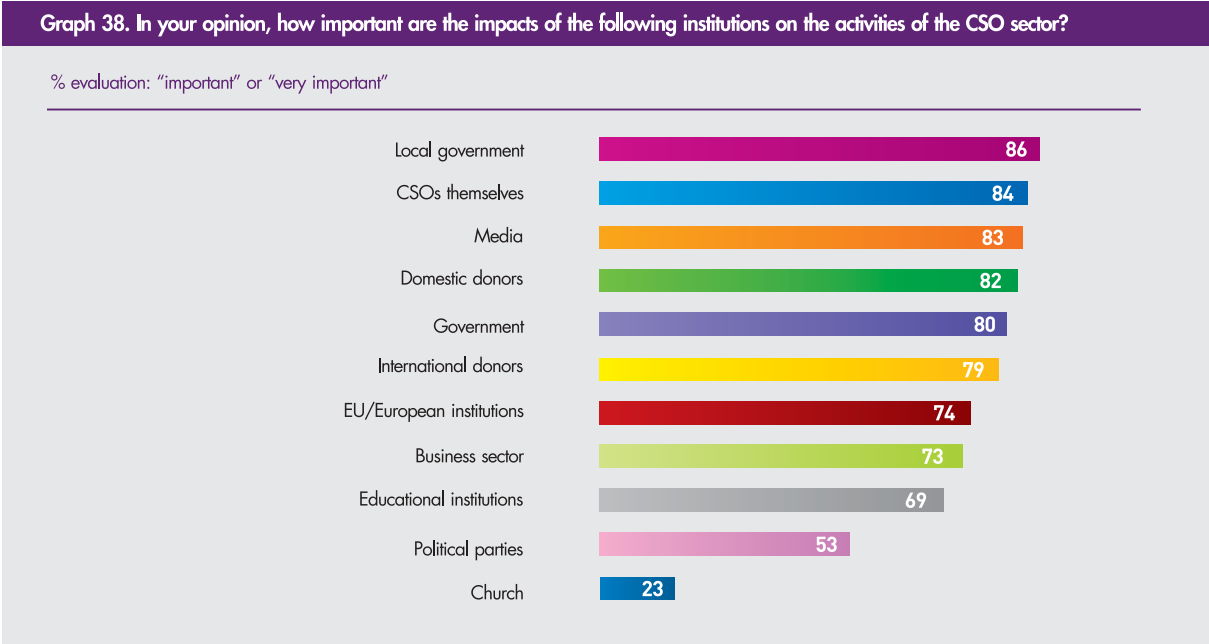
No less than 44% of CSOs evaluate the political climate in the country to be unfavourable for the development of the CSO sector. These are mostly organizations dealing with environmental issues (49%) and with education and research (48%). This is the prevailing attitude in organizations from Belgrade and from Vojvodina (47% each). It is not surprising that these organizations are mainly without budget or with very low budgets of up to €5,000 (46% each). The number of active people in the organization has no impact on such an attitude, and neither does the period of its foundation. At the same time, CSOs dealing with development and housing to the greatest extent evaluate the political climate to be favourable for the development of the CSO sector (32%). Positive marks were also given by CSOs having a budget of over €100,000 (33%) and CSOs with head offices in the region of Western Serbia (39%).

The majority of respondents think that this situation results from an undeveloped awareness of CSOs' indispensability, and from lack of interest (15%), while 8% believe that it is caused by lack of finances for the CSO sector, or the economic situation. 7% of respondents corroborate this opinion with the attitude that there is collusion between politicians and CSOs, i.e. that the authorities have their own CSOs, which they favour by ascribing to them so-called 'political eligibility'. Some 7% also believe that political parties have too much impact. 6% of respondents believe that the general crisis and instability in the State contribute to the situation, while 5% think that there are no problems in establishing and operating CSOs. It is interesting that few organizations (2%) think that prejudices or a bad image or distorted picture of the sector, have an impact on the poor ambiance for CSO operations.

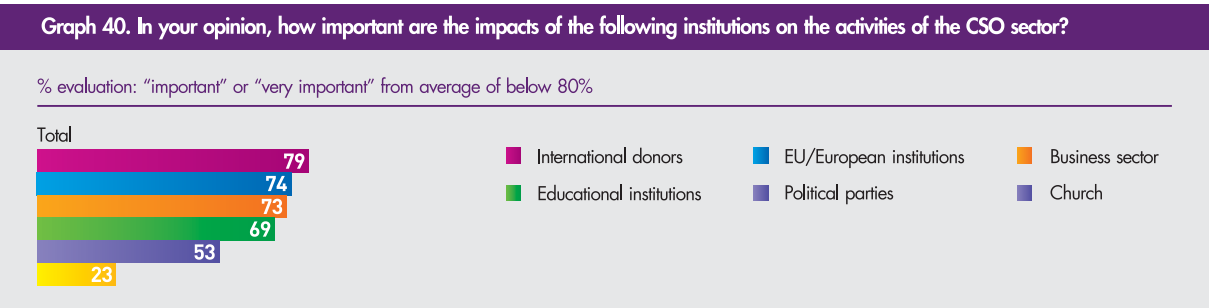
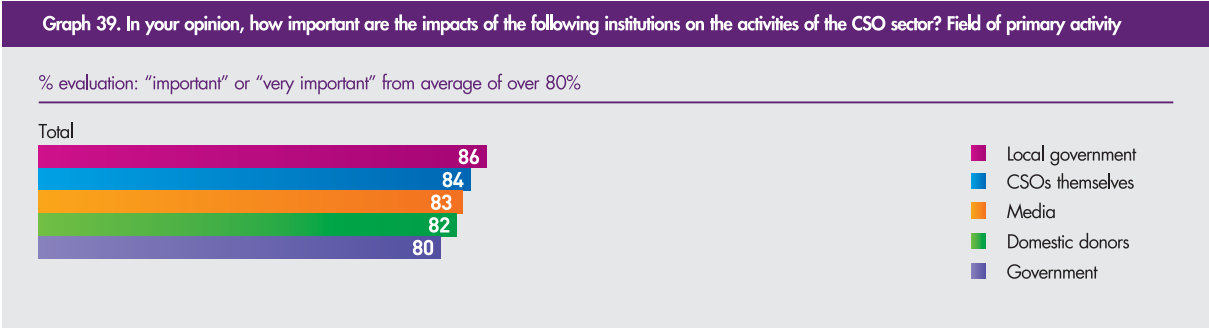
The undeveloped awareness of CSOs' indispensability and the lack of interest as the causes of the bad political climate were specified by 25% of CSOs involved in health care, and by only 6% of CSOs dealing with the field of law, advocacy and politics. Regarding the lack of CSO financing, 13% of organizations dealing with culture, media and recreation believe it to be significant; while only 2% of those whose primary field of work is law, advocacy and politics have the same opinion. There are no significant deviations among organizations, except that it is worth pointing out that the majority of CSOs from Eastern Serbia (16%) and Central Serbia (13%) believe that the cause lies in the bad economic situation, while 10% of CSOs established between 2001 and 2010, and 12% of CSOs from Belgrade speak about the collusion

between CSOs and politicians. It is also interesting that no less than 18% of CSOs from Western Serbia believe that there are no problems in establishing and operating CSOs.

Impact of institutions on the development of the sector



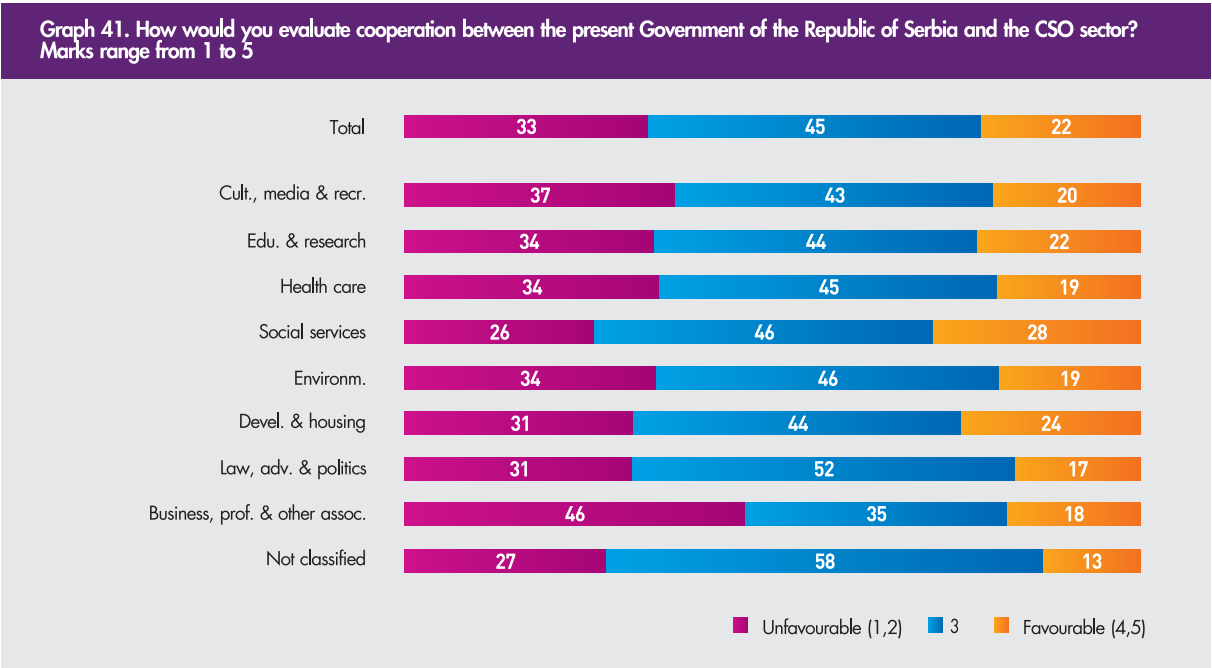
On average, CSOs evaluate that for their functioning the most important impacts come from local governments (86%), other CSOs (84%), the media (83%), domestic donors (82%) and the Government (80%). These are followed by international donors, EU institutions, the business sector, educational institutions, political parties and the Church.



In terms of the area of work, unclassified organizations, more than others, believe the role of local government to be important for the work of the sector (95%), but also the impact of political parties (86%) and the Church (34%). CSOs dealing with law, advocacy and politics believe that for CSO functioning international donors (94%) and European institutions (90%) are the most significant.

According to data findings, local government is the most important for organizations in Eastern Serbia (90%), and there is not much deviation in this attitude regarding the period of foundation, number of active persons in the organization or budget level. Also, opinion is rather uniform regarding the impact of all the aforementioned institutions, apart from some parameters. Primarily, the importance of the impact of European institutions and the EU on so-called “old” organizations was evaluated lower (66%) than in newer organizations (79%). Furthermore, the impact of the business sector on CSOs was evaluated lowest by organizations with the highest budgets (59%). The impact of educational institutions received the lowest marks in Vojvodina (62%) and the highest in Belgrade (81%). Finally, the role of the Church is seen as most important by organizations from Western Serbia (37%), those without a budget (35%), and those with more than 20 persons engaged in activities (34%), while CSOs from Southeast Serbia believe the impact of the Church to be the least important (15%).

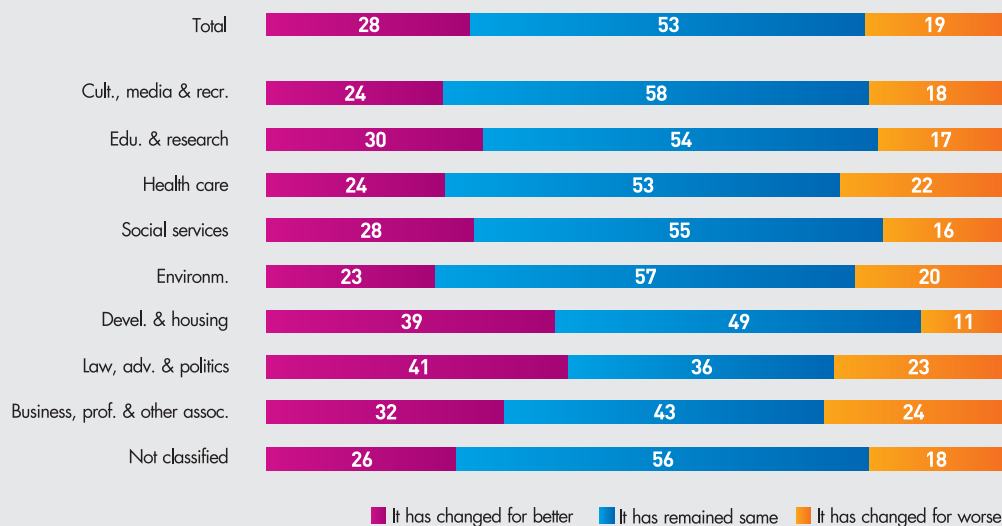
Evaluation of cooperation between the Serbian Government and CSOs



45% of respondents evaluate cooperation between the Government of the Republic of Serbia and CSOs as average, 33% as below average, and 22% as above average. The majority of unclassified organizations (58%) evaluate this cooperation as average, while business/professional and other associations evaluate it as below average (35%), and also give generally lower marks for cooperation (46%). More than other CSOs, those working in the field of social services evaluate this cooperation as positive (28%).

Newer CSOs more than others (51%) believe that cooperation is average, as do those with the lowest and the highest budgets (51% and 39% respectively). By regions, 50% of CSOs from Vojvodina and 32% of CSOs from Western Serbia gave average marks for cooperation. There are no significant deviations in evaluating cooperation as poor, while CSOs with a budget of over €100,000 (39%) and those from Western Serbia (42%) generally evaluate cooperation as good or excellent. Among those that are positively evaluation cooperation between the Serbian Government and CSOs, the least positive are CSOs from Belgrade and those without a budget (15% each).

Graph 42. In what way has cooperation with the Serbian Government changed in the past 3 years?



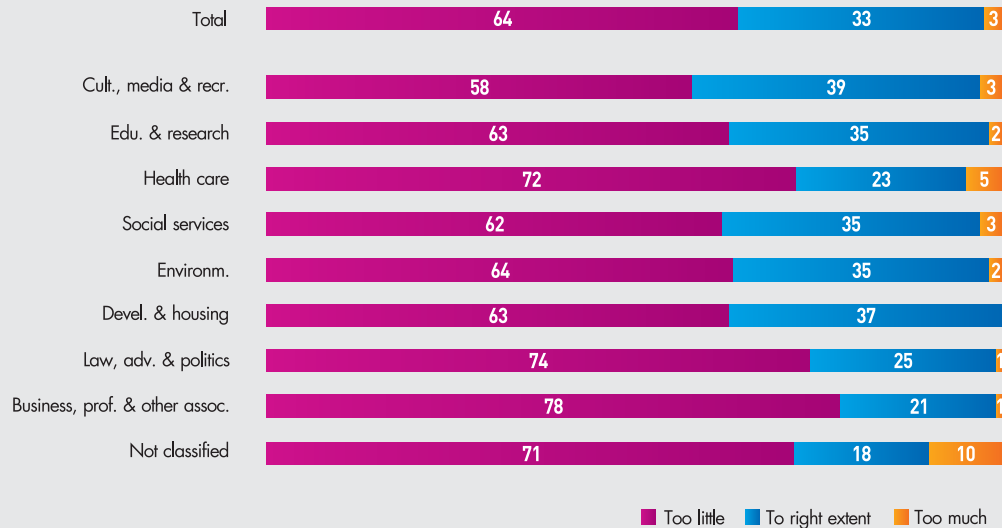
Regarding evaluation of the changes related to cooperation between the Government and civil society organizations in the past three years, 53% of organizations believe it is the same, 28% think it is better, while 19% think it is worse.

CSOs dealing with education and research mainly believe that cooperation remained at the same level (58%), while those dealing with law, advocacy and politics (36%) have the opposite opinion, which is logical, because these CSOs, more than other CSOs, evaluate this cooperation as better (41%). CSOs dealing with environmental issues more than others believe that cooperation has improved (23%). It is interesting that business/professional and other associations are those which to a greater extent than others evaluate cooperation as worse than it used to be (24%).

There are no major deviations regarding evaluation of cooperation as unchanged, except with CSOs having a budget of over €100,000, which make this evaluation far less than the others (28%); this is related to the fact that these organizations evaluate breakthroughs referring to improved cooperation very highly (no less than 60%). A significant number of organizations from Western Serbia (41%) also think that cooperation is better. 23% of respondents from Central Serbia, as well as 23% of those having a budget between €1,001 and €5,000, and 22% of organizations registered before 1989, believe that cooperation is worse.

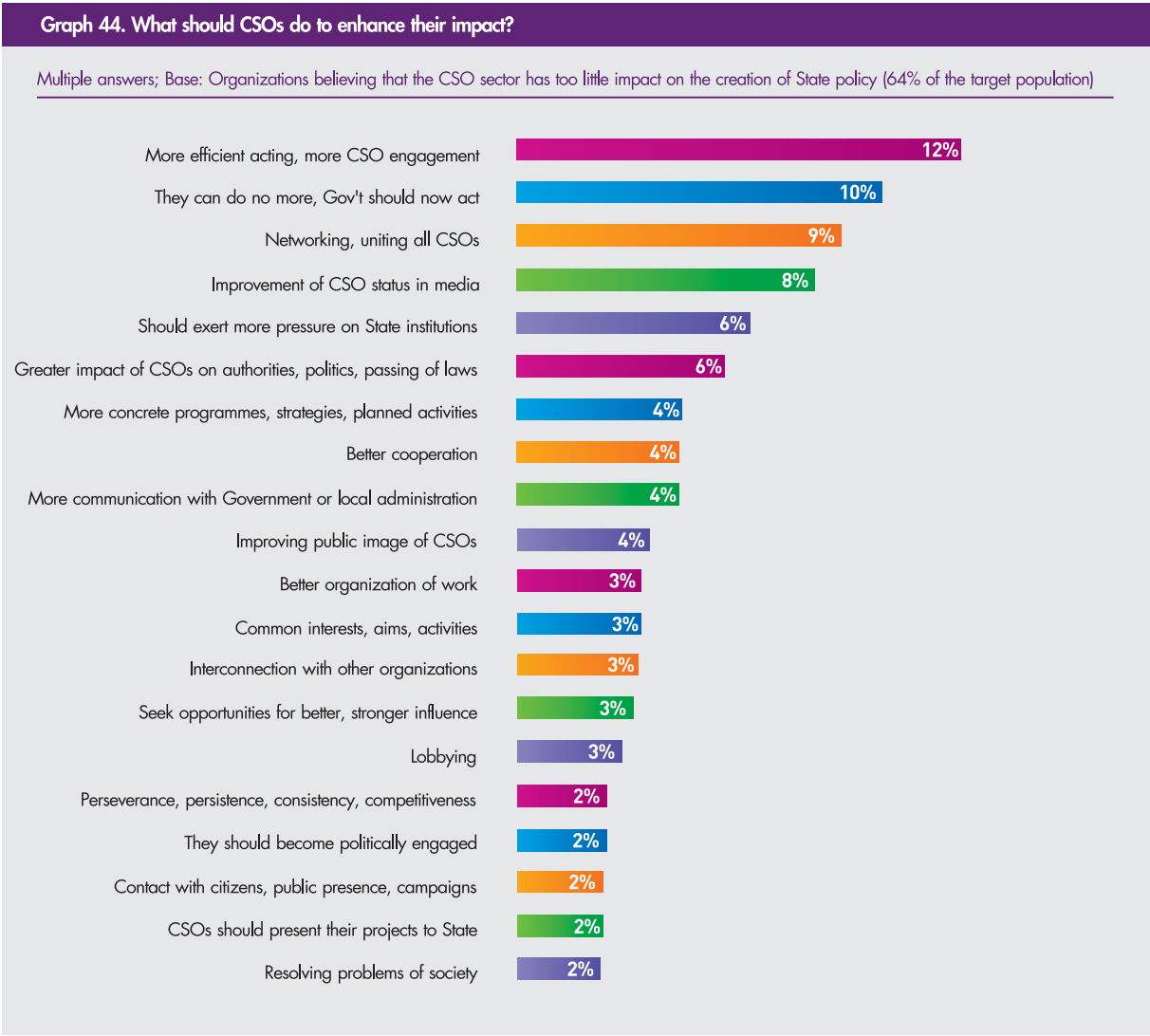
Evaluation of influence of CSOs on the creation of State policies

Graph 43. To what extent does the CSO sector have an impact on the creation of State policy?



The majority of CSOs evaluate that the influence of the sector on the creation of State policy is too small (64%); one third thinks it is just about right (33%), while 3% believe it to be too large. In terms of organization structure when compared to the answers, it is evident that the highest percentage of organizations which believe that CSOs have too little influence on the creation of the State policy are among business/professional and other associations(78%), those dealing with law, advocacy and politics (74%), and those involved in the field of healthcare (72%); while CSOs dealing with culture, media and recreation, believe more than others that their influence on the creation of State policy is just as it should be (39%).

76% of organizations from Belgrade believe that CSOs have too little influence on the creation of State policy, as well as those from Central Serbia (72%), those with a budget ranging from €20,001 to €100,000 (71%), and CSOs employing 6 to 10 people (70%); while no less than 42% of CSOs from Vojvodina and 42% of CSOs having more than 20 active persons think that the influence exerted is just about right.



Organizations which believe that the CSO sector has too little influence on the creation of State policy were offered the opportunity to provide answers stating what should be done in order to change the situation. The most common answer among CSOs (12%) is that more efficient action is needed, more engagement by CSOs. 10% believe that they cannot do anything, and that it is up to the Government to react; 9% think that the networking or unification of all CSOs is necessary, while 8% think the position and status of CSOs in the media should be improved. 6% of CSOs (in each issue) believe that CSOs should impose themselves, exert greater pressure on State institutions or attempt to make an impact on the authorities, influencing policy making and the passing of legislation.

CSOs dealing with development and housing, more than other CSOs, believe that more efficient action and more engagement by CSOs is needed (19%), while the attribution of importance to networking and unification was, as expected, typical mainly of organizations dealing with law, advocacy and politics (17%), which also gave special importance to lobbying (11%). It is interesting that business/professional and other associations, more than other CSOs, evaluate the interconnection of CSO as a necessity (10%).

In 19% of cases, CSOs from Southeast Serbia believe that CSOs cannot do anything anymore, and that it is up to the Government to react, while none of the CSOs from Western Serbia have the same opinion. It is interesting that to networking and the unification of all CSOs, both CSOs without a budget and those having a budget of over €100,000 (14%) gave the greatest importance. CSOs established before 1989, as well as those from Eastern Serbia, give the least importance to activities oriented towards an increased influence of CSOs (4% each).

Improvements of the position and status of CSOs in the media differ principally by regions; so that we find that 16% of CSOs from Western Serbia believe that it is precisely this which would contribute to the increased influence of CSOs, while only 4% of CSOs from Eastern Serbia have the same opinion. Also, it is CSOs from Central Serbia which least of all (1%) think that CSOs should impose themselves by exerting more pressure on State institutions. As expected, it is CSOs with a budget exceeding €100,000 which to the greatest extent (11%) believe that CSOs should exert influence on the authorities, politics/politicians and the passing of legislation.

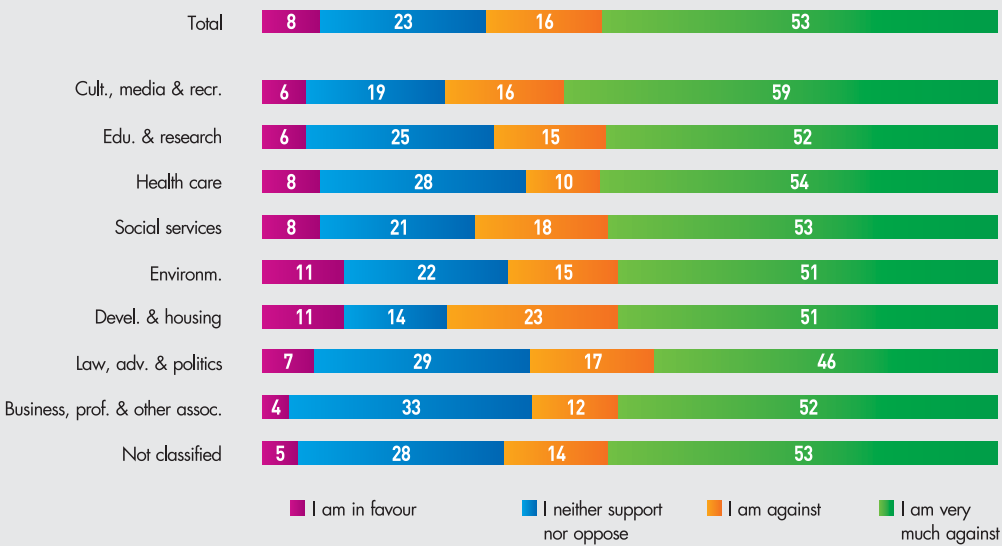
The role and participation of CSOs in the electoral process



In terms of elections, the majority (61%) believe that CSOs should play an active role in the electoral process, while 39% believe that the sector should not. Those who think that CSOs should have an active role in elections, vary in opinion: 31% believe that only CSOs dealing in that area can be active, followed by the opinion that active in the elections might be only those CSOS responsible for ensuring electoral regularity (23%); also, there is an opinion that CSOs should encourage citizens to vote in the elections (22%). Attitudes considerably vary within different areas, so that, by the nature of things, CSOs dealing with law, advocacy and politics mainly support the active role of organizations during the electoral process (80%). The same idea is supported by CSOs dealing with development and housing (72%), as well as business/professional and other associations(71%); while 46% of CSOs involved in the field of culture, media and recreation, and 45% of those dealing with environmental issues, believe that CSOs should not take part in the electoral process at all.

The attitude towards the role of CSOs in the electoral process changes significantly subject to the founding year, so that more than a half of organizations established before 1989 (53%) think that CSOs should not have an active role in the electoral process, while only 26% of CSOs registered in 2010 or later hold the same opinion. It is also interesting that the biggest deviations are by regions; thus the majority of CSOs from Western Serbia (55%) believe that CSOs should not be active, while this opinion is shared by only 31% of CSOs from Belgrade.

Graph 46. What is your opinion regarding Civil Society Organizations taking part in elections as political parties?



A large number of respondents (69%) oppose the idea that CSOs should take part in the elections as (political) parties. Out of that percentage, 53% believe that if they contest the elections they should be registered as political parties and not as CSOs, while 16% think it is quite legitimate to stand as CSOs, given that the law makes it possible. Almost one quarter of respondents (23%) neither support nor oppose the idea of CSOs contesting the elections as parties, because they believe that each organization has the right to be engaged in accordance with its mission and its capacities. Some 8% of the interviewed CSOs support this attitude and think that it is good for CSOs to contest the elections as parties.

The strongest opposition to this CSO activity comes from respondents from organizations dealing with culture, media and recreation (75%). The idea is to the greatest extent supported by CSOs dealing with the environment, as well as in the field of development and housing (11% each); while mainly neutral in this respect are business/professional and other associations (33%).

As regards the founding year, it is noticeable that neutrality in this area increases the younger the age of the organizations (from 16% with the oldest organizations to 30% with the youngest), while opposition to CSOs contesting the elections decreases in the same direction, from 75% with the oldest organizations to 63% with the youngest ones. The size of the organization and budget do not have any significant impact on the different views of this problem; but specific deviations may be noticed with CSOs from Eastern Serbia which, as compared to CSOs from other regions, present the minimum opposition to the participation of CSOs in the elections as political parties (56%).

Structure of CSOs

Membership and active persons in the organization

According to the official data from the Business Registers Agency, taken from the submitted financial statements, in the course of 2010, the associations were employing more than 4,500 persons (fulltime). And according to a very conservative assessment from the research, more than 4,500 persons were engaged via honoraria. CSOs have over 150,000 volunteers and hundreds of thousands of members. As a case in point, in terms of the number of people employed, the CSO sector may be comparable with companies in Serbia such as US Steel, Resavica Mines, Merkator...

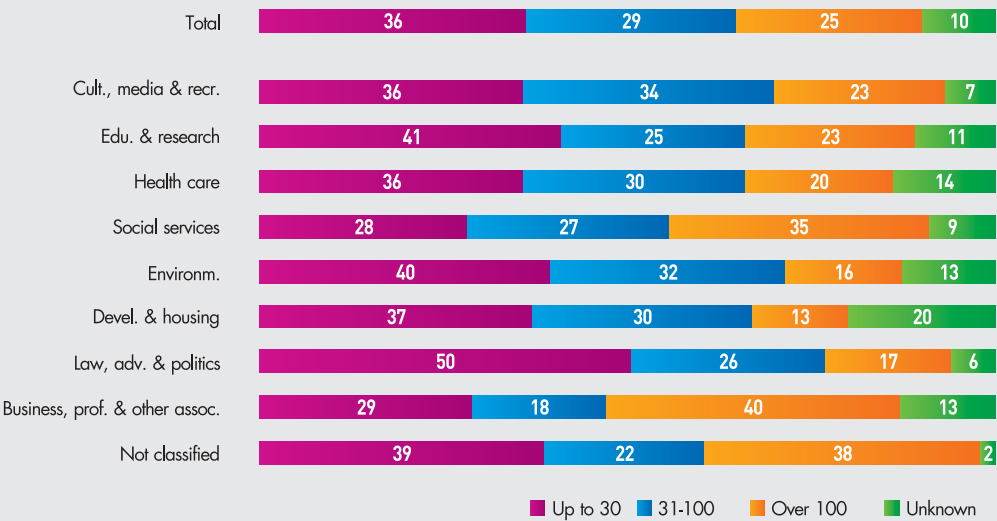
Tabela 1. Struktura OCD po segmentima

| | Total | | | |
|-------------------------------------|----------------|-----------|-----------------------|------------|
| % | Managing Board | Employees | Engaged via honoraria | Volunteers |
| Male | 63,6 | 44,4 | 53,1 | 60,2 |
| Female | 36,4 | 55,6 | 46,9 | 39,8 |
| Children (14 years of age) | 2,2 | 0,0 | 1,6 | 3,1 |
| Youth (15 to 30 years of age) | 16,1 | 26,7 | 33,4 | 16,0 |
| Middle-aged (31 do 50 years of age) | 50,2 | 52,4 | 47,8 | 40,1 |
| Elderly (over 51 years of age) | 31,5 | 20,8 | 17,2 | 40,8 |
| Elementary education | 5,0 | 2,1 | 1,7 | 15,5 |
| Secondary education | 39,2 | 34,9 | 41,3 | 56,6 |
| College degree | 14,2 | 35,0 | 14,4 | 11,7 |
| Faculty degree | 35,0 | 24,9 | 38,4 | 14,4 |
| Master's degree | 3,1 | 1,8 | 1,8 | 0,7 |
| Doctor's degree | 3,5 | 1,3 | 2,3 | 1,0 |

It is to be noted that in CSOs men dominate in the Managing Board (64%), as those engaged via honoraria (53%) and as volunteers (60%). Women are a majority only among the staff (56%). On one half of the Managing Boards are middle-aged active persons with University education (41.5%, including Master's and Doctor's degrees). Among employees also, besides the aforementioned women, middle-aged persons (52%) are dominant, and those with college and secondary education (35% each). Among persons engaged via honoraria, besides 48% of middle-aged persons, there are also young people (33%), as well as persons with University education (42%, including MAs/MSs and PhDs). Equally present are persons with secondary education (41%). Among volunteers, there are mainly elderly (41%) and middle-aged persons (40%), as well as persons with secondary education (57%). As expected, children appear mainly as volunteers (3%).

Graph 47. Number of organization members

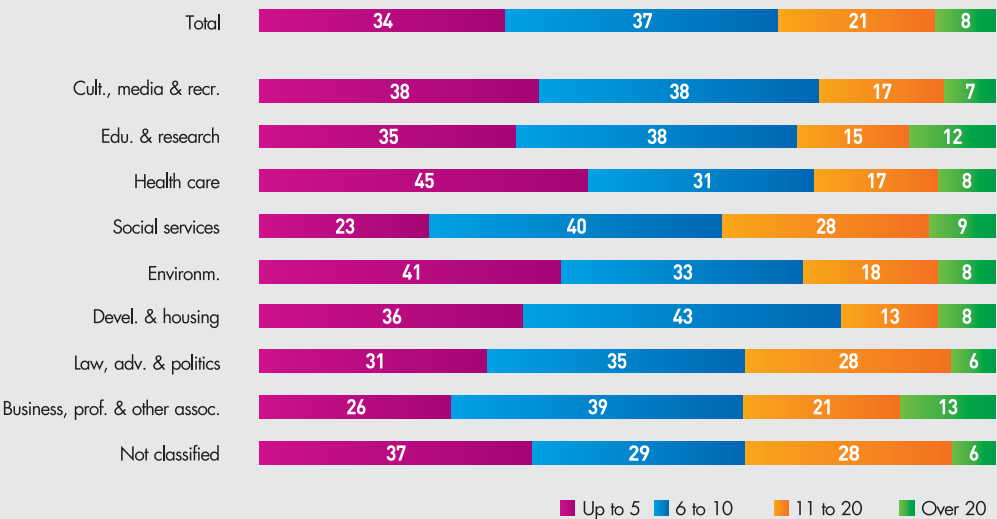
Minimum=3 Maximum=725.000



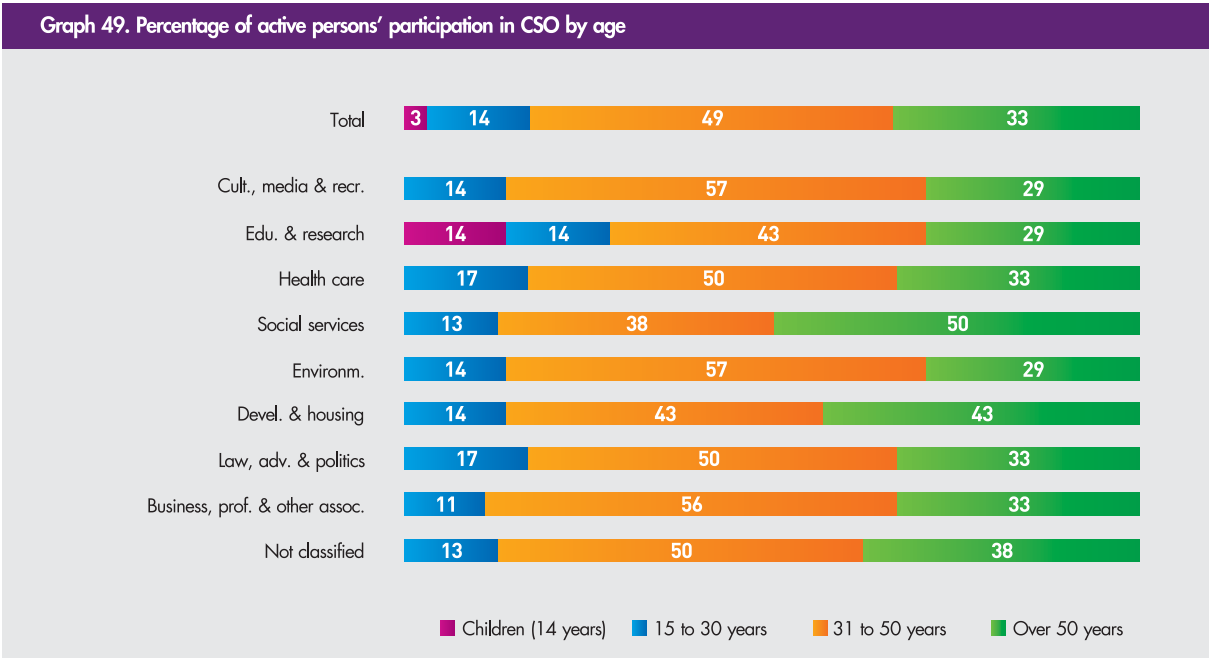
The number of members in CSOs is of an exceptionally wide range, stretching from 3 members to more than 500,000 members. The majority of CSOs have up to 30 members (36%), followed by 31 to 100 (29%), while one quarter of all CSOs (25%) have over 100 members. On average, CSOs in the field of law, advocacy and politics have small memberships (50%), while business/professional and other associations (40%), as well as CSOs rendering social services (35%), have the largest. Differences between CSOs are big, so that older organizations, as a rule, have a larger membership (42% of these organizations have over 100 members), while CSOs registered in the past two years have a large membership in 10% of cases only. The number of active persons also correlates with the number of members, so that CSOs with up to 5 active persons have membership of up to 30 persons, while CSOs with more than 20 active persons have, in 40% of cases, over 100 members. The situation regarding size of budget is similar: the higher the budget of the organization, the higher the membership – 40% of CSOs with a budget of over €100,000 have over 100 members. By regions, the largest number of small organizations are based in Southeast Serbia (51% with membership of up to 30 people), while the smallest number are in Belgrade (29%). CSOs with a large membership are based mainly in Central Serbia (34%) and in Belgrade (33%), while only 15% of such organizations are Vojvodina-based.

Graph 48. Number of active persons in an organization (managing board, staff & associates)

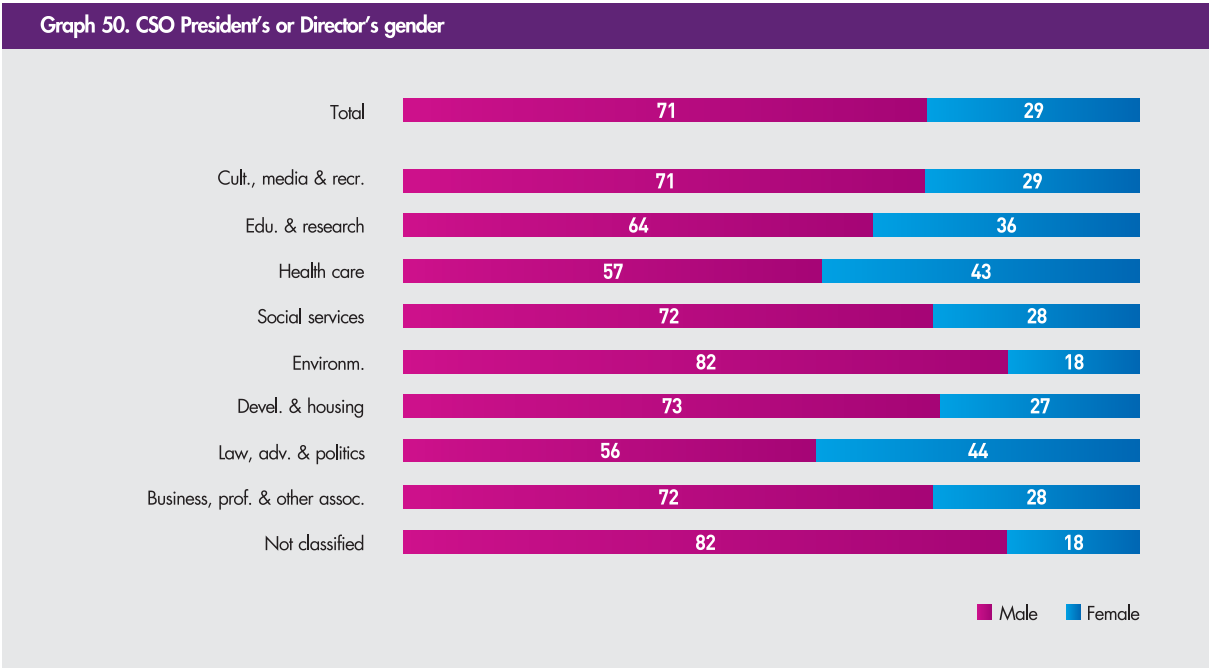
Minimum=1 Maximum=85



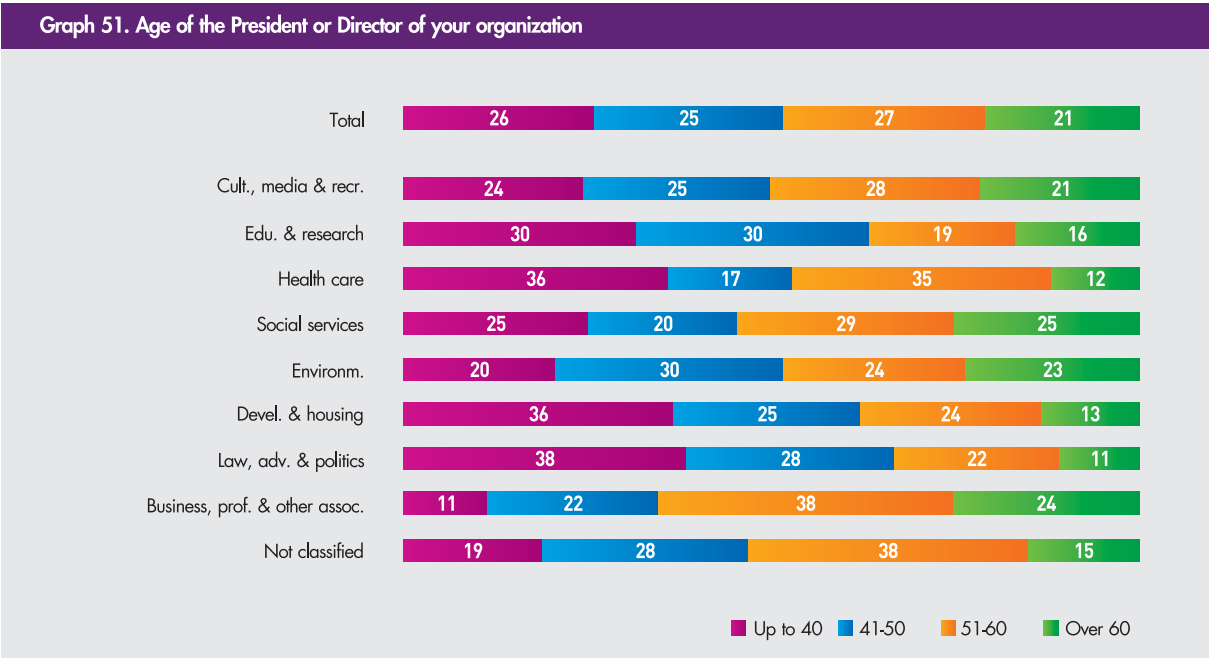
The number of active persons in CSOs is mostly either up to 5 (34%) or from 6 to 10 (37%); every fourth organization has up to 20 active persons (21%), while 8% have over 20 active persons in the organization. CSOs involved in the field of healthcare (45%) and environmental issues (41%) have the fewest active persons; CSOs dealing with development and housing (43%), as well as social services (40%), have mainly from 6 to 10 active persons. CSOs dealing with law, advocacy and politics, social services and the unclassified ones (28% each) have mainly 11 to 20 active persons, while the biggest organizations, with more than 20 active people, are business/professional and other associations(13%) and those involved in education and research (12%).



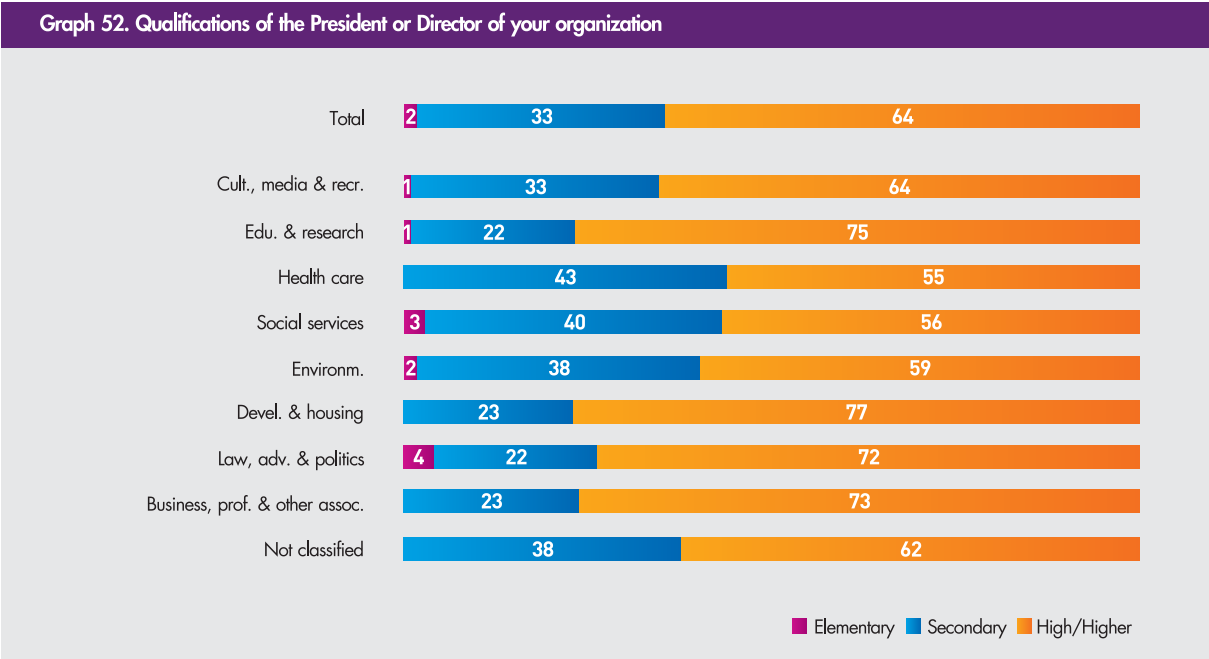
On average, of the active persons in CSOs, middle-aged persons from 31 to 50 years of age are dominant in number (49%), followed by those over 50 (33%), young people from 15 to 30 (14%) and children (3%). On average, CSOs rendering social services are “the oldest”, because one half of active people in those organizations are over 50 years of age (50%); persons over 50 years of age are the least present in CSOs dealing with culture, media and recreation, education and research, as well as environment (29% each). Active middle-aged persons (31-50) are the most present in CSOs involved in the fields of culture, media and recreation as well as environment (57%), and the least present in CSOs rendering social services (38%). On average, the youngest active people (15-30) are present in CSOs involved in the fields of healthcare and law, advocacy and politics (17% each), and least present in business/professional and other associations (11%).



On average, the directors or presidents of CSOs are men (71% of cases). The majority of men in these positions are in CSOs dealing with the environment and in unclassified organizations (82% each), while the fewest of them are in CSOs dealing with law, advocacy and politics (56%). There is no area in which there are more women than men in the leading position in an organization. Also, there are no significant deviations among CSOs, except as regards the founding year: men mainly head the older CSOs (registered before 1989, 84%), while the fewest exercising the leadership role are present in CSOs registered from 2001 to 2009 (63%).

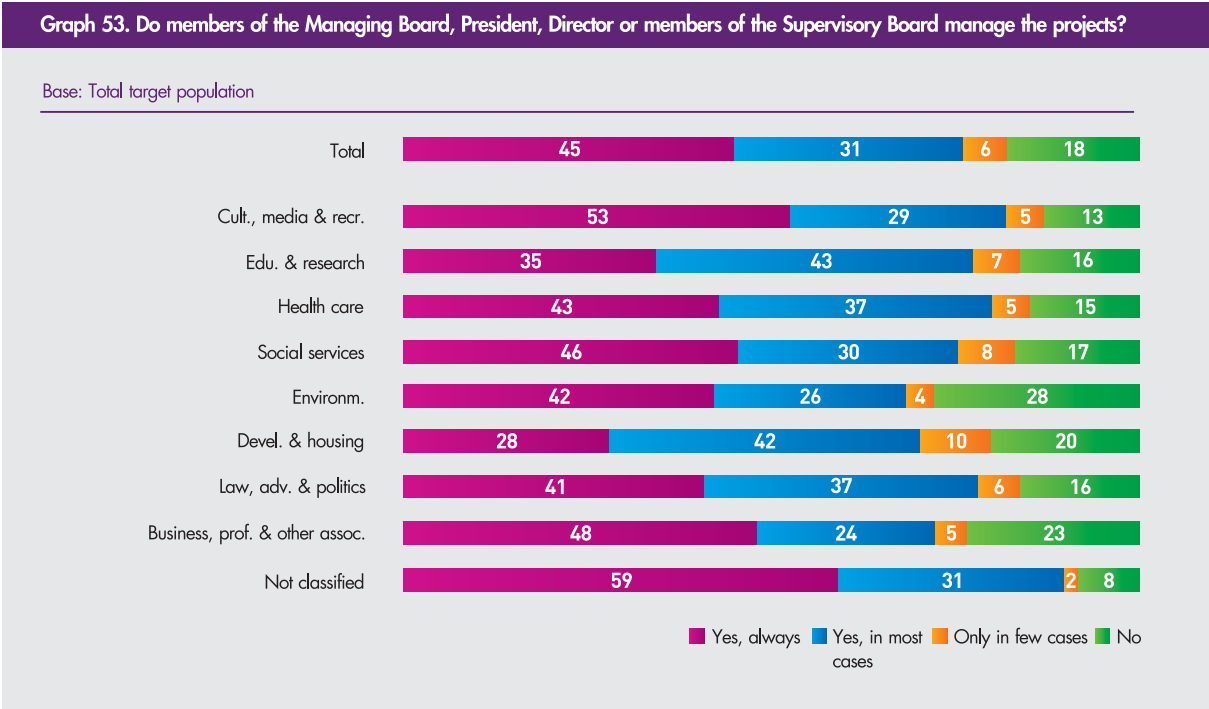


The age of CSO directors is relatively evenly distributed across the categories, beginning with the young of up to 40 years of age (26%), through those between 41 and 50 years (25%) and 51 to 60 years (27%) to the oldest, of over 60 years of age (21%). In terms of primary fields of work, the majority of the youngest directors or presidents are in CSOs dealing with law, advocacy and politics (38%); the middle-aged ones (41-50 years) are mainly present in the fields of education and research or the environment (30% each); somewhat older directors or presidents (51 to 60 years) are, on average, in business/professional and other associations, as well as in the unclassified CSOs (38% each), while the share of oldest executive officers (over 60) is mainly in CSOs rendering social services (25%).



