

Western Balkans Public Opinion on Philanthropy

SIGNS

of Public Support
for Contributing
to The Common Good



Comparative Analysis
october 2019

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1. INTRODUCTION

1.1 BACKGROUND AND OBJECTIVE

This analysis is conducted within the SIGN Up for Impact: Philanthropy Development for Stronger Civil Society project that is implemented by SIGN Network, with the financial support of the European Union and the Balkan Trust for Democracy. SIGN Network is a regional network of indigenous grantmakers for the development of sustainable local communities and civil society, established in 2009. The goal of this network is to promote and support the development of local philanthropy, local communities, cross-sector partnerships, and long-term sustainability of civil society in countries of Southeast Europe.

SIGN combines a strong understanding of local conditions through a partnership with grass-root organizations, think tanks and other local associations; cutting edge experience in developmental grant-making; renowned expertise in the field of philanthropy, local community development, cross-sector partnership, and sustainable civil society; as well as strategic advocacy partnerships at national and international levels. In 2019, SIGN members are: Trag Foundation (Serbia); MOZAIK Foundation (Bosnia and Herzegovina); Fund for Active Citizenship – fAKT (Montenegro); Forum for Civic Initiatives – FIQ (Kosovo); HORUS (North Macedonia); Foundation Catalyst Balkans (Serbia).

SIGN Up for Impact project will be implemented until September 2021 with an overall objective to enhance the impact of civil society in policy and decision-making processes in Serbia, Montenegro, Bosnia and Herzegovina, Kosovo and North Macedonia, by improving legal and financial environment for philanthropy development and contributing to civil society greater financial sustainability, independence and legitimacy.

The SIGN Up for Impact project is implemented through 3 activity clusters:

- Cluster I consists of national-level advocacy efforts aimed to further improve the legal framework in Serbia, Montenegro, Kosovo, and North Macedonia, and to increase visibility and impact of these efforts on the regional and EU levels. Major activities in this cluster include research to serve evidence-based advocacy, consultative meetings, and building inter-sector coalitions, creation of policy recommendations, lobbying, and promotion.
- Cluster II consists of comprehensive regional promotion of giving towards civil society through national reports on philanthropy with regional comparisons, regional and national cross-sector conferences, PR and social media campaigns, national and regional awards for philanthropy and distribution of philanthropy and social entrepreneurship related publications.
- Cluster III consists of capacity building provision to grassroots and other civic initiatives, including training, mentoring and sub-granting on fundraising and social entrepreneurship.

Purpose of the Comparative Analysis

As part of the activities in Cluster II, public opinion polls on attitudes toward philanthropy were conducted in all five countries. A regional comparison and analysis of these public opinion polls across countries was also envisioned as a follow-up to the opinion polls.

The purpose of this regional comparative analysis report is to provide a better understanding of the similarities and differences between the general public's views on philanthropy in 5 targeted countries in 2018: Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia and Serbia. This report is meant to both be used internally by the SIGN partners — for adjusting and modifying SIGN Up for Impact project activities — and externally — as a vehicle to increase awareness and interest in philanthropy of general public and key stakeholders related to philanthropy through the promotion of the report's findings.

Objective of the Comparative Analysis

The primary objective of this analysis is to identify both the similarities and differences related to the key aspects of the perception of philanthropy among the general population across the 5 targeted countries. Additional analysis with available secondary data sources is meant to provide context and to serve as the basis for comparing perception with the trends observed from other methods of data collection. Both the primary and secondary analysis should aid in the development of recommendations for further regional research in terms of scope, depth and methods to be used as well as possibilities for regional cooperation regarding joint communication and advocacy efforts.

Key Questions of Inquiry

- 1) What is the awareness and understanding of the concept of philanthropy in targeted countries? Are there any similarities and differences across countries?
- 2) What is the image of philanthropy like in the targeted countries? Are there any similarities and differences among them?
- 3) Are there any regional differences in the personal readiness of the general public to donate?
- 4) Are there any regional differences in the personal motivations of the general public to donate?
- 5) Are there any regional differences in the trust in institutions, practices, and mechanisms related to philanthropy in each targeted country?
- 6) What is the level of understanding of the importance of donating for the common good?
- 7) How high is the awareness of and the readiness to cooperate with foundations?
- 8) What are key sources of information for the general public on issues related to philanthropy?

1.2 METHODOLOGY

General Approach

The general approach of this comparative analysis is centered on an in-depth analysis from the findings of the opinion polls in each of the five countries: Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia and Serbia. The individual country surveys were conducted over a 27-day period in October and November 2018 using a unified set of questions developed collaboratively between the Global Market Research and Public Opinion Company IPSOS Strategic Marketing and SIGN Up for Impact partners from each of the countries. Catalyst Balkans utilized both the summary presentations of analyzed data as well as the weighted final full data sets for conducting initial and cross-referenced analysis to identify points of agreement and convergence between the countries. Catalyst Balkans utilized secondary sources of data on philanthropy in the region to make comparisons between the public perception on philanthropy and that of recorded data on giving and expert opinion on legal framework to additional information that might be of use to the SIGN Network in determining opportunities to impact public opinion and create more open and engaged societies as it relates to both understanding and participating in philanthropic activity.

Sources

The primary sources of information were the summary findings and the weighted final full data sets from each of the country-level opinion polls (PowerPoint and CSV files). IPSOS also provided post-stratification of individual country results by region, type of settlement, gender, age and education level. Catalyst Balkans subsequently cross-referenced the compiled country results for these demographic elements to determine for any significant statistical variances.

Secondary sources of information included the Giving Balkans recorded philanthropy database that Catalyst Balkans has used to track instances of philanthropic giving in each of the countries since 2014. The dataset for the calendar year 2018 was used for this analysis. Catalyst Balkans publishes annual reports on philanthropy that creates estimated levels of giving in each of the countries based off the Giving Balkans recorded giving records. The 2018 annual reports for each country were also used for the purpose of secondary data analysis.

The Lilly Family School of Philanthropy at Indiana University publishes the Global Philanthropy Environment Index (GPEI) which measures the incentives and barriers to philanthropy in 79 world economies, including all the countries included in this analysis. The 2018 GPEI scores for each of the countries were used as reference points for comparison between public perception and the view of regulatory and enabling environment experts who provided their input to the GPEI scoring.

Notes on Methodology

Primary Sources

All field surveys were conducted by the IPSOS market research and public opinion company during the period of the 24th October until 20th November 2018 using a unified questionnaire. In countries where several additional questions were added to the questionnaire that sought answers to questions unrelated to philanthropy, these questions were not considered in this comparative analysis. The field questionnaire has the average length of 25 minutes.

The entire population of permanent residents above 18 years of age in the target countries were the sample frame, with the sample size being at least 1,000 interviews per country. The sample type was determined using a three-stage random representative stratified sample. The first stage used the polling station territories; the second stage focused on households using a Simple Random Sampling without Replacement (SRSWoR) random step method; and the third stage was on individual respondents with the household.

Secondary Sources

Data within the Giving Balkans database and used for the annual reports on the state of philanthropy in each country is based on primary data collection of all recorded philanthropy that appears in public media records based on 18 keywords related to philanthropy. This initial data collection is then filtered for instances that are related to domestic sources of giving (i.e. the donor comes from one of the countries in the region or from the region's diaspora). This data is then verified through direct contact with either the recipient or donor to gather additional details on the recorded donations.

The Global Philanthropy Environment Index uses a standard expert questionnaire to collect each country expert's assessment of the environment for philanthropy in a given economy. One or more experts for each of the 79 economies included in the study responded to the questionnaire. Following this country-level data collection, 11 regional reviewers discussed scores and narratives with the country experts for their regions. The Indiana University Lilly Family School of Philanthropy research team then calculated the average values for each indicator and factor at the country, regional, and global levels and identified the key trends.

Limitations

Primary Sources

The use of a commonly developed questionnaire and the translation of the questionnaire into the relevant regional language by SIGN Up for Impact partners helped to mitigate any limitations that might exist in conducting a survey across multiple countries. While best practices in developing the sample size and frame were used, the statistical margin of error is 1.45% for an incidence of 5%, $\pm 2.86\%$ for an incidence of 25%, and $\pm 3.31\%$ for an incidence of 50%. The use of a commonly developed questionnaire and the translation of the questionnaire into the relevant regional language by SIGN Up for Impact partners helped to mitigate any limitations that might exist in conducting a survey across multiple countries.

Secondary Sources

Limitations of Catalyst Balkans recorded philanthropy and estimated levels of annual giving are primarily found in the inability of the methodology to record all instances of philanthropy that have taken place. The data then needs to be understood as the minimum levels of giving in each country. The GPEI relies on a singular country expert, with overlays of regional and global review. While these levels of review add to the quality of the scoring, there remains a limitation based on the subjectivity of one country expert's knowledge and/or opinion versus another country expert.

1.3 SUMMARY FINDINGS

QUESTION

FINDINGS

Understanding of Philanthropy

The prevailing understanding of philanthropy across the countries is that philanthropy means help to certain groups of people that are considered vulnerable and in need for various reasons. However, other dimensions and meanings, albeit in small percentages appear. Thus, in Montenegro, North Macedonia, and Serbia answers also included 'benefit for community and society'. Similarly, in Montenegro mostly and partially in Serbia and Bosnia and Herzegovina, investing in certain areas (environment, education, health) is also considered philanthropic. Among all five countries, the Montenegrin general public seem to be most open to the idea of philanthropy as an investment.

The other aspect that should be noted is that in Bosnia, Kosovo, and Serbia any kind of help is considered philanthropic. While, in Montenegro and North Macedonia more respondents felt that financial and material help is philanthropic.

Finally, in all countries, public opinion is still divided in understanding who is responsible for common good; which speaks to the lack of unique understanding of the term 'common good' among the general public across Western Balkans. In choosing between the state bearing the most responsibility, shared responsibility between state and citizens; and citizens being the most responsible, there is an unequal division across these choices that points to much of the general public believing the state bears the greatest responsibility.

Image of Philanthropy

Assessing level of philanthropy development, the general public of Kosovo and Bosnia and Herzegovina are perceiving the level of philanthropy development in their countries higher than the general public in Montenegro, North Macedonia, and Serbia. Across the countries, however, there is a perception that philanthropy is not well-developed.

Similarly, across the countries, the general public feel that the level of incentives for donating to the common good is insufficient, with the most pessimistic view held in Montenegro (86%) and Serbia (78%); followed by the general public of Bosnia and Herzegovina (72%) and North Macedonia (65%); while respondents in Kosovo (54%) were the most optimistic in their assessment.

As for the perception of who gives the most, the general public – with slight differences among countries – perceives mass

QUESTION

Personal Readiness to Donate

FINDINGS

individual donors as the most generous, followed by known individuals, the religious community, business sector and private foundations.

Finally, when it comes to the roles of various actors, there is not a big difference in the general public's views across the countries. The fair conclusion is that respondents do not fully distinguish between the different roles of various actors. All actors should, in citizen's opinion, be more engaged. A low percentage of the general public are aware of what the role of the state should be. The roles of the private sector and civil society are not perceived as very different, although a small percentage feel that civil society also has a role to educate and inform, while businesses should provide jobs. A small percentage (1-3%) of the general public feel that their own role is to volunteer and that the media should provide better information and promotion, while, in Serbia only, the general public (31%) feel that the media's responsibility is to provide information on the action from start to finish.

In terms of actual participation in donating, respondents from Bosnia and Herzegovina rank the highest (76%) and the lowest levels (29%) of participation are found in Kosovo. In all countries, the majority of those who participated did so in the last three years. In most countries, the minimum donation was between EUR 2 and 6 and maximum donation between EUR 13 and 30. The outlier in donation levels was Kosovo, with the minimum donation a slightly over EUR 46 and the maximum donation over EUR 140.