The majority of directors have a college degree (63%), followed by those with secondary education (33%); some 2% have elementary education and about 1% higher education (including Master's and Doctor's degree). Most of the leading persons with a college education are in CSOs dealing with development and housing (77%), while the fewest of them are in CSOs dealing with healthcare (55%).

Decision-making practices and procedures?

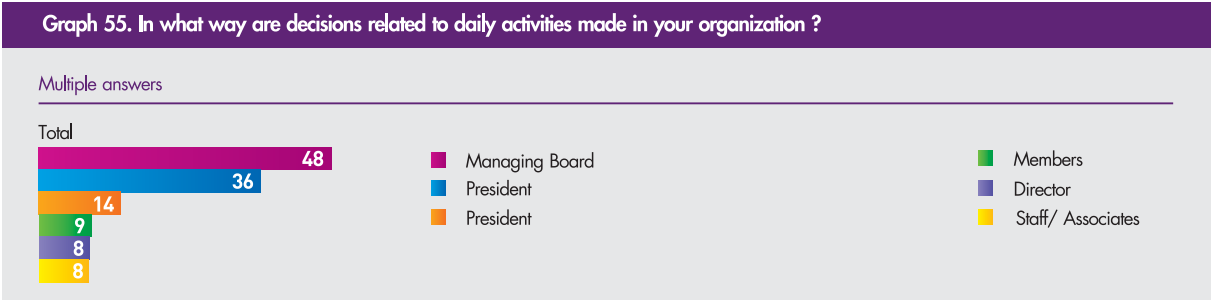


In 45% of cases, members of the Managing Board, the director or members of the Supervisory Board always manage the projects as well, while for 31% of CSOs, this applies in the majority of cases; only 6% manage projects just in a few cases, while 18% never do . In terms of the primary field of work, the permanent participation of managerial staff in project management is mostly present in unclassified CSOs (59%), as well as in CSOs involved in the field of culture, media and recreation (53%); this also applies in the majority of cases for the managerial staff of CSOs dealing with education and research (43%).; The participation of managerial staff in project management is in the fewest of cases represented in CSOs dealing with development and housing (10%); while most often in CSOs dealing with environmental issues, they do not participate at all in project management (28%).



In the majority of CSOs, strategic decisions are made by the Managing Board (53%) and the Assembly (49%). There are no significant deviations by primary areas of work. At the same time, certain differences between CSOs were noted by the founding year, budget size and regions. Thus, for instance, in CSOs registered before 1989, strategic decisions are mainly made by the Assembly (60%), while in CSOs founded in the past two years, the Assembly makes strategic decisions in 33% of cases only; as for regions, in Belgrade strategic decisions are mostly made by the Managing Board (63%), and in Eastern Serbia the Assembly (63%); in CSOs without a budget, strategic decisions are often made by the director (30%), as well as in

26% of CSOs in Central Serbia. It is interesting that in no less than 28% of CSOs with a budget exceeding €100,000, strategic decisions are made by the president or director of the organization.

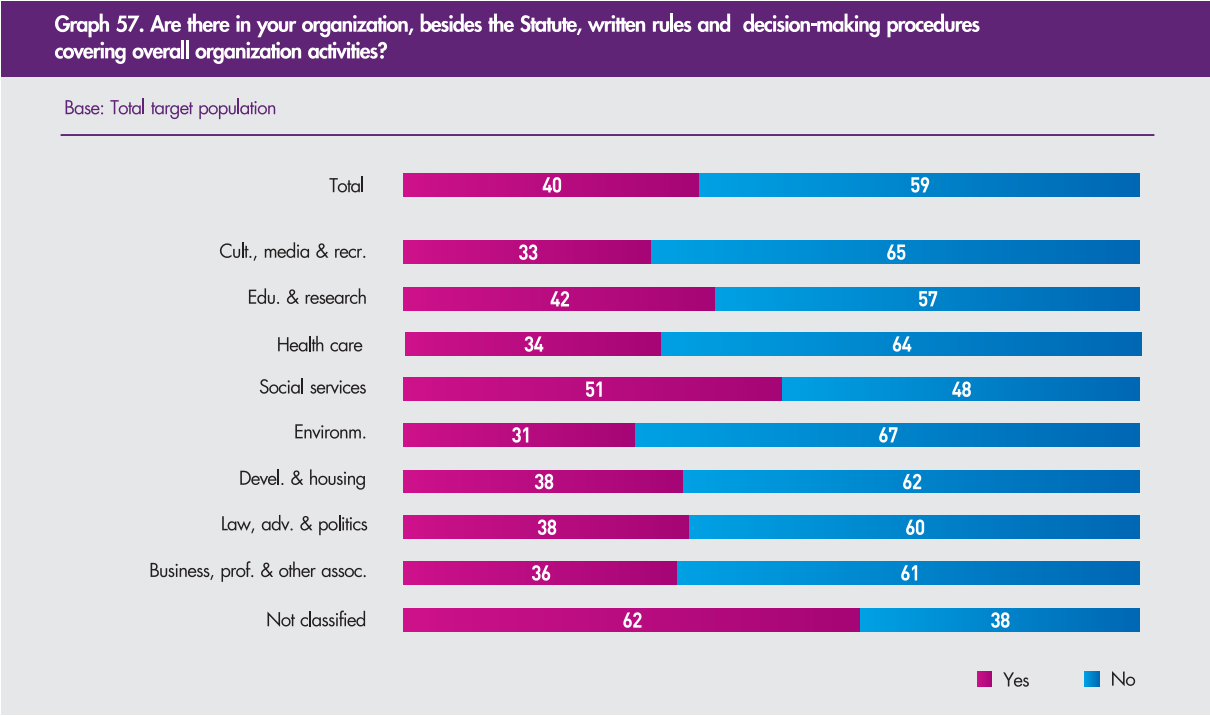


Decisions related to daily activities in the majority of CSOs are made by the Managing Board (48%) and by the president (36%). Persons managing a CSO either as president or as director, in 45% of cases decide on the daily activities of the organization. The Managing Board makes such decisions mainly in CSOs dealing with education and research (52%), while in CSOs dealing with law, advocacy and politics (56%) these decisions are to the greatest extent made by the president and/or director. It is noticeable that these organizations, to a much greater extent than the others, have the position of a director with authorization for daily management of the organization (22%).



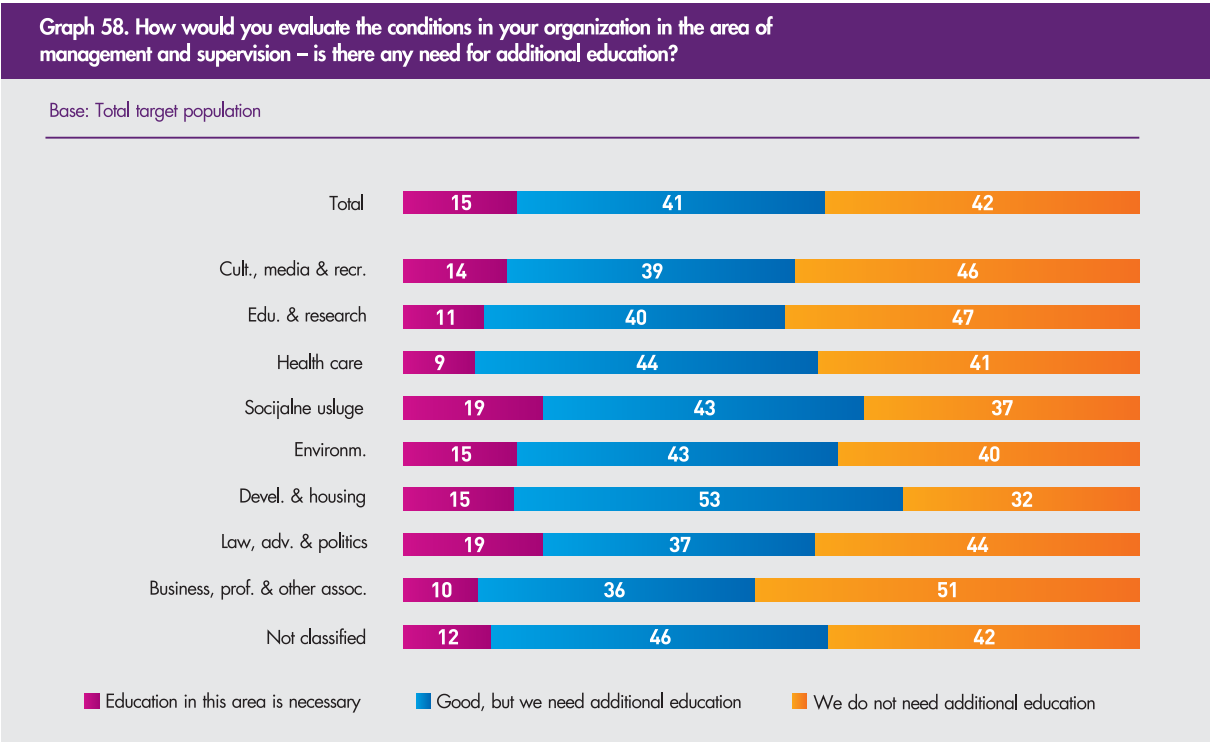
In the majority of CSOs (52%) the Managing Board makes the decisions related to activities in concrete projects. Next come the presidents (21%), programme and project coordinators (19%) and the Assembly (18%). The Managing Board makes decisions most noticeably in unclassified CSOs (67%), while this is least frequent in CSOs dealing with law, advocacy and politics (33%). At the same time, in these organizations, more than in other CSOs, decisions related to concrete projects are made by programme and project coordinators (36%) and directors (16%). An important role of coordinators is noticeable also in CSOs involved in healthcare (28%) and in education and research (27%).

The differences between organizations are perceptible by all parameters: founding year, number of active people, budget size and region. The role of coordinators in decision-making in concrete projects is much accentuated in CSOs registered in the period between 1990 and 2009 (23% on average), while in CSOs registered before 1989 and after 2010 it is only 13%. Also, the older the organization, the more important the role of the Assembly, so that in CSOs established before 1989, the Assembly makes decisions in 21% of cases regarding concrete projects, while in CSOs established in the past two years it occurs in only 12% of cases. Furthermore, the role of the Managing Board in this regard is very much accentuated in the smallest CSOs (55%), while this is much less the case in the major CSOs (33%); of course, this correlates with the role of coordinators, who in small CSOs make decisions on concrete programmes/projects much less (13%) than in the major ones (34%). In CSOs with a budget exceeding €100,000, the decision-making focus is transferred from the Managing Board to individuals, thus coordinators are mainly in charge of making these decisions (37%), and an important role is also played by employees and associates (18%) or directors (14%), who are usually represented in very few cases in other CSOs. Noticeable also are the significant differences between CSOs by regions, whereby, besides the Managing Board, in Central Serbia decisions related to projects are very often made by presidents (34%), in Belgrade by project and programme coordinators (30%), and in Eastern Serbia by the Assembly or all members (29%). In Southeast Serbia employees and associates, to a greater extent than in other CSOs, make decisions on projects (12%).



In the majority of CSOs (58%), apart from the Statute, there are no written rules and procedures for decision-making and for the overall activities of the organization. In most cases, unclassified CSOs (62%) have additional rules and procedures, as well as organizations rendering social services (51%). CSOs involved in environmental issues (31%) have the least quantity of rules. The older or the bigger the organization, and the higher the budget, the more additional rules and procedures there are; it ranges from 57% in CSOs registered before 1989, to 23% in CSOs registered in the past two years; from 29% in the smallest CSOs, to 45% in the biggest ones; from 28% in CSOs without a budget, to 54% in CSOs with a budget exceeding €100,000. CSOs in Central Serbia have more additional rules and procedures (50%) than those in other regions.

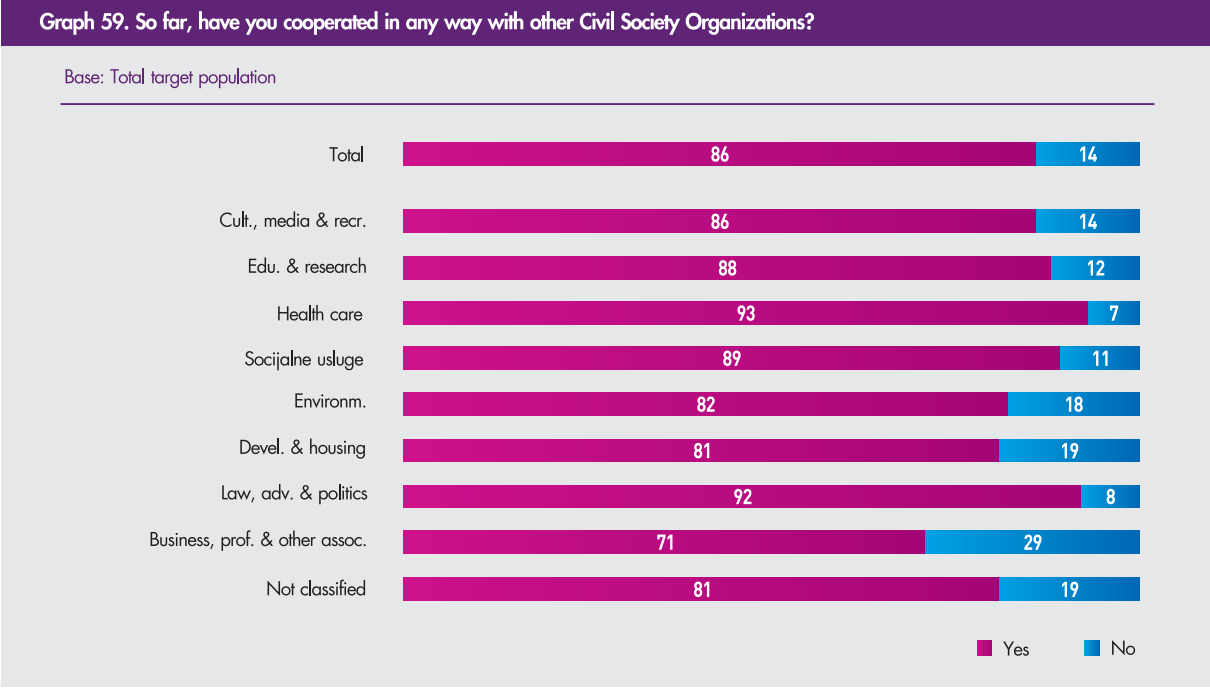
Need for education



The majority of organizations answered that they do not need additional education (42%), some 41% consider that, although the situation is generally good, they do need additional education, while some 15% believe that they are in need of indispensable support in this area. This is an interesting statement, when one takes into account the prior data on the structure of the organization, distribution of work between individual segments within the organization and decision-making methods, and the fact that about one half of CSOs only, besides the Statute, have some additional rules and procedures. To the greatest extent, business/professional and other associations have no need for additional education (51%), but at the same time, in 61% of cases they do not have additional rules and procedures for decision-making and for overall activities of the organization. Although CSOs dealing with development and housing mainly evaluate their situation as good, they do, however, need additional support (53%), while CSOs dealing with law, advocacy and politics in most cases believe that for them support in this area is indispensable (19%). There are no significant deviations between organizations, except in CSOs from Eastern Serbia, which more than others need additional education (55%).

Intersectoral cooperation – CSO cooperation - Networking

Cooperation between CSOs

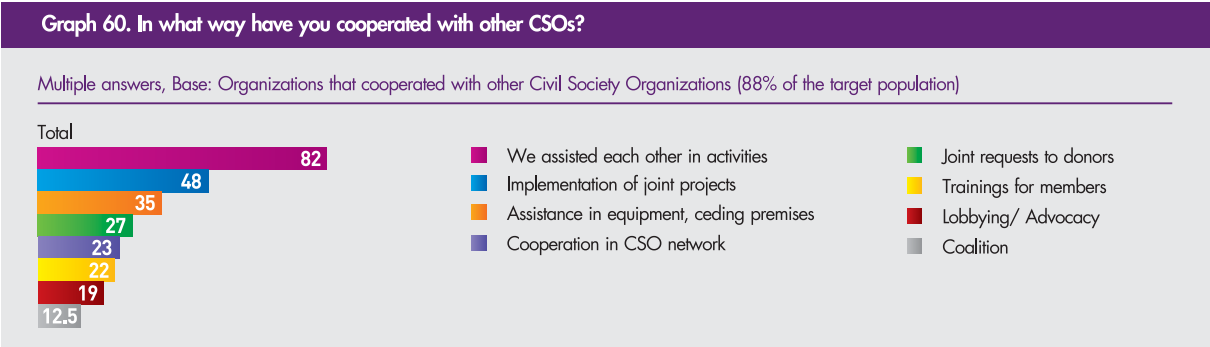


No less than 86% of interviewed organizations have so far established cooperation with other CSOs. Organizations involved in healthcare to date have established the highest percentage of cooperation with other CSOs (93%), followed by those dealing with the field of law, advocacy and politics (92%), while the lowest percentage of cooperation was established by professional associations (71%).

The highest percentage of cooperation was carried out by organizations having a budget between €5,001 and €20,000 (93%), while the lowest was carried out by organizations without a budget in 2010 (69%). In terms of the founding year, the most successful in establishing cooperation were organizations registered in the period before 1989 (90%), while the least successful were those registered after 2010 (78%).

The highest level of cooperation was established among CSOs in the Central Serbia region (91%), and the lowest in the Western Serbia region (82%).

The most frequent reasons for failure to establish cooperation is lack of the reason/need (40%), while only 1% of organizations stated lack of time to be the reason.

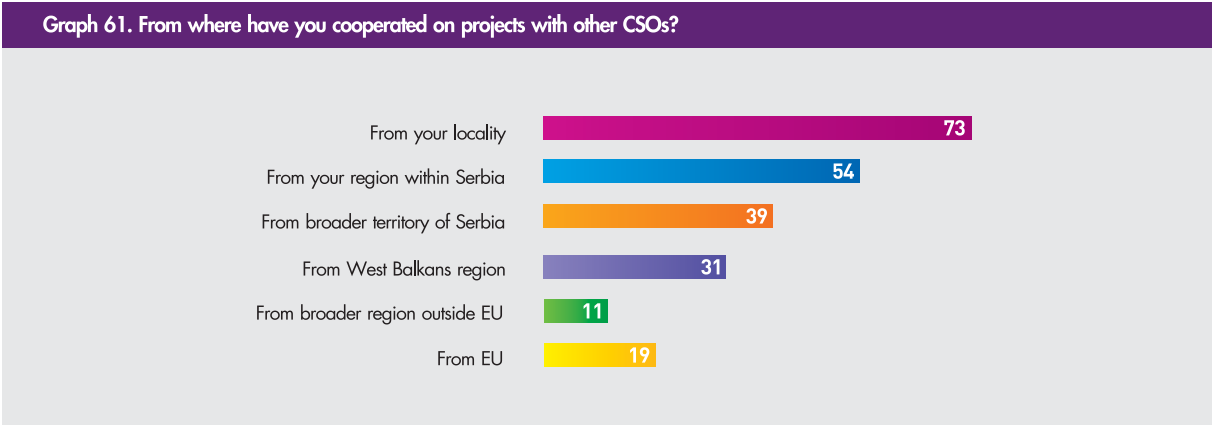


The most frequent motive for establishing cooperation was to assist each other in implementation of activities (82%), but also to carry out common projects (48%), to assist another organization with equipment or to cede premises (35%).

Unclassified organizations had the strongest motive for rendering assistance in implementation of activities (97%), while business/professional and other associations had the least motive (74%). There are no significant deviations among areas, except with organizations dealing with law, advocacy and politics, which to a greater extent than others specified the following methods of cooperation: cooperation within the CSO network (47%), donors' common requirements (44%), training for members (43%), lobbying and advocacy (46%), as well as participation in coalitions (33%).

The greatest deviation is related to the budget size or the region, as regards cooperation in implementing projects jointly. 36% of organizations without budget and 63% of organizations with a budget exceeding €100,000 specify this method of cooperation as dominant; also, this form of cooperation was mainly used by Belgrade-based organizations (58%), while the fewest organizations to use it were from Eastern Serbia (36%).

CSOs founded between 2001 and 2009, more than others, were establishing cooperation through joint requirements to donors (29%); as well as CSOs with the highest budgets (34%), which at the same time, more than other CSOs, were establishing cooperation through trainings for members as well (41%).



The majority of CSOs cooperate with CSOs from their place (73%) and their region within Serbia (54%), but as the territorial distance, increases the number of CSOs' cooperation decreases.

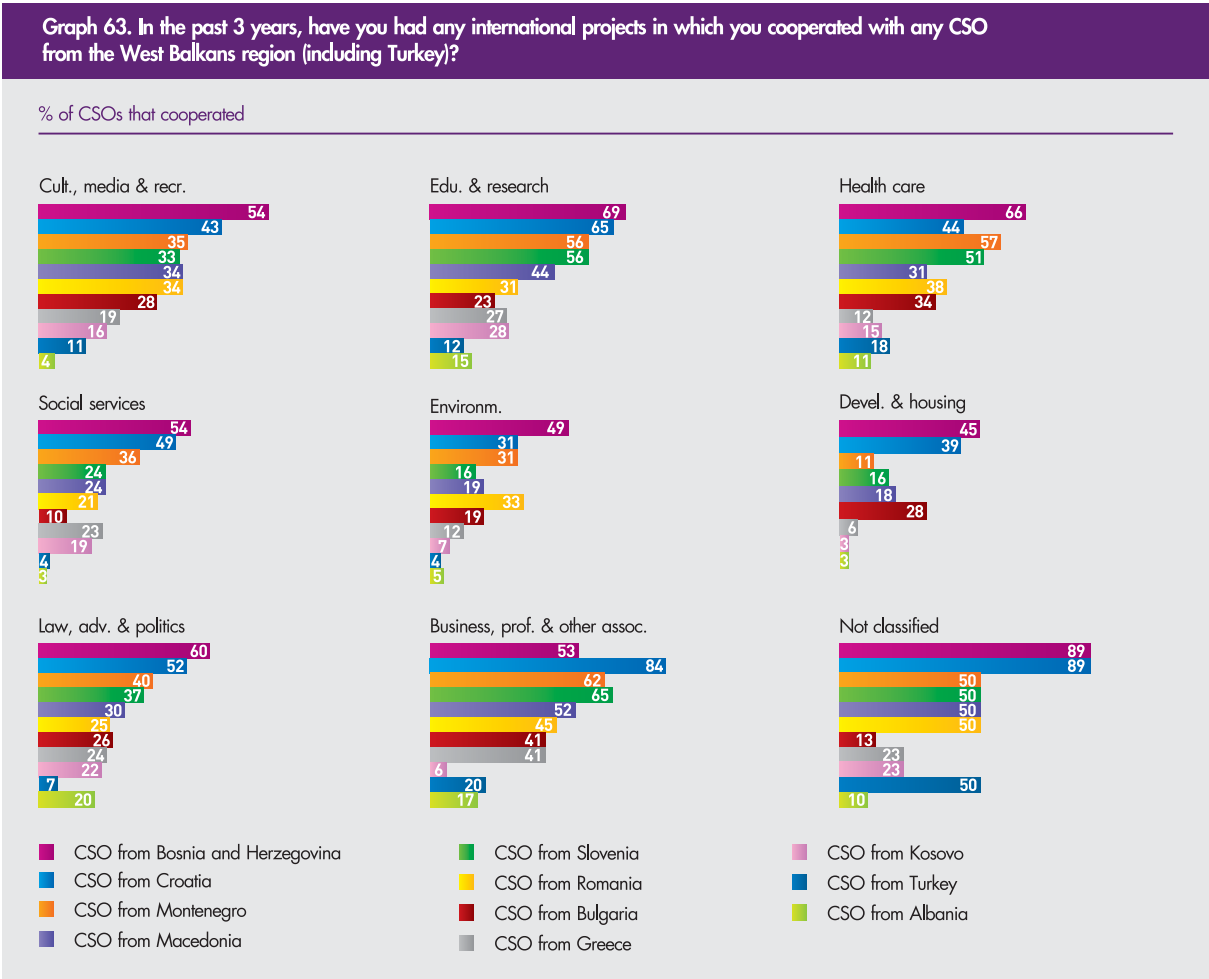
CSOs dealing with development and housing mainly cooperate with CSOs from the same town/city or place (83%), while the fewest CSOs to cooperate are in the field of the environment (68%). There are no significant differences between CSOs from this aspect; with the exception of organizations from Eastern Serbia which cooperate with CSOs from the same place/town/city much less than the others (59%).

Somewhat more than one half of CSOs (54%) cooperated with CSOs from the wider region, within Serbia. Here CSOs dealing with law, advocacy and politics (64%) blaze the trail, while the least cooperation occurs in business/professional and other associations (41%). In the wider region, the minimum cooperation was evident in CSOs founded in the past two years (40%), as well as those without a budget (39%). The most active in establishing cooperation in the wider region within Serbia were CSOs from Vojvodina (71%).

Cooperation with CSOs in the wider territory of Serbia was achieved by 38% of organizations only. Here again, CSOs dealing with law, advocacy and politics blaze the trail (53%), while the least cooperation was evident in CSOs dealing with development and housing (25%). Also, to the greatest extent cooperate CSOs registered in the period between 1990 and 2000 (51%), the biggest organizations (47%), and the ones with the highest budgets (58%), as well as those from Western Serbia (44%), are those which cooperate to the greatest extent. The least cooperation was evident in the case of CSOs without budget (28%).

Cooperation with CSOs from the West Balkan Region was established by 31% of organizations only. In this cooperation, too, CSOs dealing with law, advocacy and politics (53%) are in the forefront, while CSOs dealing with the environment established the least cooperation (19%). Also, CSOs registered in the period between 1990 and 2000 (42%), the largest organizations (43%), and those with the highest budgets (55%), as well as those which are Belgrade-based (43%), cooperate to the greatest extent. The least cooperation was to be found with CSOs from Western Serbia (15%).

Only 11% of CSOs cooperated with CSOs from the wider region outside the EU, which is the smallest percentage in comparison to cooperation with CSOs from different geographical areas. Most cooperative are CSOs dealing with law, advocacy and politics (19%), and least cooperative are CSOs dealing with the environment (3%). There are no significant differences between CSOs, with the exception of organizations with the highest budgets, which establish cooperation with CSOs in this area (25%) more than others.



Cooperation with CSOs from the European Union was established by 19% of organizations. Most cooperative are business/professional and other associations (28%), while least cooperative are CSOs rendering social services (12%). To the greatest extent, this cooperation was achieved by CSOs registered in the

period between 1990 and 2000 (27%), and those with the highest budgets (39%), as well as those based in Belgrade (28%). The least cooperation was established by CSOs from Southeast Serbia (7%).

CSOs most often cooperated on international projects with CSOs from Bosnia and Herzegovina (57%), and Croatia (51%), while the least cooperation was effected with CSOs from Albania (9%) and Turkey (10%). In terms of areas, there are variations regarding the percentage of CSOs that cooperated with CSOs from other West Balkan countries. It is noticeable that business/professional and other associations established cooperation with CSOs from almost all countries, more than any other CSOs, and mainly with CSOs from Croatia (84%) and Macedonia (65%). It is also to be remarked that CSOs from Albania established cooperation in the field of law, advocacy and politics (20%) to the greatest extent.

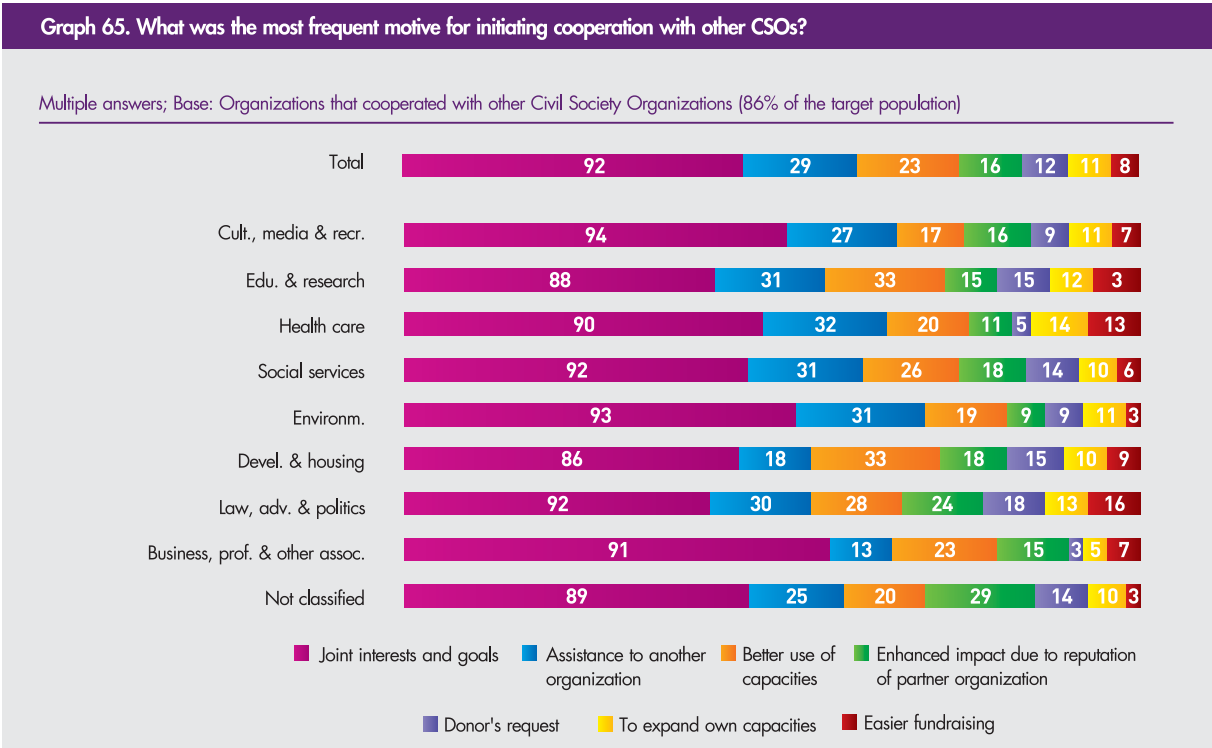
The largest percentage of cooperation, as expected, was between CSOs from Bosnia and Herzegovina and organizations from Western Serbia (83%), with those having more than 20 active people (76%), and those having a budget over €100,000 (78%).

The largest percentage of achieved cooperation in the past 3 years with organizations from the West Balkans, Croatia (66%) and Montenegro (60%) is to be found with Belgrade-based organizations.



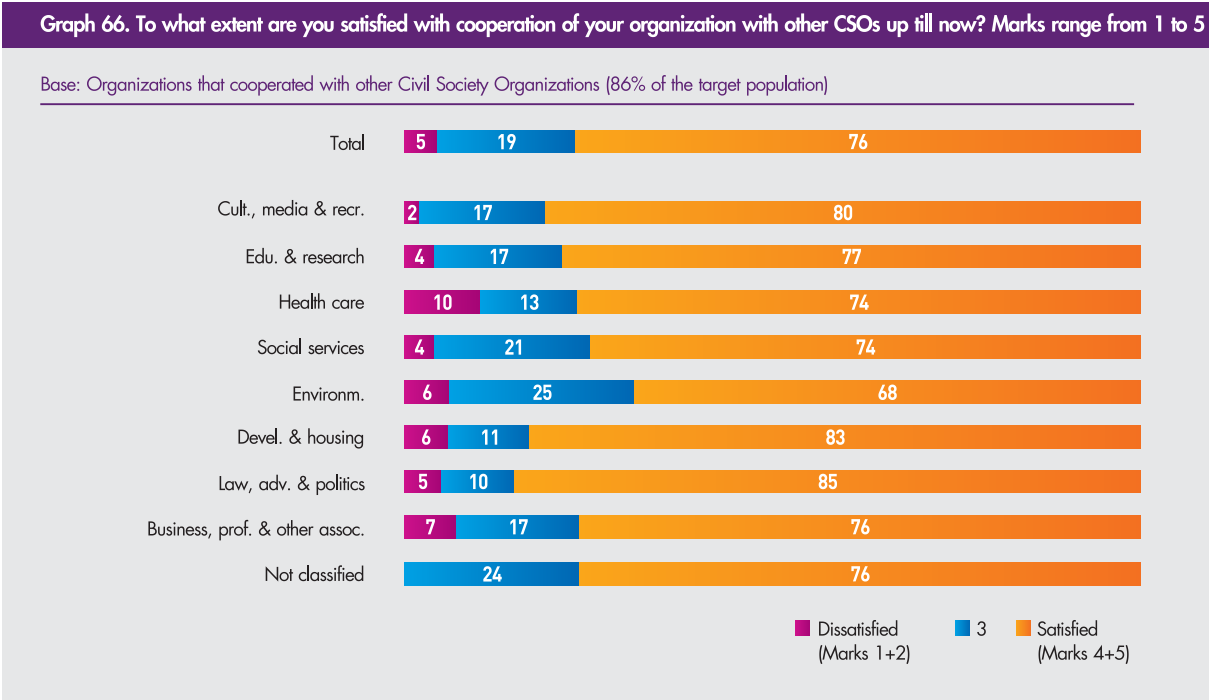
The dominant areas of cooperation were culture (29%), education (13%), and social services (12%). As expected, convincingly strongest cooperation was established between organizations involved in the field of culture, media and recreation (70%), CSOs dealing with healthcare (39%), and those cooperating on social issues. Sports, recreation and socializing were areas in which CSOs dealing with environmental issues (25%) and with development and housing (26%) mainly cooperated.

In the field of culture, CSOs registered in the period before 1989 (35%) , those with up to 5 active persons (36%), those without budgets (42%), and those based in Central Serbia (47%) were most active in cooperation . It is interesting that with sports, recreation or socializing, CSOs established before 1989 (19%), as well as CSOs from Western Serbia (29%) were in the forefront.



The most frequent motive for establishing cooperation are common interests and aims (92%); additional motives are assistance to another organization (29%), as well as better use of capacities (23%). Business/professional and other associations have cooperated less often than other organizations for the purpose of delivering assistance to some other organization (13%). Better use of capacities is the leitmotiv for cooperation between CSOs active in the fields of development and housing, as well as education and research (33% each), while this is the reason given least by CSOs dealing in culture, media and recreation. Unclassified CSOs, more than other CSOs, use the reputation of the partner organization for increasing their influence (29%). Organizations dealing with law, advocacy and politics have been more than other CSOs motivated for the cooperation required by donors (18%) or for the purpose of facilitating fund-raising (16%).

The greatest differences are related to the regional affiliation of CSOs. Organizations from Eastern Serbia have cooperated for the purpose of rendering assistance to another organization (12%) less often than other organizations. CSOs from Western Serbia cooperated to the smallest extent for the purpose of increasing their influence due to the reputation of the partner organization (7%), while CSOs from Central Serbia cooperated less than others at the request of a donor (6%).

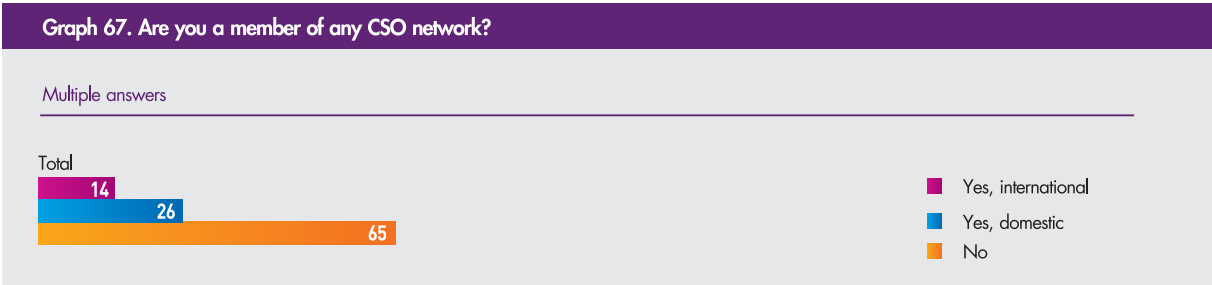


The great majority of CSOs are satisfied with cooperation with other CSOs (76%). Among them, the most represented are organizations dealing with law, advocacy and politics (85%), and those with higher budgets (80%). The largest number of unsatisfied organizations is among those involved in the field of healthcare (10%) and based in the region of Southeast Serbia (9%). There are no significant deviations in this regard among organizations.

When asked “What are you dissatisfied with, what are the main problems?” the majority of organizations answer that they are satisfied with the cooperation to date (28%). As their main problems in establishing cooperation, CSOs specify financial problems for project implementation (10%), as well as insufficient cooperation or lack of motivation for work (6%).

The highest level of satisfaction with the achieved cooperation has been expressed by organizations dealing with the field of development and housing (43%), while organizations dealing with culture, media and recreation most often state financial problems for project implementation (13%) to be an obstacle to the establishment of cooperation.

The most satisfied are organizations registered before 1989 (32%), those with a budget ranging from €1,001 to €5,000 (31%) and those based in Vojvodina (35%), while organizations based in Central and Eastern Serbia (16% each) have expressed the greatest dissatisfaction due to financial problems related to project implementation (13%).



35% of CSOs are members of a CSO network: 25% of domestic and 14% of foreign networks, and 6% of which are members both of foreign and domestic networks.

The greatest percentage of members of international networks are composed of organizations active in the fields of healthcare (27%), law, advocacy and politics, and those which are unclassified (26% each). Membership in domestic networks mainly consists of unclassified CSOs (36%), those active in the fields of social services and of law, advocacy and politics (34% each). Organizations involved in culture, media and communications are mostly not members of any network (77%).

As regards membership in domestic networks, there are no major deviations among organizations, and it is to be expected that brand new organizations, those with a small number of active people and those without a budget, will belong to networks less than other CSOs. It is similar with membership in international networks, whereby a somewhat greater representation of CSOs with budgets over €20,000 and over €100,000 (31% and 32% respectively), as well as of Belgrade-based organizations (24%), is perceptible.

Out of the total number of CSOs that have declared themselves members of a domestic network, most of them specified their membership in FENS (4%), followed by the Hunters' Union of Serbia, the Red Cross of Serbia, Union of the Blind of Serbia, Fire Fighters Union of Serbia, NAPOR (2% each).

FENS mostly brings together organizations dealing with law, advocacy and politics, and those operating in the fields of education and research (10%), those formed between 2001-2009 (7%), those with more than 20 active persons in the organization (10%), those with a budget exceeding €100,000 (10%), and those based in Belgrade and Southeast Serbia (7% each). As expected, unions (associations of associations) mainly bring together organizations established before 1989, and it is interesting that the largest membership in the Red Cross of Serbia consists of Red Cross organizations from Western Serbia (as many as 17%).

When specifying the domestic networks of which they are the members, CSOs mentioned over 400 different networks. Among them are genuine networks and unions, but also individual organizations perceived as networks (Civic Initiatives, Group 484, Ecumenical Humanitarian Organization), even public institutions (e.g. Fund for Development of the Nonprofit Sector of AP Vojvodina).

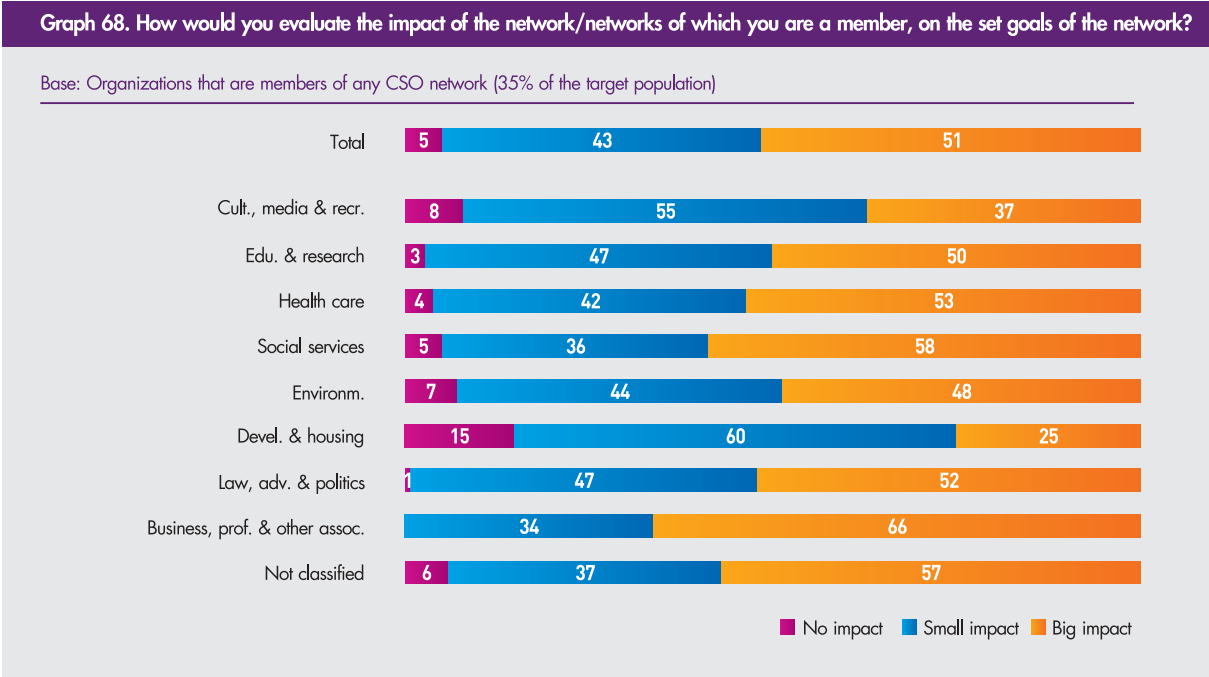
Among international networks, most prominent is the Red Cross membership (3%), and then that of FENS (2%), which is interesting, because FENS is a domestic network also perceived as international. Organizations specified more than 230 international networks of which they are members; however, domestic networks and domestic individual organizations appear among them as well.

As the main reasons for becoming members of networks, organizations mainly specified common interests, aims and activities (48%), and easier ways to achieve their aims/plans (12%), as well as an obligation by their law/Statute or sector-specific interconnection (9%), while the reason least given for membership in network organizations is achieving better results with donors (2%).

Unclassified organizations state as their main motive for joining a network common interests, aims and activities (58%). An easier way to achieve their aims/plans is most often the motive for joining a network of CSOs involved in healthcare (20%), while organizations rendering social services join networks much more than other CSOs because it has been stipulated by the law/Statute or by the organizational structure (17%).

It is noticeable that the higher the budget of the organization, the more it recognizes an interest in joining networks in order to achieve common interests, aims and activities. The convincingly smallest number

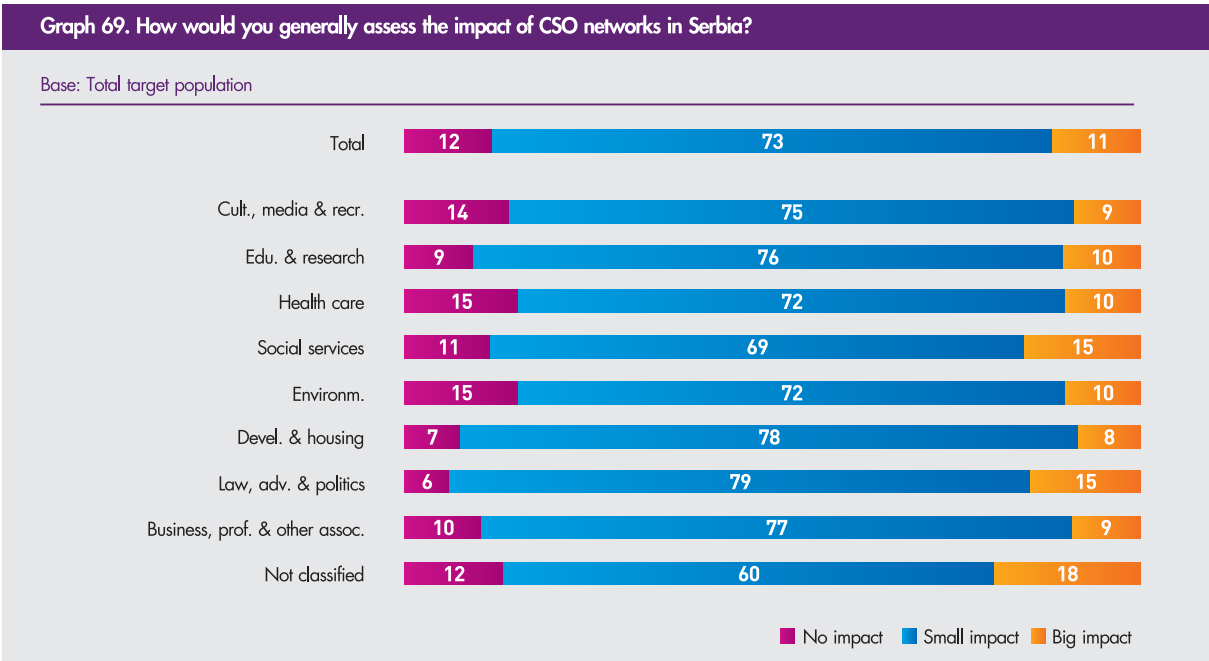
of CSOs from Western Serbia has this motive for membership in a network (25%), which is understandable, because from this region comes a large number of Red Cross organizations, which by the law /Statute or by the organizational structure belong to their network (21%). It further explains the data that this motive have no less than 18% of organizations founded before 1989. It is interesting that new organizations and the ones without a budget recognized the importance of networks for their education, which they most often specify as the motive for joining a network.



About one half of CSOs (51%) evaluate that there is big impact of the network to which they belong on the set goals of the network, but this evaluation varies considerably from area to area.

As many as 66% of business/professional and other associations considered there was a big impact, while 60% of organizations whose area of work of development and housing reported a small impact and 15% of such organizations, no impact.

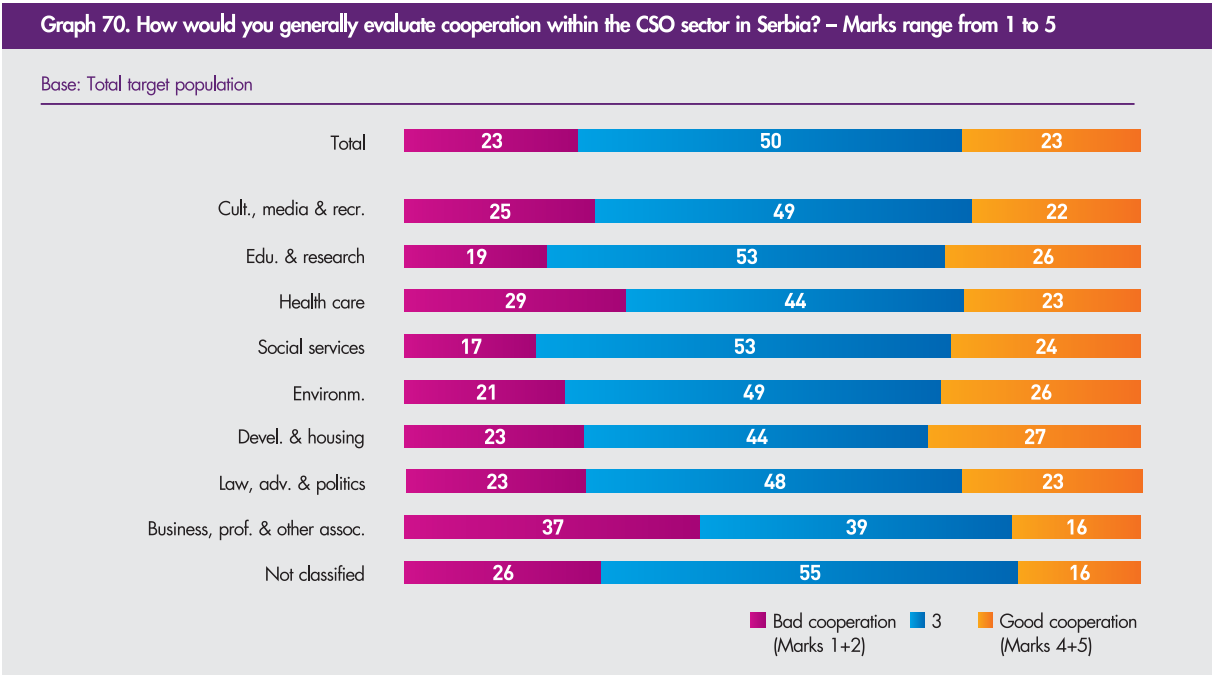
No less than 69% of organizations registered after 2010 evaluate that the impact of their network is big; it is also the opinion of CSOs with a budget exceeding €100,000 (65%), as well as CSOs operating in Western Serbia (79%). In terms of organizations believing that membership in networks has a small impact on the set goals of the network, the major deviations are noticeable with organizations active in the region of Vojvodina (55%).



The greatest percentage of organizations (73%) believe that CSO networks have a small impact in Serbia, or that they have no impact (12%), while only 11% of organizations think that CSO networks have a big impact.

Unclassified CSOs to a greater extent than other CSOs believe the impact of CSO networks in Serbia to be big (18%); CSOs rendering social services express a similar opinion (15%). CSOs dealing with law, advocacy and politics mainly believe that the impact is small (79%), while CSOs dealing with environmental issues and those involved in healthcare to a greater extent than others evaluate that CSO networks have no impact at all (15% each).

Regarding the evaluation of CSO network impact in Serbia, the greatest differences are by geographical affiliation, whereby the majority of organizations operating in the area of Southeast Serbia believe that CSO networks have a big impact (21%), while only 7% of organizations operating in the territory of Vojvodina share that opinion.



Cooperation within the CSO sector in Serbia is mostly (50%) evaluated with an average mark, whereby 23% of organizations believe that cooperation within the CSO sector is generally undeveloped, and the same percentage (23%) of organizations think that cooperation is generally good.

In the forefront of organizations believing that cooperation within the sector in Serbia is generally undeveloped are business/professional and other associations (37%), while in the forefront of organizations believing that cooperation is generally good are organizations dealing with development and housing (27%).

Belgrade-based CSOs to the greatest percentage (31%) believe that cooperation is generally undeveloped; organizations which think that cooperation within the sector is generally good are those whose budgets exceed €100,000 (34%) and which operate in the Central Serbia region (30%).



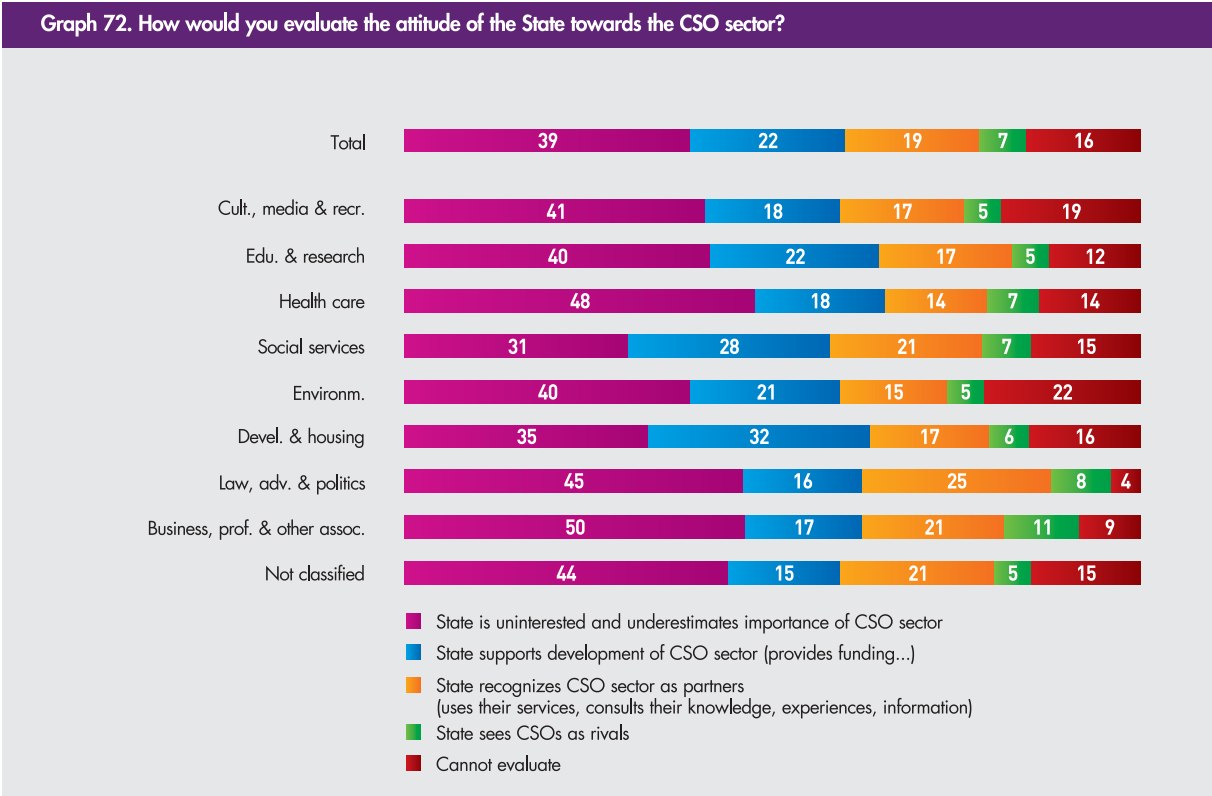
About one half of CSOs (52%) evaluated that they are ready for cooperation on projects with other CSOs in the same city/town or place, while capacities are somewhat lower for cooperation on projects on the broader territory of Serbia and outside Serbia.

Capacities for cooperation, regardless of whether it refers to a city/town, a region, the broader territory of Serbia or outside Serbia, are manifest to the greatest extent with organizations dealing with healthcare, while a negative evaluation of their own capacities is expressed mainly by CSOs involved in the environment and business/professional and other associations, which is in line with the previous findings on cooperation of these CSOs with other CSOs.

There are no significant deviations among organizations and, as expected, the newer ones, those with a smaller number of active people and those with lower budgets, evaluate that their capacities for cooperation are on average weaker than those evaluated by older and larger organizations. It is noticeable that CSOs based in Eastern Serbia evaluate their capacities for cooperation as the worst.

CSO Cooperation with the State

Attitude of the State towards the CSO sector

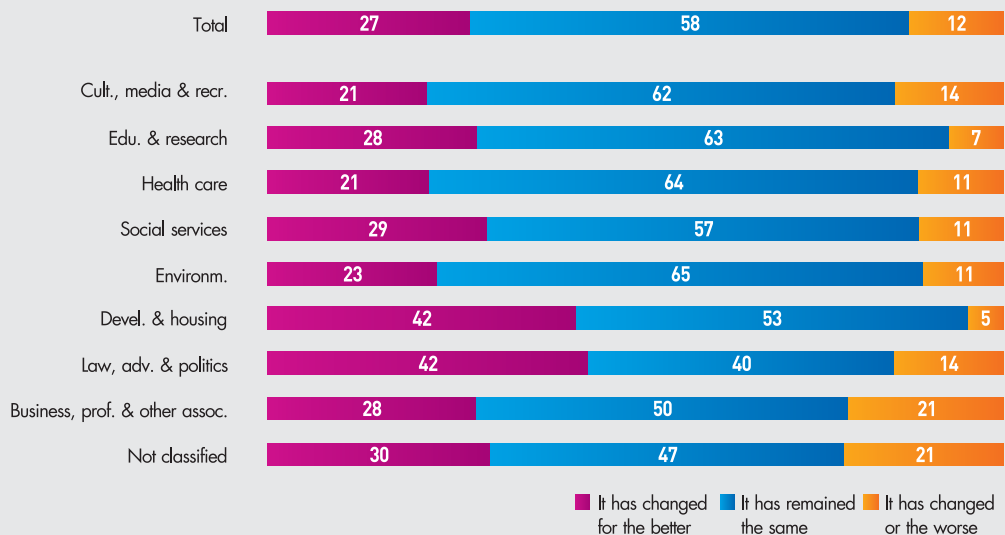


The attitude of the State towards the CSO sector is most often (39%) evaluated as lack of interest, but there are also opinions that the State has a positive attitude towards CSOs, either by helping their development (22%) or even by recognizing CSOs as partners (19%).

Business/professional and other associations mainly believe that the State is uninterested and that it underestimates the importance of the CSO sector (50%), while CSOs rendering social services are least inclined to think that way (31%). 32% of CSOs dealing with development and housing, as well as 28% of CSOs rendering social services, think that the State helps the development of the CSO sector, while CSOs dealing with law, advocacy and politics most often feel that the State recognizes the CSO sector as a partner (25%). In line with the evaluation regarding the underestimation of the CSO sector by the State, business/professional and other associations, more than other CSOs, think that the State perceives CSOs as opponents (11%).

The greatest differences from the average occur with CSOs without a budget, which think much less than other CSOs that the State is uninterested (30%), as well as by regions, where the answers range from 26% in Western and Eastern Serbia to as much as 47% in Belgrade. A good opinion of the positive attitude of the State towards the CSO sector, which is evaluated through assistance to development and financing of CSOs, is mainly expressed by CSOs registered before 1989, as well as by CSOs from Eastern Serbia (33%), while the opinion of CSOs without a budget and those which are Belgrade-based is much worse (14% each). The opinion that the State recognizes CSOs as partners is most common among big organizations, those with more than 20 active people (28%) and those with a budget exceeding €100,000 (30%), as well as CSOs from Western Serbia (31%). CSOs having more than 20 active people (14%) and CSOs without a budget to the greatest extent evaluate that the State perceives CSOs as opponents (13%).

Graph 73. In what way has that attitude changed in the past 3 years?



The majority of CSOs evaluate that the attitude of the State towards CSOs has not changed in the past three years (58%); however, among those believing that there have been changes, most think that it has changed for better (27%), while only a few think that it has changed for worse (12%).

Positive shifts have been noted mainly by CSOs dealing with law, advocacy and politics, or CSOs dealing with development and housing (42% each), while business/professional and other associations most often evaluate that things have become worse (21%).

A change for the better is mainly noticed by CSOs with a budget exceeding €100,000 (46%), and those from Western Serbia (45%), while a change for the worse is most often registered by CSOs from East Serbia (17%) and organizations registered before 1989 (16%).

CSO cooperation with the State

Graph 74. Have you cooperated with any State institution so far?

The percentage of CSOs that have cooperated



The great majority of CSOs (79%) cooperated with State institutions at the local level, less than half (36%) at the Autonomous Province level and somewhat more than one half (51%) at the Republic level.

There are no significant differences in cooperation, except at the Republic level, where cooperation in most cases was established by CSOs dealing with law, advocacy and politics (65%), and in the fewest cases by CSOs involved in culture, media and recreation (38%).

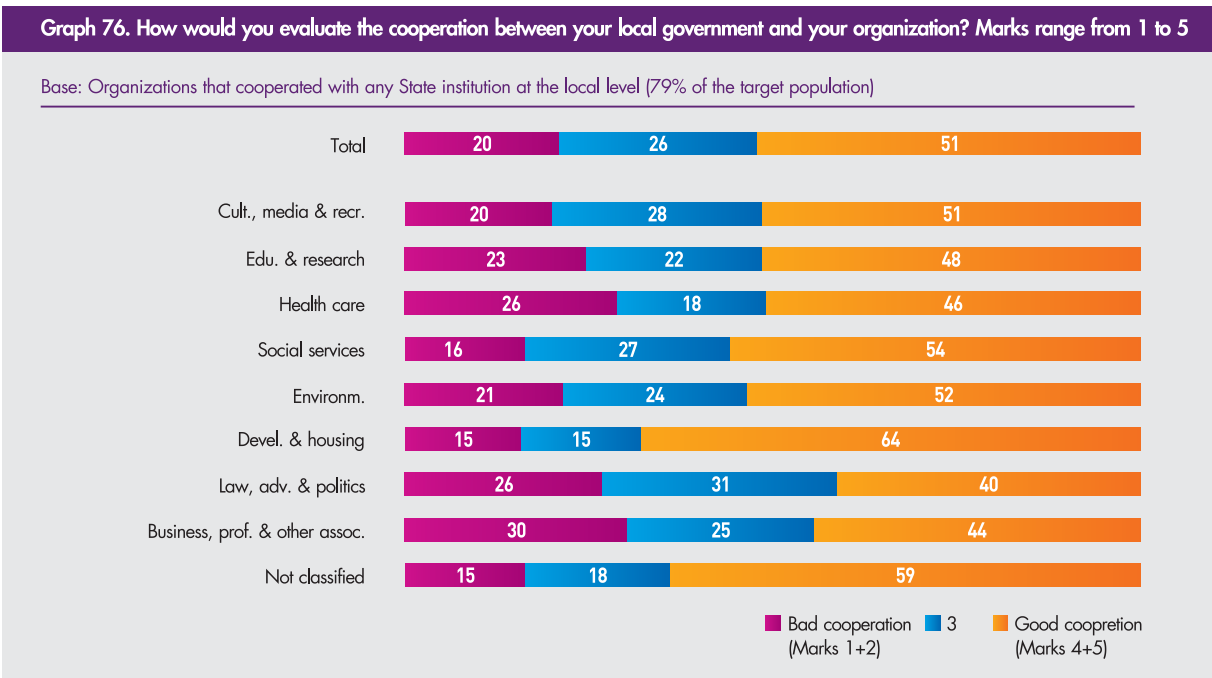
The same trends are noted in cooperation at all three levels. The older and bigger the organization (regarding the number of active members and budget), the better the cooperation established. At the local level, it ranges from 84% of the oldest organizations to 66% of the newest ones; from 71% of the smallest CSOs to 92% of the biggest; from 57% of CSOs without a budget to 92% of CSOs with a budget exceeding €100,000. At the Republic level, it ranges from 56% of the oldest CSOs to 38% of the newest; from 38% of the smallest CSOs to 70% of the largest; from 32% of CSOs without a budget to 80% of CSOs having the

highest budgets. Differences by regions are noted at the Republic level, whereby, as expected, Belgrade-based CSOs more than other CSOs (64%), cooperate with the State, while the least cooperation is evidenced by CSOs from Vojvodina (42%). At the Province level, the ranges are somewhat smaller, from 42% of CSOs established before 1989 to 31% of the newest ones; from 28% of the smallest CSOs to 66% of the largest ones; from 21% of CSOs without a budget to 53% of organizations with the highest budgets.



CSOs that have not cooperated with a State institution at any level, most often state that there was no need for cooperation (25%), and less often that the institutions were not interested (11%).

There are no significant differences among CSOs regarding primary fields of work. CSOs that cooperated with the State, but not at all levels because there was no need, are those mainly established before 1989 (21%), with a budget from €20,001 to €100,000 (26%), as well as CSOs based in Eastern Serbia (25%). The least need for cooperation with the State was felt by CSOs without a budget (18%) and CSOs from Vojvodina (14%).



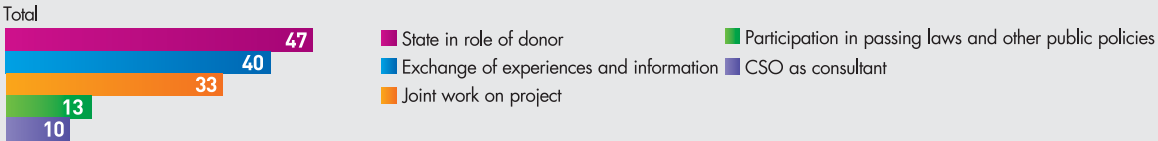
One half of CSOs (51%) give high marks to cooperation with State institutions at the local level, while every fifth organization (20%) gives low marks.

Cooperation with the local government is most highly evaluated by CSOs dealing with development and housing (64%), and worst evaluated by business/professional and other associations (30%). There are no significant differences regarding other parameters, with the exception of Belgrade-based CSOs (30%), which are dissatisfied with cooperation with the local government to a greater extent than other CSOs.

When explaining their evaluation of cooperation with local government, CSOs give diverse answers: that cooperation is good, and they are satisfied and receive full support; that there is lack of interest, a neglect and underestimation of the importance of CSOs; that local governments have understanding and good will, but undervalue the importance of CSOs.

Graph 77. What type of cooperation with State institutions have you had so far?

Multiple answers; Base: Organizations that cooperated with any State institution at any level (86% of the target population)



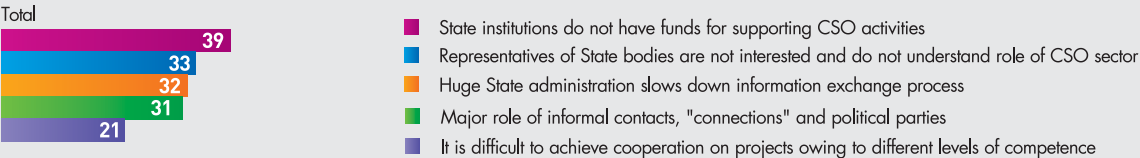
The most frequent types of cooperation are those in which the State is a donor (47%), or the exchange of experiences and information (40%), while somewhat more than one third of organizations have specified joint work on projects (33%). To a much smaller extent, CSOs participate in passing laws and other public policies (13%), or help as consultants (10%).

The State in the role of a donor is the most frequent type of cooperation with CSOs dealing with development and housing (57%) and rendering social services (56%), while CSOs that are not classified most often cooperate with the State by exchanging experiences and information (57%) and through joint work on a project (43%). As expected, CSOs involved in law, advocacy and politics cooperate with the State to the greatest extent, by participating in passing laws and other public policies (26%). CSOs dealing with education and research operate more than other CSOs as consultants to the State (18%).

It is noticeable that CSOs with a budget exceeding €100,000 cooperate with the State more than other organizations, regardless of the type of cooperation; from 56% when the State plays the role of a donor, to 24% when they perform as consultants to the State. As will be seen in more detail later in the chapter on CSO financing, the State most often appears in the role of a donor with the oldest CSOs (54%), as well as the big organizations with 11 to 20 active people (51%). Belgrade-based CSOs, more than CSOs from other regions, work together with the State on projects (39%), participate in passing laws and other public policies (19%), or operate as consultants to the State (17%).

Graph 78. What have been the most frequent problems faced by your organization in cooperating with State institutions up till now?

Multiple answers; Base: Organizations that cooperated with any State institution at any level (86% of the target population)



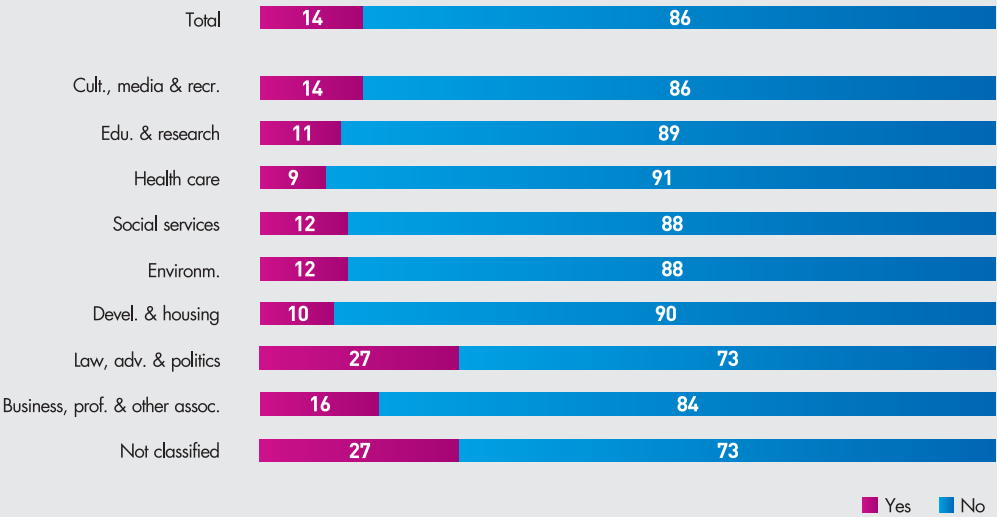
The most frequent problems in cooperation with State institutions are specified as being lack of funds for supporting CSO activities (39%), lack of interest in and understanding of the role of the CSO sector (33%), a huge State administration (32%) and the major role of informal contacts, “connections” and political parties (31%).

CSOs rendering social services and involved in culture, media and recreation, most frequently believe that State institutions do not have the funds for supporting CSO activities (48% each), while business/professional and other associations most often believe that representatives of State bodies are not interested and do not understand the role of the CSO sector (42%). These associations also believe that the huge State administration slows down the process of information exchange (42%), finding themselves in agreement here with CSOs dealing with law, advocacy and politics (44%), which also, more than others, think that the role of informal contacts, “connections” and political parties (44%) is too big.

The opinion that State bodies are not interested and do not understand the role of the CSO sector is most frequently expressed by organizations without a budget (51%), those with more than 20 active persons (47%), as well as Belgrade-based CSOs (43%). CSOs registered in the past two years, more than others, believe that the huge State administration slows down the exchange of information (43%), or that the role of informal contacts, “connections” and political parties is too big (37%), the latter opinion being most often shared by Belgrade-based CSOs.

Graph 79. Have the local authorities or the State apparatus in any way thwarted your organization's activities?

Base: Total target population



On average, 14% of CSOs state that the authorities and the State apparatus have thwarted their organizations' activities; the same observation is made by 27% of CSOs dealing with law, advocacy and politics and 27% of unclassified organizations. The least thwarted were CSO activities in the field of health-care (9%).

The most thwarted were the activities of CSOs based in Eastern Serbia (19%), Central Serbia and Belgrade (15% each), as well of CSOs established from 1990 to 2000 (17%). The least thwarted were the activities of CSOs established before 1989 and those having more than 20 active persons (11% each), as well as of CSOs with a budget exceeding €100,000 (10%).

Graph 80. In what way did the local authorities or the State apparatus thwart the activities of your organization?

Multiple answers; Base: Organizations whose activities were in any way thwarted by the local authorities or the State apparatus (14% of the target population)

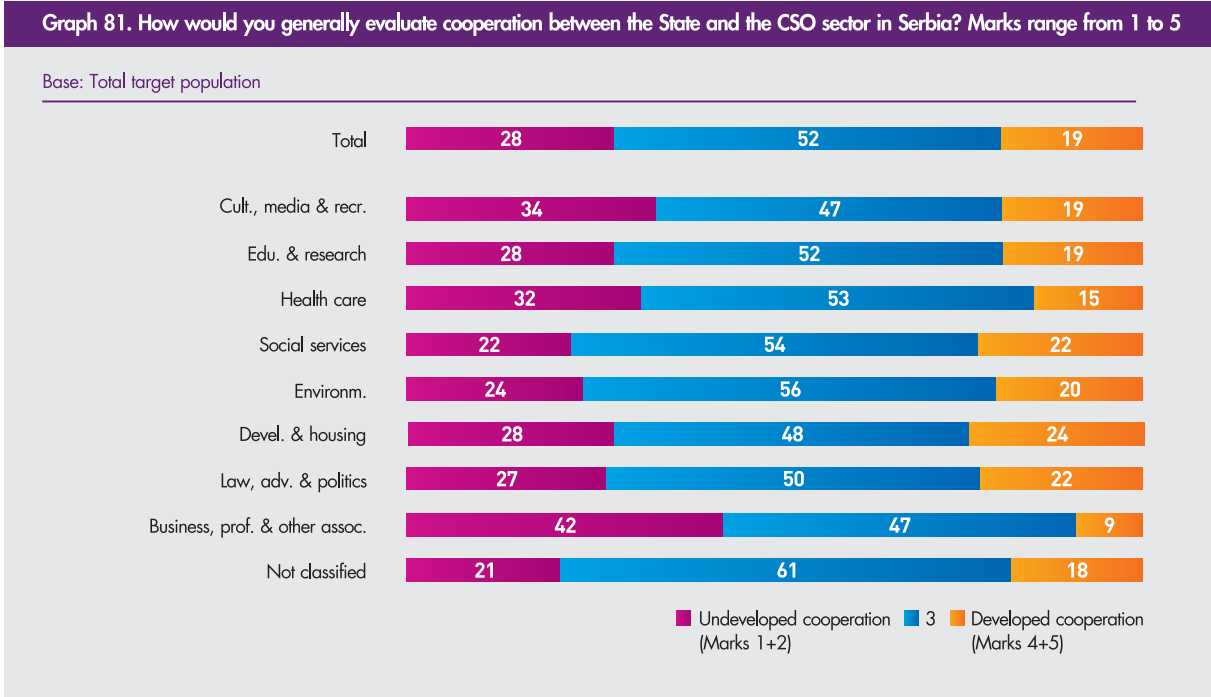


As the most frequent methods of thwarting activities, lack of interest (31%), denial of funds (25%), slowness (19%) and political pressure (16%) were mentioned.

Business/professional and other associations evaluate in the largest number that the State has thwarted their work by being uninterested, inactive, failing to give support and assistance (56%); all organizations complain equally about low or refused funds; unclassified CSOs, more than others, believe that the State is slow, is responsible for delays in approving projects and obstructs their work (46%); CSOs dealing with environmental issues most often believe that the State thwarts their work through political pressures, blackmailing, corruption, abuse, and even theft of projects (25%); while CSOs involved in education and research feel that the State thwarts their activities by failing to allocate premises to them, or by taking the premises away, or by allocating inadequate financial resources (29%).

The thwarting of the organizations' activities owing to lack of interest, inactivity of the State, or lack of support and assistance, is most experienced among CSOs registered since 2010 (44%), CSOs without a budget (47%), and, quite definitely and above all, among CSOs based in Eastern Serbia (59%); while it is least present among CSOs having a budget over €100,000 (7%). Insufficient financial resources or funds denied are the ways in which activities are thwarted most often specified by CSOs registered between 1990

and 2000 (30%) and those with a budget ranging from €5,001 to € 100,000 (40%), but the least specified by the newest organizations (9%) which, on the other hand, as the most frequent reason of thwarting their activities specify slowness, delay in approving projects (28%) as the most frequent way in which activities are thwarted. Political pressure, blackmail, corruption, different abuses, and theft of projects have been noted at about the same level by CSOs registered between 1990 and 2000 (22%), those registered between 2001 and 2009 (21%), organizations with more than 20 active people (32%), those with a budget ranging from €20,001 to €100,000 (24%), and CSOs from Southeast Serbia (22%). The latter evaluate the failure to obtain premises or their being taken away, as well as the allocation of inadequate financial resources, to be one of more significant reasons for the thwarting of their activities (22%); CSOs founded between 1990 and 2000 (21%) hold a similar opinion.



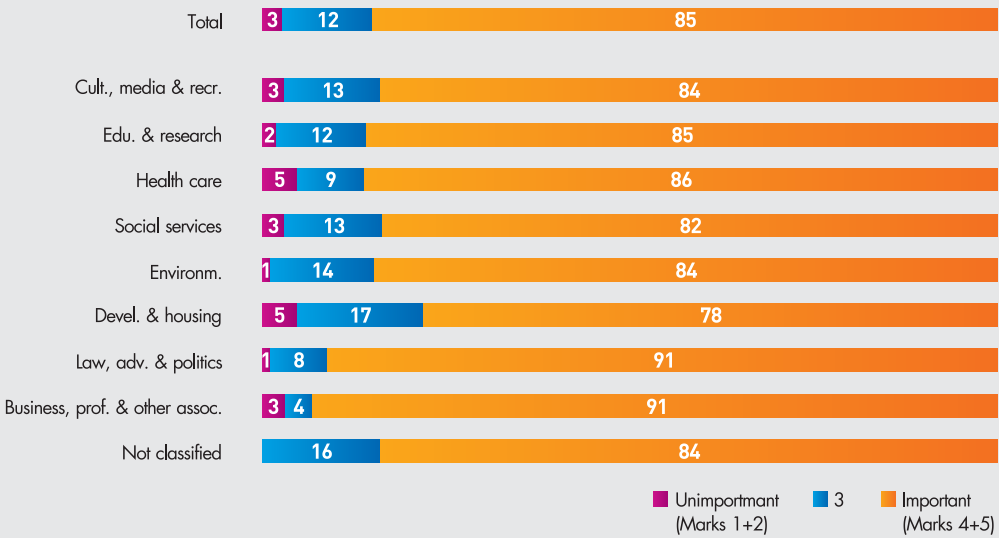
The majority of CSOs (52%) give an average mark for cooperation between the State and CSOs, while as many as 28% give a low mark, much worse than the mark given for cooperation with the local government, to which half of CSOs give a high mark.

Average marks are mostly given by unclassified CSOs (61%). The lowest marks for cooperation are given by business/professional and other associations (42%) and CSOs involved in culture, media and recreation. High marks for cooperation are given by CSOs dealing with development and housing (24%), followed by CSOs rendering social services and CSOs dealing with law, advocacy and politics (22% each).

There are no significant differences among CSOs regarding this issue, with the exception that Belgrade-based CSOs (36%) give the lowest marks for cooperation, while the highest marks are given by CSOs from Eastern (31%) and Western Serbia (28%). Also, high marks for cooperation are given by CSOs having a budget ranging from €5,001 to €20,000 (26%).

Graph 82. How would you evaluate the importance of cooperation between the State and CSOs? Marks range from 1 to 5

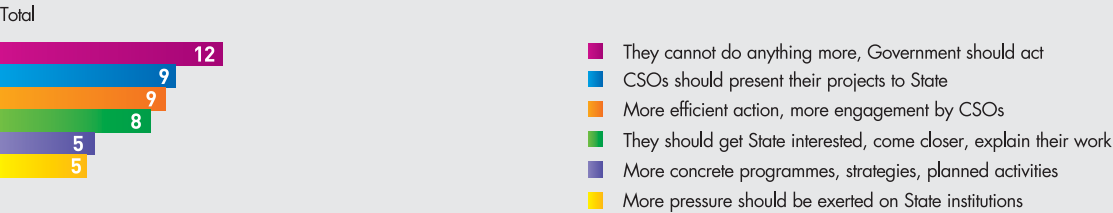
Base: Total target population



The great majority of CSOs (85%) evaluate cooperation between the State and CSOs as important, with business/professional and other associations and CSOs dealing with law, advocacy and politics (91%) taking the lead. There are no major differences between CSOs in this regard, whereby the most often stated reasons for such an assessment are: the need for support and financial assistance from the State (15%), supplementation and mutual assistance, as well as easier achievement of aims and plans (12% each), CSOs as playing a State-helping role, in recognizing problems, pointing to and offering insight into them (9%).

Graph 83. What could the CSO sector do to improve cooperation with the State?

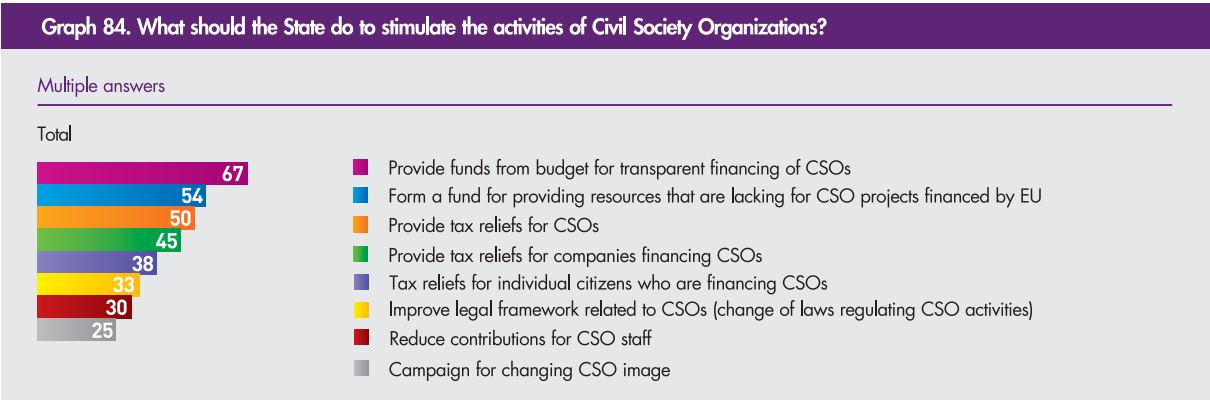
Multiple answers; Base: Total target population



As many as 12% of CSOs believe that they can do nothing more to improve cooperation with the State; other ideas have been mainly limited to the notions that CSOs need to make the State more interested by presenting their projects or by becoming more engaged and acting more efficiently (9% each). There are no significant differences among CSOs regarding primary fields of work, with the exception of the evaluation that CSOs should try to get the State interested, by coming closer and trying to explain their work, which is an opinion favoured most by organizations dealing with law, advocacy and politics (14%), and least by business/professional and other associations (2%). Also, CSOs involved in healthcare stand out for believing, more than others, that CSOs should help the State, recognize problems and draw attention to them (11%).

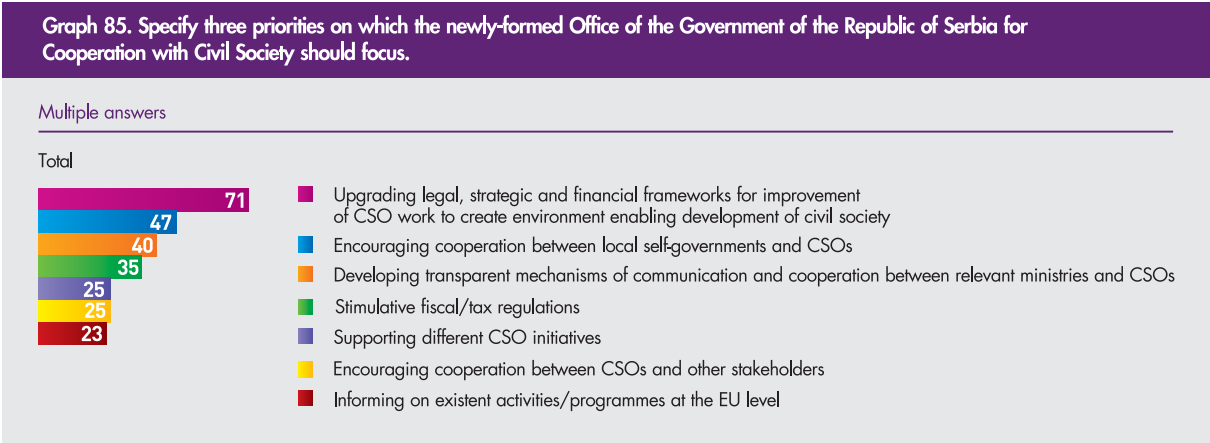
The only noticeable differences are with reference to the average. CSOs from Southeast Serbia most often feel that it is necessary to present the projects to the State (16%), while those without a budget think that the best solution is in more efficient action and more engagement by CSOs (15%). Organizations having a budget of over €100,000 believe that it is necessary to develop more concrete programmes and strategies, and to make better planning (12%), while organizations with more than 20 active people place the greatest expectations in the improved position and status of CSOs in the media (11%).

The role and contribution of the State to CSO development



CSOs have many more ideas of what the State could do to stimulate their work. The majority specified activities related to the financial problems of CSOs: providing funds from the budget in a transparent way (67%); establishing a fund for providing the EU-required “matching funds” that are lacking for CSO projects financed by the European Union (54%); tax reliefs for CSOs (50%) and tax reliefs for companies financing CSOs (45%); while every fourth organization also specified a campaign for changing the CSO image.

CSOs involved in healthcare, much more than other CSOs, believe that the State should create a fund for providing the required “matching funds” lacking for projects financed by the European Union (66%), and make possible tax reliefs for CSOs (65%), as well as for companies financing CSO activities (68%). The latter opinion is also held, to a great extent, by CSOs dealing with law, advocacy and politics (57%). Unclassified CSOs mostly believe that the State should make possible tax reliefs for citizens/individuals who are financing CSO activities. Reduced contributions for CSO employees have been suggested as the best solution for stimulating CSO activities by no less than 45% of CSOs dealing with healthcare and 42% of CSOs dealing with law, advocacy and politics, while a campaign for changing the CSO image is most often suggested by CSOs dealing with development and housing (40%). It is interesting that CSOs involved in environmental issues are the only ones with below average valuations regarding all the questions posed.



As the priority of the newly established Office for Cooperation with Civil Society of the Government of Serbia, the majority of CSOs have specified the upgrading of legal, strategic and financial frameworks, as well as of the CSO working environment (71%); here, there are no significant differences among CSOs with reference to the primary field of work.

CSOs that are not classified anywhere have the greatest expectations regarding encouragement for co-operation between local governments and CSOs (58%), similarly to CSOs involved in environmental issues (52%); development of transparent mechanisms of communication and cooperation between the relevant Ministries is seen as the priority of the Office among CSOs involved in education and research (51%); while incentive tax/fiscal regulations as the priority have been suggested by CSOs dealing with healthcare (43%). Business/professional and other associations, more than other CSOs, see the Office as

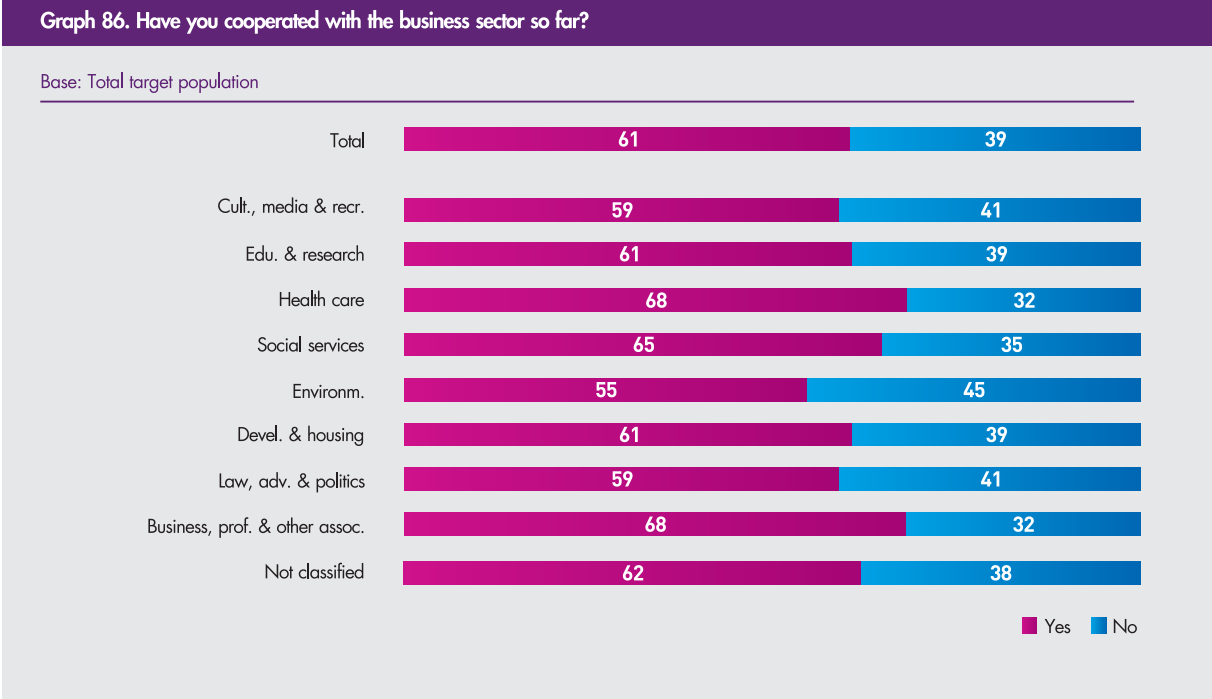
a body that will provide information on current activities and programmes at the European Union level, including the Europe for Citizens programme (42%), and will also provide support for different CSO initiatives (35%).

CSOs having more than 20 active people mainly believe that the priorities of the new Office should be the upgrading of legal, strategic and financial frameworks, as well as of the CSO working environment (82%). These organizations, more than other CSOs, also give importance to the creation of incentive tax/fiscal regulations as the Office's priority (47%), an opinion also shared by CSOs having a budget over €100,000 (46%) and Belgrade-based CSOs (45%).

Informing about the current activities and programmes at the European Union level, including the Europe for Citizens programme, is most often seen as the priority by the newly established CSOs (44%) and CSOs from Southeast Serbia (40%).

CSO Cooperation with the business sector

Reasons for and types of cooperation



The majority of CSOs (61%) have cooperated with the business sector. In the forefront are CSOs involved in healthcare, as well as business/professional and other associations (68% each). CSOs dealing with environmental issues achieved the least cooperation with the business sector (55%).

The level of cooperation with the business sector is directly connected with the age of the organization, so that those founded before 1989 (68%) establish cooperation to a much greater extent than organizations registered in 2010 and later (48%); regarding the size, CSOs having 11 to 20 active people (69%) cooperate best, while the worst cooperation is established by very small CSOs with up to five active people (55%); organizations with a budget ranging from €5,001 to €20,000 (77%) quite definitely establish the best cooperation, unlike only 35% of those without a budget. By regions, the best cooperation has been established by CSOs in Central and Eastern Serbia (68% each) and the worst, by those in Southeast Serbia (52%).



CSOs that have not cooperated with the business sector most often state as their reason that they had no need for cooperation (29%) or that the business sector was not interested (24%). Absence of the need or attempt to establish cooperation is most often specified by unclassified CSOs (70%), as well as by business/professional and other associations (42%); CSOs rendering social services (31%) to the greatest extent evaluate that the business sector is not interested, as well as CSOs involved in culture, media and

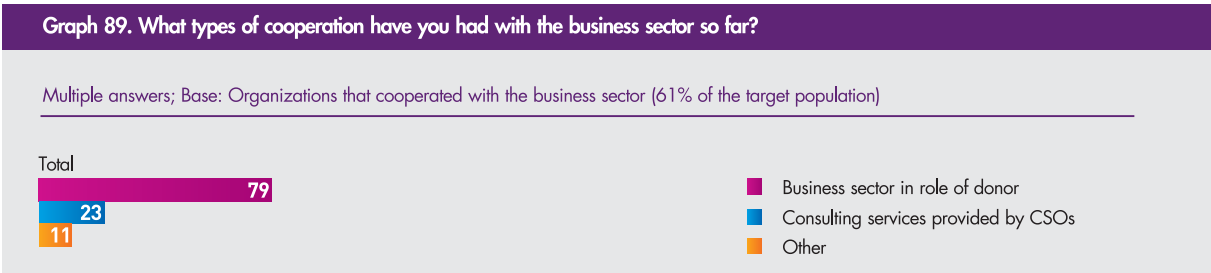
recreation (26%). Lack of the opportunity/possibility for cooperation is most often stated as the reason by CSOs dealing with development and housing (33%).

CSOs from Vojvodina to the greatest extent neither had the need for cooperation nor tried to establish it (39%), similarly to CSOs registered between 1990 and 2000 (36%), and those having 11 to 20 people (37%). The majority of CSOs from Eastern Serbia evaluate that the business sector is not interested (40%), while CSOs without a budget most often have not even had an opportunity or possibility to cooperate (32%).



Cooperation is most often initiated through the interest of the business sector in a specific area (49%) and/or by the personal motives of business sector representatives (32%). The difference by primary fields of work is noticeable. Regarding CSOs involved in culture, media and recreation, the private motives of business sector representatives are dominant in establishing cooperation with the business sector (42%); as regards business/professional and other associations, in most cases members of the Managing Board of the organization come from the business sector (40%); CSOs dealing with environmental issues to a greater extent than other CSOs establish cooperation with enterprises because they are members of the same association (16%); CSOs dealing with development and housing (20%) and CSOs involved in education and research (16%) more often than other organizations play the role of consultants to enterprises.

Interest for a specific area by the business sector is the most frequent form of cooperation for organizations with a budget exceeding €100,000 (60%); personal motives of the business sector representatives are most present among CSOs in Eastern Serbia (43%) and among organizations having modest budgets below €1,000 (42%); it is interesting that CSOs without a budget, more than other CSOs, have on their Managing Boards representatives of the business sector (27%); shared membership with an enterprise in the same association is most common among CSOs in Southeast Serbia (18%), while their percentage as consultants to the business sector is higher in Western Serbia (11%), as compared to other regions.

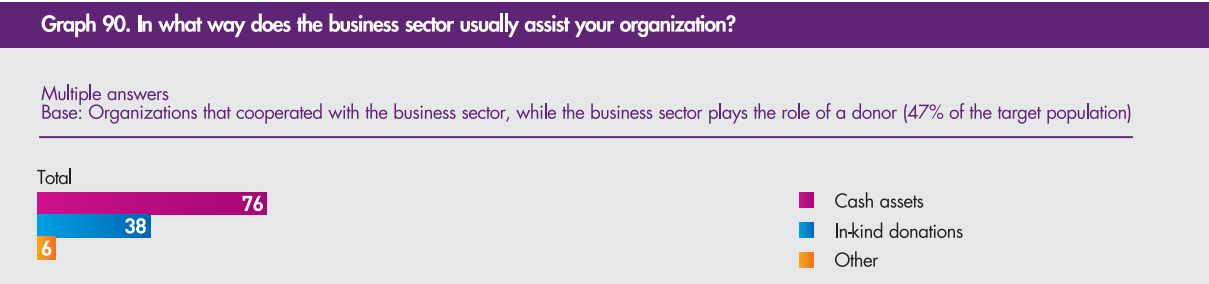


There were mostly only two types of cooperation between CSOs and the business sector: in 79% of cases of cooperation the business sector played the role of donor, while in 23% of cases it referred to consulting services offered by CSOs.

The business sector most often appears as a donor to unclassified organizations (96%), as well as organizations involved in culture, media and recreation (87%), while they are most rarely donors to organizations dealing with development and housing (64%). CSOs as consultants to the business sector most often come from organizations dealing with education and research (47%), while the fewest of them are involved in culture, media and recreation (11%).

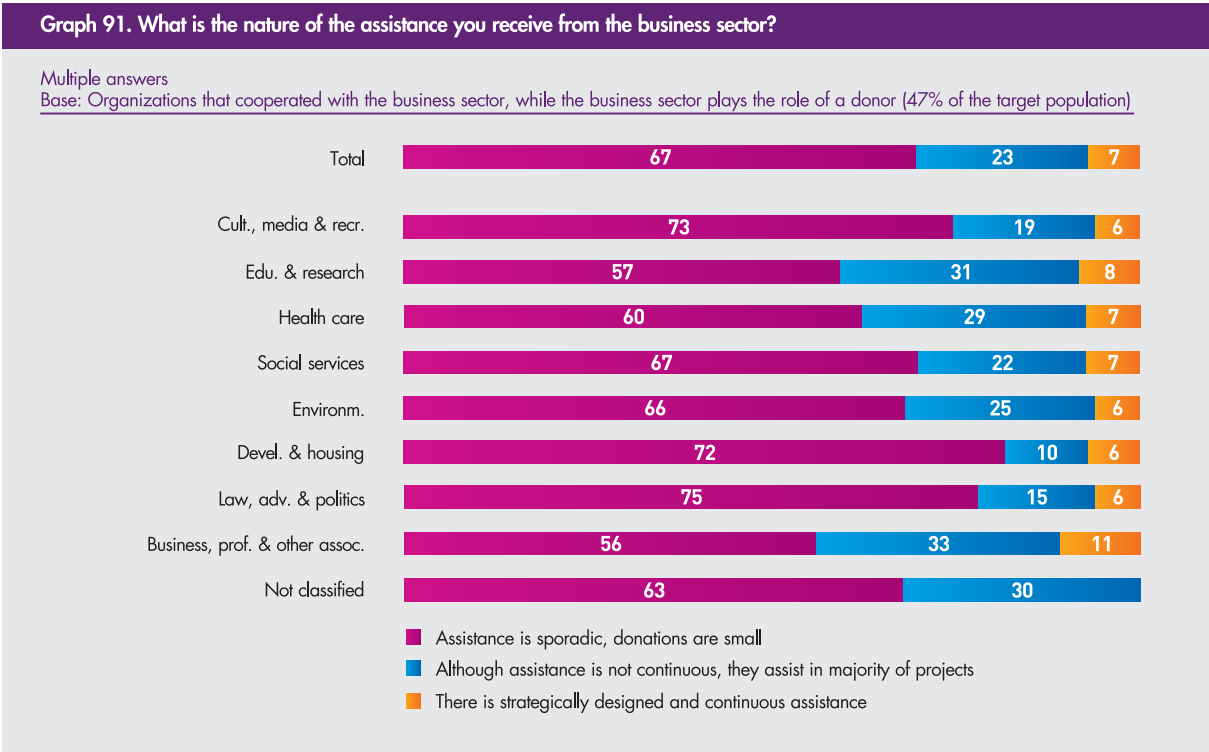
There are no significant differences in the type of cooperation based on the business sector's role of donor, the exception being the fact that the business sector is definitely most rarely a donor to organizations without a budget (61%), which more than other CSOs have representatives of the business sector on their Managing Boards. CSOs as consultants to the business sector are mainly organizations having more

than 20 active people (34%), those with a budget exceeding €100,000 (39%) and those which are Belgrade-based (29%); rarely do they appear in that role in the Eastern Serbia region (12%).