As for future participation, in all countries, over 50% of the general public think that they will participate – with the highest percentage in Bosnia and Herzegovina (72%) and the lowest in Kosovo (51%). In all countries, the main reason given for not planning to participate is the general public's poor material situation, followed by the distrust they feel in such actions. Both factors feature the highest among the general public of Serbia; while the rationale of a poor material situation was used least frequently in Kosovo and the rationale of distrust least frequently used in Bosnia and Herzegovina. In all the countries, the majority of the general public (over 60%) would be willing to give in the form of money, again with the highest percentage in Bosnia and Herzegovina and the lowest in Kosovo. The majority of respondents from all countries would rather give a smaller amount on several occasions, than allocating a bigger amount for one individual action.

QUESTION

FINDINGS

Motivation

When it comes to the question for whom they would give, in all countries, the general public most often mention people with health issues and people and/or children with disabilities. Respondents identified a large number of groups they would be ready to support, including the elderly, female survivors of violence, and victims of trafficking. In all countries, the Roma and LGBTQ+ populations were among the least likely category of final beneficiary that respondents said they would be willing to support.

Finally, when it comes to the causes for which respondents give, in all countries, respondents said that their highest levels of support goes for marginalized groups and poverty reduction. Respondents also ranked humanitarian support to vulnerable groups, human rights and the environment as high on their list. Causes that were least supported by respondents included science, sport and culture and art.

There are no significant differences between countries regarding the personal motivations to give. The feeling of doing something good is the prevalent reason that motivates people to support various philanthropic actions. The second reason in all countries, except Kosovo, is the importance of the problem. The other two reasons change their importance in various countries: producing result is more important in Kosovo and Montenegro, while confidence that money will not be misused is more important in Bosnia and Herzegovina, North Macedonia and Serbia.

The biggest reason the general public see as a barrier is lack of means, which is followed by lack of trust in all countries. Other two reasons are almost equally important: lack of information slightly more in Kosovo, North Macedonia and Serbia, and belief that their contribution will not make a change in Bosnia and Herzegovina and Montenegro.

In Bosnia and Herzegovina and Kosovo, tax incentives would have significant influence; in other countries, however, opinions are pretty much divided. It should also be kept in mind that across countries between 30% – 38% of people were undecided. In that respect, while tax incentives would probably not be the decisive reason for providing support they cannot be dismissed as unimportant.

QUESTION

Trust

Effects – Importance

FINDINGS

In terms of who they would support, in all countries personal initiatives are among the top three choices; health institutions are among the top three in all countries except Kosovo; CSOs are among the top three in three countries, but not in Montenegro and Serbia; while foundations rate best in Kosovo (44%) and Serbia (42%). Religious communities, while not in the top three choices in any country, rate best in Montenegro (32%) and lowest in Kosovo (10%).

Distrust seems highest in Serbia (45%) and then in Bosnia and Herzegovina (41%), where the general public think that misuse happens often or always; while in North Macedonia (29%), Kosovo (24%), and Montenegro (23%), the general public are more optimistic and think that misuse happens occasionally.

The Serbian general public are consistent in their mistrust, as 65% of them feel that being informed about all aspects of the action is important or very important. Kosovo's general public follow, and in somewhat smaller measure the general public of North Macedonia, Bosnia and Herzegovina and Montenegro. However, in all countries, a higher percentage of the general public feels that being informed is more important than not.

As for other practices, in all countries, there is no significant difference when it comes to a choice between local action and action of more general nature. The general public in all countries most often donate money, which is followed by in-kind support (goods), then both money and goods, while volunteering and providing services are lagging behind. It also appears that in all countries, people, while aware of the many ways to give, prefer those that they are used to: directly in person, through SMS or depositing money in the bank account.

In four countries, the percentage of the general public who believe that their donations are relevant and can really help is over 60%; the only exception is Montenegro where that percentage is 49%, which is still high. Moreover, in all five countries, the majority of the general public (between 44 – 53%) think that if everyone would give what they could, a big enough amount could be raised to make a change; between one-fourth and one-third of the general public feel that that is never enough and around one-fifth in all countries think that only the wealthy can give enough. Both of these findings show that the general public has confidence that they can make a change with their donations.

QUESTION

Cooperation with Foundations

Sources of Information

FINDINGS

While respondents claim that the lack of financial means is the biggest barrier, they, at the same time, think that more information would encourage giving for the common good, which points out that money, while often perceived or used as justification for not participating, might not really be the true obstacle for giving.

Familiarity with the work of foundations is by far the highest in Serbia (65%), around 40% in Montenegro and Kosovo, and lower in North Macedonia and Bosnia and Herzegovina. Nevertheless, willingness to give money to a foundation is between 43 – 46% in all countries except in Kosovo where more than 60% of the general public are ready to donate. The belief that foundations should be financed through donations from the general public is rather high: over 60% in all countries.

However, except in Serbia, there is no clear correlation between these findings in each of the countries. In Serbia, however, the percentage of people who are familiar with the work of foundations is exactly the same as the percentage of people who believe that foundations should be supported by citizen's donations. Moreover, unlike in other countries, there is a very small difference between the percentage of those who are willing to support the foundation and who would choose a foundation among other recipients. This speaks to the conclusion that the higher familiarity, the tangible support would be more stable.

In all countries, 52 – 58% of the general public use electronic media (primarily TV) as source of information; between 27% - 33% of the general public rely on web sources and a very small percentage (0 – 5%) use print media.

2. RESEARCH FINDINGS - ANALYSIS

2.1 UNDERSTANDING OF PHILANTHROPY

In demonstrating their understanding of what philanthropy consists of, respondents provided a variety of answers across the countries and a closer look at these open-ended answers shows that the differences lie more in their phrasing than in a real difference in understanding. Therefore, we focused on analyzing the given answers from several different aspects.

Firstly, it should be noted that two answers: 'any kind of help for people in need' and 'financial and material help' were most mentioned. In that respect, it stands out that in Bosnia and Herzegovina, Kosovo, and Serbia, the highest percentage of the general public think that any kind of help for people in need is philanthropy, or donations for the common good. On the other hand, in Montenegro and North Macedonia, the highest percentage of the general public focused on financial and other material assistance, meaning that volunteering and possibly services are not necessarily included or are of less importance. Other answers were mentioned in smaller percentage, although most of them also involved the word 'help'. Among other answers, volunteering is not mentioned explicitly only in Bosnia and Herzegovina, and most often is included in Montenegro and Serbia (6% and 4% respectively.)

Q) In your opinion, what constitutes donations for the common good?



"Any kind of help for people in need."



"Financial and material help."

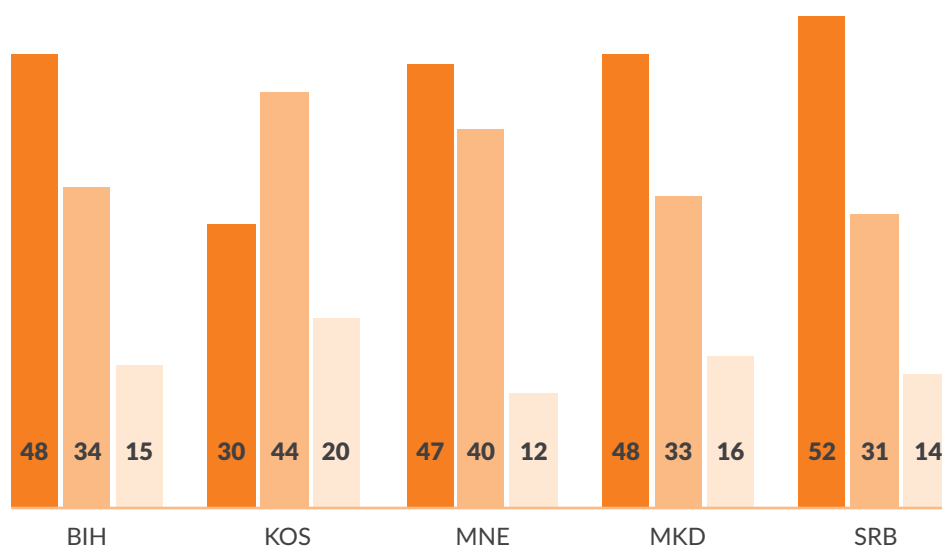
The second aspect that might be taken into consideration is the type of answers in each of the countries. Throughout the countries, the majority of respondents focused on the 'target group'. That is, support to certain group, be that those in need, with health issues, elderly, with disability, etc. In three countries, Montenegro, North Macedonia and Serbia, a smaller percentage (3%, 5% and 7% respectively) included the answer 'help for the benefit of the community, benefit for all, benefit for society'. Furthermore, in Montenegro and Serbia, 'the environment' was also included as an answer. In Montenegro people also included answers such as 'investment in education' young talents' and

‘investment in health’. In Bosnia and Herzegovina, a small percentage answered ‘infrastructure’. This means that philanthropy, in the minds of people, is still very much connected with the idea of helping someone, rather than development of community, society or humanity as a whole. While having this in mind, the small percentage of the general public that provided answers mentioning society-wide issues (such as the environment), shows that a different understanding is starting to appear.¹

The third aspect that looked at is how many people responded ‘do not know’ as their answer. Serbia is the only country to have respondents with that answer. The determination was made that the data cannot be used to draw any firm conclusions at this point.

Another question that was asked, though not in the section of understanding philanthropy, but related to the view of responsibility for common good, was:

Q) What kind of role do you think that citizens should have regarding the common good?



- A)**
- ◆ “The state is most responsible, but citizens are responsible too, and it is their duty to their community.”
 - ◆ “The state is the only one responsible and citizens’ engagement is a matter of free will.”
 - ◆ “Citizens are most responsible for common good, they should initiate activities including pressure on the state.”

¹ Additionally, when looking at the frequency of answers, in Serbia and Montenegro there is a smaller difference between the percentage of people that provided certain answers, i.e. understanding is ‘spread’ to include various answers. In Kosovo, two answers are most frequent, while in Bosnia and Herzegovina and North Macedonia one answer is most frequent. While at this point this cannot be used to draw a firm conclusion without more in-depth clarifications, it might point out that citizens in Montenegro and Serbia were maybe more exposed to different types of philanthropic actions, which resulted in a somewhat broader understanding of philanthropy.

Answers to this question might help to clarify the general public's understanding of the common good. In all countries, except Kosovo, the highest percentage (47-52%) of the general public think that both the state and citizens should share the responsibility. A rather high percentage, 31-34% in Serbia, Bosnia and Herzegovina and North Macedonia and 40 – 44% in Montenegro and Kosovo, thinks that the responsibility lies solely on the state. The lowest percentage, from 12% in Montenegro to 20% in Kosovo, feel that responsibility is on the citizens including to urge the state. These results speak to the fact that the general public in the Western Balkan countries are still split in their understanding of the role of the state versus their own role.

Findings

- The prevailing understanding of philanthropy across all countries is that it is the provision of help to certain groups of people that are considered vulnerable and in need for various reasons.
- It is encouraging that another dimension was included in Montenegro, North Macedonia and Serbia that sees it as benefitting both community and society.
- Similarly, in Montenegro and lesser so in Serbia and Bosnia and Herzegovina, investing in certain areas (environment, education, health) is also considered philanthropic. The Montenegrin general public seemed to be the most open to the idea of philanthropy as an investment.
- The other dimension that should be noted is that in Bosnia and Herzegovina, Kosovo and Serbia any kind of help is considered philanthropic, while in Montenegro and North Macedonia more respondents felt that financial and material help is philanthropic.
- The general public's responses to the question regarding their own role in doing common good demonstrated a division of opinions in terms of who is the most responsible: state, citizens or both. While in most countries, a higher percentage of the general public believe it is shared responsibility. A high percentages also felt that this is sole responsibility of the state.

2.2 IMAGE OF PHILANTHROPY

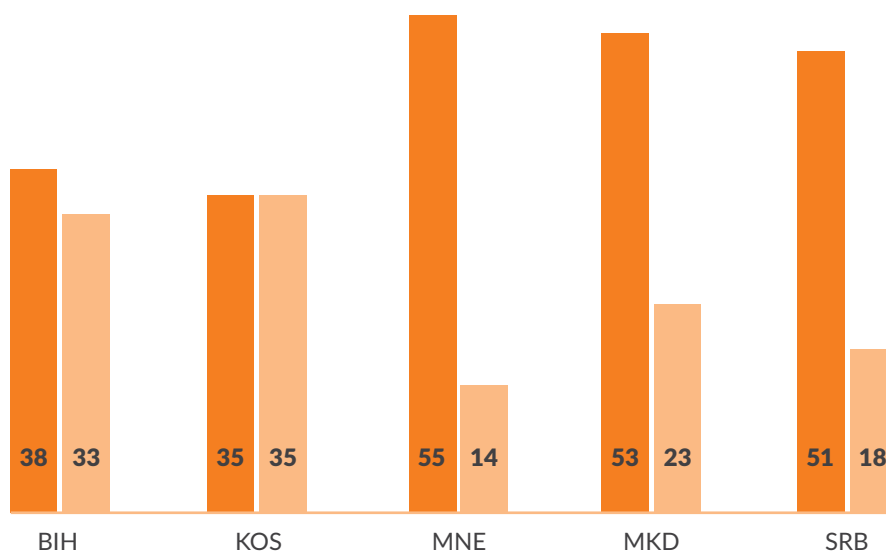
The image of philanthropy was assessed through ten different questions,² which, when analyzed, address four aspects: Status - level of development; Level of stimulating philanthropy; Perception of who gives the most for the common good; Role of different actors in giving for the common good. These four aspects are addressed in the following sections.

2.2.1 STATUS

The perception of philanthropy development by country indicates that in Bosnia and Herzegovina and Kosovo, the general public is quite divided, while in Montenegro, North Macedonia and Serbia the more frequent answer is that philanthropy is little or not at all developed. More than 50% of the respondents in these latter three countries believe that philanthropy is either a little or not at all developed. A closer look at the percentages also shows that the general public of Kosovo (35%) and Bosnia and Herzegovina (33%) are perceiving the level of philanthropy development in their countries higher than the general public in North Macedonia (23%), Serbia (18%), and Montenegro (14%).

It is interesting to note that the range of respondents who did not know or have an opinion ranged between 24-31%, consistently near or above the levels of those who believe philanthropy to be rather or very much developed.

Q) In your opinion, how developed is donating for the common good in your country?



A)



“Not at all, a little.”



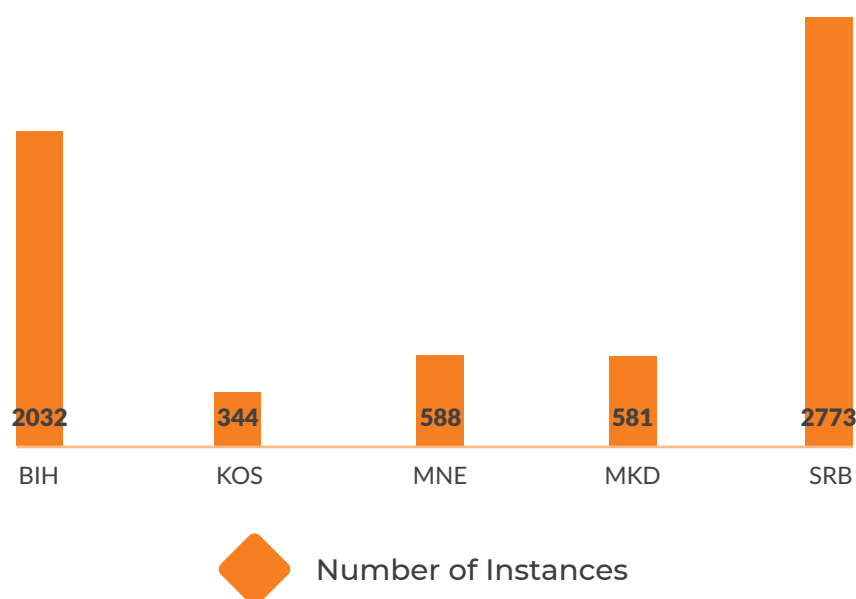
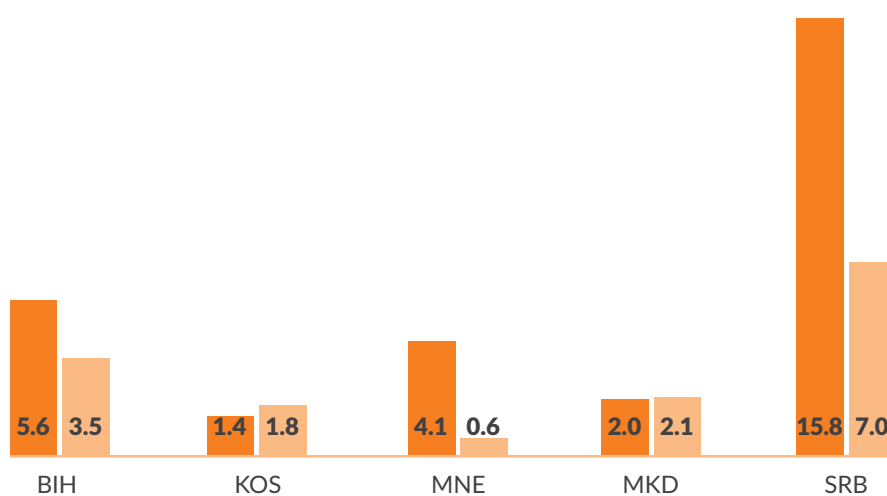
“Rather and very much.”

² In country specific polls, the number of questions that concern the level of recognition of specific actors/actions for the common good was asked. However, since this is very specific for each country these questions were not analyzed here.

If we compare these results with information from the Giving Balkans recorded giving database, the opinions of the general public do not seem to correlate with the trend lines in the growth and expansion of philanthropy over the last five years.

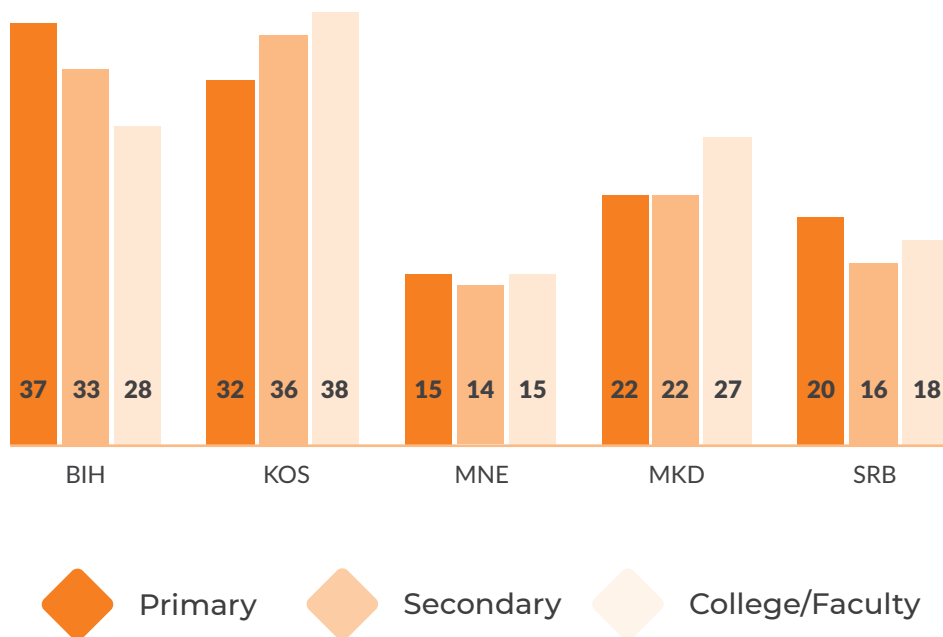
As an example, the general public in Montenegro show the greatest level of pessimism toward how well philanthropy is developed, yet, it is Montenegro where the most sustained and steady growth has been measured over the last number of years.

This contrast opens up opportunities to do more targeted communication with the general public on what developed philanthropy looks like. It also represents an interest by the general public in seeing continuous development of philanthropy despite the existing levels reached.



Cross-referencing demographic data across countries, one difference has emerged. College-educated people from Kosovo, for instance, think that the philanthropy in their country is developed more (38% of the population) than do the college-educated people across all countries (28% next highest percentage) and education categories (37% next highest).

Q) How developed is philanthropy? (% across education categories)

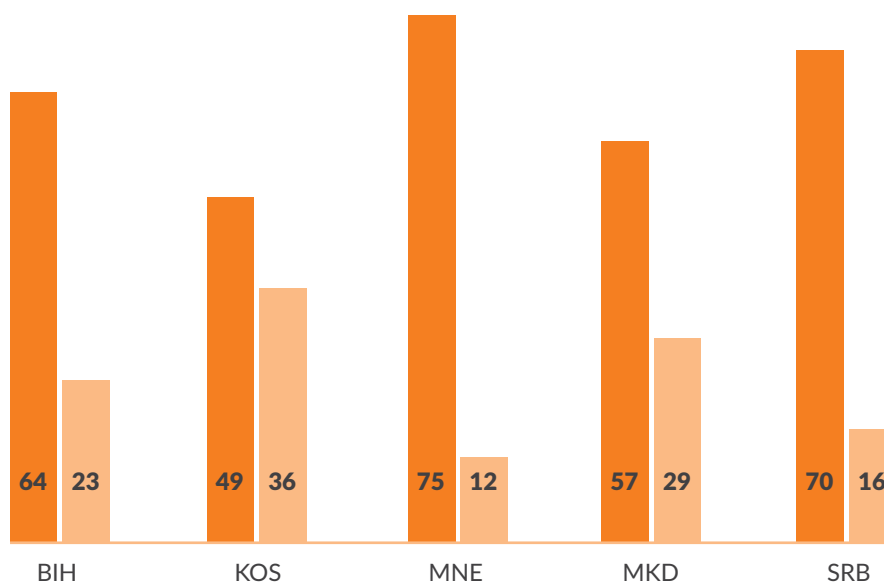




Findings

- Citizen's perception in all countries shows there is ample opportunity to engage with citizens to increase their understanding of what philanthropy development looks like and to better understand citizen expectations of what they think is a developed philanthropic system. This gives room for two-way learning.
- There is a higher level of pessimism or lack of knowledge on the topic than there is confidence that philanthropy is somewhat or highly developed. This remains consistent across countries and again points to the opportunity for more engagement with the general public.