As a donor, the business sector primarily supports CSOs through financial means (76%). Most financial help from the business sector is received by unclassified CSOs (88%), while the least help goes to CSOs dealing with law, advocacy and politics (64%). In-kind donations are most commonly given to CSOs involved in healthcare (54%), and least commonly given to unclassified CSOs (15%).

There are no significant differences among CSOs, except that organizations without budgets receive far less financial assets from the business sector than others (58%), while at the same time receiving most in-kind donations (61%).



As a donor, the business sector in the majority of cases supports CSOs sporadically and with small donations (67%), providing intermittent help but assisting most CSO projects (23%); only 7% of cooperation in this form involves strategically thought-out and continuous assistance.

CSOs dealing with law, advocacy and politics most often receive sporadic assistance in the form of small donations (75%), while business/professional and other associations receive intermittent support with most projects (33%), or strategically thought-out and continuous assistance (11%), to a greater extent than other organizations.

Small occasional donations are most frequently received by CSOs with a budget below €1,000 (82%), while occasional assistance with a majority of projects are mostly received by CSOs with a budget exceeding €100,000 (35%); CSOs without a budget (19%), those registered in the past two years (13%), and Belgrade-based CSOs (11%) receive more strategically thought-out and continuous assistance from the business sector than other organizations.

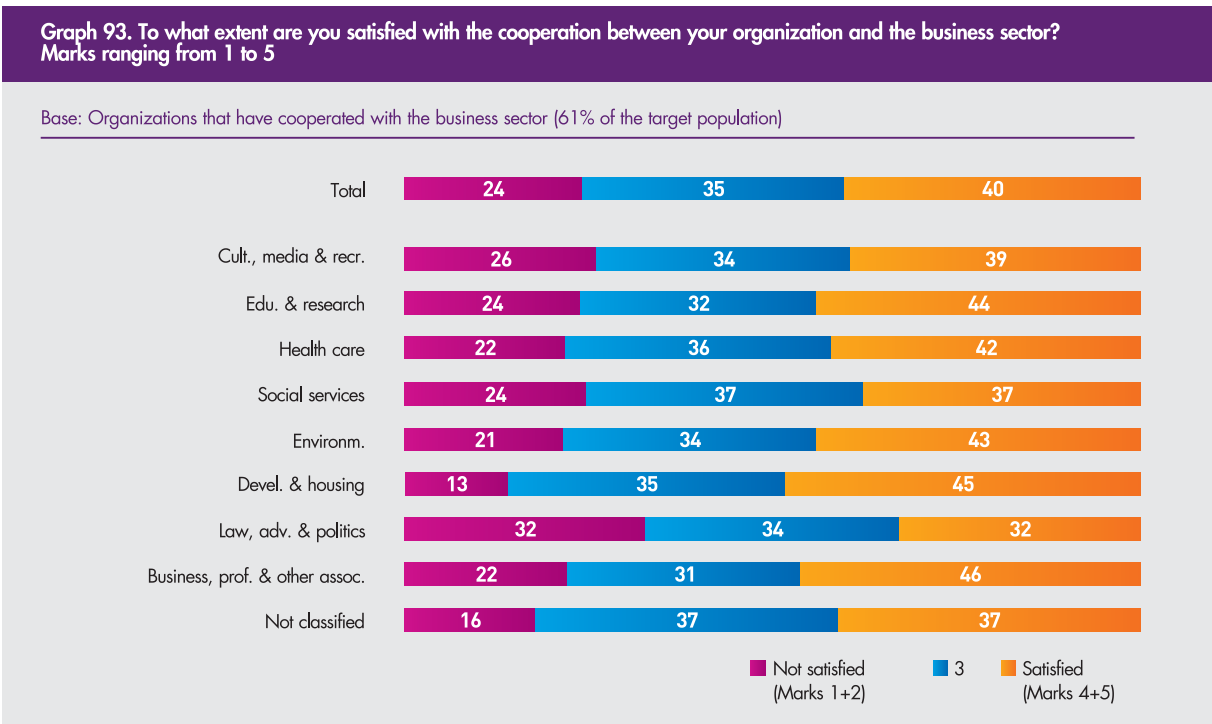
Cooperation with commercial banks



Almost 70% of CSOs failed to establish cooperation with commercial banks, above all CSOs involved in healthcare and unclassified CSOs (87% each), while business/professional and other associations have achieved the highest level of cooperation (38%).

There are no significant differences between CSOs in this regard, except that CSOs from Western Serbia to the greatest extent failed to establish cooperation with commercial banks (85%), while the most successful in establishing this type of cooperation were CSOs with more than 20 active persons (48%).

Evaluation of cooperation with the business sector



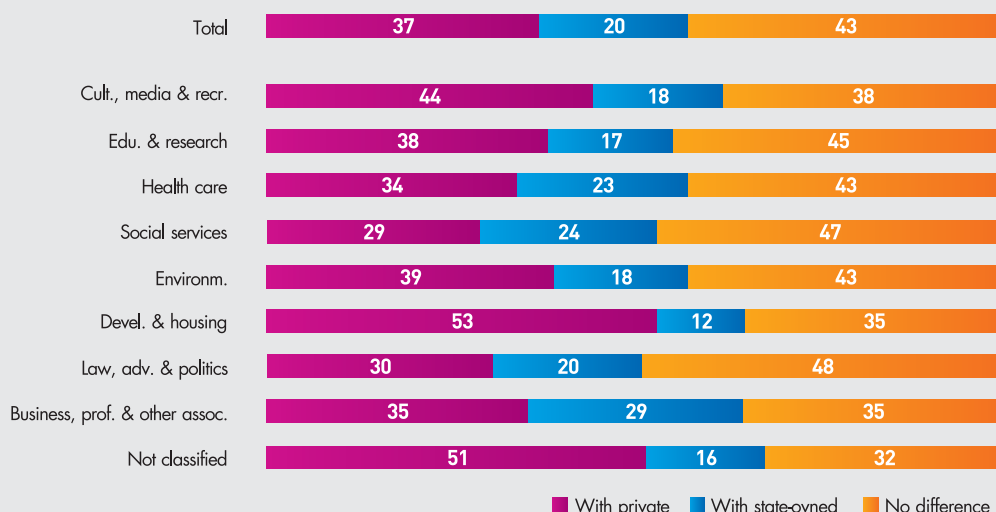
CSOs have divided opinions regarding cooperation with the business sector, although the number of those satisfied (40%) is much higher than those dissatisfied (24%).

Most satisfied with the cooperation are business/professional and other associations (46%), while least satisfied with this cooperation are CSOs dealing with law, advocacy and politics (32%).

There are no significant differences between CSOs in this regard, except that it may be noted that those most satisfied with cooperation are CSOs without a budget (51%) and the newly registered organizations (50%), while the highest level of dissatisfaction with this cooperation was expressed by CSOs having a budget below €1,000 (35%) and those registered between 1990 and 2000 (30%).

Graph 94. Do you cooperate better with private or with state-owned companies?

Base: Organizations that have cooperated with the business sector (61% of the target population)



43% of CSOs cooperate equally well with both private and state-owned enterprises. Organizations with varying experiences more often state that they had better cooperation with private (37%) than with state-owned enterprises (20%).

Although CSOs dealing with law, advocacy and politics are most dissatisfied with cooperation with the business sector, at the same time, they cooperate to the greatest extent with both state-owned and private sectors equally well (48%); the best cooperation with the state-owned sector is experienced by business/professional and other associations (29%), while the best cooperation with the private sector is enjoyed by CSOs dealing with development and housing (53%).

Among CSOs that have cooperated with the business sector, CSOs with a budget exceeding €100,000 (52%) and those established before 1989 (49%) most often cooperate equally well with both state-owned and private enterprises. The best cooperation with state-owned enterprises is enjoyed by CSOs from Southeast Serbia (33%), while the best cooperation with private enterprises is experienced by CSOs established in 2010 and later (48%).

Graph 95. Why is cooperation between your organization and the business sector not stronger?

Multiple answers; Base: Organizations that have cooperated with the business sector (61% of the target population)

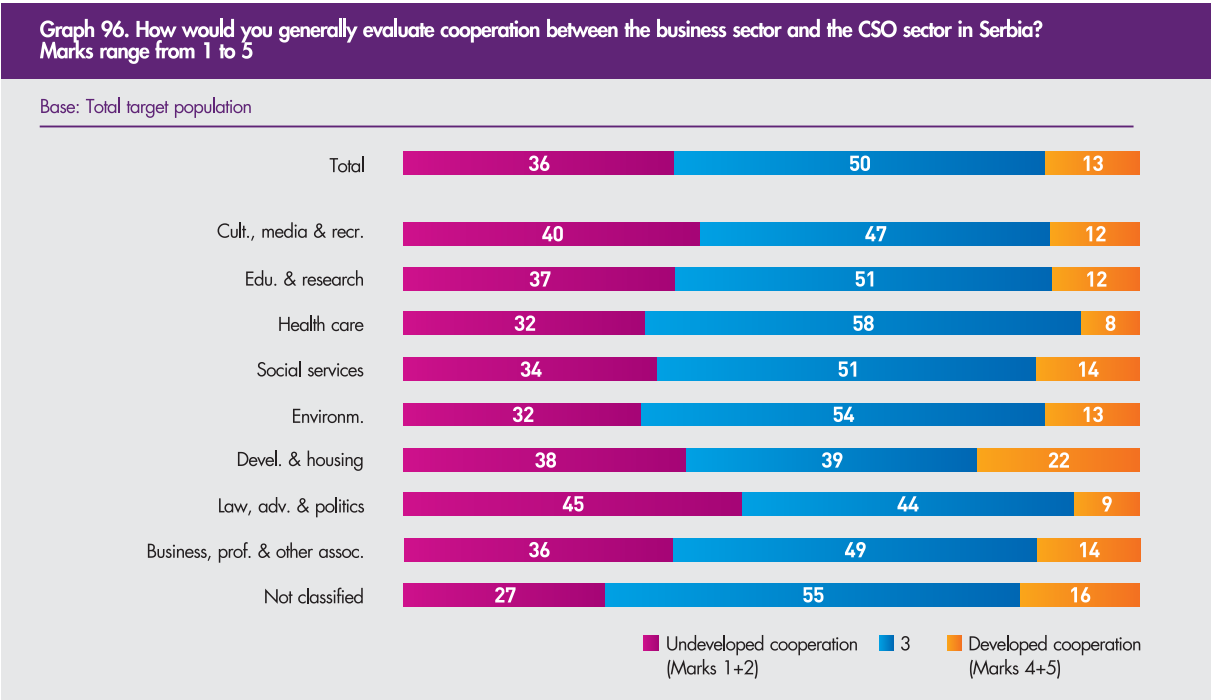


The poor state of companies (69%) and lack of tax reliefs for assistance to CSOs (45%) are the most frequently specified reasons for not having more extensive cooperation, while one third of collocutors assess that companies do not have sufficient knowledge of the role and importance of CSOs (35%).

CSOs dealing with development and housing (77%) take the lead in evaluating the companies as being in a bad state and not having funds for donations; the unclassified CSOs believe that the most frequent problem in cooperation lies in the absence of tax reliefs for assistance to the CSO sector (68%); CSOs dealing with law, advocacy and politics, more than other CSOs, believe that companies do not have sufficient knowledge of the importance and role of CSOs (55%), or that there is a negative attitude towards the CSO sector as a whole (16%); CSOs involved in the field of education and research, to a greater extent than

other CSOs, believe that companies are not interested in CSO activities (36%), while CSOs involved in healthcare believe that CSOs do not have experience in how to come closer to the business sector (20%).

CSOs from Western Serbia mainly evaluate that the companies are in a poor state and that they do not have funds for donations (80%), which is the least of reasons given by Belgrade-based CSOs (56%), which at the same time, and at a percentage higher than other CSOs, think that companies do not have sufficient knowledge of the role and importance of the sector (46%). CSOs having a budget from €20,001 to €100,000 (57%) most often are of the opinion that companies do not obtain tax reliefs for assistance to the CSO sector, while CSOs from Southeast Serbia mainly think that companies are not interested in CSO activities (41%); organizations without a budget, more than others, believe that CSOs lack experience in coming closer to the business sector (24%); Belgrade-based CSOs (18%) most often think that there is a negative attitude towards the CSO sector as a whole.



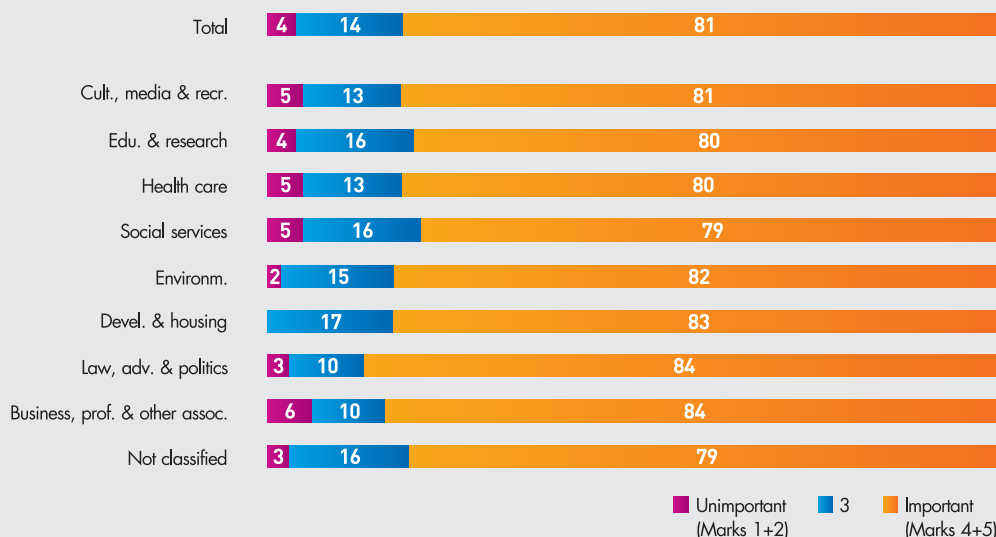
One half of CSOs give average mark for cooperation with the business sector, while 36% give this cooperation bad marks, and only 13% evaluate cooperation as good.

Of those who gave positive marks for this cooperation, the best mark was given by CSOs dealing with development and housing (22%), while among those who evaluated cooperation as negative, the worst mark was given by CSOs dealing with law, advocacy and politics (45%).

The most positive marks for cooperation between the business sector and CSOs in Serbia are given by organizations with 11 to 20 active people (18%), those with a budget ranging from €20,001 to €100,000 (19%), and those based in Western or Eastern Serbia (22% each). The most negative marks for this cooperation are given by CSOs registered from 2001 to 2000, those with a budget below €1,000 and those which are Belgrade-based (42% each).

Graph 97. How would you evaluate the importance of cooperation between the business sector and the CSO sector?

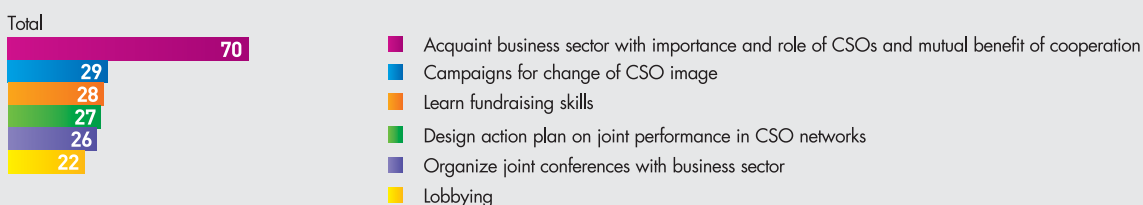
Base: Total target population



As many as 81% of CSOs evaluate cooperation with the business sector as important, in the forefront being CSOs that deal with law, advocacy and politics, as well as business/professional and other associations (84% each). There are no significant differences among CSOs in this regard, except that it is to be noted that organizations having six to ten active people and a budget from €20,001 to €100,000 evaluate to a greater extent than others this cooperation as important (85% each), while those which think least of it are CSOs having more than 20 people (65%).

Graph 98. What could the CSO sector do to come closer to the business sector?

Multiple answers; Base: Total target population

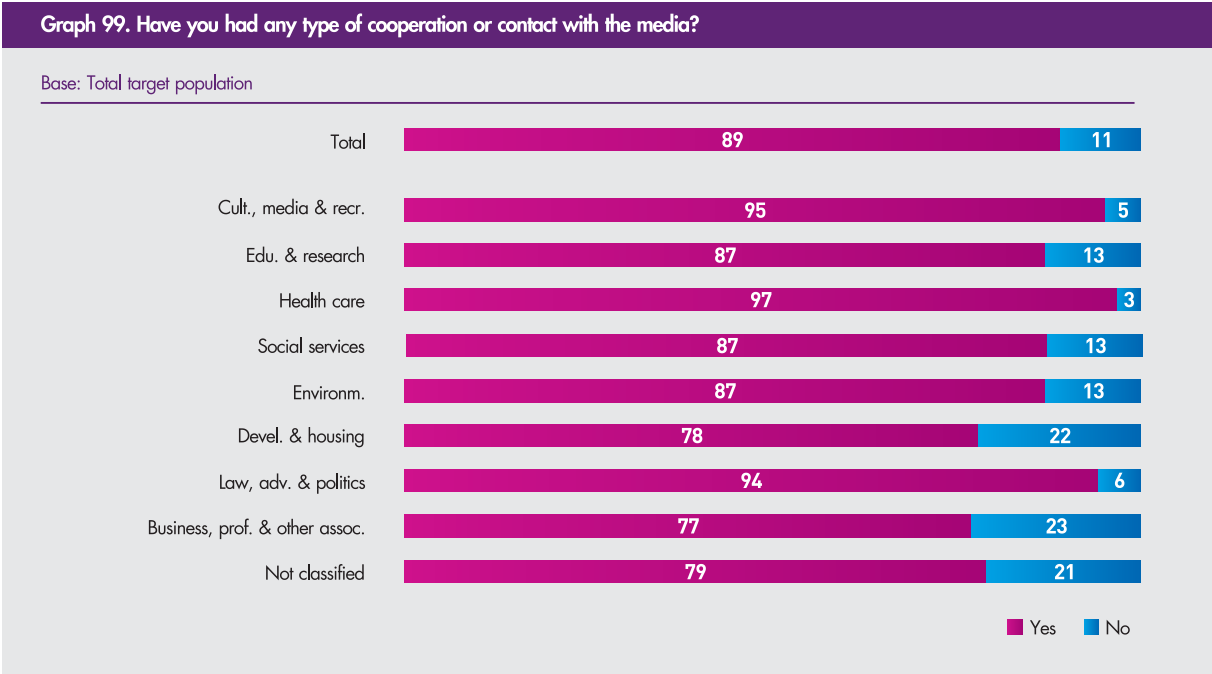


Getting the business sector acquainted with the importance and role of CSOs is the most important thing that CSOs believe they have to do in order to come closer to the business sector (70%). It is most often suggested by unclassified CSOs (80%), while campaigns for the change of the CSO image are mainly suggested by CSOs dealing with development and housing (44%); CSOs dealing with law, advocacy and politics to a greater extent than other CSOs propose the organization of joint conferences with the business sector (35%), as well as lobbying (31%).

Organizations having more than 20 active people somewhat less than others (56%) think that getting the business sector acquainted with the importance and role of CSOs is a way to come closer to the business sector; organizations having a budget over €100,000 tend mostly towards the idea of a campaign to change the CSO image (39%), as do organizations from Eastern Serbia (36%), while CSOs from Southeast Serbia, more often than others, suggest the learning of fundraising skills (37%); the organization of joint conferences with the business sector is most often suggested by CSOs from Central Serbia (33%), while CSOs from Southeast Serbia (29%) have decided in favour of lobbying, at a percentage higher than the others.

CSO Cooperation with media

Reasons and types of cooperation



The majority of organizations (89%) have established some type of cooperation or contact with the media, in the forefront of which are CSOs involved in healthcare (97%), culture, media and recreation (95%) as well as CSOs dealing with law, advocacy and politics (94%), while business/professional and other associations have established the least cooperation with the media (77%).

Among CSOs cooperating with the media, the majority are those with a budget exceeding €100,000 (99%), while CSOs without a budget (31%) and Belgrade-based organizations have established the least cooperation (17%).



In the great majority of cases (88%), the reason for cooperation was media reporting on some activity of the organization, while almost one third (31%) cooperated for the purpose of advertising the organization.

Cooperation through media reporting on activities is most present among unclassified CSOs (97%) and least present with CSOs dealing with development and housing (74%). Cooperation with the media for the purpose of advertising the organization is also most present with unclassified CSOs (48%), but least

present with CSOs involved in healthcare (24%). CSOs dealing with law, advocacy and politics to a greater extent than other CSOs cooperate with the media on projects (25%).

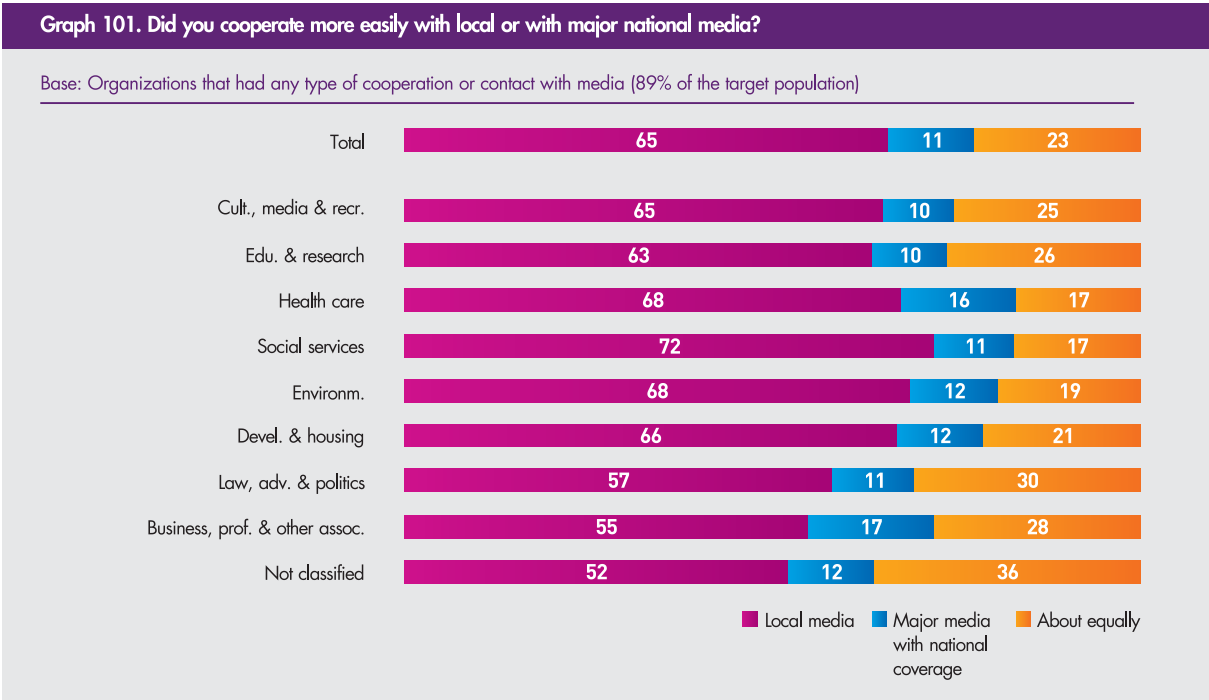
There are no great differences among CSOs with reference to media reporting on some particular activity of the organization, but there are noticeably significant differences by regions on the matter of organization promotion, whereby CSOs from Southeast Serbia (47%) most often cooperate with the media through this type of activity, while those from Central Serbia do it most rarely (19%); cooperation between a CSO and the media on a project occurs among CSOs having a budget over €100,000, as well as those having a budget from €5,001 to €20,000 (22% each), more often than among other organizations.

There are huge differences between CSOs which up to now have not had any type of cooperation or contact with the media, which constitute 11% of the total of included CSOs. When asked for their reasons for non-cooperation with the media, 39% answered that they did not have any need for it. The least need for cooperation with the media was felt by business/professional and other associations (53%) and CSOs rendering social services (46%).

More than a half (51%) of the total number of CSOs not having the need for cooperation with the media are organizations established before 1989, CSOs with a budget from €20,001 to €100,000 (61%), as well as CSOs from Southeast Serbia (59%) or Central Serbia (57%).

Among CSOs believing that the media are not interested, more than half (52%) are CSOs dealing with healthcare, as well as 38% of CSOs registered between 1990 and 2000. Lack of opportunity for cooperation with the media are most often pointed to by CSOs dealing with law, advocacy and politics (56%), but also by CSOs with a budget exceeding €100,000 (33%), which is especially interesting.

Local and national media



The majority of CSOs (65%) have found it easier to cooperate with the local media, every tenth CSO (11%) has found it easier to cooperate with the national media, while 23% have communicated equally well with the media at both levels.

The best cooperation with the local media has been enjoyed by CSOs rendering social services (72%); the best cooperation with the national media has been achieved by business/professional and other associations (17%), while equally good cooperation with the media at both levels has been experienced mainly by unclassified CSOs (36%).

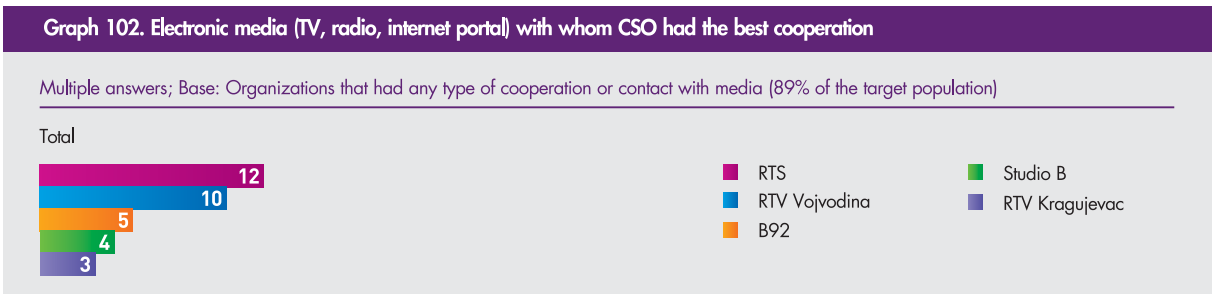
As regards cooperation with the local media, there are huge differences with reference to the budget size and the region. The best cooperation has been enjoyed by CSOs with modest budgets below €1,000

(74%), and the poorest cooperation by CSOs with a budget exceeding €100,000 (45%); CSOs based in Southeast Serbia have had the best cooperation with the local media (86%), while the worst cooperation has been that of Belgrade-based CSOs (34%).

The situation is similar with media with national coverage, whereby the greatest difference has occurred among CSOs without a budget (22%), which have managed to establish this cooperation more than any other CSOs, along with CSOs from Belgrade (26%); while the poorest cooperation established was by CSOs from Eastern (2%) and Southeast Serbia (3%).

Equally good cooperation with the media, regardless of whether with local media or those with national coverage was most often enjoyed by CSOs with a budget exceeding €100,000 (46%) and by Belgrade-based CSOs (40%).

Electronic and printed media



CSOs which have established cooperation with the media state that, among the electronic media, they have had the best cooperation with RTS (12%), RTV Vojvodina (10%), B92 (5%), Studio B (4%) and RTV Kragujevac (3%).

There are huge differences among CSOs. In terms of the founding year, the best cooperation with RTS is had by CSOs registered in the period between 1990 and 2000 (16%); as regards the size of the organization, cooperation ranges between 8% among the smallest CSOs to 23% among the biggest; it is interesting that equally successful cooperation has been experienced by organizations without a budget (19%) and those with a budget exceeding €100,000 (20%). Belgrade-based CSOs definitely have the best cooperation (28%) as compared to CSOs from other regions. Regarding other electronic media with which CSOs have cooperated, the share in cooperation by organizations coming from the region “covered” by the specified medium, predictably, increased, so that CSOs from Vojvodina have most often cooperated with RTV Vojvodina (25%), while for Belgrade-based CSOs it has been with B92 and Studio B (15% each), and for CSOs from Central Serbia, with RTV Kragujevac (22%).

It is interesting that CSOs specified some 300 different electronic media with which they have cooperated so far.

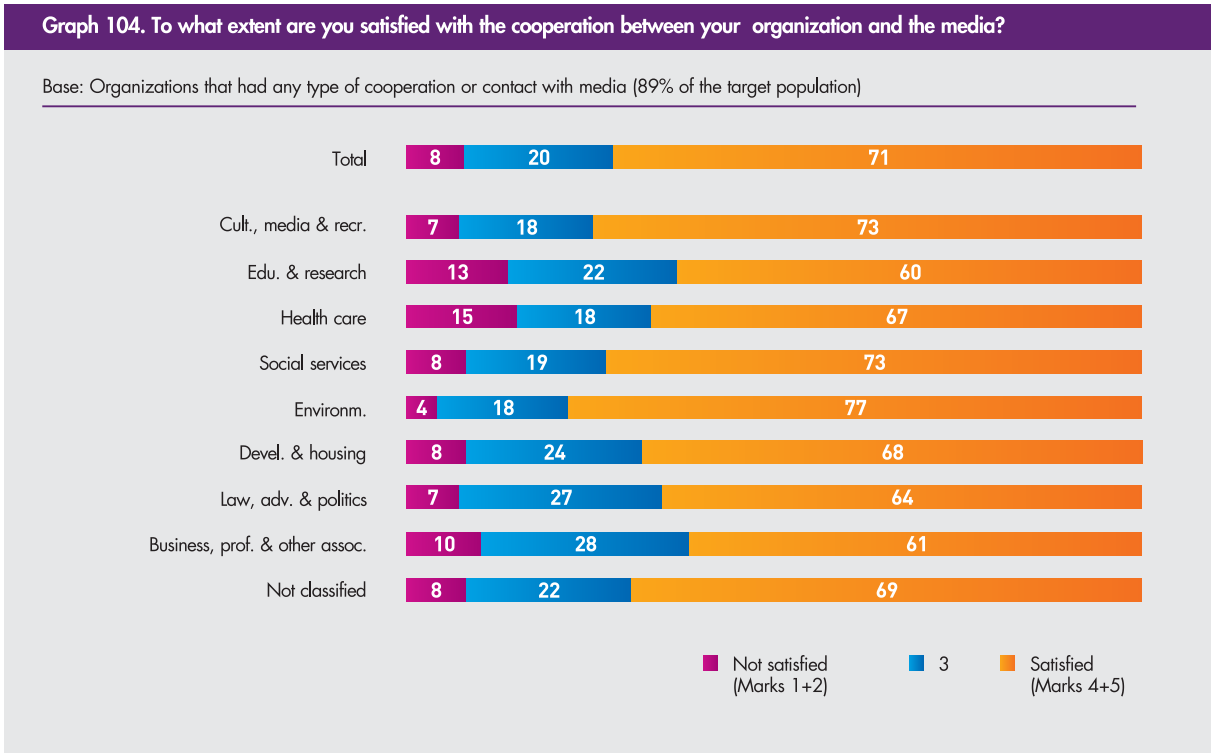


Regarding printed media, CSOs cooperated best with the daily newspapers BLIC (10%), POLITIKA (7%), Večernje novosti (6%), DNEVNIK (4%), Narodne novine and DANAS (3% each). In cooperation with the daily BLIC, CSOs dealing with law, advocacy and politics (13%) are at the forefront, while the

poorest cooperation with this newspaper has been experienced by CSOs involved in healthcare (4%); the best cooperation with the daily POLITIKA has been enjoyed by business/professional and other associations (18%), while CSOs dealing with environmental issues have cooperated least with it (3%). The datum that stands out is that CSOs dealing with law, advocacy and politics have had far better cooperation with the daily DANAS (10%) in comparison with other CSOs.

When specifying the printed media they cooperated with, CSOs listed some 170 media.

Satisfaction with cooperation with media

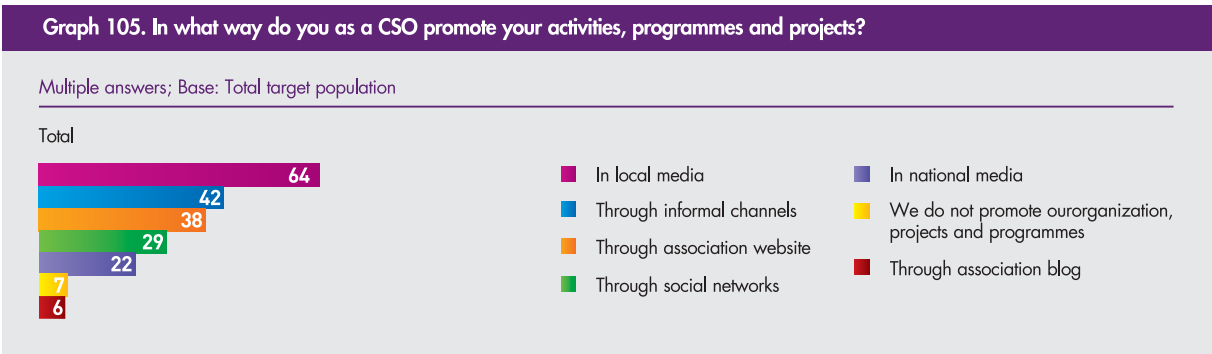


The majority of CSOs (71%) are satisfied with their cooperation with the media, and only 8% are not satisfied. CSOs dealing with environmental issues are most satisfied with media cooperation (77%), while the highest level of dissatisfaction has been expressed by CSOs involved in education and research (13%).

There are no significant differences among CSOs in this regard, except that it is perceptible that CSOs from Western and Southeast Serbia (80% each) are the most satisfied with the cooperation with the media, while the highest level of dissatisfaction was expressed by Belgrade-based CSOs (13%). As reasons for dissatisfaction, CSOs have most often stated that there is no investigative journalism in the field of the CSO sector coverage (28%), that the media are not interested in reporting on CSO activities (25%), or that they encounter the problem of advertising rates in the media, which are too high for them (22%).

In most cases, organizations that cooperate with the media communicate with them from time to time, at least once every three months (48%), while in 27% of cases they communicate with them often (at least once a month). In 19% of cases, they communicate rarely (although at least once a year), while 6% of organizations communicate less than once a year. The most frequent communication was definitely evidenced by unclassified CSOs (50%), as well as CSOs dealing with law, advocacy and politics (38%), while business/professional and other associations (29%) communicated rather rarely, and CSOs involved in healthcare (11%) had the least communication (less than once a year).

Noticeable are deviations from the average regarding the size of budget and region. CSOs having a budget of over €100,000 most often communicate with journalists at least once a month (46%), CSOs from Western Serbia mainly communicate only from time to time (59%), those without a budget in most cases communicate rarely or no more than once a year (28%), while CSOs based in Central Serbia have the poorest communication with journalists, i.e. less than once a year (12%).



The majority of organizations (64%) promote their activities, programmes and projects in the local media, through informal channels (42%), over the Internet website of the association (38%), via social networks (29%) or in the national media (22%).

There are noticeable differences according to the field of work in the manner of promotion, so that the local media are most often used by CSOs dealing with culture, media and recreation (73%), and least often by business/professional and other associations (34%). Informal methods of promotion are most present in business/professional and other associations (60%). Internet websites and social networks are to the greatest extent used by CSOs dealing with law, advocacy and politics (57% and 47% respectively), and least used by CSOs dealing with environmental issues (27% and 19% respectively). In the national media, CSOs involved in healthcare (34%) are promoted more than other CSOs. It is interesting that 7% of organizations do not promote their activities at all.

There are differences among CSOs in terms of all the other characteristics as well. The newest organizations (54%) and the ones without a budget (42%), as well as the Belgrade-based organizations (42%) least use the local media for promotion of their work, while the greatest use is made by CSOs from three regions: Central Serbia(80%), Eastern Serbia (81%) and Southeast Serbia (80%). The informal method of promotion is least used by CSOs registered before 1989 (33%), as well as by CSOs from Central Serbia (22%), while Belgrade-based CSOs more than any other use informal channels (56%); CSOs based in Central Serbia (18%) and those established before 1989 use the Internet websites of the association less than other CSOs, while on the other hand, such sites are mostly used by Belgrade-based CSOs (64%), those having a budget over €100,000 (58%), and those with more than 20 active people (51%). In using social networks, the newest organizations take the lead (43%) as well as those with a budget exceeding €100,000 (42%), and Belgrade-based CSOs (40%). Social networks are least used by the oldest organizations (16%) and by CSOs based in Western and Central Serbia (17% each). In the national media, the CSOs most promoted are those having more than 20 people (35%), those with a budget exceeding €100,000 (54%), and those which are Belgrade-based (36%); while those least promoted in this manner are CSOs from Eastern Serbia (9%). CSOs from Western Serbia (17%) are, for the most part, not promoted in the media at all.

Organizations promoting their activities over social networks are mainly using Facebook (98%) and Twitter (19%), while LinkedIn and My Space are each used by 5% of organizations. A difference is noticeable in the use of the social network Twitter, which is most used by unclassified CSOs (45%) and CSOs dealing with law, advocacy and politics (33%), and least by CSOs involved in healthcare (3%) and social services (8%). LinkedIn is mainly used by CSOs dealing with development and housing (19%) and CSOs involved in education and research (14%). Also, in the use of the social network Twitter, Belgrade-based CSOs (30%) predominate.

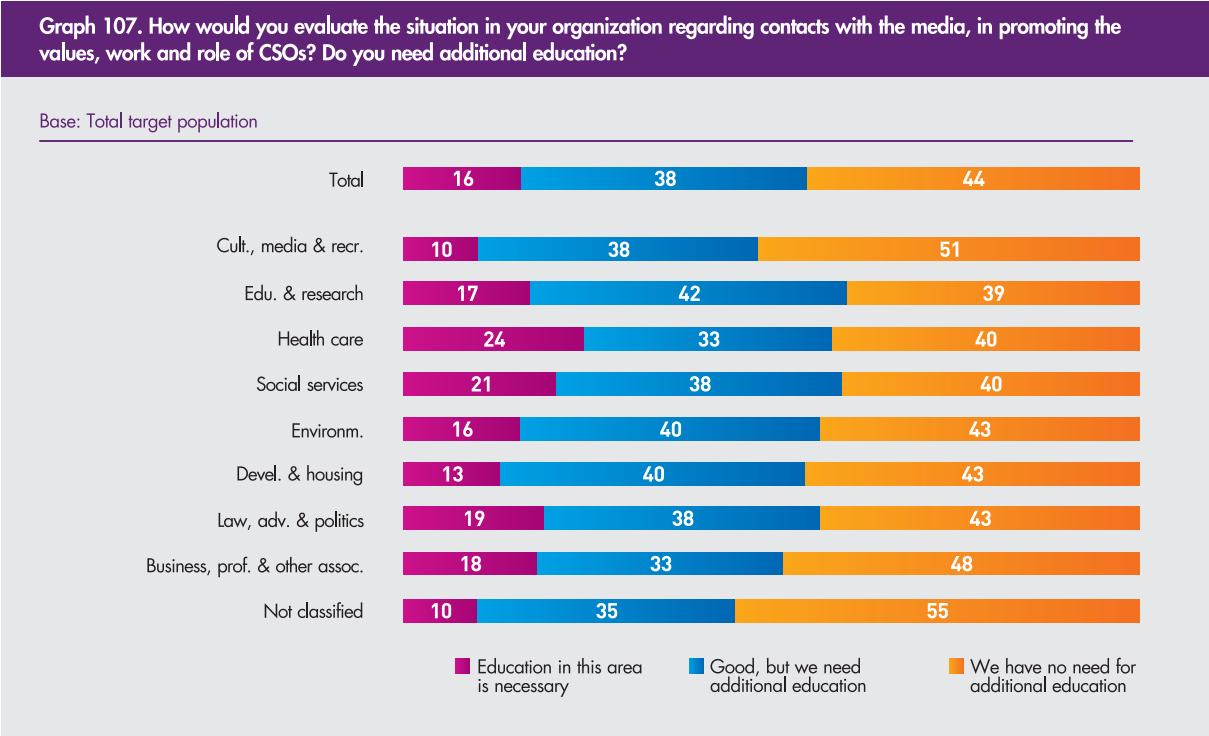


The most frequent form of covering an organization’s activities is through interviews on their activities (68%), and by written (36%), while paid advertisements are used in 6% of cases only.

CSOs dealing with healthcare most often give interviews on their activities (90%), while CSOs dealing with development and housing do it most rarely (42%); their work is also most rarely covered through articles (20%). In articles, CSOs dealing with law, advocacy and politics (55%) appear most frequently. Paid advertisements are to the greatest extent used by unclassified CSOs (17%)., It is to be noted that as many as 16% of business/professional and other associations state that the media do not cover or rarely cover their activities.

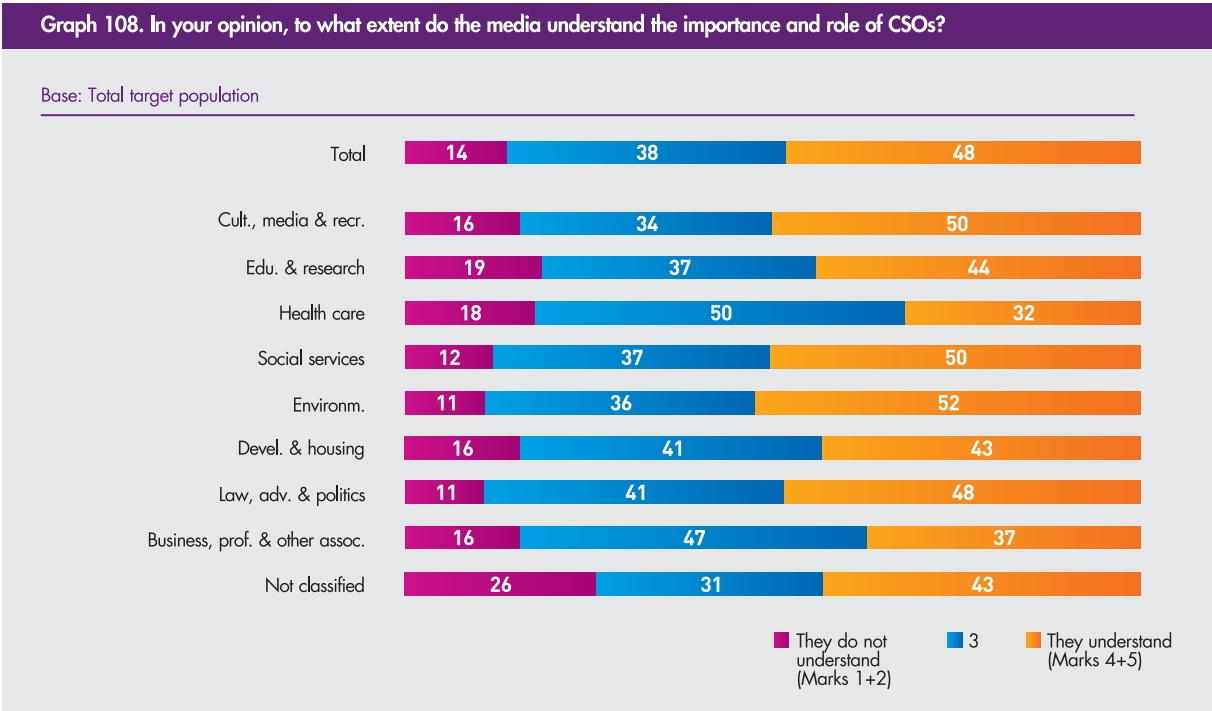
Also perceptible are certain differences between organizations; thus interviews are most often given by CSOs from Southeast Serbia (80%) and most rarely by CSOs without a budget (54%); the activities of CSOs with a budget exceeding €100,000 (54%) and of those which are Belgrade-based (46%) appear most frequently in articles; while most rarely appearing are CSOs from Western Serbia which, at the same time, use paid advertisements more than other CSOs (17%).

The need for education about the media



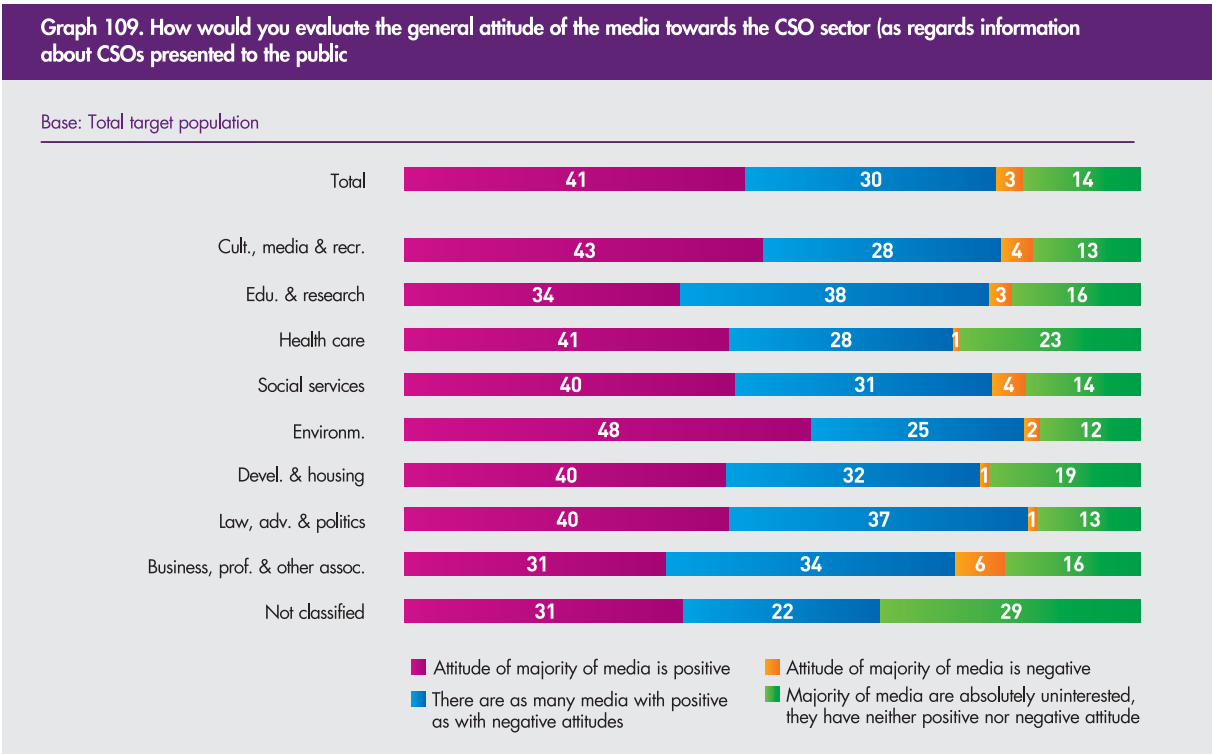
Somewhat more than half of CSOs (54%) believe that they need education on media, either when they assess that their situation is good but there is a need for additional education (38%), or when they believe that education in this area is indispensable for them (16%).

The greatest need for education in this area is expressed by CSOs dealing with education and research, or dealing with social services (59% each). The greatest differences occur by regions, so that as many as 73% of CSOs from Eastern Serbia express the need for additional education, in relation to only 49% of CSOs from Vojvodina.



Less than one half of CSOs (48%) believe that the media understand the importance and role of CSOs, with CSOs involved in environmental issues being the most positive in this regard (52%), while unclassified CSOs are the most negative (26%).

Differences are noticeable by regions so that CSOs from Eastern Serbia, to a greater extent than others (67%), evaluate that the media understand the importance and role of CSOs, while Belgrade-based CSOs (18%) have a mainly negative opinion.