2.2.2 LEVEL OF STIMULATED PHILANTHROPIC GIVING

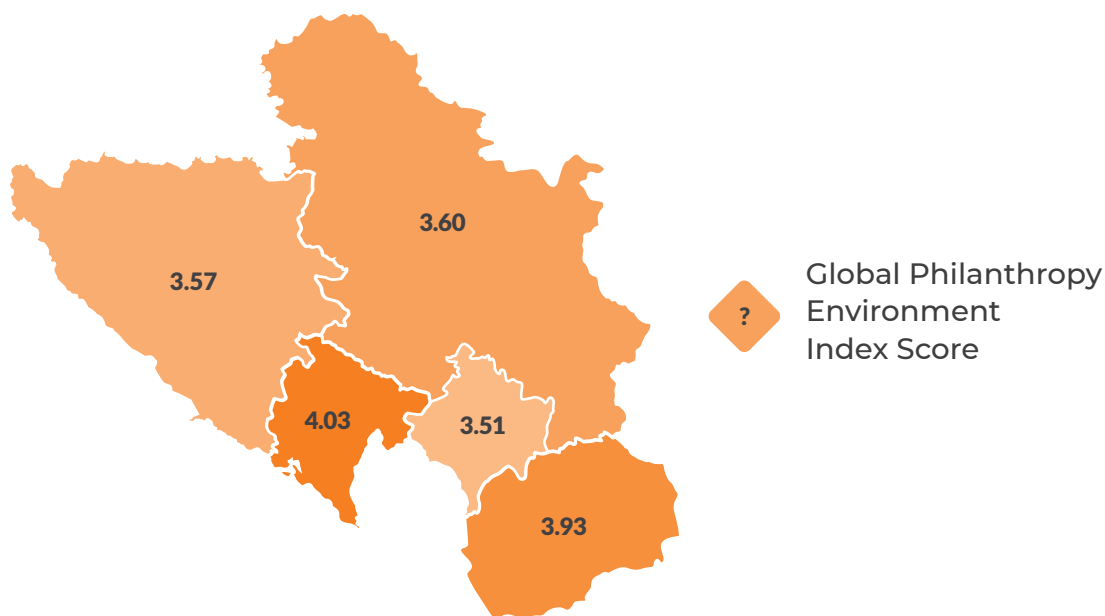
Q) To what extent is donating for the common good stimulated, given importance in our society?



A)  "A little, insufficiently."  "Sufficiently, just right."

Across the region, the percentage of the general public who feel that giving for the common good is little or insufficiently stimulated is higher than the percentage of those who think that is sufficiently or stimulated in just the right measure. However, there are differences here as well: Most pessimistic are again the general public of Montenegro (75%) and Serbia (70%), then the general public of Bosnia and Herzegovina (64%) and North Macedonia (57%). The general public of Kosovo are the most optimistic in their assessment with 36% stating that philanthropic giving is stimulated sufficiently or just right.

Using data from the 2018 Global Philanthropy Environment Index, all countries of this region demonstrate that the enabling environment is better than the average of the 79 world economies scored. Yet, this does not seem to be reflected in the perceptions of the general public.



The differences are particularly notable among Montenegro's general public that perceives an environment for giving that is not stimulated, while their GPEI score is the highest in the region. On the contrary, a high percentage of the general public in Kosovo believe that donating for the common good is stimulated, while their score in the GPEI is lower than those of other countries.

Findings:

- The citizen's perception on the level in which philanthropic giving is incentivized differs from Global Philanthropy Environment Index scores.
- One reason for this difference may be that the general public has not been informed enough by the government and other philanthropy actors about the benefits that can be realized in philanthropic activities.
- There is ample opportunity to dig deeper and understand from the general public about what types of stimulation or incentives would be most welcome and to make sure that the general public has both the knowledge and easy access to the incentives that do already exist in each of the countries.

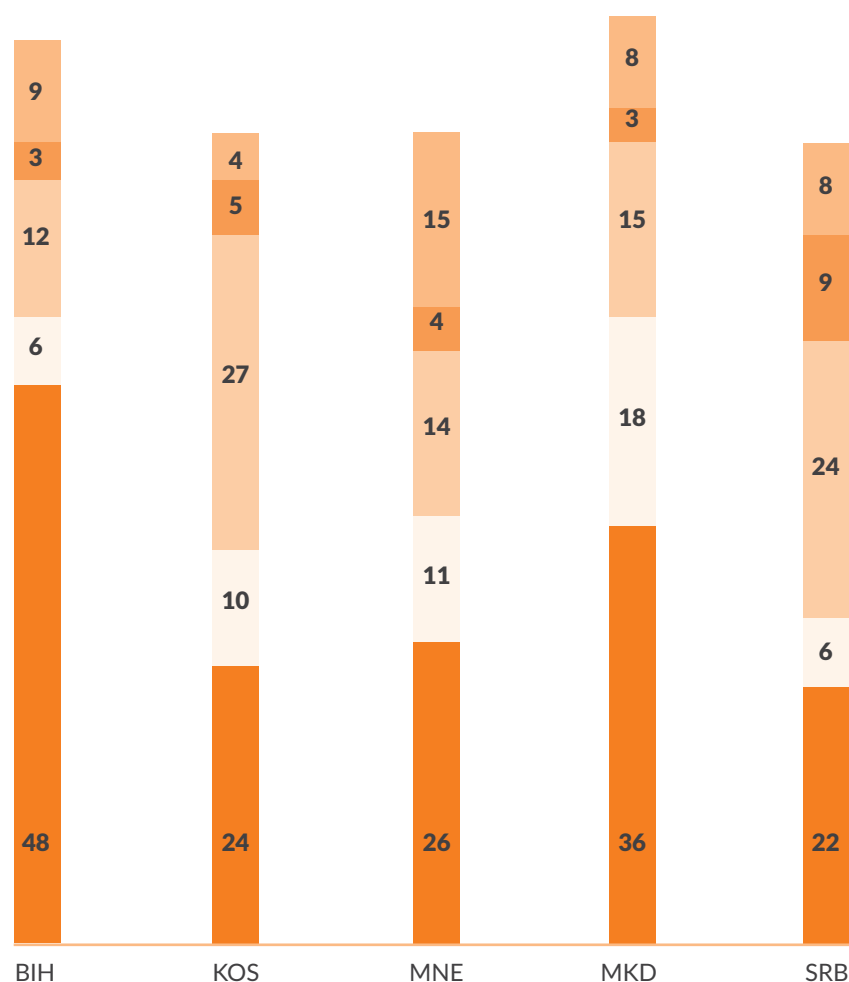
2.2.3 WHO GIVES THE MOST

Two questions related to the citizen's perception on who gives the most were asked in the survey:

Q) In your opinion, how much does each of the following organizations/institutions donate for the common good?

Q) Which organization/institution would you put in the first place, as the one which donates most of all for the common good?

Answers to the second question were used for comparison in the chart below since they include the ranking:



A)

- Mass Individual
- Corporate
- Known Individuals
- Private Foundations
- Religious Communities

Across the countries, the perception of the type of donor that gives the most is generally ranked: mass individual, known individuals,³ religious communities, corporate donors, and private foundations. Exceptions to this are in Kosovo where corporates and private foundations rank better than religious communities, and in North Macedonia where the corporate sector ranks better than religious communities.

It is interesting to note that in both Kosovo and Serbia, the general public perceives that known or prominent individuals give slightly more than mass individual donors. Yet Montenegro (26% vs. 14%), North Macedonia (36% vs. 15%) and Bosnia and Herzegovina (48% vs. 12%) perceive known individuals as more significant donors by a factor of two to four times that of mass individual donors.

The belief that individuals (combining both mass and known) are the most significant donor type ranges from 46 – 60% across the countries and does indeed form the most significant block of donor type considered to give the most.

Despite the presence of prominent humanitarian and/or grantmaking foundations in each of the countries, the perception of the role of these foundations in giving is lower than even that of religious communities in all countries except for Kosovo and Serbia where the levels are nearly similar.

In Bosnia and Herzegovina, both urban (42%) and rural (52%) populations are confident in the position of ordinary citizens in the first place, where rural populations featured a difference of 16% from the next highest answer in all countries. People from North Macedonia also place significant belief in the impact of ordinary citizens with no difference between their urban (36%) or rural (36%) populations, with about 10% difference from other countries (but less than Bosnia and Herzegovina). Similarly, rural populations from Serbia (30%) and Kosovo (30%) are more confident in prominent individuals than are rural populations of other countries (the next highest percentage being 15%).

Smaller differences are in Kosovo where corporates and private foundations rank better than religious communities - especially in rural populations of North Macedonia (17%), with a 7% difference from other countries, and an 11% difference from the confidence placed in religious communities.

In comparing public perception to the Giving Balkans database of recorded philanthropy for 2018, there are a number of differences that are revealed on what type of donor is perceived as giving the most versus what type of donor is recorded as giving the most.

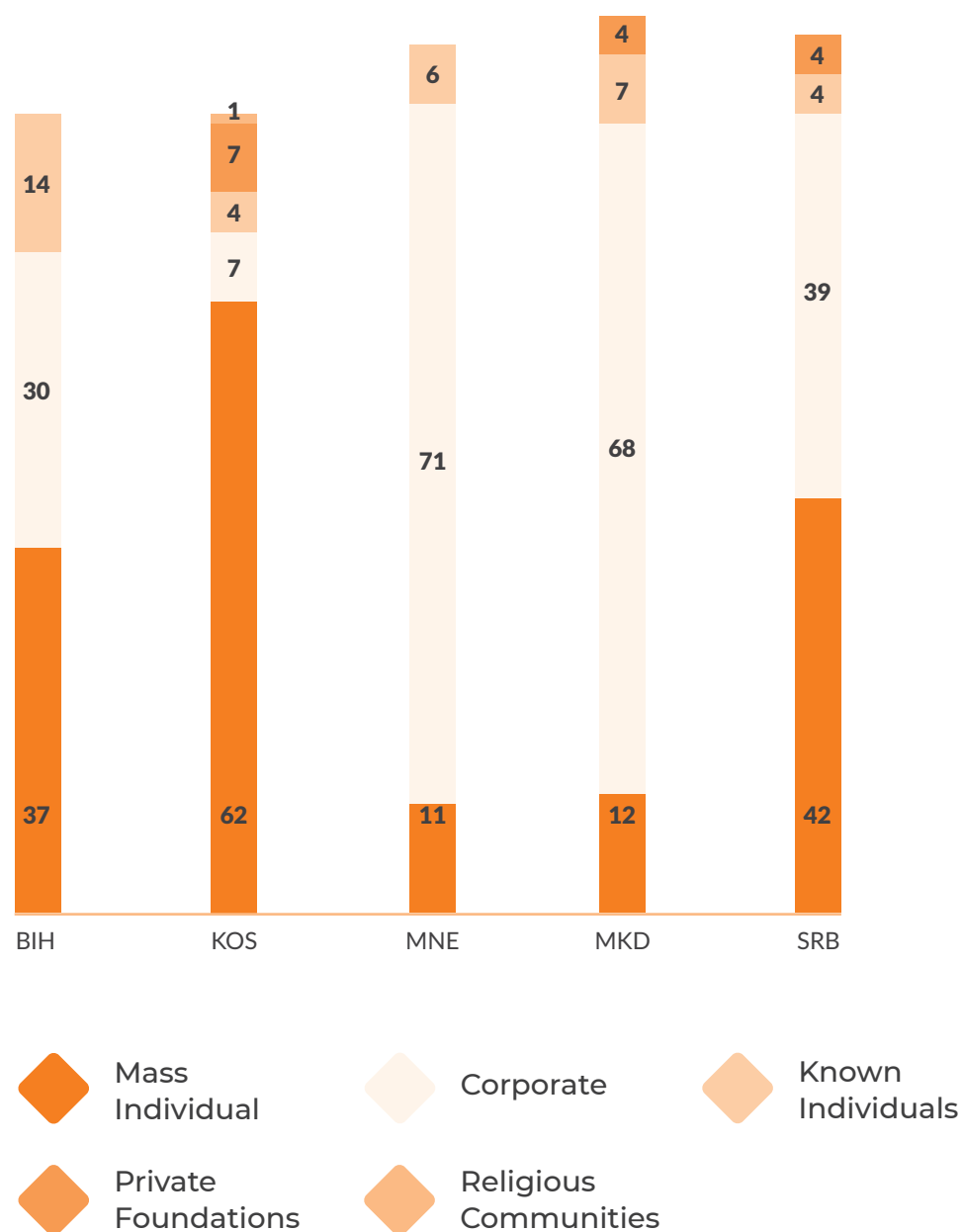
It is important to note that due to the lack of legally required transparency in giving/receiving for religious communities, the Giving Balkans database has very few records of donations from this donor type.

A significant difference between public opinion and recorded giving lies in how the corporate sector is viewed. In Montenegro, North Macedonia and Serbia, corporate giving surpasses that of mass individual giving, while in Bosnia there is a small difference. The closest correlation in viewing the corporate sector is in Kosovo where public opinion believes there is slightly more corporate giving than what is recorded.

The combined total of recorded mass individual and known individual giving ranges from 46 – 66% in Bosnia and Herzegovina, Kosovo and Serbia, but drops down to 17 – 19% in Montenegro and North Macedonia.

³ Mass individual giving is understood to refer to collective or en masse giving where individual donations are not disaggregated but rather collected as a whole. "Known individual" giving tends to be higher value giving and/or giving made by well-known celebrities or public figures and therefore is more publicized in disaggregated form.

Recorded Giving - Who Gives the Most?



Findings

- Mass individual donors are perceived as the most significant donor in all countries.
- Prominent individuals are perceived among the more generous donors.
- Combined, the two categories of individual donors are considered to be largest block of donors who give the most.
- Corporate donors are perceived as being less generous than individuals.
- Religious communities are always mentioned and ranked among the top five donors in each country.

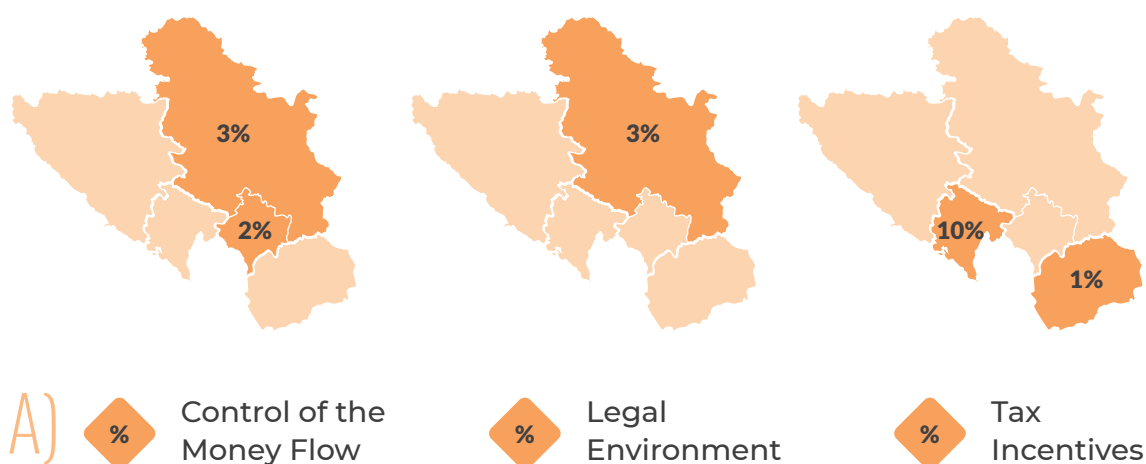
2.2.4 ROLE OF DIFFERENT ACTORS

The public opinion polls considered the role of the following actors in the philanthropy ecosystem: the state, civil society, citizens, business sector and media.

State

Q) In your opinion, in the actions for the common good, what should primarily be the role of state?

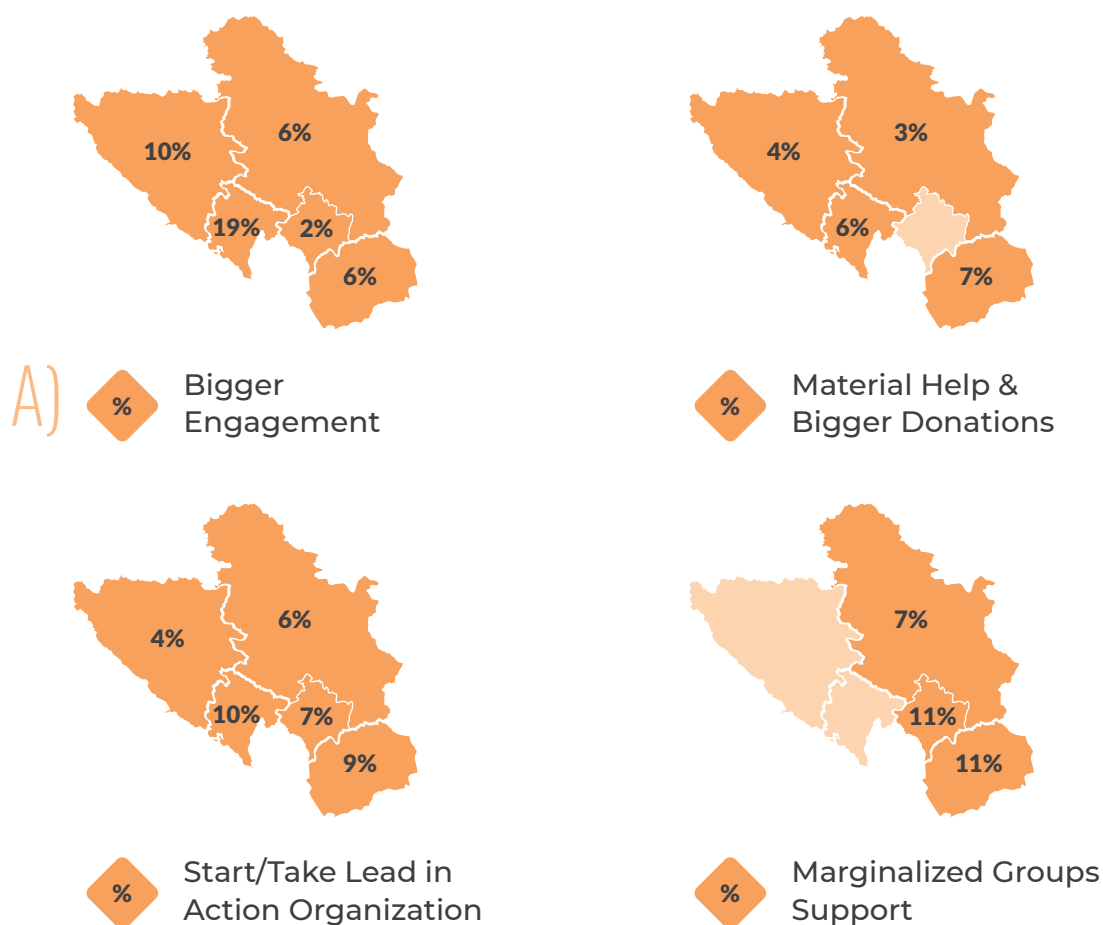
The most frequent four answers in all countries were bigger engagement, helping the poor, helping as much as they can, and providing material help. In all countries, other responses included: better standard, employment, and making a foundation. It seems that the general public feel that the state should be involved in actions for the common good by giving and helping directly. However, since this is not the actual role of the state, the graph above shows some of the answers that are more closely aligned to the structural functions of the state in philanthropy – namely that the role of the state is to create a better environment for giving and to be engaged in the monitoring of the money flow. Twelve percent of Montenegrins believed that the state should be engaged in this manner (broken down across three sub roles in the above map/graph), followed by 6% of the Serbian general public, and 1% of the North Macedonian public.



Civil Society Organizations

Q) In your opinion, in the actions for the common good what should primarily be the role of CSOs?

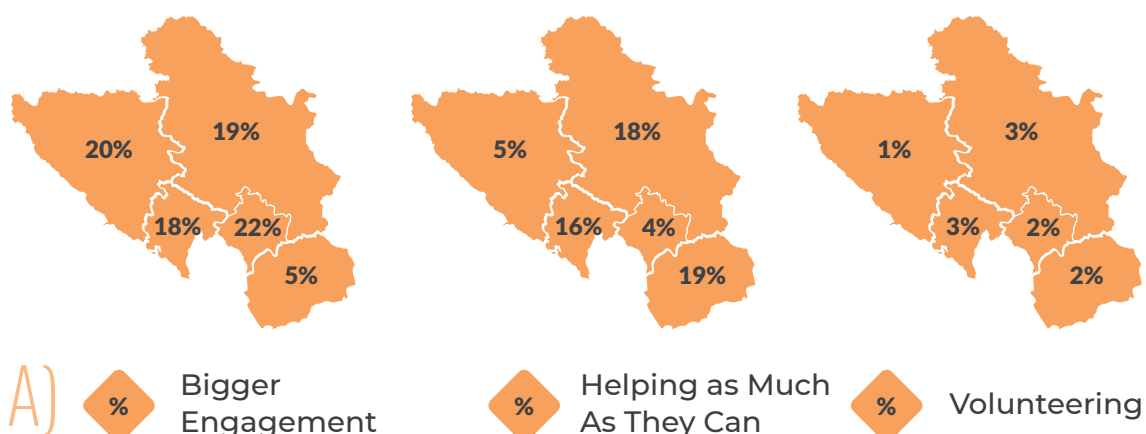
The general public gave various answers when it comes to civil society, but mostly they addressed the need for bigger engagement, taking a lead in organizing actions, and providing support to various marginalized groups. In all countries between 1 and 4% of the general public also feel that their role is to provide better communication on actions, reporting, information and education.



Citizens

Q) In your opinion, in the actions for the common good what should primarily be the role of citizens?

Again, looking at their own role, the general public identified various answers, but were almost united (except in North Macedonia) in the opinion that their engagement should be bigger; they also mentioned that they should be helping as much as they can (most notably in Montenegro, N. Macedonia and Serbia). In all countries between 1 and 3% of the general public also identified volunteering.



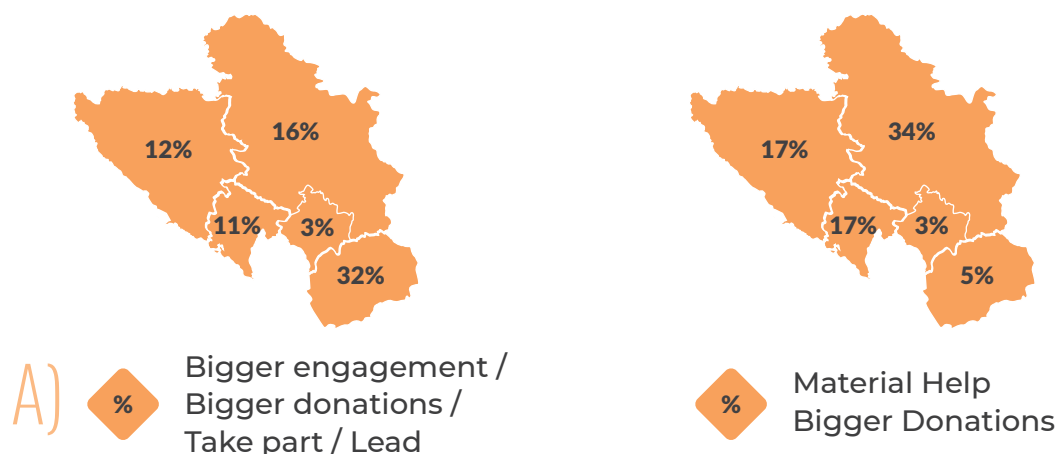
Corporate Sector

Q) In your opinion, in the actions for the common good what should primarily be the role of business sector?

While expressed in a different way, the role of business sector is seen to be providing donations, be more engaged (most notably in N. Macedonia, followed by Serbia, Bosnia and Herzegovina and Montenegro); provide material help (most notably in Serbia and then Bosnia and Herzegovina and Montenegro).

Interestingly, those and other answers got very low percentages in Kosovo, where the general public were quite divided in their opinions, while the majority stated that they do not know what the role of businesses should be.

In some countries, their role was defined as to provide jobs or adequate salaries, presumably with the idea that if they did that, philanthropic support would be less necessary.



Media

Q) In your opinion, what should primarily be the role of media?