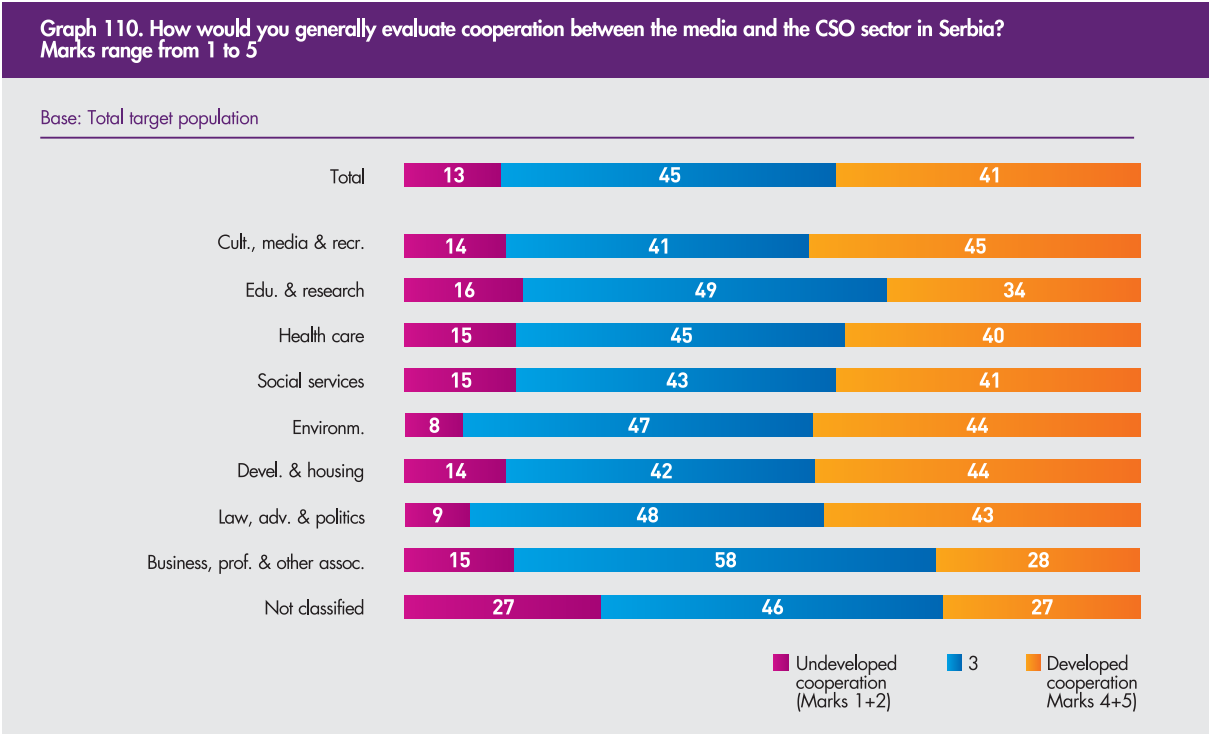


The majority of CSOs trust the media at least partially, 41% believing that the attitude of the majority of media is positive, and 30% thinking that there are as many media with a positive as with a negative attitude. 14% feel that the majority of media are absolutely uninterested.

There are no significant differences among CSOs in terms of fields of work, with the exception of business/professional and other associations and unclassified CSOs (31% each), whose opinion is that the attitude of the majority of the media is positive; the latter also take the lead with the attitude that the media are uninterested (29%).

Differences among CSOs by regions are also noticeable, so that CSOs from Eastern Serbia for the most part believe that the attitude of the majority of the media is positive (68%), while Belgrade-based CSOs least think so (26%). Vice-versa, Belgrade-based CSOs take the lead in the opinion that there are an equal number of media with a positive attitude as with a negative (40%), while CSOs from Eastern Serbia are the fewest to hold that opinion (15%). CSOs having more than 20 people (13%) most often think that the attitude of the majority of the media is negative.

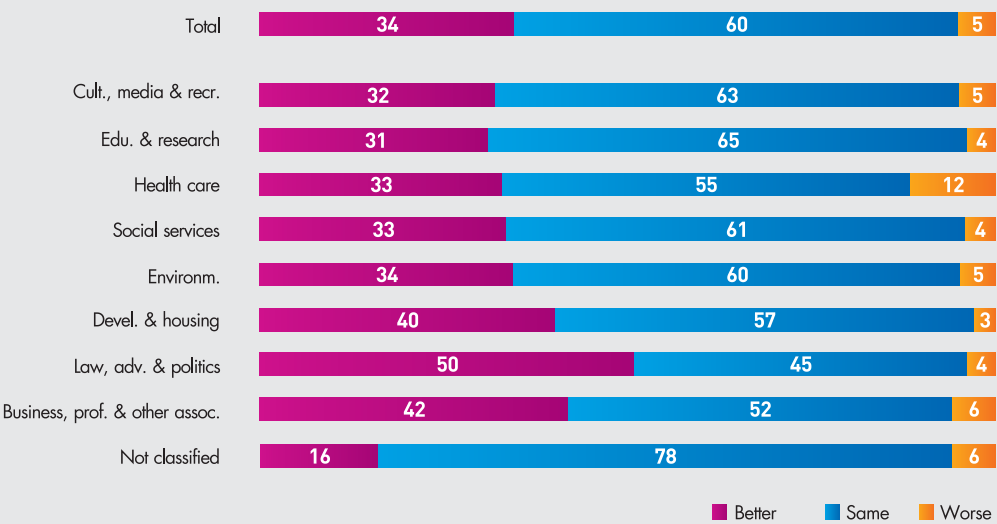
Evaluation of cooperation between CSOs and media



41% of CSOs give cooperation with media high marks, and only 13% give it low marks; while there is no huge difference among CSOs in terms of fields of work, with the exception that business/professional and other associations more rarely than others give high marks for cooperation (28%), while the majority of negative marks come from unclassified CSOs (27%). Also, differences are noticeable by regions, so that CSOs from Eastern Serbia mostly give high marks for cooperation between media and the CSO sector (60%), while Belgrade-based CSOs give such cooperation the lowest marks (20%).

Graph 111. Is cooperation with the media in the past three years.....?

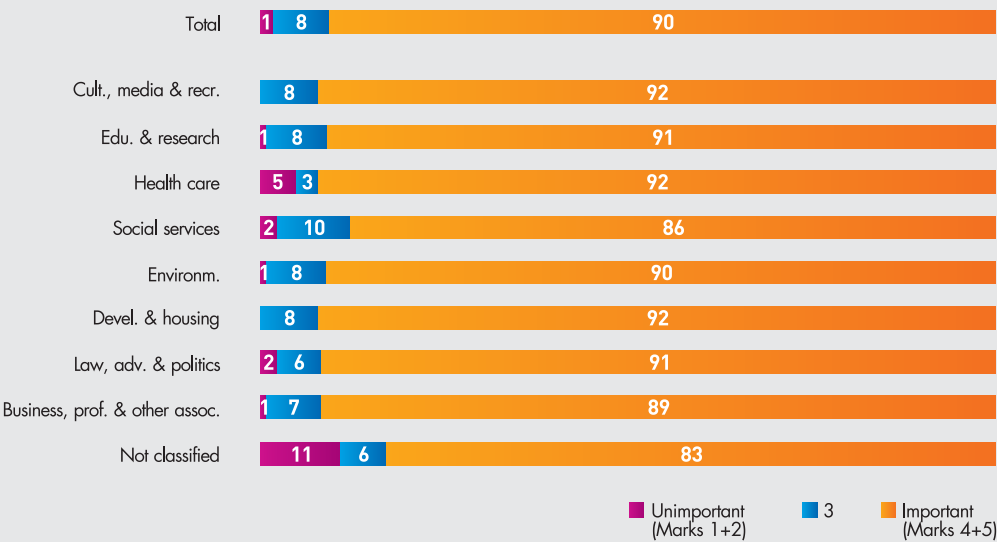
Base: Total target population



The majority of CSOs (60%) evaluate that cooperation with the media has not changed in the past three years; however, more than one third of them (34%) believe that it has changed for the better. The greatest progress has been noticed by CSOs dealing with law, advocacy and politics (50%); while CSOs involved in the field of healthcare more than others think that it is worse than before (12%). CSOs from Western Serbia (51%), as well as CSOs having a budget over €100,000, for the most part think that cooperation has improved, while CSOs from Vojvodina mainly feel that nothing has changed (68%).

Graph 112. How would you evaluate the importance of cooperation between media and CSOs? Marks range from 1 to 5

Base: Total target population



The great majority of CSOs (90%) evaluate cooperation with media as important; this opinion is undivided among all CSOs, regardless of their characteristics.

Employing staff



About one half of organizations employ staff, although only 11% have a complex system, while 37% employ them depending on their projects and without a complex system. Unclassified CSOs mostly have an elaborate system for staff employment (25%), while CSOs dealing with law, advocacy and politics mainly employ staff depending on projects, without an elaborate system (46%). CSOs involved in culture, media and recreation, more than other CSOs, do not employ staff (58%).

Differences among organizations are perceptible, so that CSOs established before 1989 (17%) have complex systems for employment much more often than the newest CSOs (7%), as do the largest ones (29%) compared to the smallest ones (5%), and those with budgets exceeding €100,000 (27%). Employment without an elaborate system, depending on projects, varies with reference to the founding year, organization size and budget, rising from 30% among CSOs registered before 1989 to 42% among CSOs registered in 2010 and later, from 31% among the smallest organizations to 49% among the biggest organizations, and from 28% among CSOs without a budget to 49% among CSOs having a budget of over €100,000. Differences are present by regions, too, with from 33% in Vojvodina and Central Serbia to 49% in Southeast Serbia. CSOs not employing staff are mainly those established before 1989 (51%), those of up to five active persons (61%), those with a budget below €1,000 (62%), and those in the region of Vojvodina (54%).

Recruiting volunteers



CSOs recruit volunteers in different ways. They mainly apply themselves (28%), or are recruited from among organization members (21%), or are reached through personal contacts and acquaintances (11%).

In the majority of cases, volunteers come by themselves to CSOs dealing with culture, media and recreation, or environmental issues (31% each), while they least apply in this manner to business/professional and other associations (15%). Volunteers are most often engaged from among members of the organization in unclassified CSOs (27%), but only most rarely in CSOs dealing with law, advocacy and politics (13%), where volunteers are mainly engaged through personal contacts and acquaintances (18%).

Volunteers most often apply to large CSOs with more than 20 active people (37%), and most rarely to CSOs in Western Serbia (20%), where volunteers most often get recruited from among their own membership (29%): It is interesting that organizations with a budget exceeding €100,000 much more often than others (14%) engage volunteers through announcements or competitions.

The most frequent problems in work with staff and volunteers

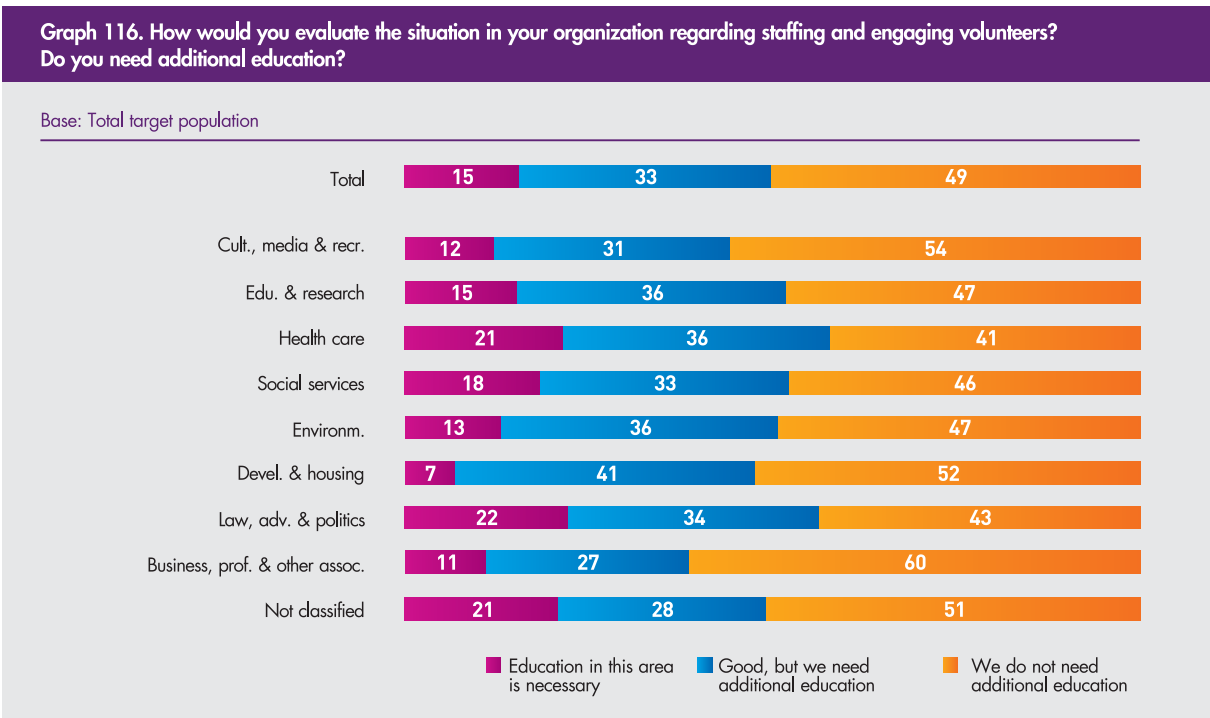


The most frequently specified problems are the insufficient motivation (26%) or insufficient experience of staff (22%), while some 11% of organizations mention recruiting and keeping staff and volunteers to be a problem.

Insufficient motivation is most often stated as a problem with CSOs involved in education and research (34%), while the problem of insufficiently experienced staff is to the greatest extent encountered by CSOs dealing with law, advocacy and politics (36%); recruiting and keeping staff are more often a problem for CSOs dealing with healthcare (18%), while a similar problem with volunteers is experienced about equally by CSOs rendering social services and those dealing with healthcare (14% each).

Differences by regions are noticeable, so that in Southeast Serbia no less than 44% of organizations point to the problem of insufficient motivation of engaged members, while 34% point to the problem of insufficiently experienced staff; CSOs having a budget of over €100,000, more than other CSOs, have a problem of recruiting and keeping staff (22%), while with recruiting and keeping volunteers most problems are experienced by CSOs with more than 20 active people (21%), or CSOs based in Eastern Serbia (19%).

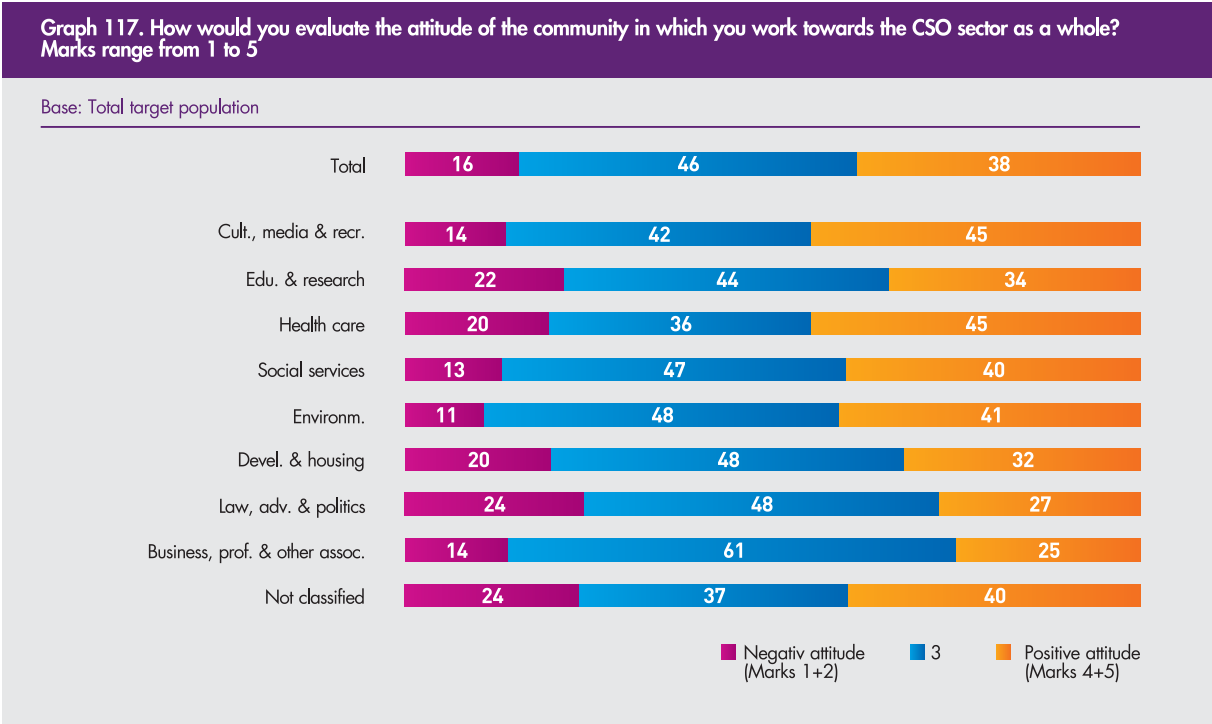
The need for education



One half of CSOs (48%) need additional education as regards staffing and engaging volunteers. The need for additional education is most stated by CSOs involved in healthcare (57%), while the least need for education is experienced by business/professional and other associations (60%). Differences are noticeable by regions, so that Belgrade-based CSOs most frequently do not need additional education (56%), while CSOs from Eastern Serbia express the most need for additional education in this area (65%).

Attitude of the public towards CSOs

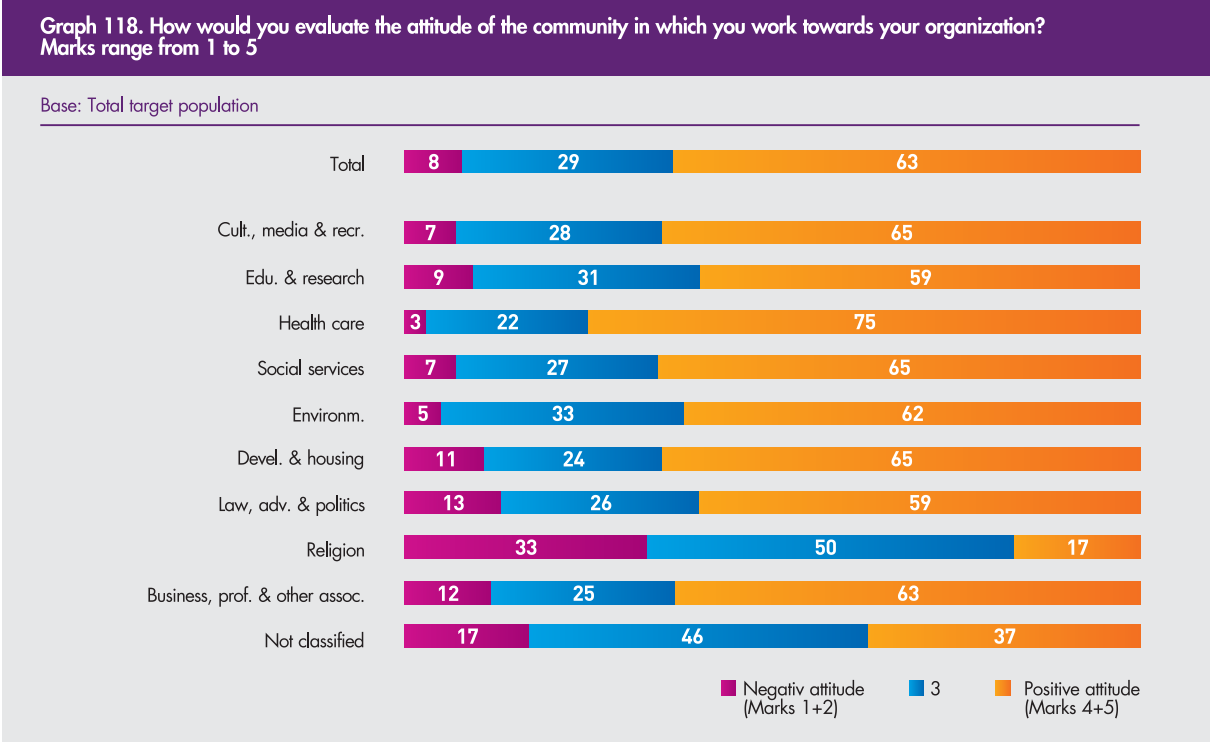
Attitude of the community towards the CSO sector



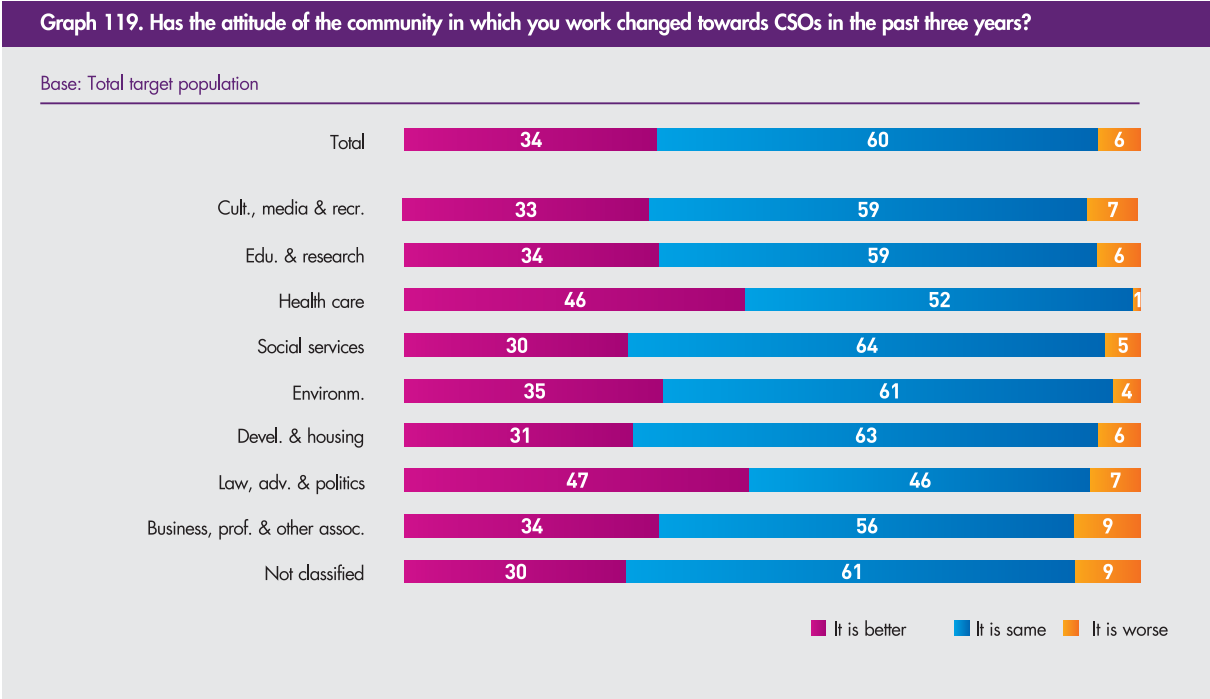
The attitude of the community in which they work towards the CSO sector as a whole most often gets an average mark (46%); however, there are significantly more positive (38%) than negative marks (16%).

CSOs involved in culture, media and recreation and health (45% each) most frequently evaluate the attitude of the community towards CSOs positively (45%), while negative marks are mainly given by CSOs dealing with law, advocacy and politics, as well as by unclassified CSOs (24% each).

The most frequently positive marks are given by CSOs established before 1989 (47%), by those with 11 to 20 active people (46%) and by CSOs from Eastern Serbia (51%); the most frequently negative marks are given by Belgrade-based CSOs (23%).



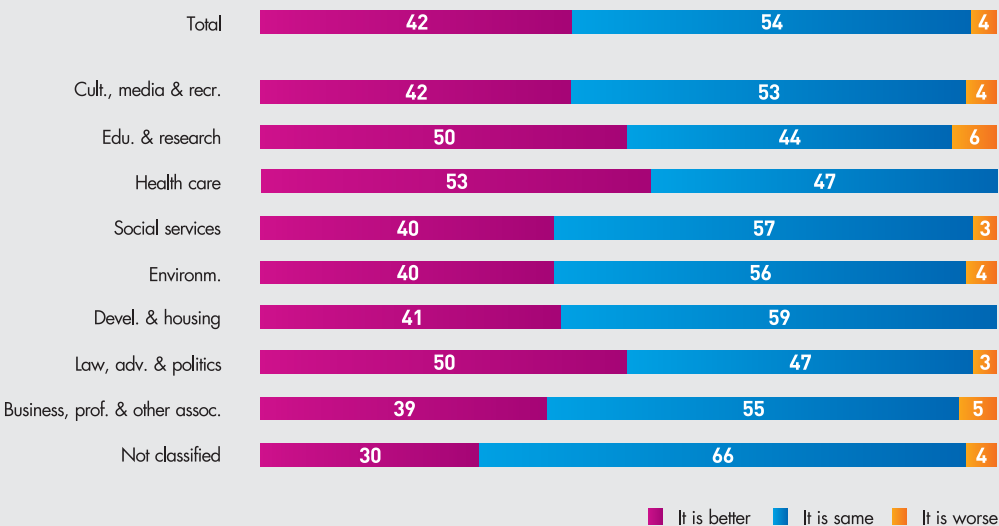
The attitude of the community they are active in towards their CSOs receives considerably higher marks than the attitude towards the CSO sector as a whole, so that as many as 63% of CSOs give positive marks. CSOs involved in healthcare take the lead (75%) in giving positive marks, while negative marks regarding the attitude of the community towards their own organization are most frequently given by unclassified CSOs (17%) and CSOs dealing with law, advocacy and politics (13%). There are no other significant differences among CSOs in this regard.



60% of CSOs evaluate that in the past three years the attitude of the community towards the CSO sector has not changed, while 34% feel that it has changed for the better. The biggest shift in the positive direction has been noted by CSOs dealing with law, advocacy and politics (47%), CSOs registered in the past two years (43%), those with a budget ranging from €20,001 to €100,000 and exceeding €100,000 (45% each), as well as by CSOs from Western Serbia (51%).

Graph 120. Has the attitude of the community in which you work changed towards your organization in the past three years?

Base: Total target population

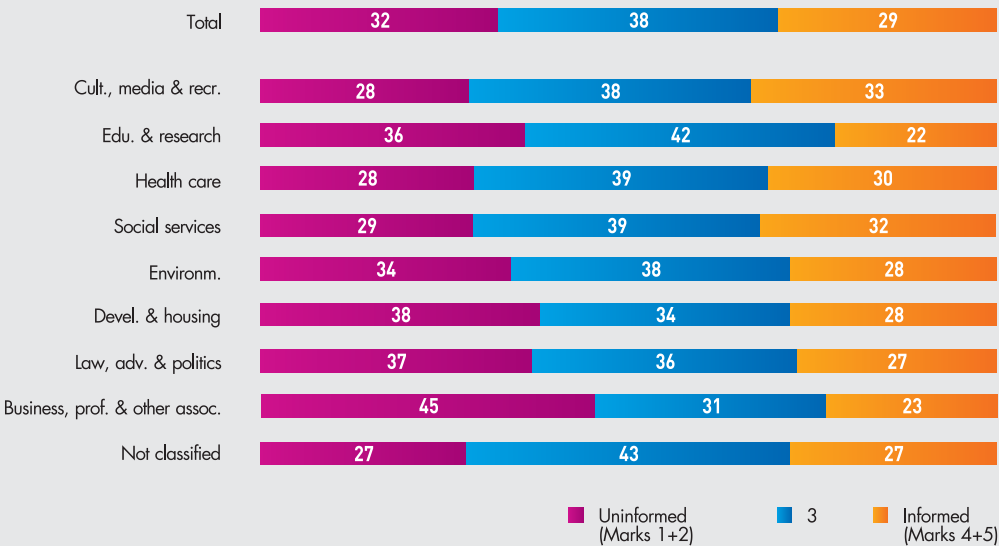


Changes of attitude by the community they are active in towards particular CSOs were also evaluated as more positive (42%) than changes towards CSOs in general, and in this, CSOs involved in health-care take the lead (53%), as well as those with a budget ranging from €20,001 to €100,000 and exceeding €100,000 (52% each), and CSOs from Western Serbia.

Citizens’ level of information on CSO activities

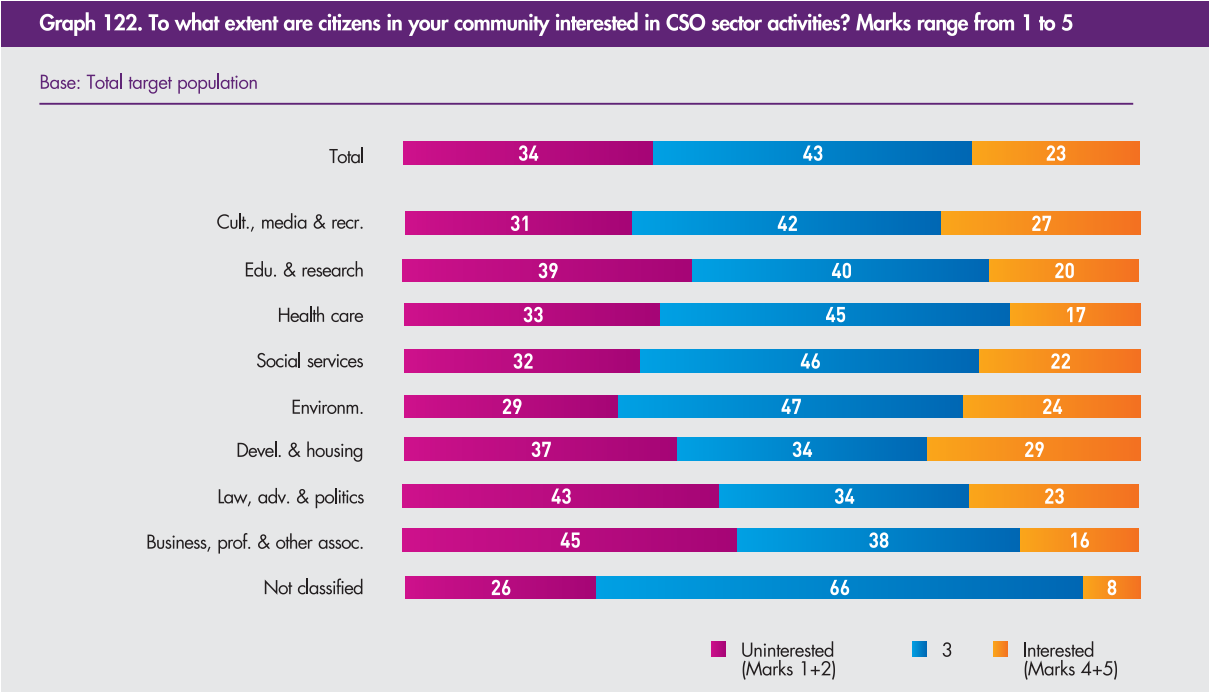
Graph 121. How would you evaluate citizens’ level of information on CSO sector activities in your community? Marks range from 1 to 5

Base: Total target population



Organizations have divided opinions on the level of information of the citizens in their community regarding CSO sector activities. Only 29% evaluate that citizens are well informed, while 32% evaluate that they are mainly uninformed. CSOs involved in culture, media and recreation (33%) and social services (32%) mostly believe that citizens in their community are informed on the CSO sector activities, while business/professional and other associations mostly believe (45%) that citizens are uninformed.

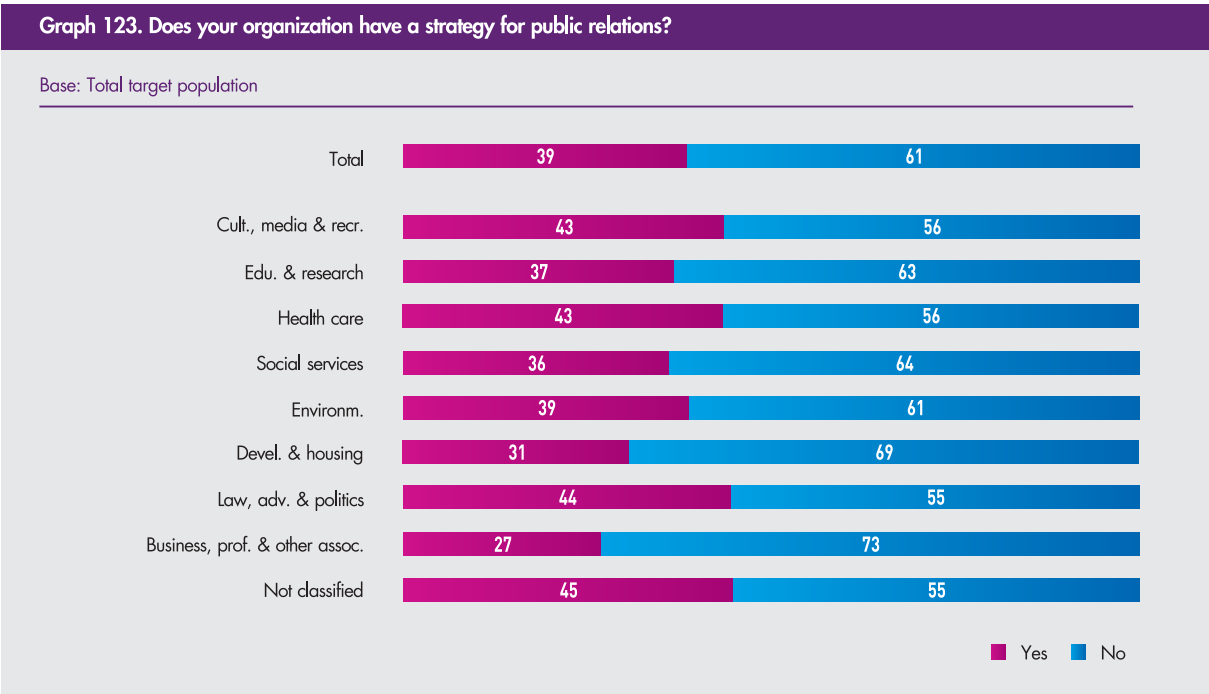
There are noticeable differences by regions, whereby no less than 50% of CSOs from Eastern Serbia positively evaluate the level of information on the CSO sector activities of citizens in their community, while 47% of Belgrade-based CSOs give mainly negative marks.



CSOs also have divided opinions on the extent to which citizens in their environment are interested in CSO sector activities; only 23% evaluate that citizens are interested, while 34% feel that citizens are uninterested. Among the latter, business/professional and other associations (45%) dominate.

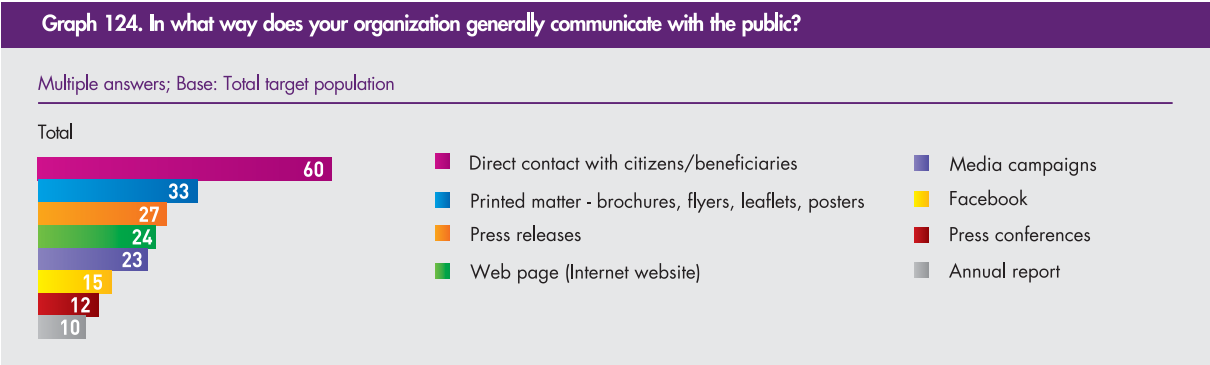
Differences are greatest by regions: CSOs from Eastern Serbia (39%) mostly evaluate that citizens are interested in CSO sector activities; while as many as 45% of Belgrade-based CSOs believe that citizens are mainly uninterested.

Public relations strategy



61% of CSOs do not have a public relations strategy and especially business/professional and other associations (73%), CSOs having up to five active people (67%), those with a budget below €1,000 (68%) and Belgrade-based CSOs (67%).

Most frequently in possession of a public relations strategy are the unclassified CSOs (45%), and CSOs dealing with law, advocacy and politics (44%), as well as CSOs from Eastern Serbia (50%).



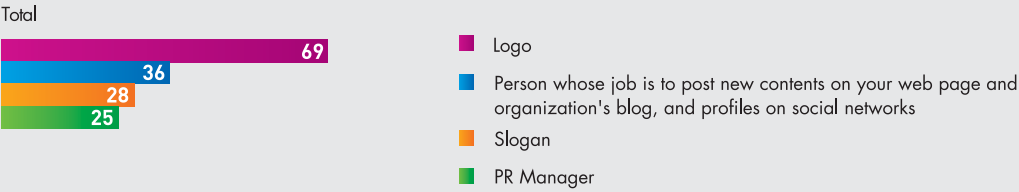
60% of CSOs communicate with the public directly, while about one third (33%) communicate through printed matter; 27% issue press releases, 24% use the webpage (Internet site), while 23% conduct media campaigns.

Significant differences by field of work can be perceived. Direct contact with citizens/beneficiaries as a form of communication is most frequently found among CSOs rendering social services (69%), and least frequently among business/professional and other associations (45%), as well as those dealing with law, advocacy and politics (46%). Most in favour of printed media are the CSOs involved in healthcare (53%), and least so, CSOs rendering social services or dealing with environmental issues (28% each); press releases are most common with CSOs involved in healthcare (35%) and least frequent with unclassified CSOs (19%). The webpage as a means of communication with the public is most used by CSOs dealing with law, advocacy and politics or business/professional and other associations (40% each) and least by CSOs dealing with social services (15%); media campaigns are most common among CSOs involved in healthcare (33%), and least frequent among CSOs dealing with development and housing (14%); CSOs involved in culture, media and recreation, as well as CSOs involved in education and research, (21% each) use the Facebook social network as the most frequent way of communication with the public, more than other CSOs, while it is least frequently used by CSOs involved in healthcare and social services (10% each); press conferences are most represented among organizations dealing with law, advocacy and politics (26%), and least represented among CSOs dealing with environmental issues (7%) and social services (9%). An annual report is most frequently published by business/professional and other associations (15%).

There are huge differences among CSOs regarding other parameters as well. Direct contact with citizens/beneficiaries is most frequently made by CSOs from Eastern Serbia (70%), and least frequently by Belgrade-based CSOs (49%); CSOs having high budgets from €20,001 to €100,000 and over €100,000 more often than others decide in favour of printing their material (44% each); while organizations having more than 20 active people (37%) tend to issue press releases. The Internet webpage as the most frequent means of communication is mostly used by Belgrade-based CSOs (47%), those with a budget exceeding €100,000 (37%), and those with more than 20 active people (35%); it is least used by CSOs from Central (6%) and Western Serbia (8%). Media campaigns are most common among CSOs from Western Serbia (33%), and least among CSOs from Belgrade (16%). The use of the Facebook social network in communicating with the public shows the greatest differences among CSOs: it ranges from only 6% of organizations established before 1989 to 31% of those registered in 2010 and 2011; from 21% of the smallest CSOs to 6% of the largest; from 24% of CSOs without a budget to 12% of CSOs having a budget over €100,000. Most represented in the use of the Facebook social network for the purpose of communication with the public are Belgrade-based CSOs (22%), while least represented are CSOs from Western (7%) and Central Serbia (8%). Annual reports are most frequently published by CSOs founded before 1989 (15%).

Graph 125. Does your organization have...? Percentage of Yes answers

Base: Total target population



The majority of CSOs, 69%, have their own logo; 36% employ a person whose job is to take care of the webpage and of social networks; only 28% have a slogan; and 25% have public relations managers.

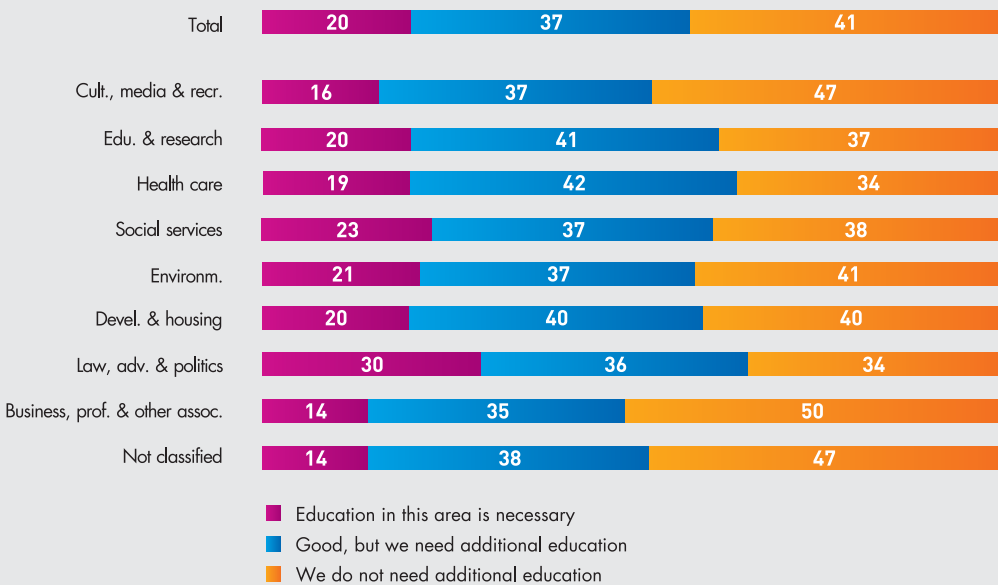
A logo is most frequently found among CSOs dealing with law, advocacy and politics (85%), and least frequently with CSOs involved in environmental issues (58%); a person whose job is to post new contents on the webpage of the organization, profiles on social networks and/or the organization's blog is mostly found among CSOs involved in healthcare and those dealing with law, advocacy and politics (50% each), while the fewest CSOs having such a person are in the fields of social services (28%) and environment (26%). A slogan is most frequently used by unclassified CSOs (49%) and least frequently by business/professional and other associations (17%). A person responsible for public relations is most often found among CSOs dealing with law, advocacy and politics (37%) and least often among CSOs dealing with development and housing (14%).

As regards the logo, there are differences among organizations, depending on the budget size and region, ranging from 56% of organizations without a budget which have a logo to 90% of organizations with a budget exceeding €100,000, and from 47% of CSOs in Western Serbia having a logo to 83% of Belgrade-based organizations. A person whose job is to post new contents on the webpage of the organization, profiles on social networks and/or the organization's blog is employed by 24% of the oldest organizations and 50% of the newest ones, 26% of CSOs with a budget below €1,000 and 51% of CSOs with a budget exceeding €100,000, as well as by 20% CSOs from Central Serbia and 52% of Belgrade-based CSOs. A slogan is most frequently found with organizations from Eastern Serbia (39%), while a person responsible for public relations is most frequently employed by CSOs with a budget exceeding €100,000 (39%), or from Eastern Serbia (37%).

The need for education

Graph 126. How would you evaluate the situation in your organization regarding public relations? Do you need additional education?

Base: Total target population



The majority of CSOs (57%) need at least additional education related to public relations. This need was most frequently stated by CSOs dealing with law, advocacy and politics (66%), and least frequently by business/professional and other associations (49%).

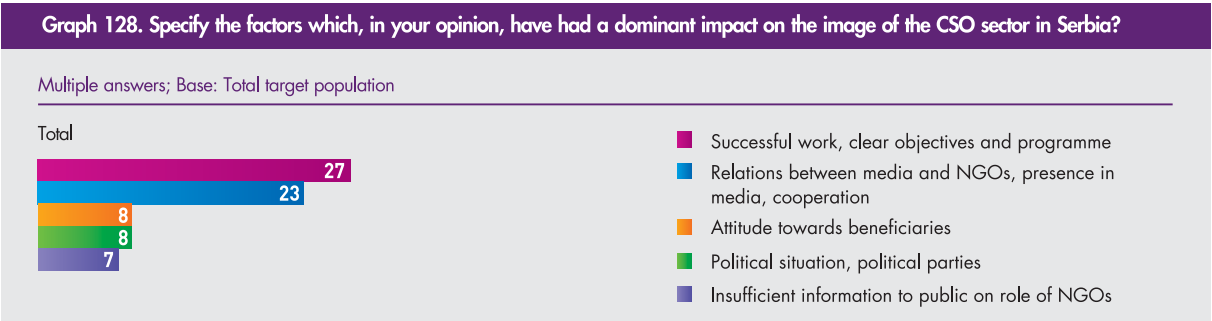
To the greatest extent, the need for additional education was felt by CSOs from Eastern Serbia (73%), CSOs with more than 20 active people (64%) and those with a budget exceeding €100,000 (63%).

CSO image



The majority of CSOs see their attitude towards beneficiaries (72%) and their presence in the media (64%) as key factors for creating the organization’s image. CSOs dealing with development and housing (58%), less than others, feel that the attitude towards beneficiaries and a comprehensible manner in addressing citizens is important for creating the organization’s image. 76% of unclassified CSOs and 74% of CSOs involved in culture, media and recreation, evaluate presence in the media as being crucial, while least importance is given to it by CSOs rendering social services (55%). CSOs dealing with law, advocacy and politics are most represented in the evaluation that a clear attitude regarding current problems in the community is crucial (57%), while CSOs involved in healthcare, more than other CSOs, evaluate that for creating an organization’s image it is crucial to have public performance skills (42%), or a leadership image (29%).

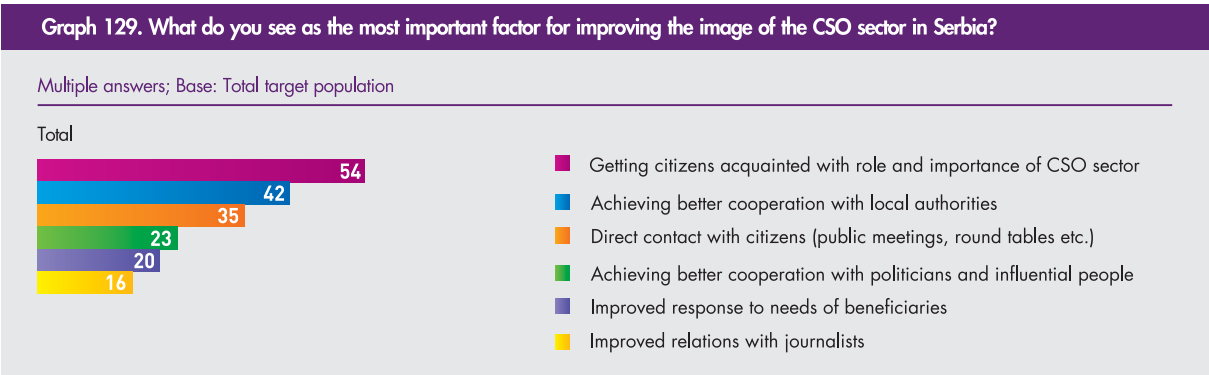
Differences by regions are noticeable. Belgrade-based CSOs, more than other CSOs, believe that, for creating an organization’s image, successful activities by the organization (53%) and a clear attitude towards current problems in the community (45%) are crucial; these opinions are shared by only 32% and 24% respectively of CSOs in Central Serbia. CSOs from Southeast Serbia take the lead in attributing importance to well-prepared promotional materials (42%), as well as to good connections/relations and contacts with other leaders and organizations (37%); membership/volunteers on a massive scale or the size and age of the organization, are most frequently perceived as important by CSOs from Central and Eastern Serbia (36% each); awareness of the need for possessing public performance skills is most present among the newest CSOs (34%), as well as Belgrade-based CSOs and those from Southeast Serbia (33% each). The greatest differences among CSOs, as is to be expected, refer to the use of social networks, ranging from 15% among CSOs founded before 1989 to 34% of CSOs founded since 2010, and from 12% among CSOs from Western Serbia to 31% of Belgrade-based CSOs. A leadership image is evaluated as crucial mostly among CSOs from Western Serbia (23%) and Southeast Serbia (22%).



The reasons most frequently specified by the organizations for the CSO sector image are successful work, clear objectives and programme (27%), and a positive relationship between the media and CSOs (23%).

CSOs dealing with education and research most frequently (33%) evaluate that, as regards the CSO sector's image, successful work, clear objectives and programmes have the dominant impact, while this opinion is least frequently held by CSOs involved in healthcare and those which are unclassified (15% each). CSOs dealing with education and research also give most importance to the relations between the media and CSOs (32%), while CSOs dealing with development and housing give it less importance than other CSOs (13%).