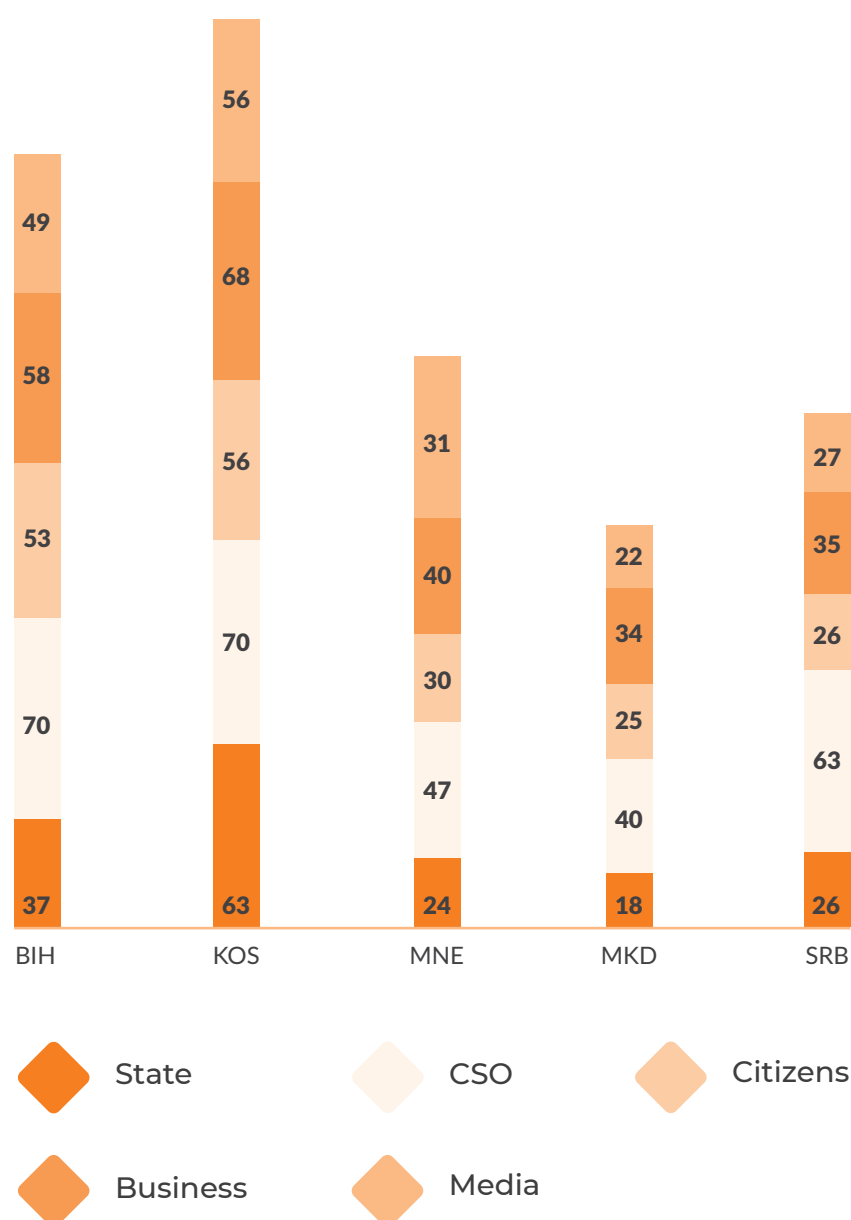
Obviously, while in varying percentages, the most frequent answer was that the role of media is to provide information and promote actions. The only significant difference is in Serbia in which the highest percentage of the general public (31%) answered: 'they should report to the public objectively about the actions from the beginning to the end'. Other answers vary and include a range of opinions that are mostly connected with providing information. The general public in Kosovo, North Macedonia and Serbia felt that special programs should/could be made, while in Bosnia and Herzegovina, Montenegro and North Macedonia asked for 'informational help'.



Another interesting aspect to look at was the percentage of the general public in each state that responded that they do not know the role of certain actors. The graph below shows that in each of the countries, the largest percentage of the general public claims that they are not aware of what should be the role of civil society, and then the business sector, while they believe they are clearer about the role of citizens, media and state.

On the other hand, the general public of Kosovo were less clear about the roles of various actors, while the general public of North Macedonia and Montenegro expressed greater clarity. In Serbia, there is a sharp contrast between a quite high percentage of the general public that are not clear about the role of civil society and a lower percentage not clear about the role of other actors.

Don't know the role of the actors (%)



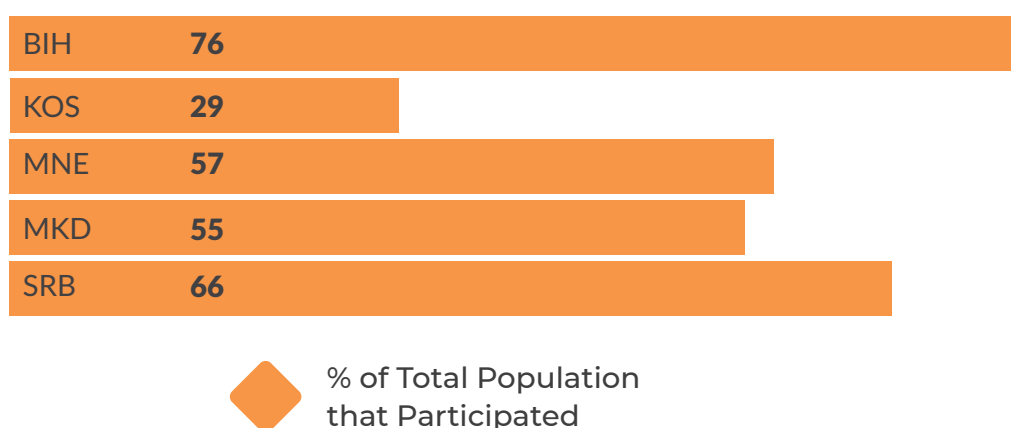
Findings:

- Across the countries, the general public perceive that the role of different actors is to help and to be more engaged. Their answers, while not particularly precise, in general show some awareness of the roles of the actors, but not understanding what the differences are in those roles.
- Public opinion across all countries believe that all actors should be more engaged.
- When looked at carefully, the role of businesses and civil society is not different in opinion of the general public. Although some small percentage feel that civil society also has a role to educate and inform, while businesses should provide jobs.
- A low percentage of the general public feel that their role is to volunteer.
- Media should provide better information and promotion and, in Serbia only, the general public feel that their responsibility is to provide information on the action from beginning to end.
- In terms of assessing their own knowledge about the role of different actors, the general public are most confident in Montenegro and North Macedonia, while the general public of Kosovo are cognizant of their assessment that they do not know enough of the roles of different actors.
- Respondents in general assessed their knowledge about the role of civil society as weaker than those of other actors.

2.3 PERSONAL READINESS TO DONATE

2.3.1 PARTICIPATION IN ACTIONS FOR THE COMMON GOOD

The participation is highest in Bosnia and Herzegovina and Serbia, similar in Montenegro and North Macedonia and the lowest in Kosovo. Majority of those that participated have done so in the last three years. As for the frequency, apart from Kosovo, the majority of those who participated, are participating several times a year in all other countries. In Kosovo, the majority of those that participated, participated several times in their life. College-educated respondents reported that they participated in actions for common good more than the respondents with only primary or secondary education across all countries did.

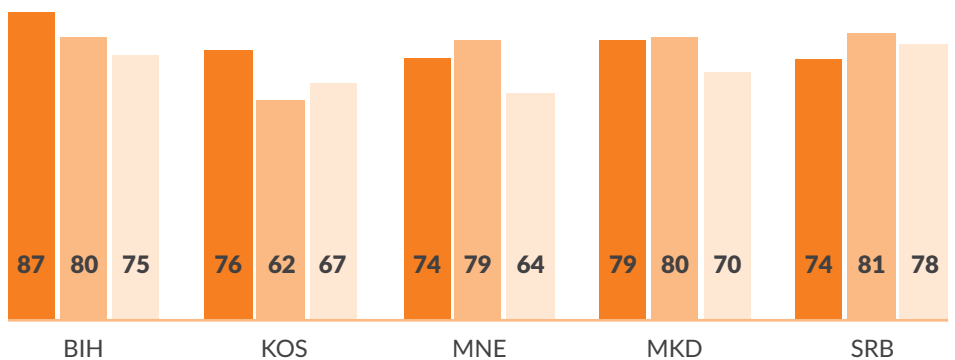


The general public were also asked how they participated. Respondents reported most often donating money, followed by in-kind support (goods), then both money and goods, while volunteering and providing services are lagging behind.

Taking into account that this question features a lower sample,⁴ the demographic data reports some indications on this issue. In terms of pro bono work, the people from Kosovo with secondary education report to have offered free services from their work opus significantly less (62%) than people within the same education category across countries (79% as the next lowest percentage), even registering slightly lower than all other categories (albeit slightly, with 64% college-educated reports in Montenegro).

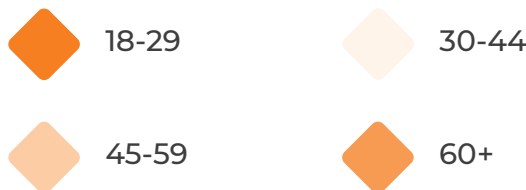
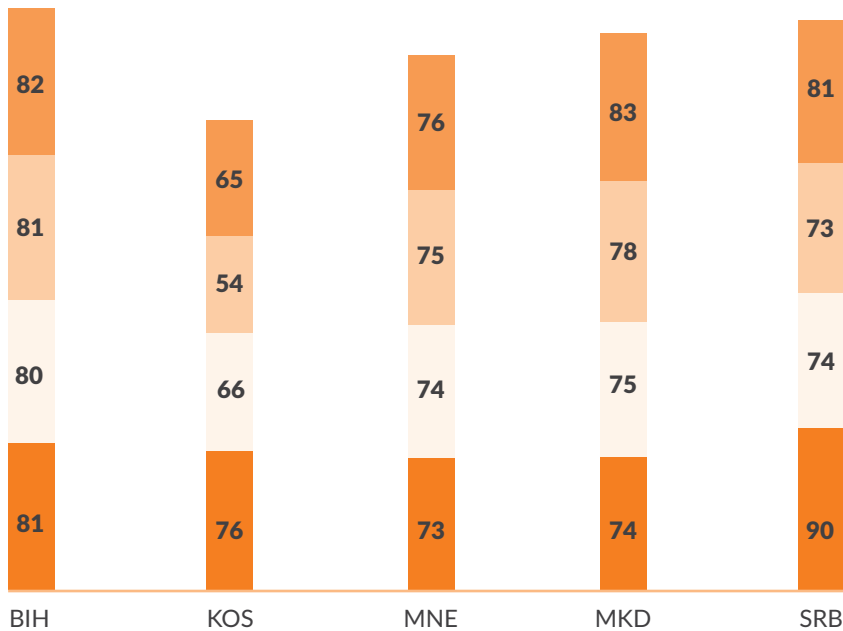
⁴ Lower sample of respondents indicates that the population may not be representative – especially in Kosovo, where only 19% of the total sample of respondents could answer this question.

% of Donating Respondents Who Have Given with Pro Bono Services, by level of education



The same is true for all age groups in Kosovo except 18-29, with people from the 45-59 age group contributing with free services the least across age and country (54% as opposed to 73% next lowest percentage).

% of Donating Respondents Who Have Given with Pro Bono Services, by age group



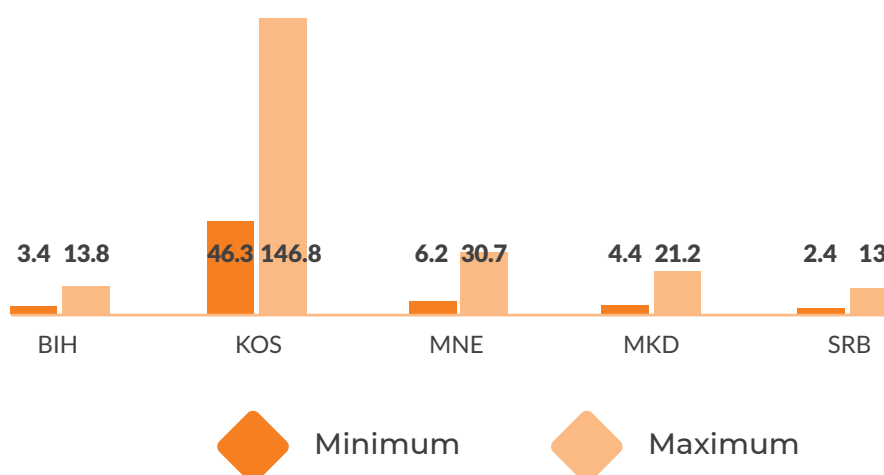
In terms of money, people in the 60+ group in North Macedonia (79%) and the 18-29 group in Serbia (77%) report having contributed the least opposed to all others (85% as the next lowest percentage for both instances).

% of Donating Respondents Who Have Given Money
by age group



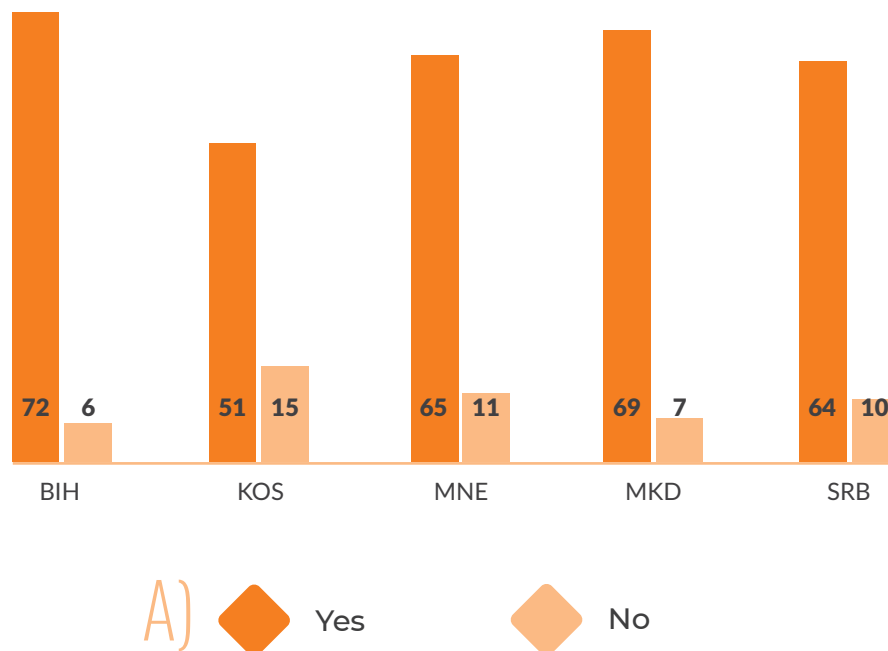
There are some interesting findings when it comes to the amount donated. While in most countries the minimum donation was between EUR 2 and 6 and maximum donation between EUR 13 and 30, in Kosovo respondents stated their minimum donation as slightly over EUR 46 and the maximum donation over EUR 140.

Q) How much was donated according to statements?



2.3.2 PERCEIVED PARTICIPATION IN THE FUTURE

Q) Do you think that you will participate in charity actions for the common good in future?

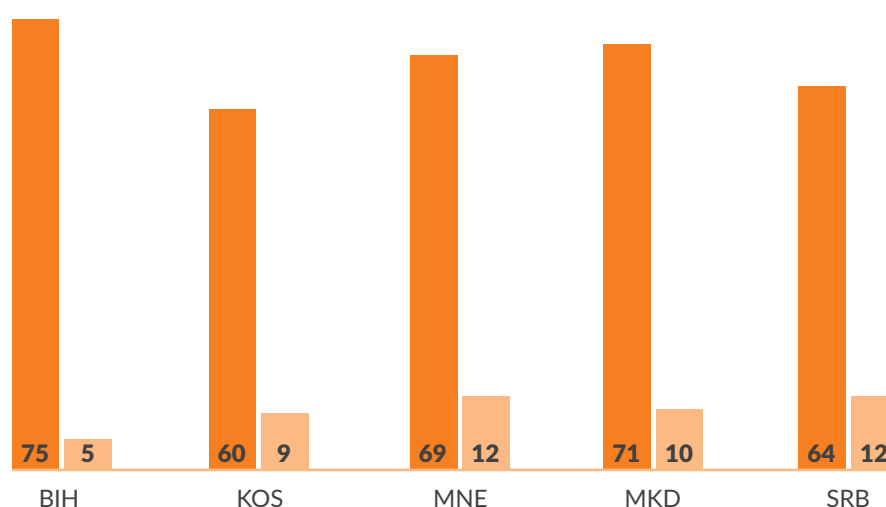


In all countries, over 50% of the general public think that they will participate – highest percentage in Bosnia and Herzegovina (72%) and lowest in Kosovo (51%). Across age groups, the people in the 60+ age group have reported that they would participate less than other age groups in all of the five countries; the differences are especially stark in Serbia (49% as opposed to 69% as the next lowest percentage), North Macedonia (58% as opposed to 68%) and Montenegro (54% to 65%). At the same time, between 6% (Bosnia and Herzegovina) and 15% (Kosovo) feel that they will not be able to participate. There are no differences among countries regarding the reasons for not participating: in all countries, the main reason is the general public's poor material situation, followed by the distrust they feel in such actions. Both factors feature the highest among the general public of Serbia; poor material situation is lowest in Kosovo, and distrust in Bosnia and Herzegovina.

In all the countries, the majority of the general public would be willing to give money – again the highest percentage in Bosnia and Herzegovina and the lowest in Kosovo, especially in urban populations. Similarly, across countries the general public are ready to give up to 10 euros for an individual action. Additionally, one fourth of the general public in Bosnia and Herzegovina are ready to give 11-30 EUR. However, as the sum goes up, the percentage of the general public ready to allocate it reduces.

The general consensus among most of the general public from all the countries involved in the survey is that they would rather give a smaller amount on several occasions, than allocating a bigger amount at once for one action.

Q) Would you be willing to help financially the actions for the common good in future, if this were the only way to help in some action?



A) Yes No

Q) Which charitable group would you su

The general public identified a large number of groups they would be willing to support. In all countries, people with health issues ranked as the first or second most frequently mentioned group. Others that were also frequently mentioned across most or all countries were people and/or children with disabilities, and people in economic need. Children without parental care was more frequently mentioned by respondents in Montenegro and Serbia. In all countries, groups such as the elderly, female survivors of violence, and victims of trafficking were mentioned, but not as significantly as some of the top groups. The table below shows a comparison between the top three groups the general public most frequently expressed a willingness to support.

	BIH	KOS	MNE	MKD	SRB
1)	People with health issues	People in economic need	People with health issues	People with health issues	Children with disabilities
2)	People with disabilities	People with health issues	Children w/o parental care	Children with disabilities	People with health issues
3)	People in economic need	Children with disabilities	Children with disabilities	People in economic need	Children w/o parental care

The Roma, LGBTQ+, and migrant populations are among the least frequently mentioned groups that respondents show willingness to support and this is a trend that is true across all countries. However, the demographic data shows that urban populations in Bosnia and Herzegovina are polarized when it comes to the question of whether they would support the LGBTQ+ population, with both sides standing at the 40% level. In all other countries, the difference between “would” and “would not support” is much more skewed towards the latter. In terms of migrants, both urban and rural populations of Bosnia and Herzegovina would support migrants as a group more than in any other country, except Kosovo where rural communities would do so at a higher level as well.

The data on recorded giving tracked in the Giving Balkans database shows a number of similarities and some differences in how recorded philanthropy is distributed across final beneficiary in comparison to the beneficiary groups the general public states they themselves would be willing to support. Below is the table of the top three beneficiary groups supported in 2018:

	BIH	KOS	MNE	MKD	SRB
1)	People with health issues	People in economic need	People with health issues	People in economic need	People with health issues
2)	People in economic need	People with health issues	People with disabilities	People with health issues	People with disabilities
3)	People with disabilities	Local communities	Local communities	Local communities	People in economic need

Beneficiary groups such as people with health issues, people in economic need, and people with disabilities track closely to the survey results. The recorded philanthropy data shows the populations of local communities as a common group, especially in Kosovo, Montenegro and North Macedonia. This difference may be due to the respondents not seeing people in a given geographic community as its own classification of beneficiary groups.

Some groups that were more frequently mentioned by respondents as being willing to support, such as children without parental care, female survivors of violence, and the elderly do not show within the recorded data as being as significantly supported. This may be due to the general public having limited resources at their disposal, so that they actually support those groups that rank higher in their thinking.

Q) For which purposes would you personally be ready to participate?

As with final beneficiaries, the general public named a wide range of causes that they would be ready to support. In all countries, humanitarian support to vulnerable groups⁵ is rated as the cause

⁵ Humanitarian support to vulnerable groups is mostly financial or material support to those groups, while support to marginalized groups is support to various actions that help better their position and integration.

respondents are the readiest to support, except for Montenegro, where this ranked as the third cause. Poverty reduction and support to marginalized groups followed up as the second and third most common cause in Bosnia and Herzegovina, North Macedonia and Serbia, and ranked as first and second in Montenegro. Kosovo respondents also saw poverty relief and mitigation as the second most common cause. Health is then ranked as the third most important cause. Additional causes that appeared significantly on the list of most countries included education, human rights, and the environment. Issues such as science, sports, and arts and culture rank lower on most countries' list of causes. The below table shows a comparison between the top three causes that respondents across the countries stated they would support:

	BIH	KOS	MNE	MKD	SRB
1)	People with health issues	People in economic need	People with health issues	People in economic need	People with health issues
2)	People in economic need	People with health issues	People with disabilities	People with health issues	People with disabilities
3)	People with disabilities	Local communities	Local communities	Local communities	People in economic need

In all countries, the range of causes that are the most commonly funded in the Giving Balkans recorded philanthropy data set is somewhat more limited than the causes mentioned by respondents in the public opinion survey that they would be willing to support. The top three causes recorded as being supported per country are listed in the below table:

	BIH	KOS	MNE	MKD	SRB
1)	People with health issues	People in economic need	People with health issues	People in economic need	People with health issues
2)	People in economic need	People with health issues	People with disabilities	People with health issues	People with disabilities
3)	People with disabilities	Local communities	Local communities	Local communities	People in economic need

Causes like poverty relief and mitigation and support to marginalized groups are both seen by respondents as causes they would most likely support and indeed are shown to be causes to which more resources are actually directed. While healthcare ranks highly on the list of causes where support has been recorded, it is not listed as significantly by respondents to the public opinion polls.

A discrepancy between intention or willingness to a cause and actual follow-through with giving to that cause is observed with issues like human rights and the environment. These causes are considered as important and respondents express a willingness to give, yet giving records do not show that these causes are commonly funded by the general public. This may be due to the general public feeling that these causes need their support, but when it comes to actual participation, with limited resources at their disposal, they actually support those causes that rank higher in their thinking.

Urban citizens of Bosnia and Herzegovina have reported at a significantly higher level (73%) than urban populations of other countries (58% at the next highest level) that they would support programs that advocate the establishment of good relations between ethnic groups. Same is true of the citizens of Bosnia and Herzegovina with primary education as opposed to citizens with primary education in other countries.

Findings

Actual participation

- Participation in actions for the common good is highest in Bosnia and Herzegovina and the lowest in Kosovo. In all countries, the majority of those who participated did so in the last three years.
- The general public most often donates money, which is followed by in-kind support (goods), then both money and goods, while volunteering and providing services are less frequent ways of participation.
- In most countries, the minimum donation was between EUR 2 and 6 and maximum donation between EUR 13 and 30. In Kosovo, respondents reported their minimum donation as slightly over EUR 46 and the maximum donation right at EUR 140.