Differences among CSOs by regions are noticeable: CSOs in Eastern (38%) and Southeast Serbia (39%) more than other CSOs believe that successful work has the dominant impact on the CSO sector's image in Serbia, while only 16% of Belgrade-based CSOs share that opinion. Organizations with more than 20 active people (32%) most point to the impact of the media. The attitude towards beneficiaries is most mentioned by CSOs from Southeast Serbia (17%).

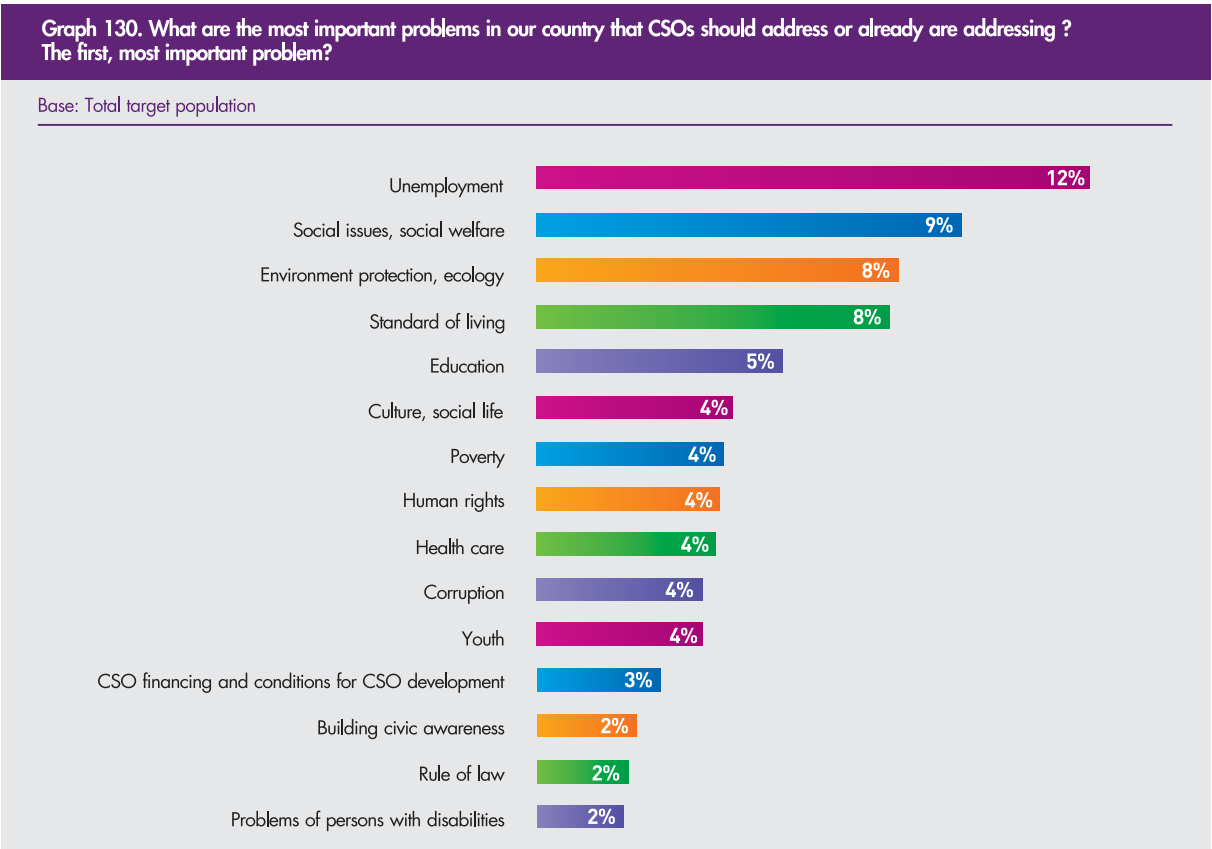


Getting citizens acquainted with the role and importance of the CSO sector (54%), better cooperation with local authorities (42%) and direct contacts with citizens (35%) are most frequently stated as factors for improving the image of CSOs in Serbia. There are no significant differences among CSOs by fields of work, except that groups of organizations dealing with development and housing (34%), law, advocacy and politics (32%), and unclassified CSOs (39%), more than others, recognize that an upgraded response to the needs of beneficiaries is necessary for the improvement of the sector's image.

The greatest differences among CSOs are by regions: CSOs from Central Serbia give most importance to getting citizens acquainted with the role and importance of the CSO sector (64%) and to establishing better cooperation with local authorities (54%); CSOs from Western Serbia give great importance to contacts with citizens (51%); CSOs from Southeast Serbia, more than other CSOs, feel that the response to the needs of beneficiaries should be upgraded (26%), while Belgrade-based CSOs, more than others,, think that relations with journalists should be changed and improved (21%).

Diversity within the sector/ regional standardization

CSOs and the most important problems in the country



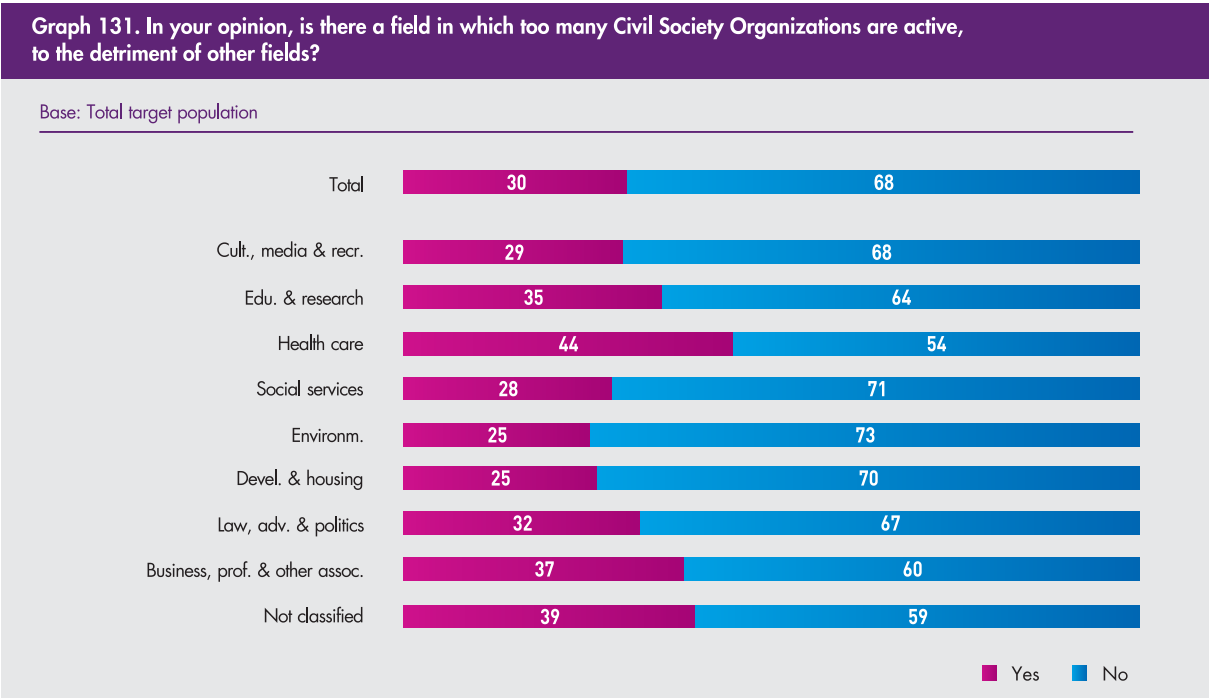
As the first and most important problem, 12% of CSOs point to unemployment, while every tenth points to social problems or social welfare (9%), followed by environmental protection/ecology, as well as the general standard of living (8% each).

Unemployment as the major problem is most frequently pointed to by organizations dealing with development and housing (30%), and least frequently by CSOs involved in healthcare (4%). As expected, resolving social problems and social welfare are considered to be the priority for CSOs rendering social services (17%), while the same opinion is held by just 1% of organizations involved in education and research. Regarding environmental protection and ecology, there is big distance between organizations dealing with the environment (27%) and the others, of which only 3% of business/professional and other associations and of CSOs involved in culture, media and recreation, feel that they are the most important problems in society. The resolution of the issue of the problem of the standard of living is a priority for business/professional and other associations (17%), as well as for CSOs providing social services (12%). As is to be expected, education is the first priority for 20% of organizations in that field, but it has a rather low priority in all other fields of work. Corruption is most recognized as a problem among organizations dealing with law, advocacy and politics (11%).

As regards unemployment as the first problem to be solved, most represented are organizations from Western Serbia (20%), those without a budget (17%), those having more than 20 active people (18%), and those registered between 2010 and 2011 (17%). Besides unemployment, the greatest percentage of organizations from Western Serbia (13%) see poverty and struggle against the poverty as the priority, while CSOs from Central Serbia most frequently believe that social problems and their resolution are the

priority (15%). The problem of the standard of living is most important for organizations established before 1989; education is seen as a problem that has to be solved urgently by 9% of Belgrade-based organizations, but only by 1% from Western Serbia and none from Eastern Serbia. Corruption is seen as the most important problem that needs to be addressed or is being addressed by CSOs by 7% of organizations founded between 1990 and 2000, as well as by CSOs with a budget ranging between €20,001 and €100,000. The majority of organizations that see corruption as the priority problem were from Central Serbia (6%) and only 1% was from Western Serbia.

Fields in which too many CSOs are active



68% of CSOs believe that there is no field in which too many CSOs are active and thereby disregarding other fields; among them, CSOs involved in the environment (73%) and social services (71%) take the lead, while CSOs involved in healthcare are among the fewest to share this opinion (54%). Differences are to be noted only by regions, so that Belgrade-based CSOs in 52% of cases think that there are no fields in which too many civil society organizations are active, while CSOs from Vojvodina hold this opinion in many more cases (77%).



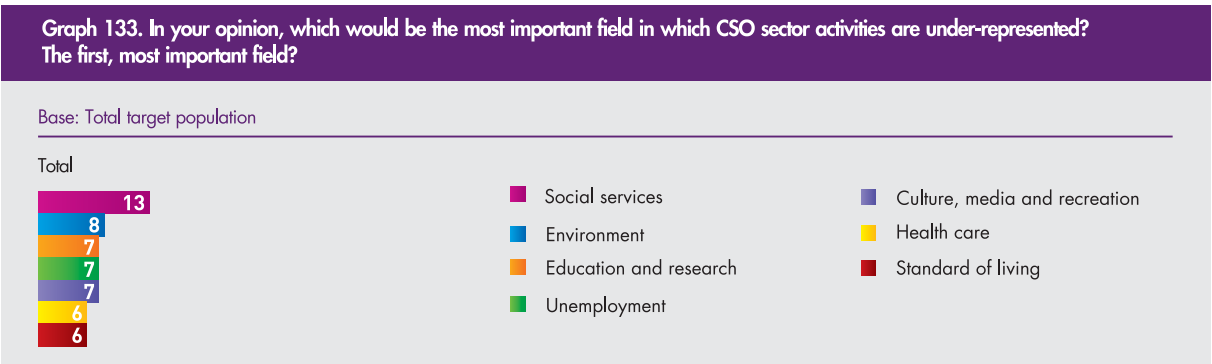
68% of the interviewed organizations believe that there are too many CSOs dealing with political parties and organizations, 17% feel that too many CSOs deal with human and minority rights, while 10% think that there are too many CSOs involved in environmental issues.

Unclassified CSOs (39%) and business/professional and other associations (33%) most often believe that there are too many CSOs dealing with political parties and organizations, while CSOs dealing with

law, advocacy and politics (8%) feel this least, believing more that there are too many CSOs in the field of human, minority and citizens’ rights (44%).

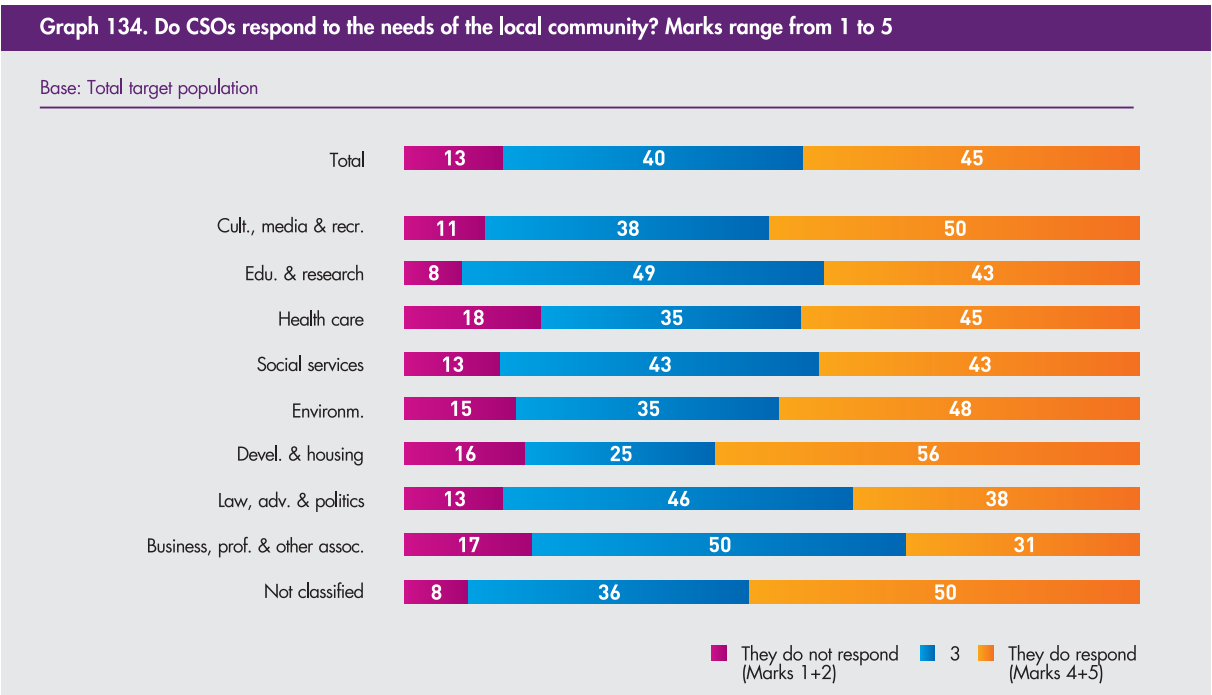
In terms of dealing with political parties and organizations, differences are greatest by regions: CSOs from Western Serbia to a much greater extent (38%) than CSOs from Southeast Serbia (9%) believe that there are too many CSOs dealing with this area at the expense of other areas. That there are too many CSOs dealing with human and minority rights is the opinion of 26% of CSOs registered in the period 1990 to 2000, those with a budget exceeding €100,000 (26%), and those which are Belgrade-based (24%), while CSOs from Vojvodina (9%) hold this opinion least.

Fields in which CSO activities are under-represented at the level of society



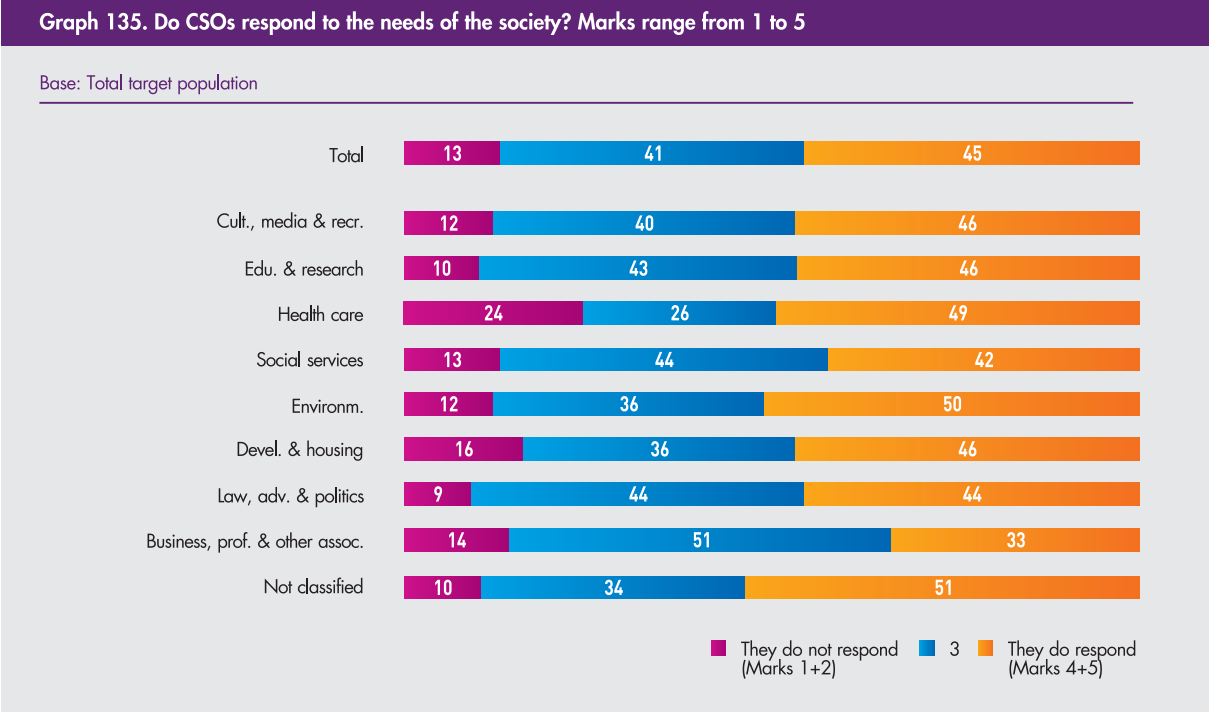
As the first and most important field in which CSO activities are under-represented, most often mentioned are social services (13%), followed by the environment (8%), as well as education and research, unemployment, and culture, media and recreation (7% each). 6% of organizations included in the research feel that there are not enough CSOs in the field of healthcare and the standard of living. The opinions that CSO sector activities are not sufficiently represented in the area of social services, environmental issues, education and research, culture, media, recreation and healthcare are most frequently held by exactly those CSOs dealing with the above specified fields of work.

CSOs and the needs of the local community and society



Almost one half of CSOs (45%) believe that the CSO sector fully or mostly does respond to the needs of the local community, while only 13% think that it does not respond. Among the CSOs believing that the response to the needs of the local community is positive, organizations dealing with development and housing stand out (56%). A negative attitude on this subject is mainly found among CSOs involved in healthcare, where 18% of cases feel that CSOs fail to respond to the needs of the local community.

Regional differences are noticeable, so that as many as 61% of CSOs from Eastern Serbia believe that the CSO sector responds to the needs of the local community, while 19% of Belgrade-based CSOs have a negative opinion in this regard.

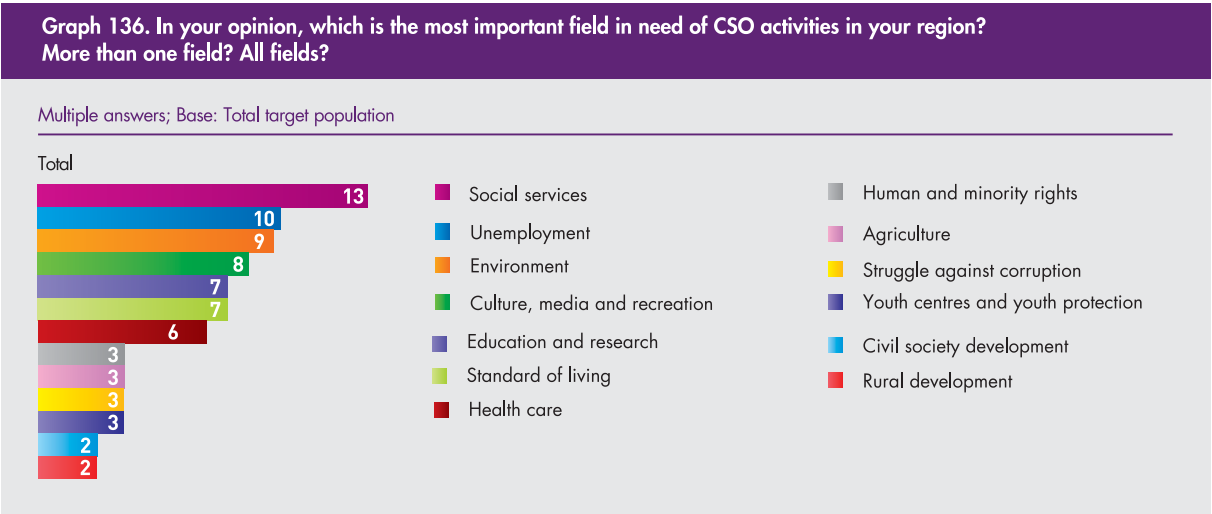


Attitudes regarding coordination of CSO activities with the needs of society are the same as those regarding local communities; almost one half of CSOs (45%) believe that the CSO sector fully or mostly responds to the needs of society, while only 13% think that they fail to do so.

Unclassified CSOs take the lead in the evaluation that the sector responds to the needs of society (51%), an opinion they share with CSOs involved in the environment (50%). As in the case of the previous question, a negative attitude is most held among CSOs involved in healthcare, which in 24% of cases believe that CSOs fail to respond to the needs of society.

Attitudes in this regard also differ most by regions: 57% of CSOs from Eastern Serbia believe that the CSO sector responds to the needs of society, while a negative opinion in this regard is held by as many as 18% of Belgrade-based CSOs.

Fields in which CSO activities are under-represented at the regional level

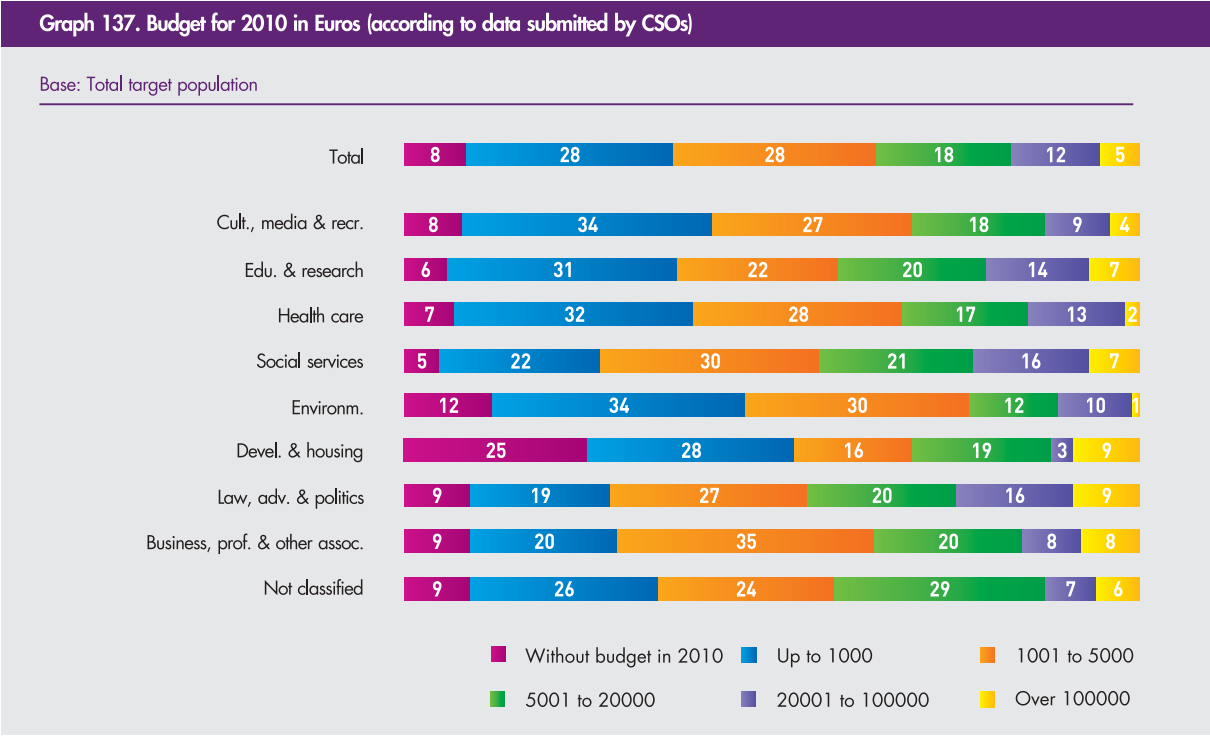


Social services are seen to be the CSO activity most lacking (12%) in the region in which the organization participating in this research does its work; they are followed by unemployment and environment (9% each), culture, media and recreation (8%), education and research (7%). Most often, organizations see as the primary area lacking CSO involvement in their region as being the field they themselves are working in; so that, for instance, business/professional and other associations mostly point to the need for dealing with the standard of living (13%).

That social services are the most neglected CSO field of work is an opinion held by all organizations equally, regardless of the year of foundation, size, budget or region. Unemployment is perceived as a topic in which CSOs are insufficiently engaged by 17% of organizations from Southeast Serbia, and by the same percentage of organizations having more than 20 active people; while this opinion is shared by only 1% of CSOs from Eastern Serbia, who are at the same time most aware of a lack of CSO activities in the field of environmental issues (16%).

It is interesting that only a very low percentage of organizations evaluate the struggle against corruption as the first and most insufficiently covered field of activity. The same goes for civil society development, youth centres and youth protection, as well as rural development, local community development etc.

CSO budgets in 2010



The size of budgets available to CSOs in 2010 varied more among individual CSOs than among their primary fields of work. A large majority of CSOs had a budget below €20,000, with only 5% over €100,000.

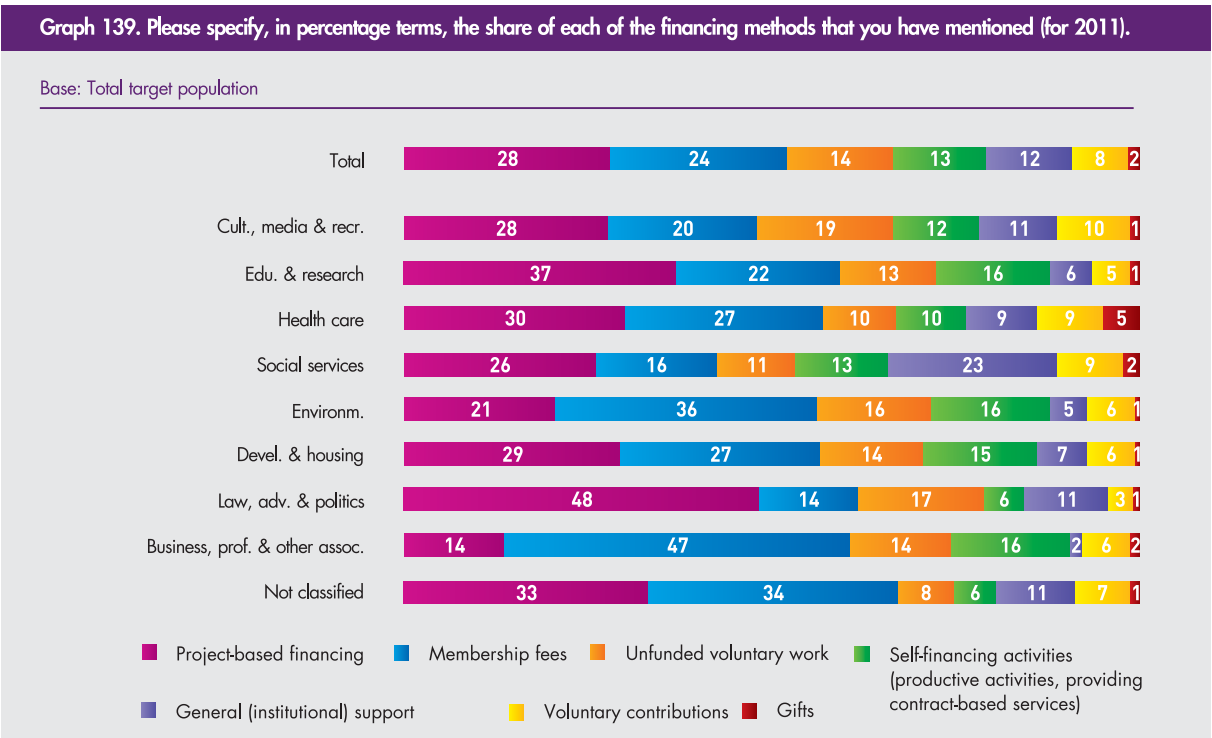
Most frequently without a budget were CSOs dealing with development and housing (25%), and least frequently those rendering social services (5%); a budget below €1,000 was most often found among CSOs involved in culture, media and recreation, as well as CSOs dealing with environmental issues (34% each), and most rarely among CSOs dealing with law, advocacy and politics (19%); a budget ranging from €1,000 to €5,000 was most present among business/professional and other associations (35%), and least present among CSOs involved in education and research (22%); a budget ranging from €5,001 to €20,000 was most often found among unclassified CSOs (29%), and most rarely among those ones dealing with environmental issues (12%); a budget ranging from €20,001 to €100,000 was most represented among CSOs dealing with law, advocacy and politics, as well as those rendering social services (16% each), and least represented among CSOs dealing with development and housing (3%); most CSOs with a budget exceeding €100,000 were those dealing with development and housing, as well as those dealing with law, advocacy and politics (9% each), while the fewest CSOs with such a budget were those involved in environmental issues (1%).



Almost one half of CSOs specified two methods of financing in 2011: either one based on membership fees (49%) and/or one based on projects (44%); while no less than 31% of work is volunteer-based. However, variations across the fields are considerable.

Among CSOs financed mainly from membership fees, most represented are business/professional and other associations (70%), while among those which are project-based, the leaders are CSOs dealing with law, advocacy and politics (64%). It is interesting that CSOs rendering social services, more than others, are financed from voluntary contributions (33%) and through general (institutional) support (36%). In self-financing activities, the leaders are business/professional and other associations, as well as CSOs involved in education and research (29% each).

Mostly financed from membership fees are CSOs founded before 1989 (61%), those with 11 to 20 active people (55%), and those from Eastern Serbia (54%); mostly financed from projects are CSOs founded in the period between 1990 and 2000 and those with more than 20 active people (54% each), as well as those with budgets exceeding €100,000 (67%). Volunteers are mainly found working in CSOs registered since 2010 (38%), those without a budget (49%), and those which are Belgrade-based (39%); voluntary contributions are mostly received by CSOs whose budget exceeds €100,000 (36%), while income from self-financing activities is most represented among CSOs established before 1989 (34%), those with more than 20 active people (38%), and those with a budget exceeding €100,000 (37%). General (institutional) support is most received by CSOs founded before 1989 (35%) and those having more than 20 active people (30%).



On average, the largest percentage share originates from project-based financing (28%) and membership fees (24%), and the lowest from voluntary contributions (8%) and gifts (2%); however, variations across the primary fields of activity are huge.

Most project-based financing is accomplished by CSOs dealing with law, advocacy and politics (48%), while membership fees constitute the largest percentage share in financing business/professional and other associations (47%). Volunteer work is most represented among CSOs involved in culture, media and recreation (19%); self-financing activities are most represented among CSOs dealing with the environment (16%), while CSOs rendering social services, more than other CSOs, receive general (institutional) support (23%). Voluntary contributions are most often received by CSOs involved in culture, media and recreation (10%), while gifts are most represented among CSOs involved in healthcare (5%).

CSOs registered before 1989 are in percentage terms the most financed from membership fees (27%), in comparison to those registered between 2001 and 2009, among which project-based financing is most represented (35%). Among CSOs whose budget exceeds €100,000, project-based financing is most represented (45%), while CSOs for which membership fees represent the main method of financing are mostly in the category of CSOs with a budget below €1,000 (32%). Self-financing is most represented among CSOs that did not have a budget for 2010 (20%). The strongest institutional support is given to CSOs established before 1989 (20%). There are no significant differences by regions, except that Belgrade-based CSOs use voluntary work more than others (18%). Voluntary work is least represented as a financing method among CSOs in Central Serbia (8%), which have the largest share of voluntary contributions in their organizations' budgets (11%) as compared to other regions.

Financing sources in 2011



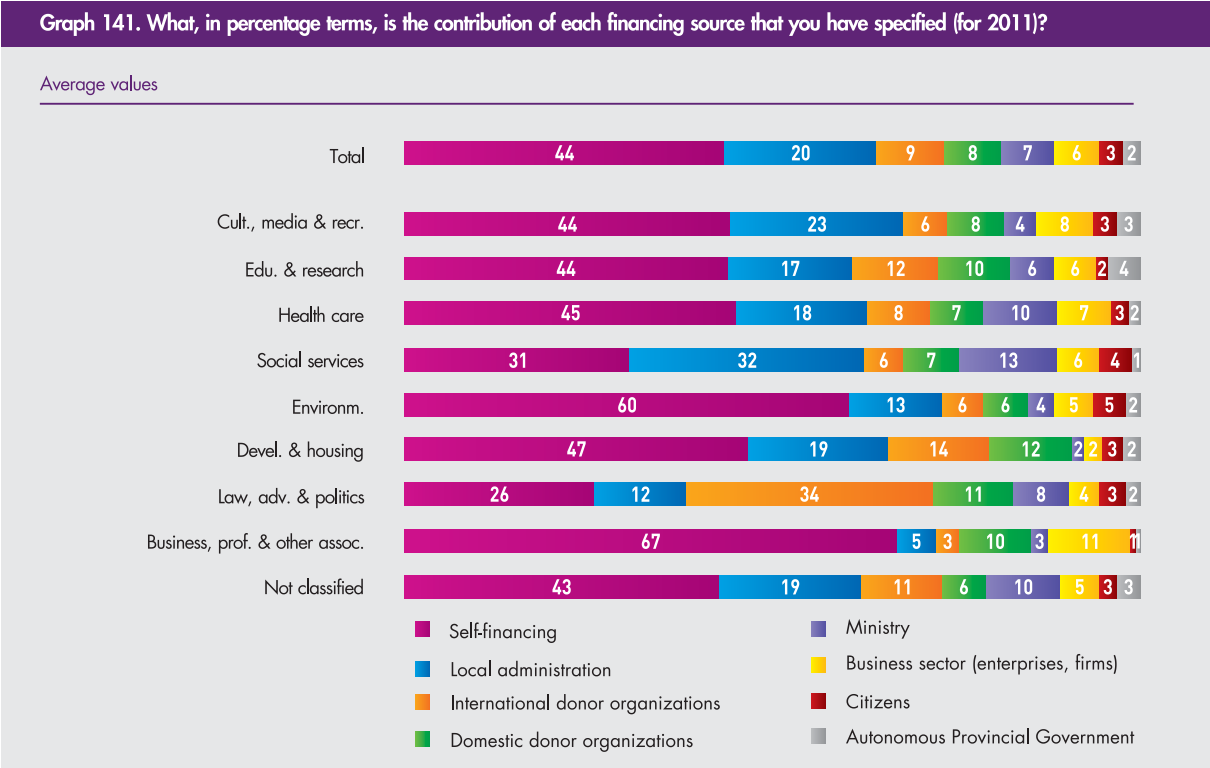
Unlike the previous two graphs that outline different methods of organizations' financing, this graph and the next provide information on the sources of financing, meaning, who is financing CSOs.

Besides self-financing, which is the method stated by an average of 61% of organizations, the local administration (42%), domestic donor organizations and the business sector (21% and 17% respectively) are the financiers that most often appear.

Self-financing is most represented among business/professional and other associations (82%), while the local administration most often finances CSOs rendering social services (61%). International donor organizations mainly finance CSOs dealing with law, advocacy and politics (45%), while ministries and citizens mainly finance CSOs rendering social services (27%, 16%).

Self-financing as a source of financing is most frequently specified by CSOs having a budget below €1,000 (71%). Local government most finances CSOs registered before 1989 (57%), those with a budget ranging from €1,002 to €20,000 (50%), and organizations based in the territory of Central Serbia (51%), while they least finance CSOs registered from 2010 and onwards (28%) and Belgrade-based CSOs (28%). Both domestic and international donor organizations mostly finance CSOs founded in the period between 1990 and 2000 (25% and 24% respectively), those with more than 20 actively engaged people (36% and 28% respectively), and those with budgets exceeding €100,000 (36% and 49% respectively). Domestic donors are most present among CSOs in the region of Eastern Serbia (27%), while international donors are most present in the Belgrade region (23%). Ministries are most often specified as financiers among CSOs established before 1989 (22%), those with more than 20 active people (22%), and those with a budget

exceeding €100,000 (33%); such organizations being mostly found in the territory of Belgrade (22%), and least in the region of Vojvodina (9%).

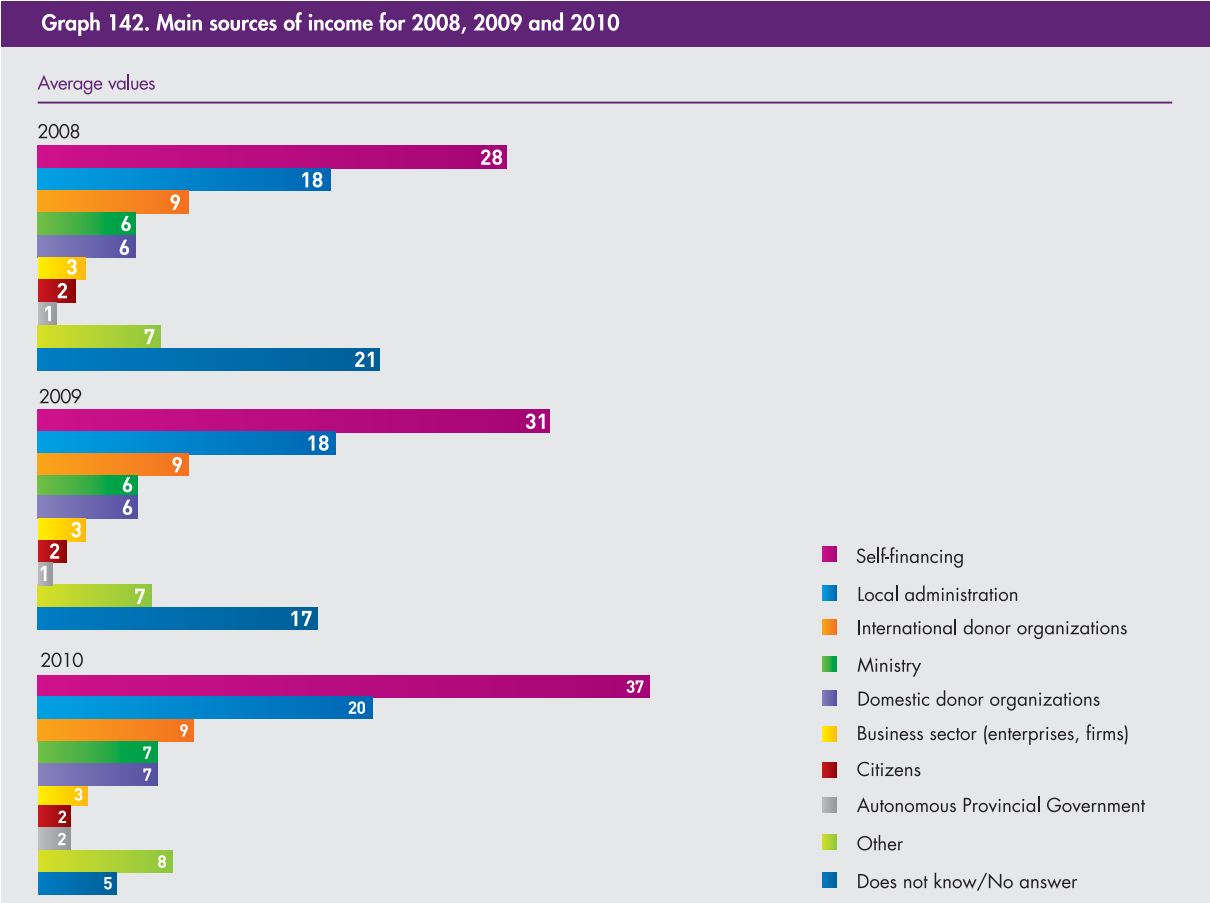


On average, the largest share in percentage terms derives from self-financing (44%), financing by local administrations (20%) and financing by international donors (9%); however, there are huge differences across the various fields.

Self-financing plays the largest role among business/professional and other associations (67%), and the smallest among CSOs dealing with law, advocacy and politics (26%), where most common, in percentage terms, is financing by international donor organizations (34%). Funds from local administration are mainly used by social services CSOs (32%), which are also the major beneficiaries of the funds of ministries (13%), as compared to other fields. Although the business sector as a whole represents a low percentage of CSO-financing (6%), in most of the cases their funds are targeting business/professional and other associations (11%).

The share of different financing sources also varies relative to certain other parameters: self-financing is most represented in the budget of new CSOs (55%), those with up to five active people (48%), CSOs without a budget (61%), and those from the region of Western Serbia (55%). Funds of local administrations, which are the second most represented, are mostly drawn on by the oldest CSOs (31%), as compared to CSOs registered after 2010 (13%); the share of the funds of local administration is the largest among CSOs whose budget ranges from €1,001 to €5,000 (26%) and among CSOs from Eastern Serbia (26%); funds from international donor organizations, although not representing the largest share, still play a significant role in the budgets of organizations registered between 1990 and 2000 (14%), among CSOs with more than 20 active persons (14%), and those with a budget exceeding €100,000 (30%), where they also represent the largest share in the organization's budget, and highest among Belgrade-based CSOs (14%) when compared to other regions. Ministries appear as a significant financing source among CSOs with a budget exceeding €100,000 (13%); this source is least represented among CSOs from Vojvodina (4%).

Financing sources in the past three years

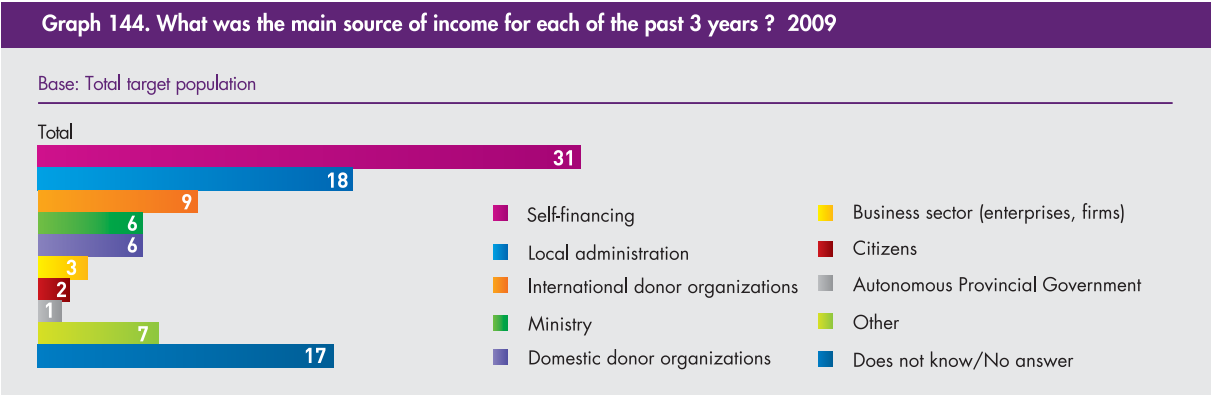


On average, in the past three years there have been no changes regarding financing sources. The largest share, in percentage terms, has come from self-financing, financing by the local administration and financing by international donors; whereby one can observe an increasing trend in the share of self-financing (from 28% to 37%), and a decreasing trend in financing by the local administration (from 18% to 20%). Financing by international donor organizations has remained the same throughout the three years (9%); although CSOs dealing with law, advocacy and politics have increased their funds from these sources (from 29% to 36%), unlike business/professional and other associations, for whom this financing source has decreased (from 4% to 1%).

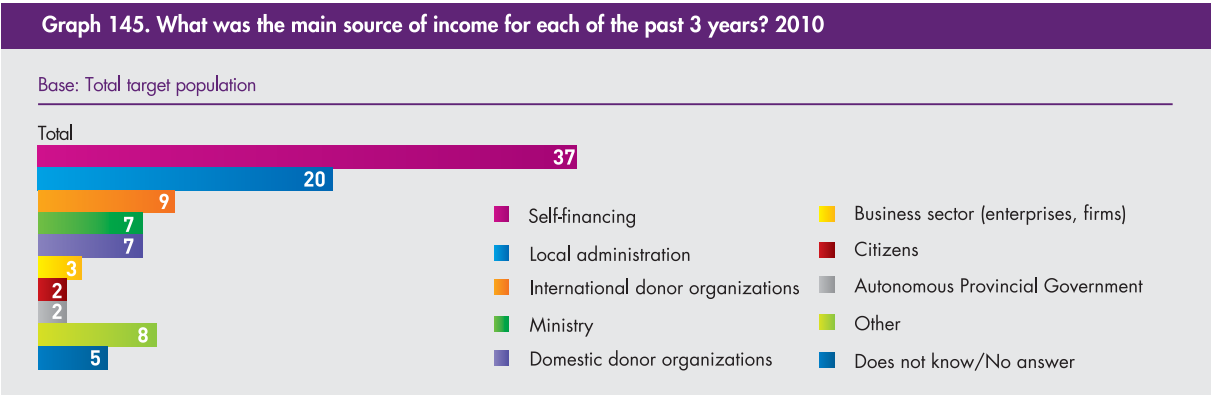
It is noticeable that the lower the budget the higher the self-financing share; thus CSOs without a budget have more than doubled this share (from 21% to 50%), while CSOs with a budget exceeding €100,000 have had the lowest increase in this method of financing (from 18% to 22%). In regional terms, the highest increase in self-financing has been noted among CSOs from Western Serbia (from 36% to 49%). In the past three years, CSOs founded from 2001 to 2009 (from 15% to 19%), CSOs with a budget from €1,001 to €5,000 (from 22% to 26%) and CSOs based in the territories of Vojvodina (23% - 27%) and Belgrade (10% - 14%) have started to use local administration funds to somewhat greater extent, while the share of those funds has somewhat decreased among CSOs in the regions of Western and Southeast Serbia (from 21% to 18%). A very slight increase in the share of financing by international donor organizations in the past three years has been registered only among Belgrade-based CSOs (12 % - 14%).



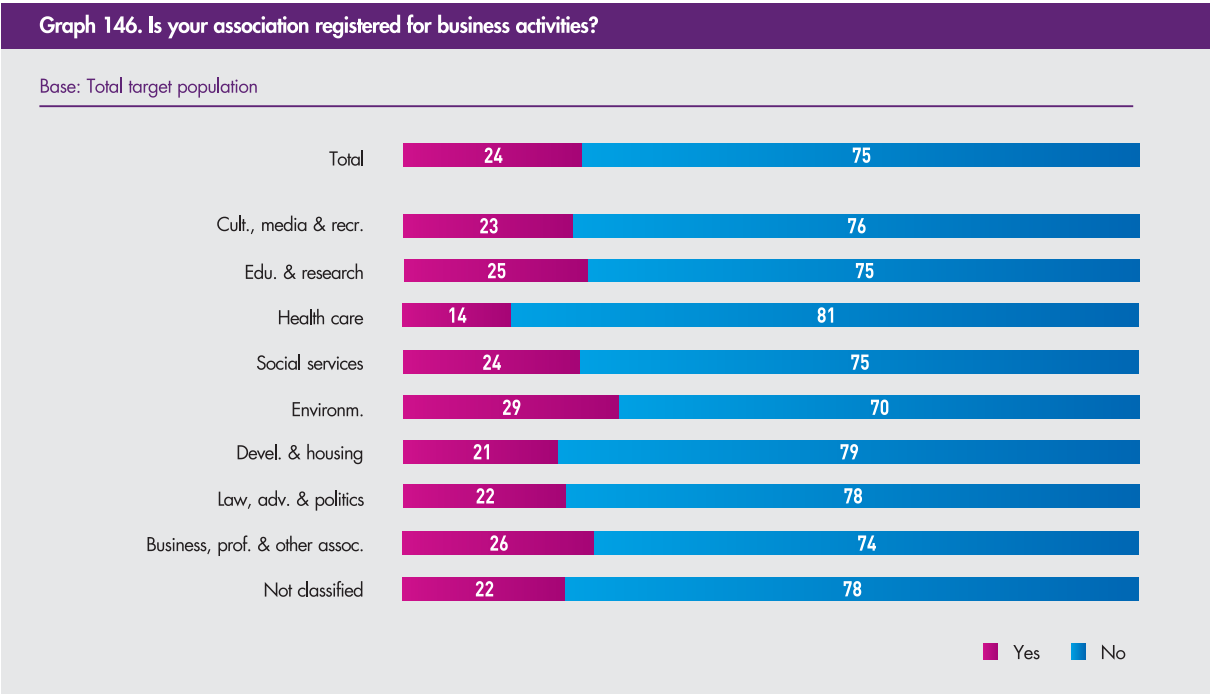
Differences in financing sources are notable across the fields of activity: self-financing has been the main source of income among all of them, mostly in business/professional and other associations (48%), with the exception of CSOs dealing with law, advocacy and politics (11%), whose main financing sources have been international donor organizations (29%) and CSOs rendering social services, whose main financing sources have been local administration funds (29%). In 2008, self-financing was the main source of organizations' income regardless of the founding year, number of active people or region, with the exception of CSOs whose budget for 2010 exceeded €100,000, and whose main financing sources in 2008 were international donors (37%).



Financing sources within the field did not change in 2009 in comparison with 2008. The only important difference in comparison with 2008 was that international donor organizations were also the most common source of financing among CSOs whose budget for 2010 ranged from €20,001 to €100,000 (24%).



The structure of financing sources within the field is a constant from 2008 to 2010, whereby in 2010 self financing has increased in all CSOs, regardless of primary area of activity.



Almost one quarter of CSOs registered business activities (24%). Among them, the most were CSOs involved in environmental issues (29%), while the fewest were those involved in healthcare (14%). In terms of other categories, business activities were mainly registered by CSOs established before 1989 (33%), the biggest CSOs (35%) and CSOs with budgets exceeding €100,000 (48%), as well as CSOs based in the territory of Western Serbia (29%); the fewest CSOs to register business activities were from Southeast Serbia (only 15%).



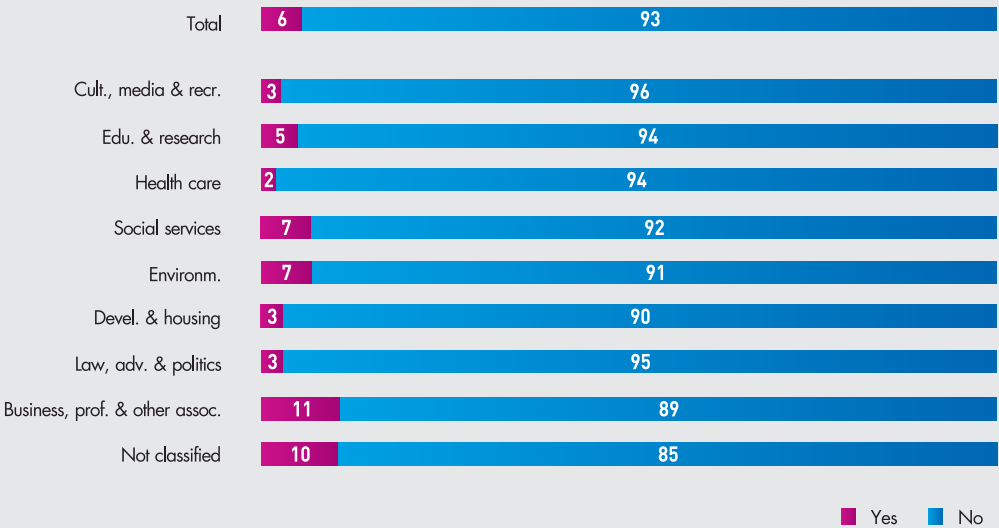
A number of heterogeneous business activities were registered, depending on the primary fields of the CSOs. The CSOs registered publishing most as their business activity (14%), followed by service activities (9%).

Among CSOs that registered publishing as their business activity, most numerous were CSOs involved in healthcare (31%), while service activities were most registered by business/professional and other associations (16%), which were also leaders in registering education/training as business activities (18%). The protection and rescue of people and property were registered by 24% of CSOs rendering social services, while CSOs involved in environmental issues took the lead in registering agricultural activities (22%).

Publishing activities were most registered by CSOs founded between 2001 and 2009 (21%), those without a budget (29%) and those based in Belgrade (25%). Service activities were mostly registered by CSOs from the region of Western Serbia (29%), while the protection and rescue of people and property were most present among CSOs established before 1989 (18%).

Graph 148. Has your association registered a company?

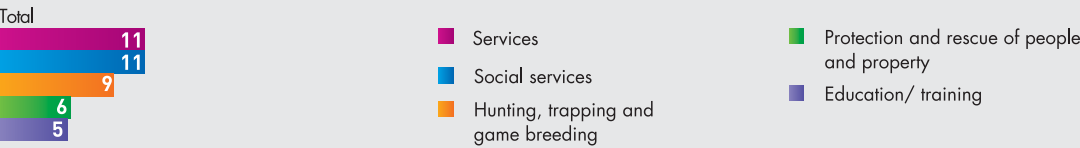
Base: Total target population



Companies were registered by only 6% of CSOs, most of them business/professional and other associations (11%), organizations founded before 1989 (10%), those having more than 20 active people (12%), and those with a budget exceeding €100,000 (21%).

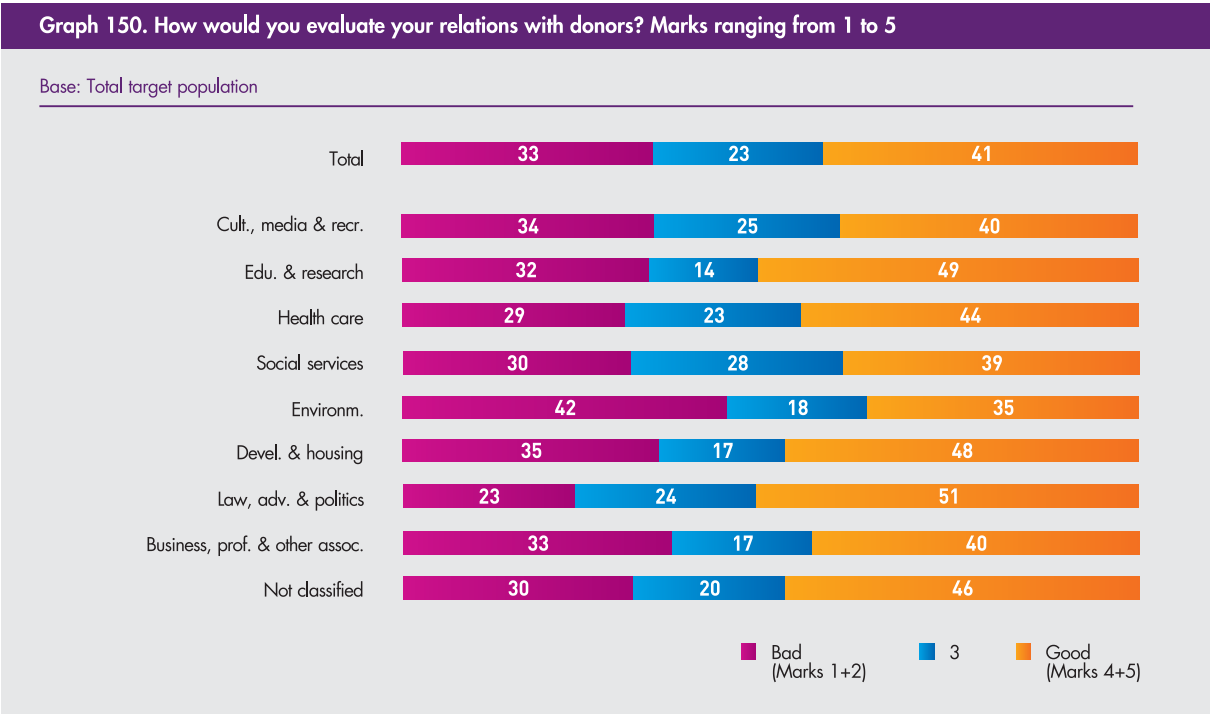
Graph 149. What type of company did you register ?

Multiple answers; Base: Organizations that registered a company (6% of the target population)



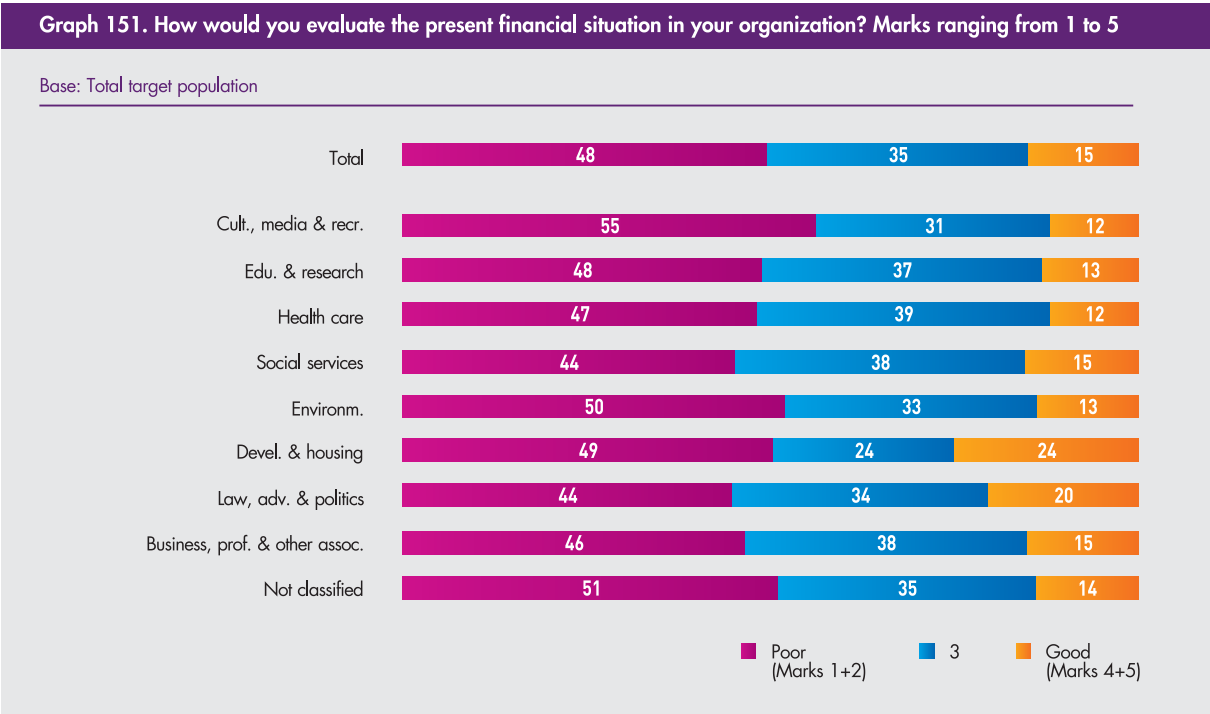
The most frequently registered companies were for providing service activities and providing social services (11% each), followed by hunting, cattle breeding and game breeding (9%). Among CSOs that registered companies for providing service activities, the majority were organizations dealing with law, advocacy and politics (50%), and among those that registered companies for providing social services, the majority of CSOs were those whose primary field of work it is (36%), while organizations involved in the environment mostly registered companies related to hunting, cattle breeding and game breeding (33%). Companies providing service activities were mostly registered by CSOs established in the period between 1990 and 2000 (30%), those without a budget (38%), and those from the territory of Central Serbia (25%). As regards organizations that registered companies for providing social services, they were mainly without a budget (32%) and all of them in the territories of Belgrade (22%) or Vojvodina (15%). Business activities related to hunting, cattle breeding and game breeding were mainly registered by old organizations established before 1989 (19%), and regionally most represented in Southeast Serbia (27%).

Evaluation of relations with donors

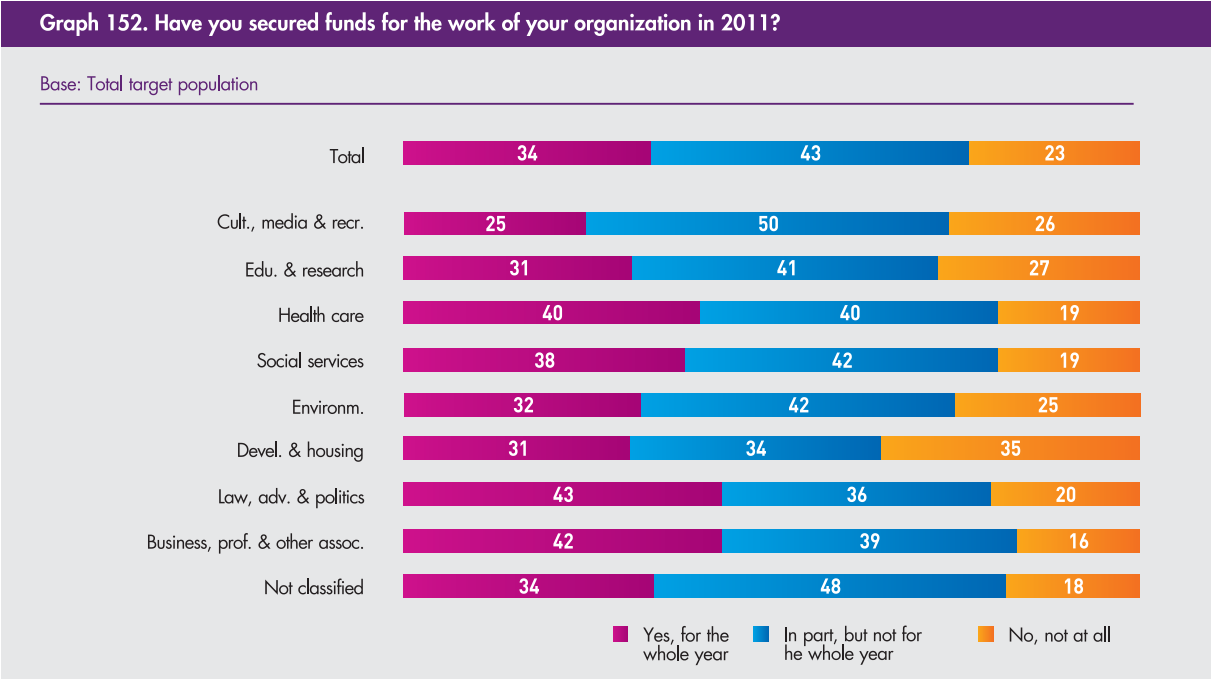


41% of CSOs give high marks to their relations with donors; however, about one third (33%) give them low marks. The most dissatisfied with their relations with donors are organizations dealing with the environment (42%), unlike organizations dealing with law, advocacy and politics, who give the most positive evaluation of their relations with donors (51%), as do CSOs involved in education and research (49%). As expected, the most dissatisfied with these relations are CSOs without a budget (52%), in contrast to organizations having a budget exceeding €100,000, who ipso facto evaluated these relations very highly (59%). The greatest dissatisfaction with relations with donors is among organizations from Western Serbia (47%), while CSOs from Southeast Serbia evaluated their relations with donors positively the most (51%).

Evaluation of financial situation in own organization



48% of CSOs evaluate the financial situation in their organization as poor, and only 15% as good. The most dissatisfied are organizations involved in culture, media and recreation (55%), while CSOs dealing with development and housing (24%) give their financial situation the best marks. Among the most dissatisfied are CSOs having a small number of active people (61%), those without a budget (64%) and those which are Belgrade-based (54%); while, of course, the most satisfied with their financial situation are CSOs having a budget of over €100,000 (35%).

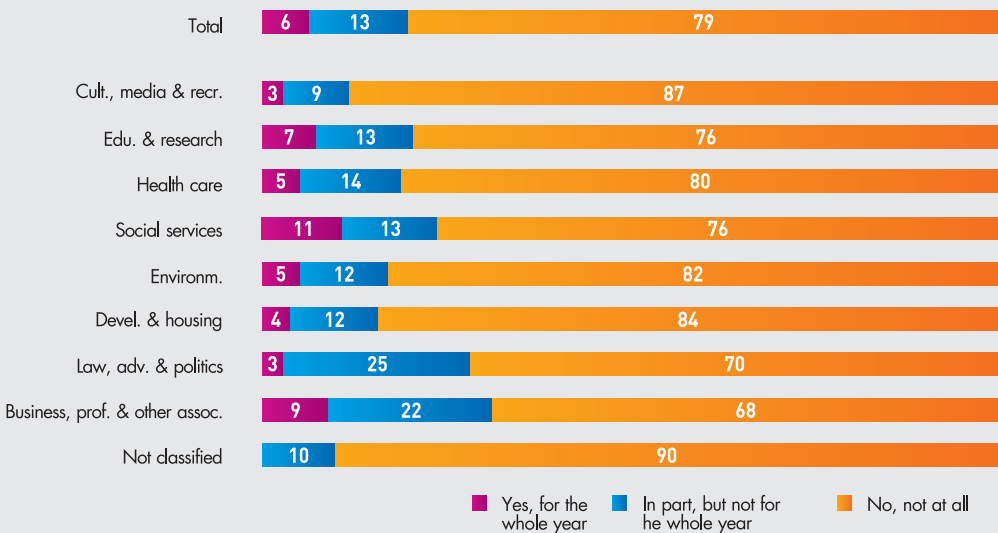


Only 34% of CSOs provided funds for the work throughout the whole of 2011, while every fifth CSO (23%) failed to provide the funds at all (according to data from June 2011). Among those that provided funds for the whole year, most were those dealing with law, advocacy and politics (43%), while the fewest were CSOs involved in culture, media and recreation (25%), which for the most part managed to provide funds for a part of the year only (50%). CSOs dealing with development and housing in general failed to provide funds for the whole year (35%).

Funds for the whole year were to the greatest extent successfully provided by CSOs founded before 1989 (39%), those having 11 to 20 people (45%), those with a budget exceeding €100,000 (62%), and those based in Western Serbia (42%). CSOs with a budget ranging from €1,001 to €5,000 (52%) and those from Central Serbia (51%) provided funds in part. As expected, among CSOs that failed to provide funds for 2011, the majority were CSOs founded in 2010 and 2011 (36%), small CSOs (28%) and those without a budget (49%). CSOs that failed to provide any funds for 2011 were mainly based in the region of Southeast Serbia (32%).

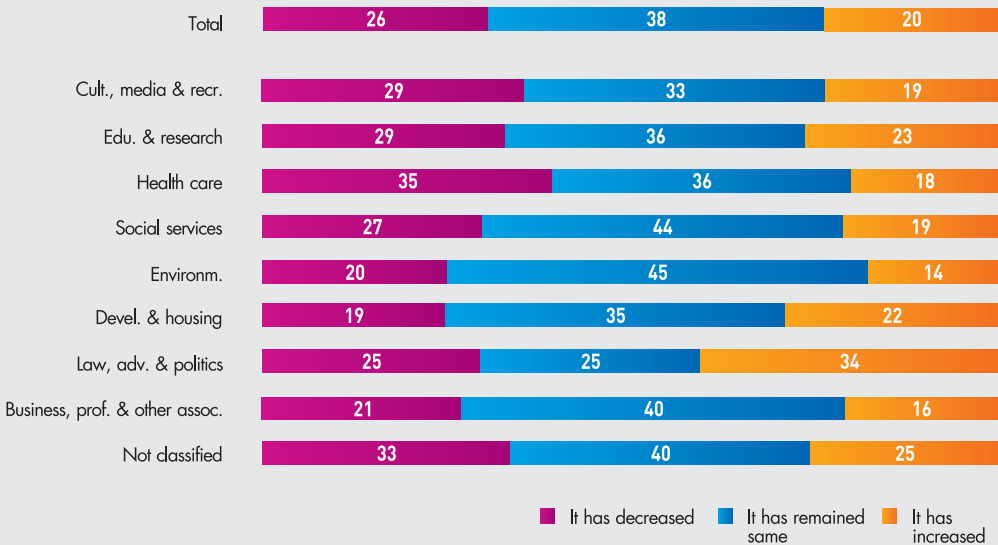
Graph 153. Have you secured funds for the work of your organization in 2012?

Base: Total target population



79% of CSOs failed to provide any funds for their work in 2012 (according to data from June 2011), while only 6% did so for the whole year, the most successful among them being CSOs rendering social services (11%). CSOs dealing with law, advocacy and politics were the most provide funds for a part of the year (25%). The size of the organization was directly connected with the provision of funds, whereby CSOs having more than 20 active people (11%) and a budget of over €100,000 (18%) were to provide funds the most for the whole year, as well as for a part of the year (21% or 32%). Most often, CSOs registered since 2010, those having up to five active people (87%) and those without a budget (89%) did not provide funds at all; but in terms of region there were no differences among CSOs.

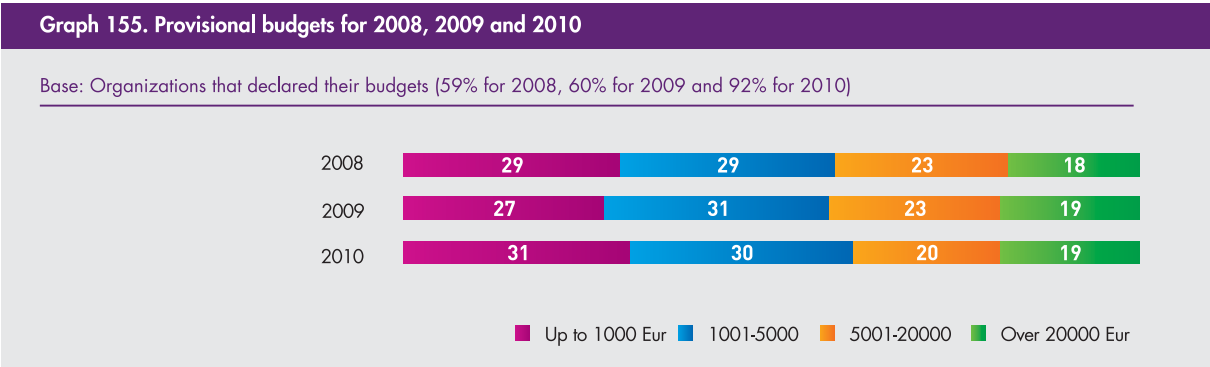
Graph 154. Has the annual income in your organization increased, remained the same or decreased in the past 3 years?



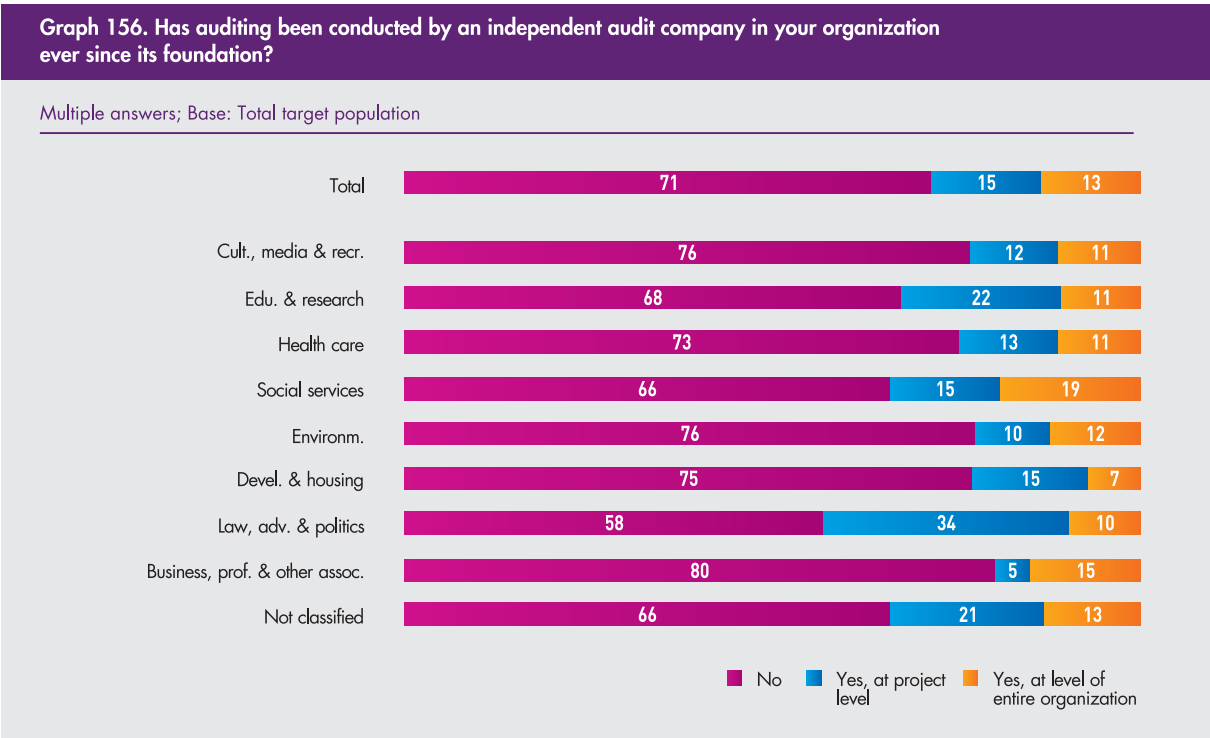
The situation regarding income differs in the CSO sector; most often, it is stated that the situation is the same (38%), while every fifth CSO (20%) states that their annual income has increased, and 26% state that it has decreased. Among those whose income has remained the same, the majority are CSOs dealing with the environment (45%); among CSOs whose income has decreased, the majority are CSOs involved in healthcare (35%), while CSOs dealing with law, advocacy and politics most state that their income in this period has increased (34%). Concerning the decrease in subsidies, Belgrade-based CSOs (29%) those

from Vojvodina (28%), and CSOs founded between 1990 and 2000 (32%) offer the most complaints, while among organizations whose income has increased the majority are big CSOs (27%) with budgets exceeding €100,000 (34%), and CSOs from the region of Southeast Serbia (25%).

In the Graph below is the outline of the provisional budget for the past three years; it shows that, on average, there have been no changes in the budget.



Independent financial audit



In the majority of organizations (71%), a financial audit by an independent audit company has not been conducted since their establishment up till now. 15% of CSOs answered that there were financial audits conducted at the project level, and 13% answered that there were audits conducted at the organization level.

Among CSOs that have had an audit conducted at the project level, the majority are CSOs dealing with law, advocacy and politics (34%); while at the organization level, most represented are CSOs providing social services (19%). Among CSOs that have not had any audit conducted, in the forefront are business/professional and other associations (80%).

As expected, the newest and the smallest CSOs, as well as those without a budget, were those who were least likely to have conducted a financial audit. At the project level, an independent audit had most often been conducted for CSOs founded between 1990 and 2000 (21%), those with more than 20 active people (22%), and those with a budget exceeding €100,000 (41%); while at the organization level, an independent

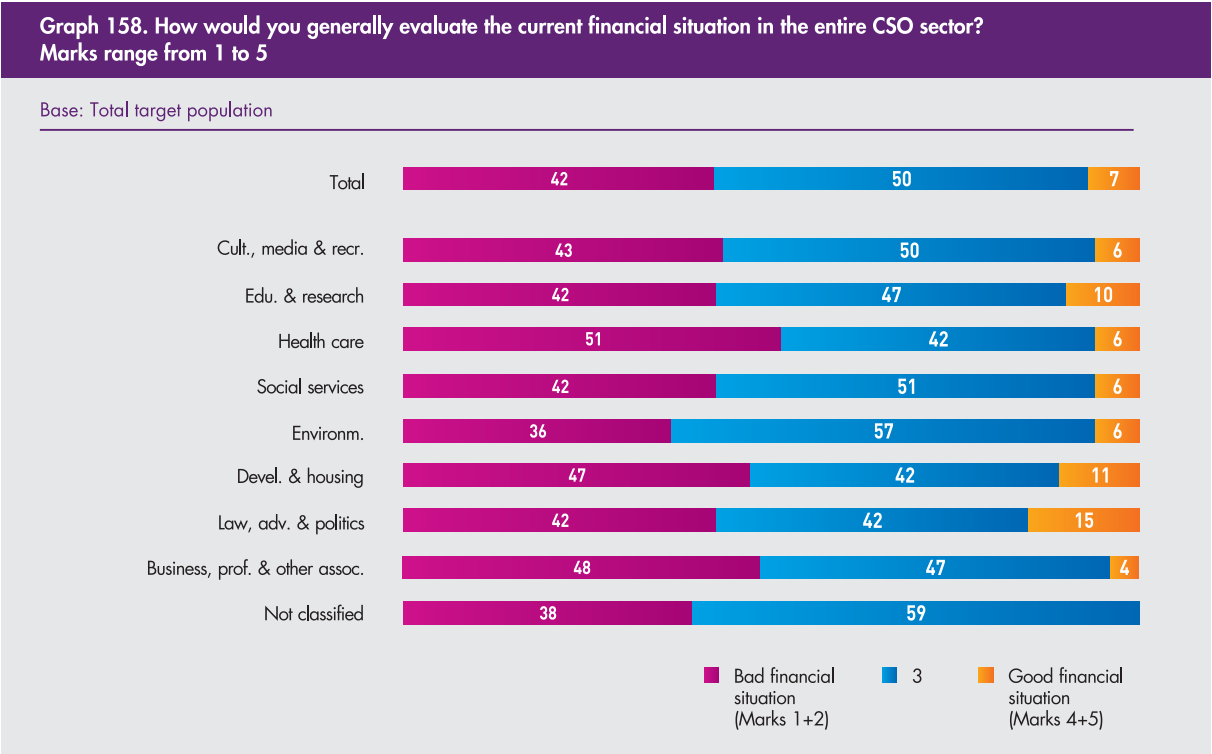
audit had been conducted most among CSOs with a budget ranging from €20,001 to €100,000 (24%), CSOs with more than 20 active people (19%) and those founded before 1989 (25%).

The need for additional education



On average, the majority of organizations (55%) need additional education at least as regards financial management, although 42% of CSOs state that they have no need for additional education, among which business/professional and other associations take the lead (47%). The majority of those that advocate for education as being indispensable are to be found among CSOs involved in healthcare (29%). The necessity of education is pointed to by 35% of CSOs from Southeast Serbia, to a greater extent by those having a budget below €1,000 (27%) and those registered between 2001 and 2009 (26%). The need for additional education is most emphasized by CSOs having more than 20 active people (46%) and a budget exceeding €100,000 (44%). Among CSOs declaring they do not need education, most of them are CSOs founded between 1990 and 2000 (49%), CSOs with 11 to 20 people (50%), those without a budget (55%), and those from Western Serbia (47%).

Financial situation in the entire sector



Most often, CSOs evaluate the financial situation in the sector as of medium-quality (50%) or bad (42%); only 7% believe that the situation is good. Among those which evaluate the situation as bad, the most represented are CSOs involved in healthcare (51%), while among those which evaluate the situation as good, the most numerous are organizations dealing with law, advocacy and politics (15%). CSOs that evaluate the situation as bad mainly belong to the category of those with a budget below €1,000 (50%). The majority are based in the region of Western Serbia (48%). Among organizations that evaluate the financial situation in the sector as good are those whose budgets exceed €100,000 (16%).



The majority of CSOs see the main problems as being the small number of donors (65%) and the low funds of the State and local governments (60%). Organizations providing social services (70%) mainly complain about the small number of donors, while organizations involved in healthcare (74%) are those most dissatisfied with State and local government funds. Organizations involved in healthcare are most critical with respect to a large number of specific problems related to donor financing of CSOs, including their impression that donors only finance large organizations, so that for small ones there are not enough grants left (50%); at the same time, they are most dissatisfied with tax policy (49%); while CSOs dealing with law, advocacy and politics to the greatest extent note that donors do not finance specific fields anymore (49%).

Most frequently to be found among those seeing the problem as lying in the small number of donors, are organizations with a budget ranging between €1,001 and €5,000 (74%), those from the Central Serbia region (71%), and those established before 1989 (68%). The problem of State or local government lack of

funds is mainly recognized by CSOs from Western Serbia (74%) and Central Serbia (70%). The majority of organizations believing that the problem lies in donors financing only big organizations are, as might be expected, CSOs with up to five active people (42%), CSOs with a budget ranging from €5,001 to €20,000 (42%) and CSOs based in Belgrade and Southeast Serbia (41% each). Belgrade-based CSOs (40%) believe most that donors do not finance specific fields anymore, while bad tax policy is stated as a problem by CSOs with more than 20 active people (44%). On the subject of the complicated conditions for submitting project proposals, CSOs from Eastern Serbia (34%) and from Belgrade (33%) are the most articulate.



The majority of CSOs believe that the best method of financing would be by the State through special funds (58%), from European Union funds (38%), by local government (36%) and by foreign donors (31%).

Unclassified CSOs most often (67%), business/professional and other associations believe that in the future the State should finance the CSO sector through special funds, and business/professional and other associations least often (53%). Those with the highest expectations regarding European Union funds are CSOs dealing with law, advocacy and politics (54%), and those with the lowest, CSOs providing social services (31%) or dealing with environmental issues (32%). Opposite expectations were apparent with reference to local government, so that in terms of financing, the highest expectations of them are entertained by CSOs rendering social services (42%), and the lowest by CSOs dealing with law, advocacy and politics (25%), which also believe, more than the others, that the CSO sector should be financed by foreign donors (40%). Business/professional and other associations most believe that the sector should be mainly financed through self-financing or membership fees (28%).

Attitudes are united on the matter of CSO-financing by the State through special funds. There are differences regarding financing from European Union funds, so that CSOs registered before 1989 only think in 26% of cases that it is the best method of financing the CSO sector in Serbia for the future, as opposed to as many as 44% of CSOs registered between 2001 to 2009. By regions, this latter opinion is mostly shared by CSOs from Southeast Serbia (55%) and only by 28% of CSOs from Central Serbia. The highest expectations of local government are entertained by CSOs established before 1989 (44%), as well as by CSOs from Central and Eastern Serbia (43% each), while the lowest expectations are found among CSOs with a budget exceeding €100,000 (25%). The greatest expectations of foreign donors are entertained by CSOs from Southeast Serbia (49%). Financing from the business sector is most often mentioned by CSOs without a budget (34%) and Belgrade-based CSOs (32%), while self-financing (business activities, service providing) is most mentioned by CSOs from Western Serbia (26%).



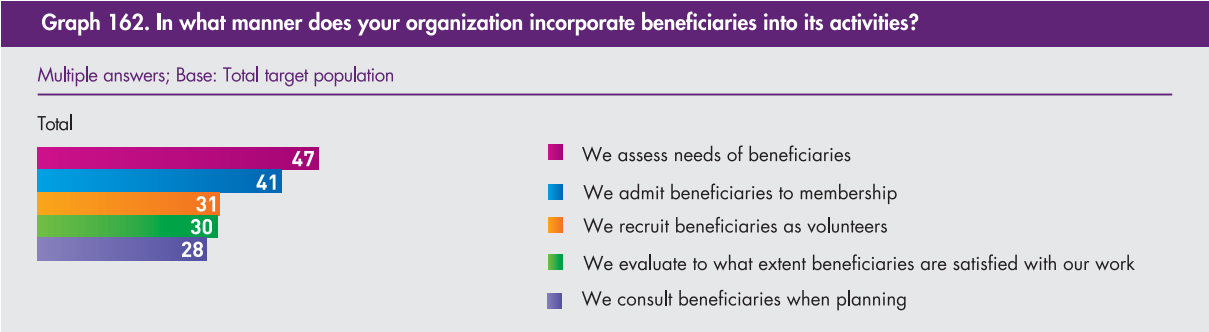
As a way of enhancing the financial transparency of CSO activities, 59% of CSOs specify simplified regulations governing financial management, 39% specify changes in tax policy, and 32% specify education of CSOs on financial management.

Unclassified CSOs take the lead with the attitudes that the State should simplify the regulations on financial management (65%) and change the tax policy (51%), while CSOs should sign the ethics code and adhere to it (34%). At the same time, these organizations least think that CSOs need education on financial management (17%). CSOs dealing with development and housing, as well as CSOs dealing with law, advocacy and politics, are most represented in the opinion that the financial transparency of CSOs could be improved by educating CSOs on financial management (48% each); the latter are also leaders in the attitude that this transparency can be achieved by introducing the obligation to publish annual financial statements (32%) and by engaging financial experts (24%).

Differences among CSOs are to be perceived in their attitudes towards tax policy change as a method for the enhancement of the financial transparency of CSOs, in that this suggestion is most often made by CSOs with more than 20 active people (49%) and by CSOs from Belgrade (45%). The fewest suggestions regarding education on financial management are made by CSOs established before 1989 (23%), and those with more than 20 active people (26%); while most such suggestions have been made by CSOs established in 2010 and later (38%), those with up to five active people (38%), those with a budget below €1,000 and those from Southeast Serbia (39% each). Obligatory publication of annual financial statements is most often suggested by CSOs with a budget of from €20,001 to €100,000 (31%), and most rarely by CSOs from Vojvodina (17%). The signing of an ethics code is most suggested by CSOs registered from 2001 to 2009 (26%) and least by CSOs from Eastern Serbia (12%), which, more than other CSOs, propose the engagement of financial experts (25%).

Including the community in CSO activities

Involvement of beneficiaries in the work of the organization



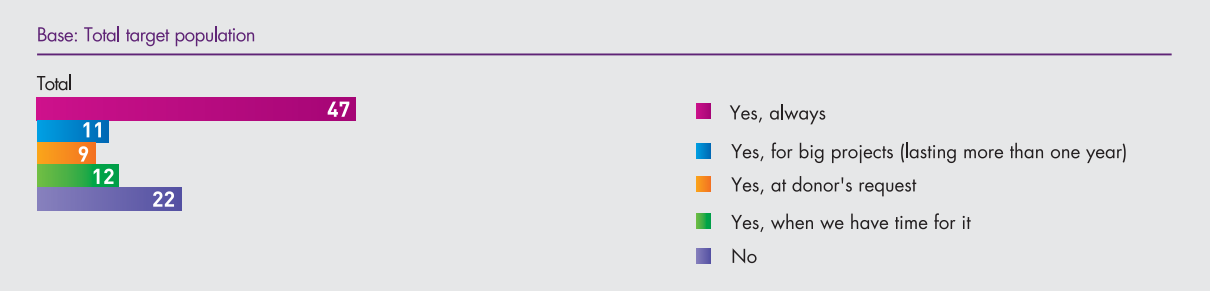
CSOs most often involve beneficiaries in their work by analyzing their needs (47%) and by accepting beneficiaries as their members (41%); to a somewhat lesser extent, they recruit them as volunteers (31%) and check how satisfied beneficiaries are with the organization’s work (30%); while they consult them least on planning (28%).

The organizations that most analyze beneficiaries’ needs are unclassified organizations (69%) and those dealing with law, advocacy and politics (64%), while those that do this least are business/professional and other associations (32%). Acceptance of beneficiaries for membership is most present among organizations dealing with development and housing (46%), with education and research and with healthcare (43% each), and least represented among the unclassified CSOs (30%). Recruiting beneficiaries as volunteers is most common among organizations dealing with law, advocacy and politics (42%), while it is least present among business/professional and other associations (16%). Professional associations, more than other CSOs, check how satisfied beneficiaries are with their work (42%), while organizations involved in the environment and development and housing (23% each) do this least. Consulting beneficiaries on planning is mostly conducted by organizations dealing with law, advocacy and politics (43%), and least by CSOs dealing with development and housing (24%).

The needs of beneficiaries are mostly analyzed by the newest organizations (51%), CSOs with the largest number of active people in the organization (46%), or those with the highest budget (56%). By regions, the needs of beneficiaries are mostly analyzed in Southeast Serbia (55%) and least analyzed in Eastern Serbia (34%). Accepting beneficiaries as members is more or less uniform in all areas, whereby older organizations accept more members than the others (47%). In Eastern and Southeast Serbia, acceptance of beneficiaries as members is especially accentuated (55% and 51%). In terms of recruiting beneficiaries as volunteers, there are no significant differences among organizations. Organizations established before 1989 deal less with evaluation of beneficiaries (23%) than newer CSOs, while Belgrade-based organizations (38%) and those with a budget ranging from €5,001 to €20,000 (39%) do this most often. Consultation on planning is most present among organizations having a budget of over €100,000 (47%) and Belgrade-based organizations (34%); but this is not the case with organizations registered before 1989, which in only 21% of cases consult their beneficiaries about planning, similarly to CSOs from Eastern Serbia (17%).

Needs assessment of beneficiaries

Graph 163. When preparing a project proposal, do you assess the needs of beneficiaries (conduct some kind of research)?



About one half of CSOs (47%) always conduct a beneficiaries’ needs assessment when preparing a project proposal, while every fifth organization (22%) never does.

Organizations involved in healthcare (56%) and social services (55%) and those dealing with law, advocacy and politics (54%), when preparing a project proposal, most often conduct beneficiaries’ needs assessments, while CSOs involved in environmental issues (39%) do this least often. Business/professional and other associations lead among those who do not conduct beneficiaries’ needs assessment when preparing a project proposal (32%).

There are no huge differences among CSOs regarding beneficiaries’ needs assessment as a regular practice. Beneficiaries’ needs assessment for big projects (lasting longer than one year) is least present among organizations founded before 1989 (7%), and most present among CSOs registered between 1990 and 2000 (15%); less present among CSOs with 11 to 20 people (9%), and more present among CSOs with more than 20 active people (19%); by regions, this aspect of beneficiaries’ needs assessment is least practised by CSOs from Central Serbia (6%), but most by Belgrade-based CSOs (14%). The organizations that do not analyze beneficiaries’ needs at all when preparing a project are mainly organizations with a budget below €1,000 (30%), those with up to five active people and those from Western Serbia (26% each).

Collecting feedback data from beneficiaries

Graph 164. After the implementation of a project, do you collect feedback from beneficiaries?
In what manner does your organization collect feedback from beneficiaries?

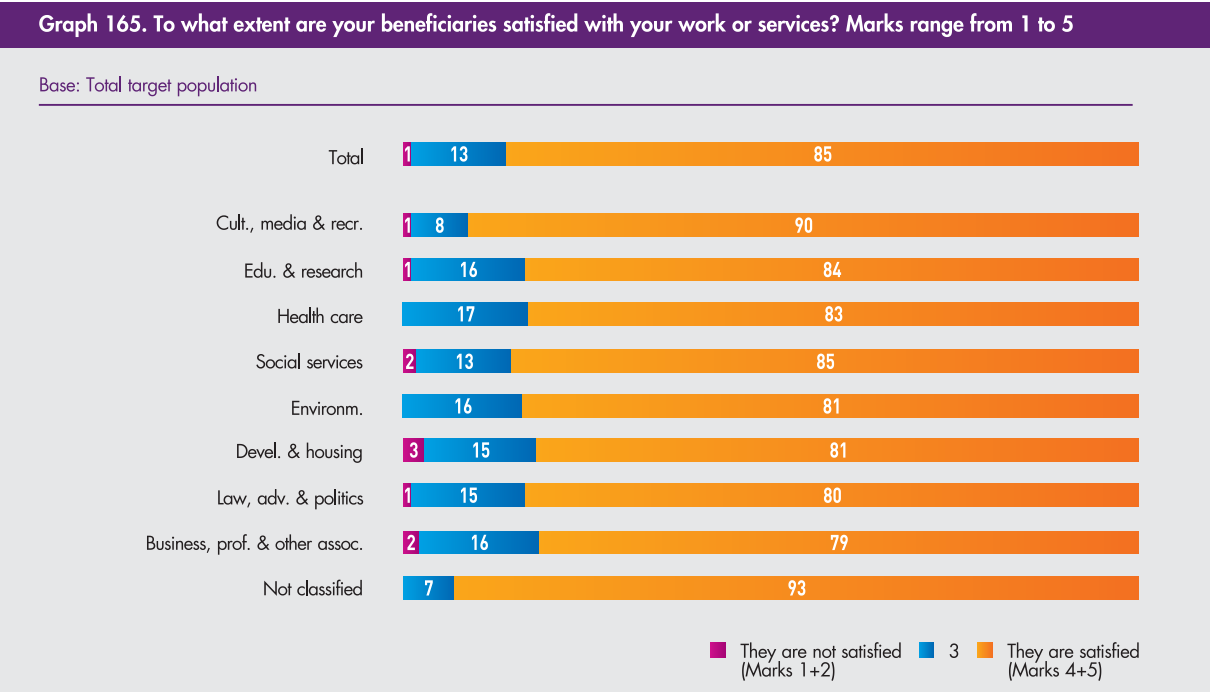


The majority of CSOs (53%) after the project implementation phase collect data informally about beneficiaries' reactions, and somewhat less than one third (29%) do it in a formal manner, while every fifth CSO (21%) does not practice collection of beneficiaries' feedback. There are huge differences among fields of work, so that informal beneficiaries' feedback collection is mainly used by organizations involved in culture, media and recreation and by unclassified CSOs (61% each), while CSOs dealing with development and housing use this least (34%). The formal collection of answers through polls or interviews is most frequently used by organizations involved in healthcare (46%) and those dealing with law, advocacy and politics (45%), and least frequently by CSOs involved in environmental issues (17%). Business/professional and other associations (30%), more than other CSOs, do not collect beneficiaries' reactions at all.

Informal methods of collecting feedback information from beneficiaries are most frequently used by CSOs established before 1989 (58%), CSOs with more than 20 active persons (59%), those from Vojvodina (57%) and those with a budget ranging from €1,001 to €5,000 (57%), while this method is least frequently used by organizations from Western Serbia (33%). Formal collection of answers through a poll or interview are most frequently used by organizations established from 1990 to 2000 (36%), those with more than 20 active people (39%), those having a budget of over €100,000 (44%) and those which are Belgrade-based (36%). Organizations which have not collected any beneficiaries' feedback so far are, as expected, those which are newly founded (28%) and those without a budget (34%), as well as organizations from Western Serbia (28%).

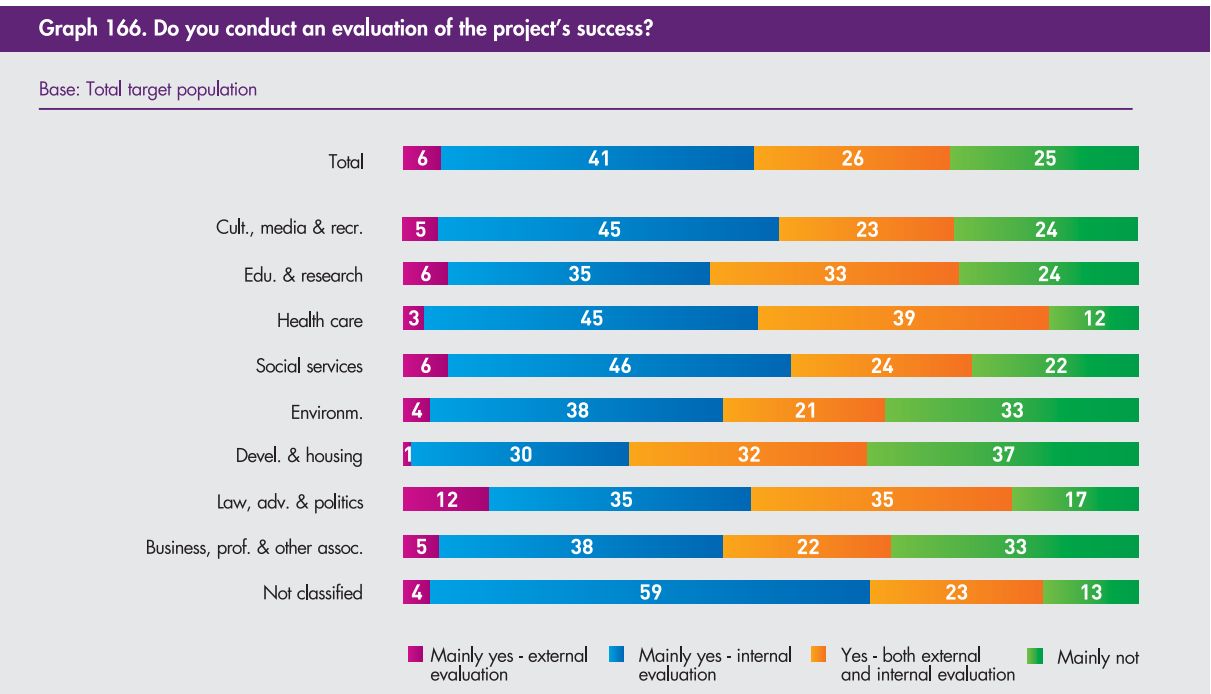
Quality of services

Beneficiaries' satisfaction with work/services of the organization



The majority of CSOs (85%) give high marks to beneficiaries' satisfaction (although only 29% state that they have made formal evaluations of clients' satisfaction, and 21% state they have made none at all). The majority of unclassified organizations (93%) believe that beneficiaries are satisfied with their services and 79% of business/professional and other associations have the same opinion. There are no significant differences among organizations regarding other parameters.

Project success evaluation

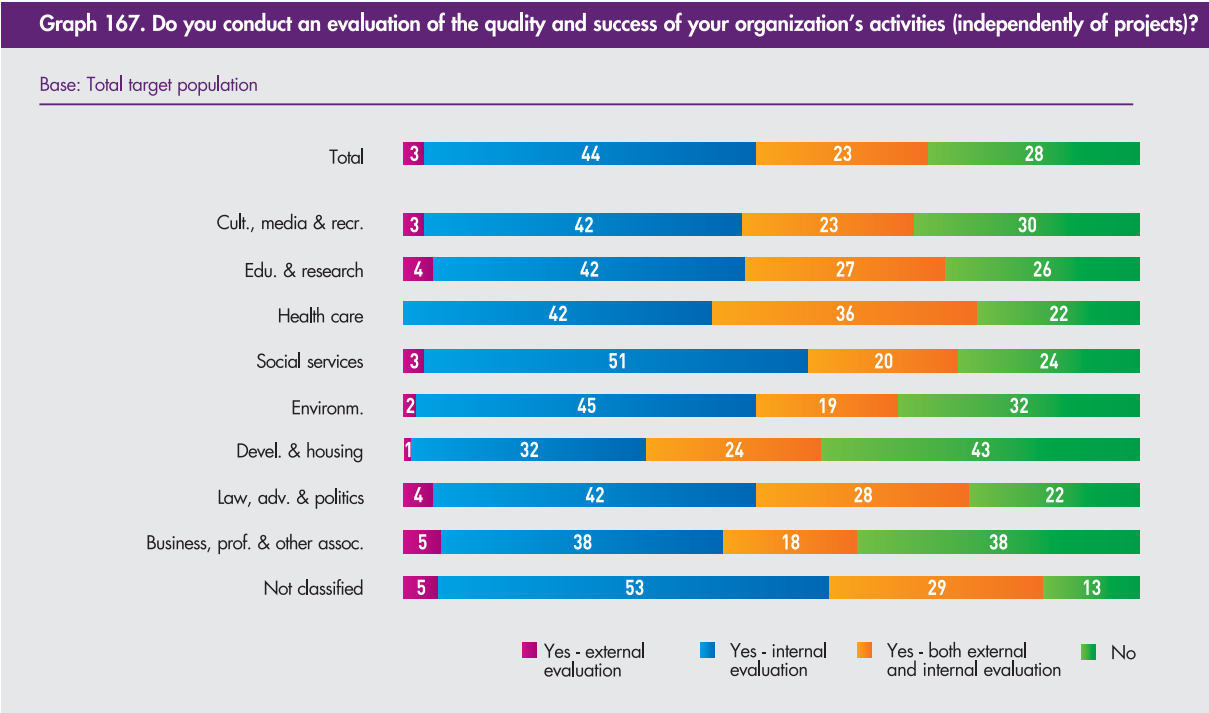


About 73% of CSOs conduct success evaluations of their projects. CSOs most often conduct only internal project success evaluations (41%), while 6% conduct external evaluations; somewhat less than one third conduct both external and internal evaluations (26%), while 25% mostly do not conduct any evaluation at all.

CSOs involved in healthcare most frequently carry out some form of project evaluation (87%), while CSOs dealing with development and housing (37%), as well as CSOs involved in environmental issues and business/professional and other associations (33% each) most often do not carry out any project evaluation.

Internal, external or both types of project success evaluations are mainly conducted by CSOs with a budget exceeding €100,000 (90%), as well as CSOs having more than 20 active persons (86%). By regions, project evaluation is most frequently carried out by Belgrade-based CSOs (78%), and least frequently by those from Western Serbia (61%).

Evaluation of the successfulness of the organization



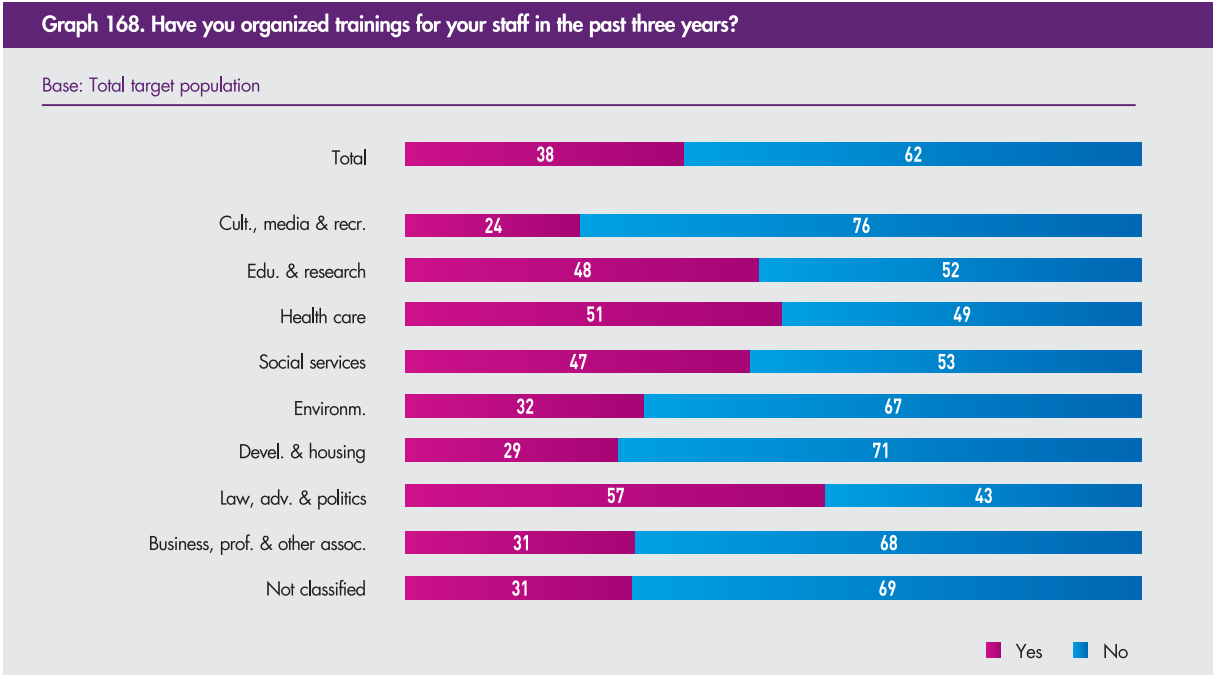
The majority of CSOs (70%) carry out some form of evaluation of the successfulness of their organization's performance, in most cases only an internal evaluation, regardless of projects (44%); 23% conduct both external and internal evaluations, 3% only an external evaluation, while 28% do not carry out any evaluation.

CSOs involved in healthcare take the lead in conducting evaluations of the organization (78%), while CSOs dealing with development and housing are the most often found not conducting any evaluation of the organization (43%).

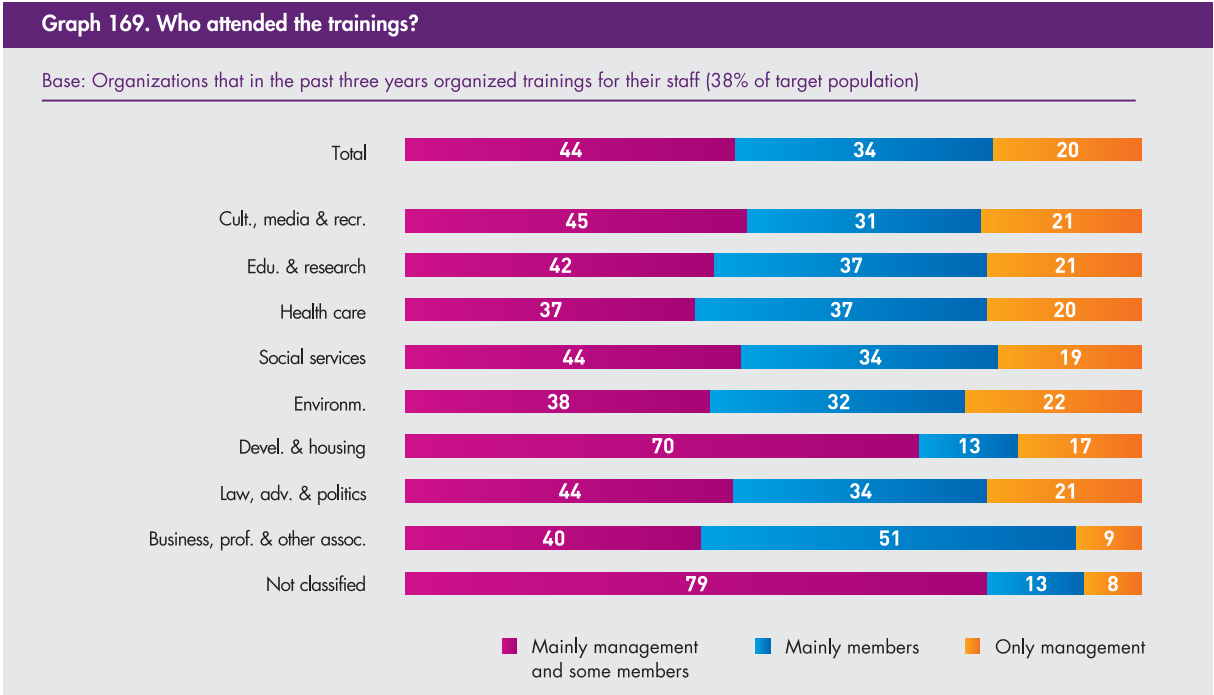
Evaluation of the successfulness of the organization is most frequently carried out by organizations with a budget exceeding €100,000 (82%) and those with more than 20 active people (81%); while CSOs from Western Serbia least frequently evaluate the successfulness of their organization's performance (59%).

Training level of staff working in CSOs

Trainings attendance to now



The majority of CSOs (62%) in the past three years have not organized any training for their staff. Staff-training has been offered most by organizations dealing with law, advocacy and politics (57%), and least by organizations involved in culture, media and recreation (24%), with whom as many as 76% did not have any form of training. There are no huge differences among CSOs except as regards size of budget, whereby CSOs without a budget have had fewest trainings for their staff (21%) in comparison to CSOs with a budget exceeding €100,000 (54%), which have organized the largest number of trainings.



Among CSOs that have offered trainings, the majority have been intended for the management and some members (44%), or mainly for members (34%), or in 20% of cases for the management only.

Unclassified CSOs (79%), as well as organizations dealing with development and housing (70%), mostly include for training both the management and members. Business/professional and other associations educate their members to the greatest extent (51%), while CSOs dealing with environmental issues send their management for trainings somewhat more than others (22%).

Among organizations founded between 1990 and 2000 (51%), those with more than 20 active members (56%), those with a budget ranging from €5,001 to €20,000 (56%) and those from Western Serbia (59%), trainings are attended mainly by the management and some members; CSOs without a budget (43%) and those from Eastern Serbia (40%) concentrate most on educating their members.

Among organizations with up to five active members (29%), as well as among organizations with a budget below €1,000 (27%) and those from Vojvodina (27%), trainings are in most cases attended by the management alone; while the management of CSOs from Western and Central Serbia (9% each) attend trainings the least.

Areas/topics of trainings – basic level



Fields of training at the basic level varied considerably depending on the primary aim of the CSO, but they most often referred to project proposal writing (35%), teamwork and leadership (32%) and strategic planning (28%), while the least organized trainings were in the fields of European Integration (10%) and fundraising (9%).

Training for project proposal writing was most common among unclassified CSOs (79%), and least frequent among CSOs dealing with the environment (23%). Also, unclassified CSOs most frequently (62%) organized training on the topic of teamwork and leadership, along with CSOs involved in healthcare (55%), while strategic planning was the most frequent topic among CSOs involved in education and research (44%). CSOs dealing with law, advocacy and politics took the lead in trainings related to topics on lobbying and advocacy (36%), media and public relations skills (30%), and monitoring and evaluation (26%), as well as human and minority rights (23%).

Attendance at training on the topic of project proposal writing varied within all parameters: from 21% among the oldest CSOs, to 45% among the newest; from 40% among CSOs with up to five active persons, to 16% among those with more than 20 active persons; from 29% among CSOs without a budget, to 41% among CSOs with a budget exceeding €100,000; from 24% in Eastern Serbia to 42% in Western Serbia.

CSOs founded before 1989 have been receiving the least education on teamwork and leadership (25%), along with those with more than 20 active people (24%) and which are Belgrade-based (24%), while CSOs from Western Serbia have received the most training in this field (46%). Strategic planning as a topic was least attended by CSOs founded before 1989 (19%), along with those having a budget below €1,000 (19%), and most attended by CSOs with a budget exceeding €100,000 (41%) and those from Western Serbia (40%). Lobbying and advocacy were least represented as a topic among CSOs from Eastern Serbia (9%) and CSOs established before 1989 (11%), and most represented among CSOs from Western Serbia (37%). The least training on financial management at the basic level was received by CSOs from Eastern Serbia again (9%), and the most by CSOs from Central Serbia (33%), as well as CSOs with a budget exceeding €100,000 (34%). CSOs with a budget exceeding €100,000 generally received more trainings than ot-

her CSOs on the topics of using Internet and social networks (32%), monitoring and evaluation (25%), intersectoral cooperation (22%) and human and minority rights (24%).

Areas/topics of trainings – advanced level



Training areas at advanced level vary considerably too, depending on the primary field of the CSO, but, as in the case of basic level training, on average they most often refer to project proposal writing (22%). CSOs whose primary field of activity is law, advocacy and politics stand out for above-average attendance at advanced level trainings, regardless of the topic, be it project proposal writing (39%), project management (33%), teamwork and leadership (35%), lobbying and advocacy (35%), European Integration (24%), human and minority rights (24%), media and public relations skills (16%) or social networks (15%). CSOs involved in culture, media and recreation participate least in trainings on the topics of financial management and lobbying and advocacy (3% each), and intersectoral cooperation (1%), while organizations dealing with the environment participate least in the training of trainers (3%) and the use of Internet and social networks (2%), as well as media and public relations skills (1%).

Older organizations, registered before 1989, as well as those with up to five active persons, on average participate least in advanced training, regardless of the topic, while CSOs with a budget of from €20,001 to €100,000 and those with budgets exceeding €100,000 take the lead in advanced training related to the majority of topics. Organizations in Southeast Serbia stand out for their higher participation in advanced training for project proposal writing (38%) and project management (34%), while CSOs from Western Serbia take the lead in trainings on strategic planning and teamwork and leadership (27% each).

Satisfaction with the education level



The majority of CSOs are satisfied with the education level of their staff and members (58%), and only 8% are dissatisfied.

Unclassified CSOs (71%) and business/professional and other associations (64%) are for the most part satisfied with the education level of their members, more so than organizations dealing with the environment or social services, which are satisfied with the education level in 54% or 53% of cases respectively.

Organizations having a budget of over €100,000 are in a large percentage satisfied with the education level of their members (70%), as are Belgrade-based CSOs (66%), unlike CSOs with a budget below €1,000 (49%) and those from Southeast Serbia (46%), which are less satisfied.

Priority needs for education

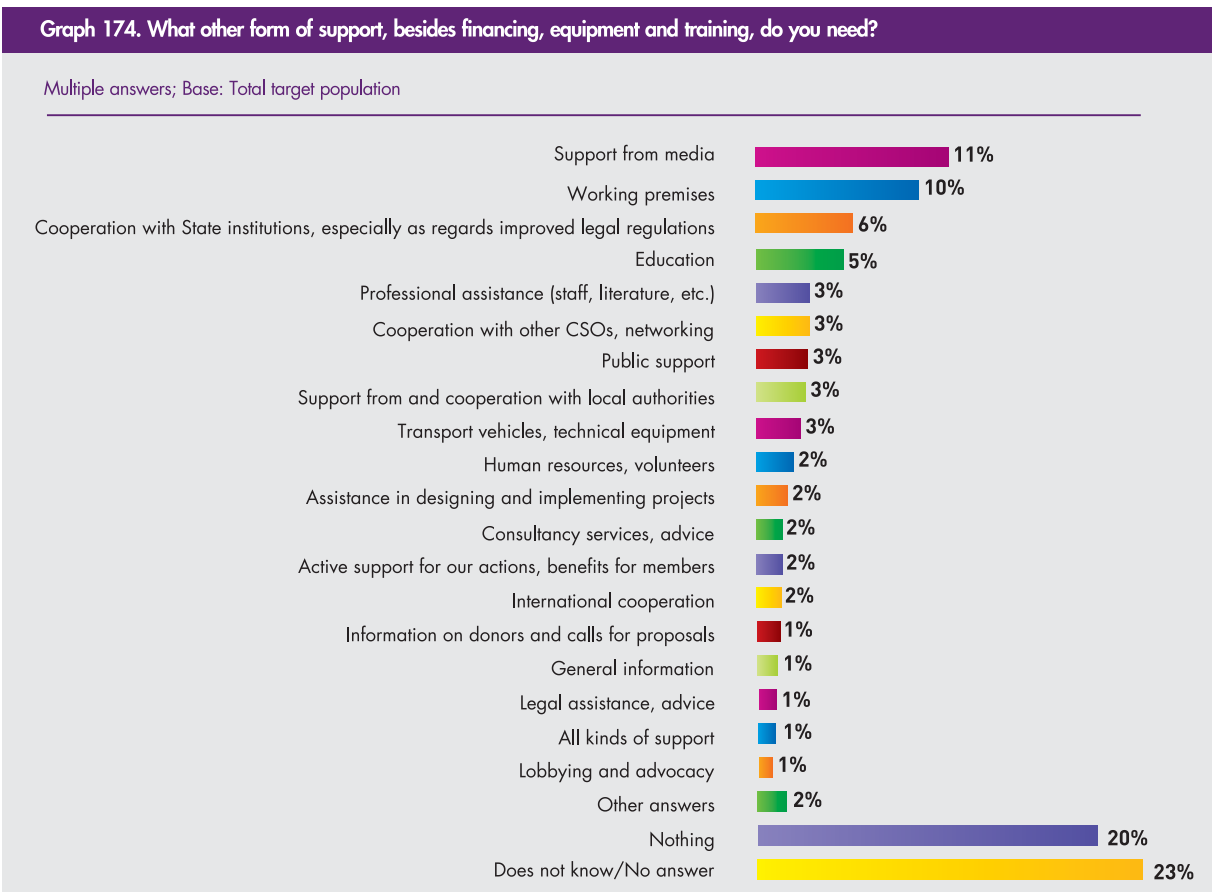


Priority topics for which education is needed vary across the fields; however, on average, they are mainly project proposal writing (22%), advanced training for the issues and problems that the organization deals with (17%) and financial management (17%).

In only 8% of cases do organizations dealing with law, advocacy and politics feel that they need advanced training; in which cases, more than the others, they feel they need education in financial management (20%), strategic planning (13%), the field of legal regulations (11%), European Integration (10%) and fundraising (8%). Education related to media and public relations is most needed by unclassified organizations (23%), as well as by CSOs involved in culture, media and recreation (20%), and least needed by organizations dealing with the environment and development and housing (10% each).

Older organizations, established before 1989, mainly recognize as their educational priority advanced training in the issues and problems they are addressing (21%), and are generally less interested in fundraising (1%) and European Integration (2%). The newest organizations specify the topic of financial management as their educational priority (22%). For organizations having up to five members, the most important topic is project proposal writing (27%), while organizations with 11 to 20 active persons see education on the issues and problems they are dealing with as their educational priority (21%); media and public relations skills are considered to be the priority by organizations having more than 20 active members (28%). Organizations with a budget ranging from €20,001 to €100,000, more than other CSOs, see education in strategic planning as the priority (13%). By regions, Belgrade-based CSOs express the greatest need for education on media and public relations skills (21%); while CSOs from Eastern (25%) and Southeast Serbia (28%) tend most to see advanced training on the issues and problems their organization is dealing with as the priority.

Other needed forms of support

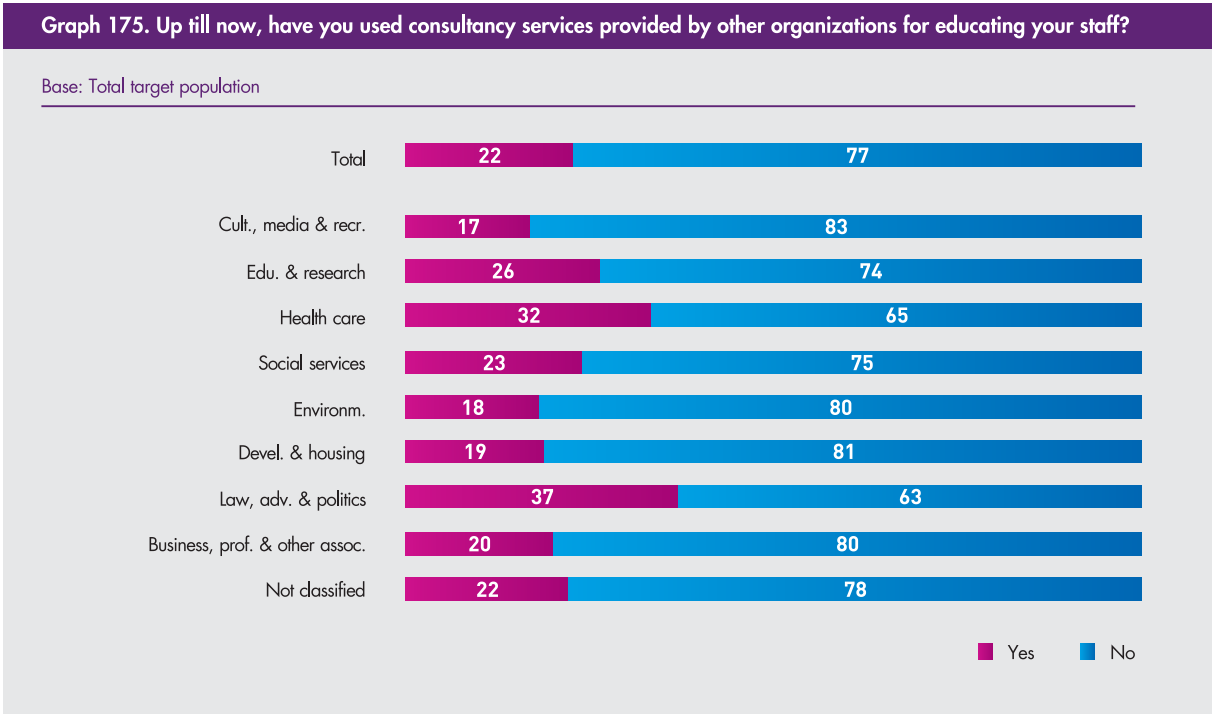


It is interesting that as many as 20% of organizations state that they do not need any other form of support, while 11% answer that they need media support, and another 10% reply that they need premises for work.

Media support is most needed by business/professional and other associations (16%), while premises for work is the form of support organizations involved in culture, media and recreation most consider necessary (14%). Organizations dealing with law, advocacy and politics mostly need support in establishing cooperation with government institutions and with regard to legal regulations (11%).

Only a few deviations from the average are to be noted: CSOs with more than 20 people most express the need for media support (18%), while the need for work premises is most indicated by CSOs with a budget ranging from €1,001 to €5,000 and those which are based in Belgrade (13% each). Generally, the need for education is most expressed by CSOs from Southeast Serbia (13%), while organizations from Vojvodina in 28% of the cases have no need for other forms of support.

The use of other organizations’ consultancy services



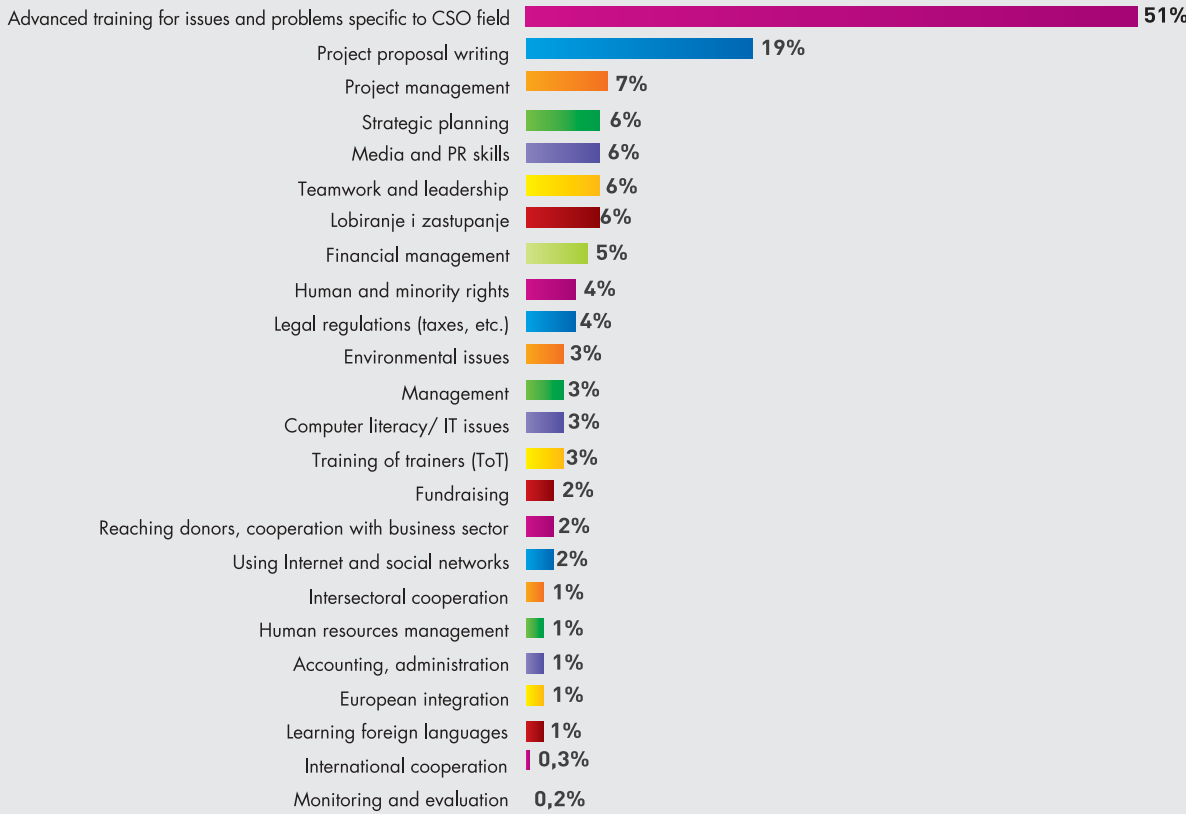
77% of organizations did not use the consultancy services of other organizations for training their staff, while 22% did.

The majority of organizations using the consultancy services of other organizations for training their staff are organizations dealing with law, advocacy and politics (37%), while those which have least used them are CSOs involved in culture, media and recreation (83%).

Founding years do not have a significant impact on the use of the consultancy services of other organizations for training one’s staff; however, the use of these services noticeably increases as the size of the organization increases: from 16% among the smallest organizations to 26% among the biggest. The same trend is perceptible with regard to budget size, so that consultancy services for training staff are least used by CSOs without a budget (13%) and most used by CSOs with a budget exceeding €100,000 (32%). By regions, the consultancy services of other organizations for training one’s staff were most used by organizations from Southeast Serbia (34%) and least used by organizations from Vojvodina (16%).

Graph 176. In what fields did you use consultant services provided by other organizations for the capacity building of your staff?

Multiple answersBase: Organizations that used consultant services by other organizations for capacity building of their staff (22% of the target population)



In 51% of cases, consultancy services were used for advanced training with regard to the issues and problems the organization was dealing with, while in 19% of cases they were used for training the staff in project proposal writing. Organizations that most used consultancy services for advanced training were business/professional and other associations (67%), while those that most used them for project proposal writing were unclassified CSOs (78%).

The greatest differences were by regions: CSOs from Eastern Serbia most often (69%) used consultancy services for advanced training, Belgrade-based CSOs least often (37%). The newest organizations, much more than others, used consultancy services for project proposal writing (34%), while CSOs with a budget exceeding €100,000, as well as those coming from Eastern Serbia, did this least (8% each).

Consultancy services were mainly delivered by other CSOs (9%), experts in a specific field (7%), Civic Initiatives/Team TRI (6%), the Serbian Red Cross (4%) and TACSO (3%).

The highest percentage of organizations obtaining consultancy services from other CSOs within their own networks were those involved in culture, media and recreation (22%), while business/professional and other associations obtained most consultative services from experts for specific fields (28%). Organizations involved in education and research and CSOs dealing with development and housing, obtained consultancy services most from Civic Initiatives/Team TRI (20% each), while from the Serbian Red Cross these services were mainly received by organizations providing social services (10%).

The most important problems regarding CSO sustainability

Problems important for sustainability of the CSO sector in Serbia



The majority of CSOs agree that all of the stated problems are significant for the sustainability of CSOs, but that the most important are lack of support from the State (82%), underdeveloped donorship within the business sector (78%), the withdrawal of international donors (73%) and underdeveloped cooperation with local authorities (72%). On the other hand, least important for the sustainability of the sector are poor cooperation with the media (56%) and the negative attitude of the community (55%).

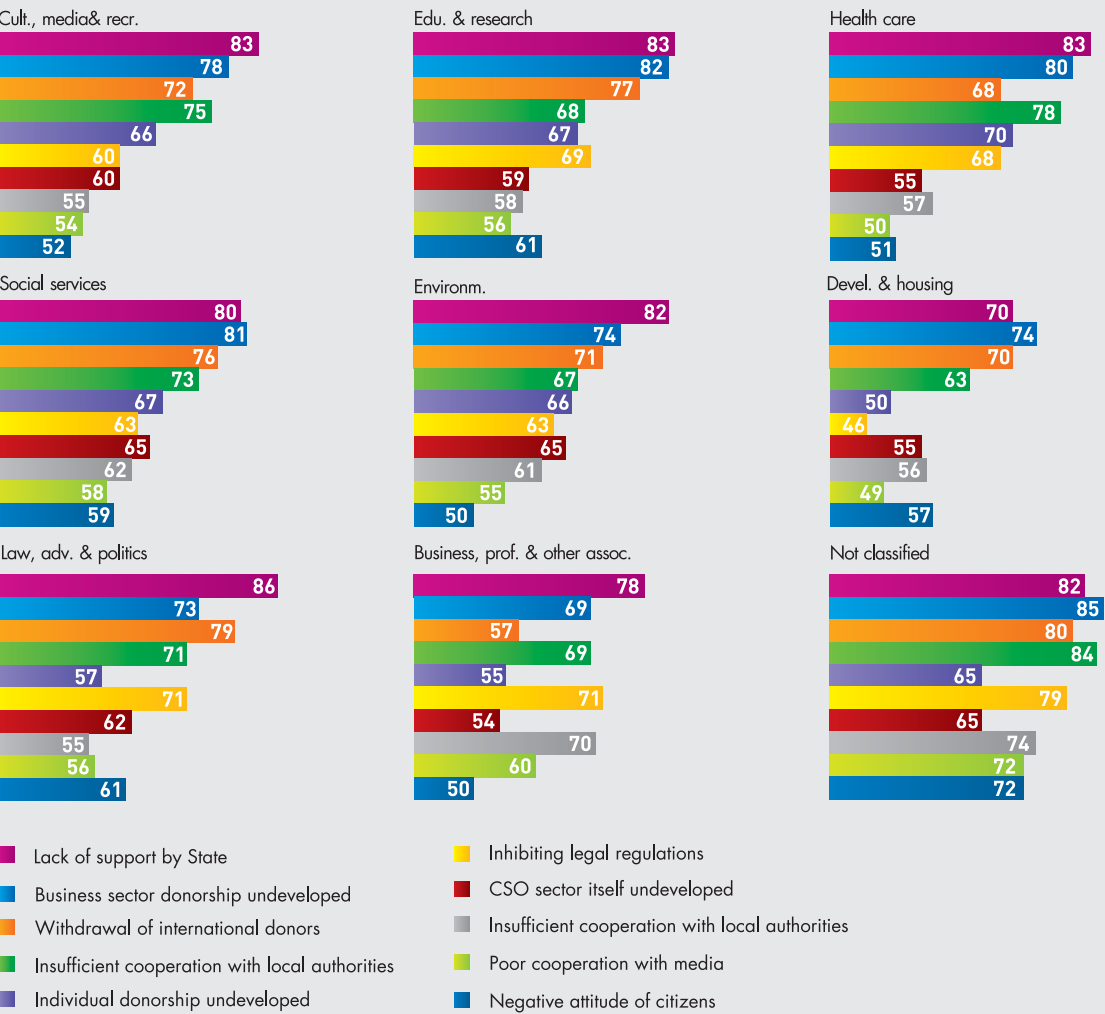
For organizations dealing with development and housing, support by the State is of lesser importance (70%), while business sector donorship is less important for business/professional and other associations (69%), for whom support by international donors is also less important (57%). The withdrawal of international donors is more important for organizations dealing with law, advocacy and politics (79%), as well as for unclassified CSOs (80%). Organizations involved in healthcare mostly recognize the importance of cooperation from local authorities (78%), to a greater extent than organizations dealing with development and housing (63%).

Differences by regions are noticeable in relation to some of the factors making for sustainability of the sector. Restrictive legal regulations are a significant factor for Belgrade-based organizations (76%), but less so for organizations in Southeast Serbia (51%) and in Vojvodina (57%). The negative attitude of the community is very significant for Belgrade-based organizations (65%), but less so for CSOs in Southeast Serbia (48%). Also, poor cooperation with media is especially significant in the eyes of Belgrade-based organizations (69%), while for those based in Southeast Serbia (42%), the media are not that important as factors significant for the sustainability of the sector.

Grafikon 178. ide zajedno sa Grafikonom 177. jer se radi o istom pitanju, samo je prvi dat na nivou totala a drugi prikazuje podatke i po oblastima. Nekako da se udjene tekst izmedju ova dva grafikona, ako je moguće

Graph 178. In your opinion, how important are the following problems for the sustainability of the CSO sector in Serbia, according to the primary field of activity?

% of answers "important" (very important+ important)



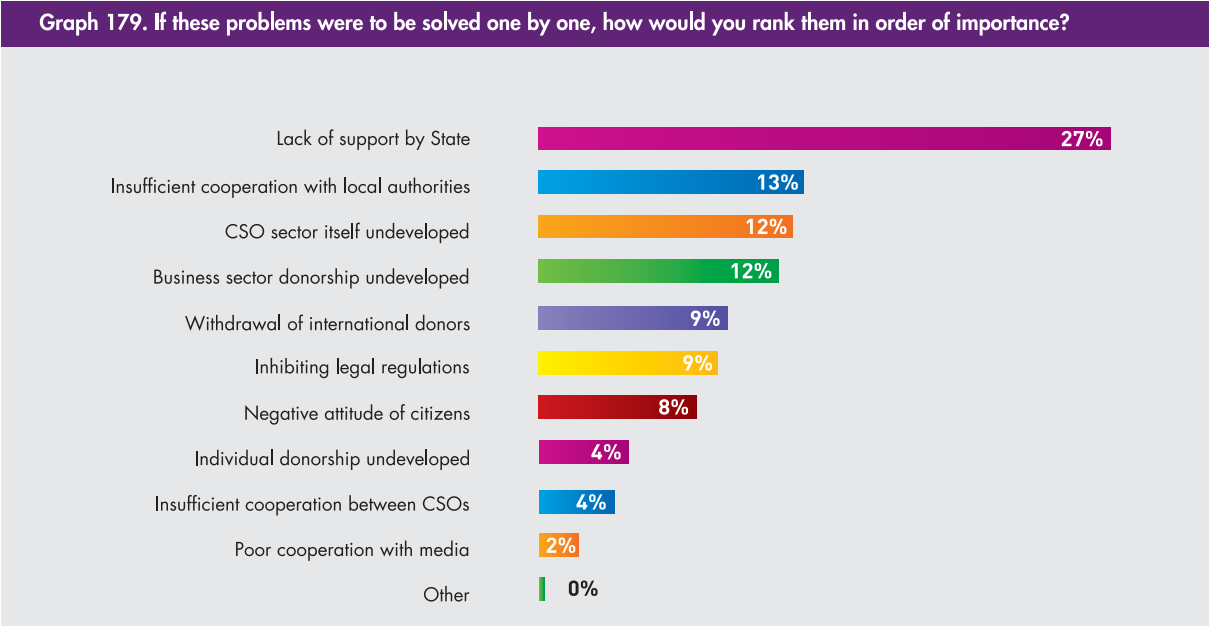
Priorities in solving problems

The ranking of priority problems corresponds to a great extent with the answers to the previous question. Most frequently, it is precisely lack of support by the State which is indicated as the first problem requiring a solution (27%); this is followed by insufficient cooperation with local authorities (13%), underdevelopment of the CSO sector itself (12%) and underdevelopment of donorship within the business sector (12%). Solving the problem of poor cooperation with the media is the priority for only 2% of organizations included in the research.

There are differences among CSOs according to fields of work, in their ranking of the problems which have priority as regards sustaining the sector. Underdevelopment of donorship within the business sector ranks high as a priority problem among unclassified CSOs (21%) and those involved in education and research (16%), while only 6% of CSOs dealing with law, advocacy and politics rank the solution of this problem as a priority. Restrictive legal regulations are also ranked high by unclassified CSOs (19%) and business/professional and other associations (15%), while they are ranked lowest by CSOs involved in environmental issues (5%). The greatest deviation from the average as regards the importance attributed to solving the problem of underdeveloped donorship from individuals is to be perceived among CSOs dealing with development and housing, which rank it high (15%).

It is first necessary to solve the problem of the lack of support by the State, according to the opinion of 32% of Vojvodina-based organizations, while the same opinion is held by only 19% of organizations based in Western and Eastern Serbia. Only 8% of organizations with more than 20 active persons and 8% of Belgrade-based organizations believe that the problem of insufficient cooperation with local authorities should be the first to be solved, while for organizations based in Eastern Serbia (24%) this form of

cooperation is much more important. The solution of the problem of underdeveloped donorship within the business sector should be the priority in the opinion of 20% of organizations based in Central Serbia and only 9% of organizations based in Southeast Serbia. CSOs from Western Serbia, more than those in other regions (15%), believe that the priority problem requiring solution is the withdrawal of international donors. CSOs with a budget exceeding €100,000 are definitely the leaders in the opinion that the priority problem requiring solution is that of restrictive legal regulations (18%).



When CSOs were asked to rank problems in order of priority for their organizations, regardless of the situation in the sector, lack of support by the State again appeared first on the list of problems to be dealt with for the benefit of individual organizations (26%), followed by insufficient cooperation with local authorities (16%), underdevelopment of donorship within the business sector (13%), and the withdrawal of international donors (10%).

Differences among CSOs are to be noted only with reference to some of the problems, whereby organizations involved in healthcare mainly feel that for their organizations the priority is to solve the problem of the lack of support by the State (32%); while CSOs dealing with law, advocacy and politics (15%) and CSOs involved in education and research (16%), believe that the problem of the consequences of the withdrawal of international donors should be solved first. Organizations dealing with environmental issues (15%), to a greater extent than the average, believe that the underdevelopment of the CSO sector itself is the problem to be solved. Unclassified organizations believe, in as many as 24% of cases, that the problem of restrictive legal regulations should be solved first.

Differences among CSOs were perceptible with reference to solving the problem of the withdrawal of international donors; in the opinion of 16% of organizations whose annual budget ranges from €20,001 to €100,000 and 17% of those whose budget exceeds €100,000, this problem should have priority. The same problem is not that important for 5% of organizations established before 1989; but it is important for organizations registered between 1990 and 2000 (15%). Restrictive legal regulations are a priority problem requiring a solution for 14% of each of those CSOs having budgets from €20,001 to €100,000 and exceeding €100,000.

The International Classification of Nonprofit Organizations (ICNPO)

Nonprofit organizations in the satellite account are classified by primary area of activity according to the International Classification of Nonprofit Organizations (ICNPO). It is the classification system recommended in the UN Handbook on Non-Profit Institutions in the System of National Accounts. The ICNPO system groups organizations into 12 major activity groups, including a catch-all 'not elsewhere classified' category. These 12 major activity groups are further divided into 24 subgroups. Satellite account estimates are published at the major group level. These are briefly described below.

1. Culture and recreation
2. Education and research
3. Health
4. Social services
5. Environment
6. Development and housing
7. Law, advocacy and politics
8. Philanthropic intermediaries and voluntarism promotion
9. International
10. Religion
11. Business and professional associations, unions
12. Not elsewhere classified

Group 1: Culture and recreation

Media and communications: Production and dissemination of information and communication; includes radio and TV stations; publishing of books, journals, newspapers and newsletters; film production; and libraries.

Visual arts, architecture, ceramic art: Production, dissemination and display of visual arts and architecture; includes sculpture, photographic societies, painting, drawing, design centers and architectural associations.

Performing arts: Performing arts centers, companies and associations; includes theatre, dance, ballet, opera, orchestras, chorals and music ensembles.

Historical, literary and humanistic societies: Promotion and appreciation of the humanities, preservation of historical and cultural artifacts and commemoration of historical events; includes historical societies, poetry and literary societies, language associations, reading promotion, war memorials and commemorative funds and associations.

Museums: General and specialized museums covering art, history, sciences, technology and culture.

Zoos and aquariums:

Sports: Provision of amateur sport, training, physical fitness and sport competition services and events; includes fitness and wellness centers.

Recreation and social clubs: Provision of recreational facilities and services to individuals and communities; includes playground associations, country clubs, men's and women's clubs, touring clubs and leisure clubs.

Service clubs: Membership organizations providing services to members and local communities, for example Lions, Zonta International, Rotary Club and Kiwanis.

Group 2: Education and research

Elementary, primary and secondary education: Education at elementary, primary and secondary levels; includes pre-school organizations other than day care.

Higher education: Higher learning, providing academic degrees; includes universities, business management schools, law schools, medical schools.

Vocational/technical schools: Technical and vocational training specifically geared towards gaining employment; includes trade schools, paralegal training and secretarial schools.

Adult/continuing education: Institutions engaged in providing education and training in addition to the formal educational system; includes schools of continuing studies, correspondence schools, night schools and sponsored literacy and reading programs.

Medical research: Research in the medical field; includes research on specific diseases, disorders, or medical disciplines.

Science and technology: Research in the physical and life sciences and engineering and technology.

Social sciences, policy studies: Research and analysis in the social sciences and policy area.

Group 3: Health

Hospitals: Primarily inpatient medical care and treatment.

Rehabilitation: Inpatient health care and rehabilitative therapy to individuals suffering from physical impairments due to injury, genetic defect, or disease and requiring extensive physiotherapy or similar forms of care.

Nursing homes: Inpatient convalescent care, residential care, as well as primary health care services; includes homes for the frail elderly and nursing homes for the severely handicapped.

Psychiatric hospitals: Inpatient care and treatment for the mentally ill.

Mental health treatment: Outpatient treatment for mentally ill patients; includes community mental health centers and halfway homes.

Crisis intervention: Outpatient services and counsel in acute mental health situations; includes suicide prevention and support to victims of assault and abuse.

Public health and wellness education: Public health promotion and health education; includes sanitation screening for potential health hazards, first aid training and services and family planning services.

Health treatment, primarily outpatient: Organizations that provide primarily outpatient health services e.g., health clinics and vaccination centers.

Rehabilitative medical services: Outpatient therapeutic care; includes nature cure centers, yoga clinics and physical therapy centers.

Emergency medical services: Services to persons in need of immediate care; includes ambulatory services and paramedical emergency care, shock/trauma programs, lifeline programs and ambulance services.

Group 4: Social services

Child welfare, child services and day care: Services to children, adoption services, child development centers, foster care; includes infant care centers and nurseries.

Youth services and youth welfare: Services to youth; includes delinquency prevention services, teen pregnancy prevention, drop-out prevention, youth centers and clubs and job programs for youth; includes YMCA, YWCA, Boy Scouts, Girl Scouts and Big Brothers/Big Sisters.

Family services: Services to families; includes family life/parent education, single parent agencies and services and family violence shelters and services.

Services for the handicapped: Services for the handicapped; includes homes, other than nursing homes, transport facilities, recreation and other specialized services.

Services for the elderly: Organizations providing geriatric care; includes in-home services, homemaker services, transport facilities, recreation, meal programs and other services geared towards senior citizens. (Does not include residential nursing homes.)

Self-help and other personal social services: Programs and services for self-help and personal development; includes support groups, personal counselling and credit counselling/money management services.

Disaster/emergency prevention and control: Organizations that work to prevent, predict, control and alleviate the effects of disasters, to educate or otherwise prepare individuals to cope with the effects of disasters, or to provide relief to disaster victims; includes volunteer fire departments, life boat services, etc.

Temporary shelters: Organizations providing temporary shelters to the homeless; includes traveller's aid and temporary housing.

Refugee assistance: Organizations providing food, clothing, shelter and services to refugees and immigrants.

Income support and maintenance: Organizations providing cash assistance and other forms of direct services to persons unable to maintain a livelihood.

Material assistance: Organizations providing food, clothing, transport and other forms of assistance; includes food banks and clothing distribution centers.

Group 5: Environment

Pollution abatement and control: Organizations that promote clean air, clean water, reducing and preventing noise pollution, radiation control, treatment of hazardous wastes and toxic substances, solid waste management and recycling programs.

Natural resources conservation and protection: Conservation and preservation of natural resources, including land, water, energy and plant resources for the general use and enjoyment of the public.

Environmental beautification and open spaces: Botanical gardens, arboreta, horticultural programs and landscape services; organizations promoting anti-litter campaigns; programs to preserve the parks, green spaces and open spaces in urban or rural areas; and city and highway beautification programs.

Animal protection and welfare: Animal protection and welfare services; includes animal shelters and humane societies.

Wildlife preservation and protection: Wildlife preservation and protection; includes sanctuaries and refuges.

Veterinary services: Animal hospitals and services providing care to farm and household animals and pets.

Group 6: Development and housing

Community and neighbourhood organizations: Organizations working towards improving the quality of life within communities or neighbourhoods, e.g., squatters' associations, local development organizations, poor people's cooperatives.

Economic development: Programs and services to improve economic infrastructure and capacity; includes building of infrastructure like roads; and financial services such as credit and savings associations, entrepreneurial programs, technical and managerial consulting and rural development assistance.

Social development: Organizations working towards improving the institutional infrastructure and capacity to alleviate social problems and to improve general public well being.

Housing associations: Development, construction, management, leasing, financing and rehabilitation of housing.

Housing assistance: Organizations providing housing search, legal services and related assistance.

Job training programs: Organizations providing and supporting apprenticeship programs, internships, on-the-job training and other training programs.

Vocational counselling and guidance: Vocational training and guidance, career counselling, testing and related services.

Vocational rehabilitation and sheltered workshops: Organizations that promote self-sufficiency and income generation through job training and employment.

Group 7: Law, advocacy and politics

Advocacy organizations: Organizations that protect the rights and promote the interests of specific groups of people, e.g., the physically handicapped, the elderly, children and women.

Civil rights associations: Organizations that work to protect or preserve individual civil liberties and human rights.

Ethnic associations: Organizations that promote the interests of, or provide services to, members belonging to a specific ethnic heritage.

Civic associations: Programs and services to encourage and spread civic mindedness.

Legal services: Legal services, advice and assistance in dispute resolution and court-related matters.

Crime prevention and public policy: Crime prevention to promote safety and precautionary measures among citizens.

Rehabilitation of offenders: Programs and services to reintegrate offenders; includes halfway houses, probation and parole programs, prison alternatives.

Victim support: Services, counsel and advice to victims of crime.

Consumer protection associations: Protection of consumer rights and the improvement of product control and quality.

Political parties and organizations: Activities and services to support the placing of particular candidates into political office; includes dissemination of information, public relations and political fundraising.

Group 8: Philanthropic intermediaries and voluntarism promotion

Grant-making foundations: Private foundations; including corporate foundations, community foundations and independent public-law foundations.

Volunteerism promotion and support: Organizations that recruit, train and place volunteers and promote volunteering.

Fund-raising organizations: Federated, collective fundraising organizations; includes lotteries.

Group 9: International

Exchange/friendship/cultural programs: Programs and services designed to encourage mutual respect and friendship internationally.

Development assistance associations: Programs and projects that promote social and economic development abroad.

International disaster and relief organizations: Organizations that collect, channel and provide aid to other countries during times of disaster or emergency.

International human rights and peace organizations: Organizations which promote and monitor human rights and peace internationally.

Group 10: Religion

Congregations: Churches, synagogues, temples, mosques, shrines, monasteries, seminaries and similar organizations promoting religious beliefs and administering religious services and rituals.

Associations of congregations: Associations and auxiliaries of religious congregations and organizations supporting and promoting religious beliefs, services and rituals.

Group 11: Business and professional associations, unions

Business associations: Organizations that work to promote, regulate and safeguard the interests of special branches of business, e.g., manufacturers' association, farmers' association, bankers' association.

Professional associations: Organizations promoting, regulating and protecting professional interests, e.g., bar association, medical association.

Labour unions: Organizations that promote, protect and regulate the rights and interests of employees.

Group 12: [Not elsewhere classified]