Future participation

- In all countries, over 50% of the general public plan future participation in actions for the common good: with the highest percentage in Bosnia (72%) and lowest in Kosovo (51%).
- There are no differences among countries regarding the reasons for not participating. In all countries, the main reason is the general public's poor material situation, followed by the distrust they feel in such actions.
- In all countries, the majority of the general public (over 60%) would be willing to give money in the future.
- Across all countries, the readiness to give up to 10 EUR per individual action is most commonly expressed. Additionally, one-fourth of the general public in Bosnia and Herzegovina are ready to give between 11 and 30 EUR. A general observation is as the sum of giving per individual action goes up, the percentage of the general public ready to give that amount reduces.

- The majority of the general public from all the countries would rather give a smaller amount on several occasions, than allocating a bigger amount at once for one action.

Final beneficiaries

- In all countries, the general public identify a large number of groups they would be ready to support with the three most common being people with health issues, people and/or children with disabilities, and people in economic need.
- The Roma and LGBTQ+ population are the groups that citizens are least willing to support across all countries.

Purpose

- In all countries, the general public named many causes that they would be ready to support, with humanitarian support to vulnerable groups, poverty relief and reduction and support to marginalized groups being the most common.
- Causes expressed as least likely to receive the support of respondents included science, sports, and arts and culture.

2.4 MOTIVATION

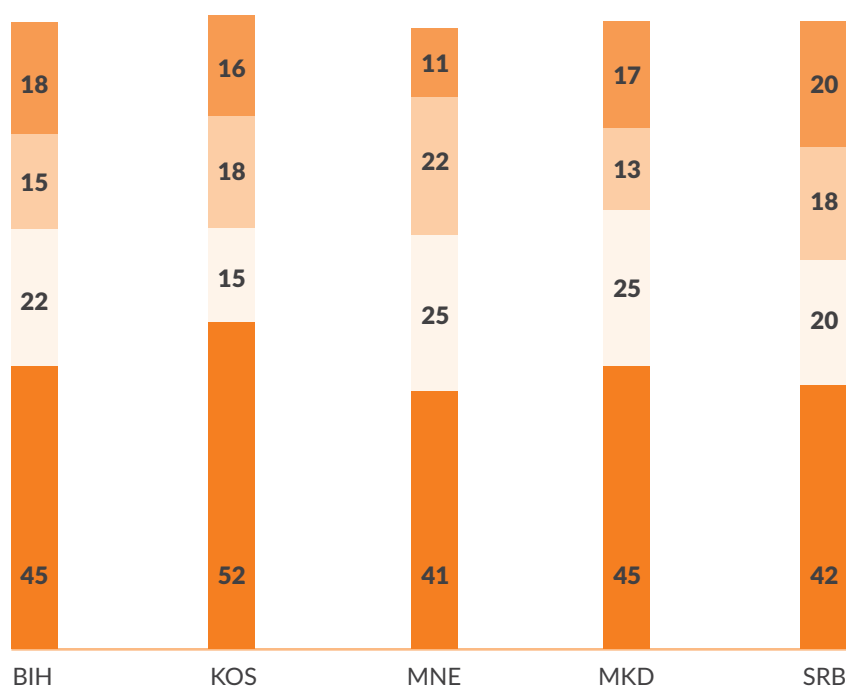
Q) What are the reasons for which you give to an action for common good?

Asked to evaluate to which extent various reasons impact their decision to support some action aimed at the common good, the general public in almost all countries rate those reasons pretty much equally. The belief that action would produce results showed slightly greater importance to respondents when compared to other given reasons. The fact that they are doing something good and the importance of the problem were both regarded equally by respondents. A fourth most common reason given was confidence that money will not be misused.

Demographic data shows that the Serbian respondents in the age group 30-44 place more importance (83%) on the importance of a problem for them than people of other countries within the same group (77% next highest response). While the belief that an action would produce results is not a significant motivator for groups with primary education across countries (3% maximum), Montenegrin people with primary education report this reason significantly more (13%).

However, when asked to assess the most important reason answers change as the graph below shows:

The most important reason to support the action



A)



Doing something noble



Importance of the problem



Producing result



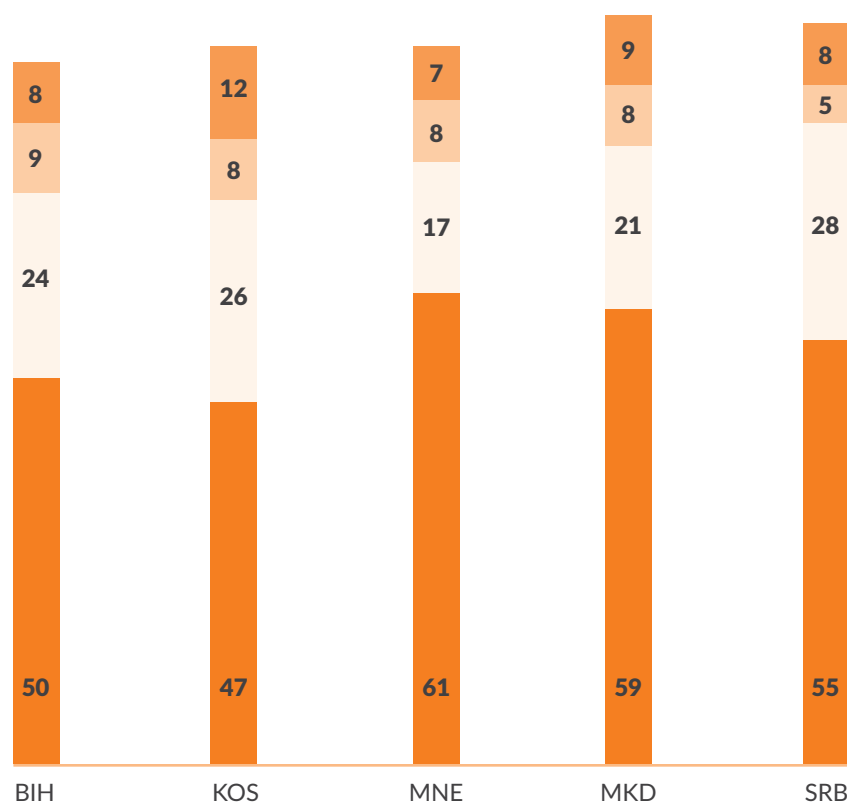
Confidence not to be misused

When asked to pick out the most important reason, the feeling of doing something good or noble was by far the most important reason picked out by respondents in all countries. The second most important reason in all countries except Kosovo is the importance of the problem. The other two reasons change their importance in various countries: producing results is more important in Kosovo and Montenegro, while confidence that money will not be misused is more important in Bosnia and Herzegovina, North Macedonia and Serbia. However, the differences are relatively small and the fact that doing good is the primary motivation, confirms that giving is primarily emotionally driven.

Q) What is the biggest problem for you regarding donations for common good?

As the graph below demonstrates, the biggest reason the general public see as a barrier to giving is their lack of means, which is then followed in all countries by a lack of trust. Two other key reasons given are almost equally important: a lack of information slightly more in Kosovo, North Macedonia and Serbia, and a belief that their contribution will not make a change in Bosnia and Herzegovina and Montenegro. However, the differences are so small, as to be practically negligible.

The biggest problem for you regarding donations



A)



Lack of means



Distrust



Lack of information

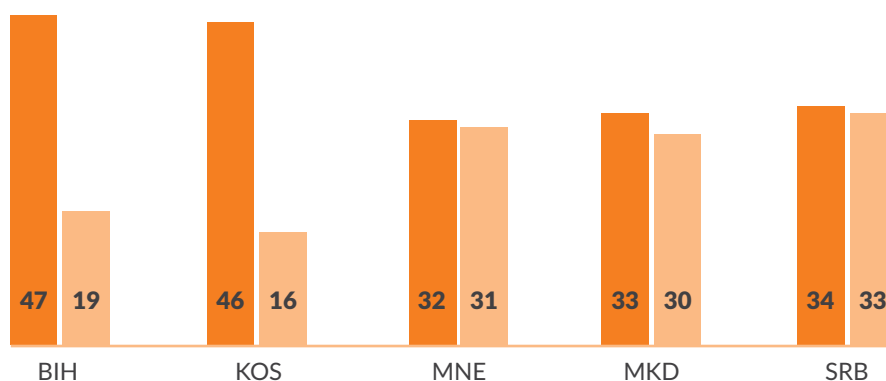



My contribution would not make a change.

The general public also mentioned two other reasons/barriers: the lack of time/procedures and the absence of tax reliefs, but they are ranked less important compared to other reasons.

Tax reliefs/incentives, however, are explored in more depth in the section below.

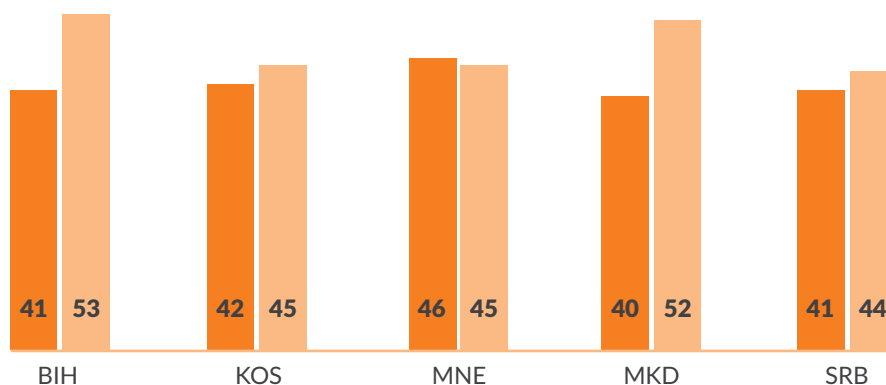
Q) To what extent would a monetary donation tax relief introduction for the common good stimulate you to donate more to the common good?





A)  "Rather" or "Very much"  "Little" or "Not at all"

As the graph above shows, in Bosnia and Herzegovina and Kosovo, tax incentives would have significant influence, especially in groups with primary education; in other countries, however, opinions are pretty much divided. It should also be kept in mind that across countries between 30% – 38% of people were undecided. In that respect, while tax incentives would probably not be the decisive reason for providing support they cannot be dismissed as unimportant.

Q) When you decide whether you will participate in some action aimed at the common good, do you rather choose:



A)  "Local action"  "General nature."

The results show that the general public in all countries see equal importance between supporting local actions and actions of more general nature where a bigger circle of people would benefit. Only in Bosnia and North Macedonia is a greater preference placed on supporting actions of a more general nature.

Q) Which of these ways to give do you consider to be the best, most suitable for you?

	BIH	KOS	MNE	MKD	SRB
Directly on-site, at events dedicated to it	55	57	30	46	33
Sending SMS	12	8	27	25	29
Depositing money on giro-account	14	11	17	13	14
Inserting money into charity boxes in public	9	8	9	6	8
Buying a certain product	2	8	6	4	4
Buying a ticket to a humanitarian event	2	1	3	2	4
Via internet (electronic payment)	1	1	2	2	1
Opening a standing order in a bank	1	1	1	0	0
Taking an affinity credit card	0	0	0	0	0

While the general public did not consider that procedures are a very important barrier for them when it comes to giving, it seems that across the countries, the general public remain relatively conservative when it comes to the ways in which they prefer to give. Thus, giving directly on site at an event is by far the most preferred way in all countries, followed by SMS messages in Montenegro, North Macedonia and Serbia, and depositing money into a bank account in Bosnia and Herzegovina and Kosovo. This is followed by inserting money into charity boxes.

Other ways, such as buying a product, buying a ticket for the event, and online electronic payments are far below, while opening a standing order, or using an affinity credit card have significantly lower, almost non-existent support from the general public.

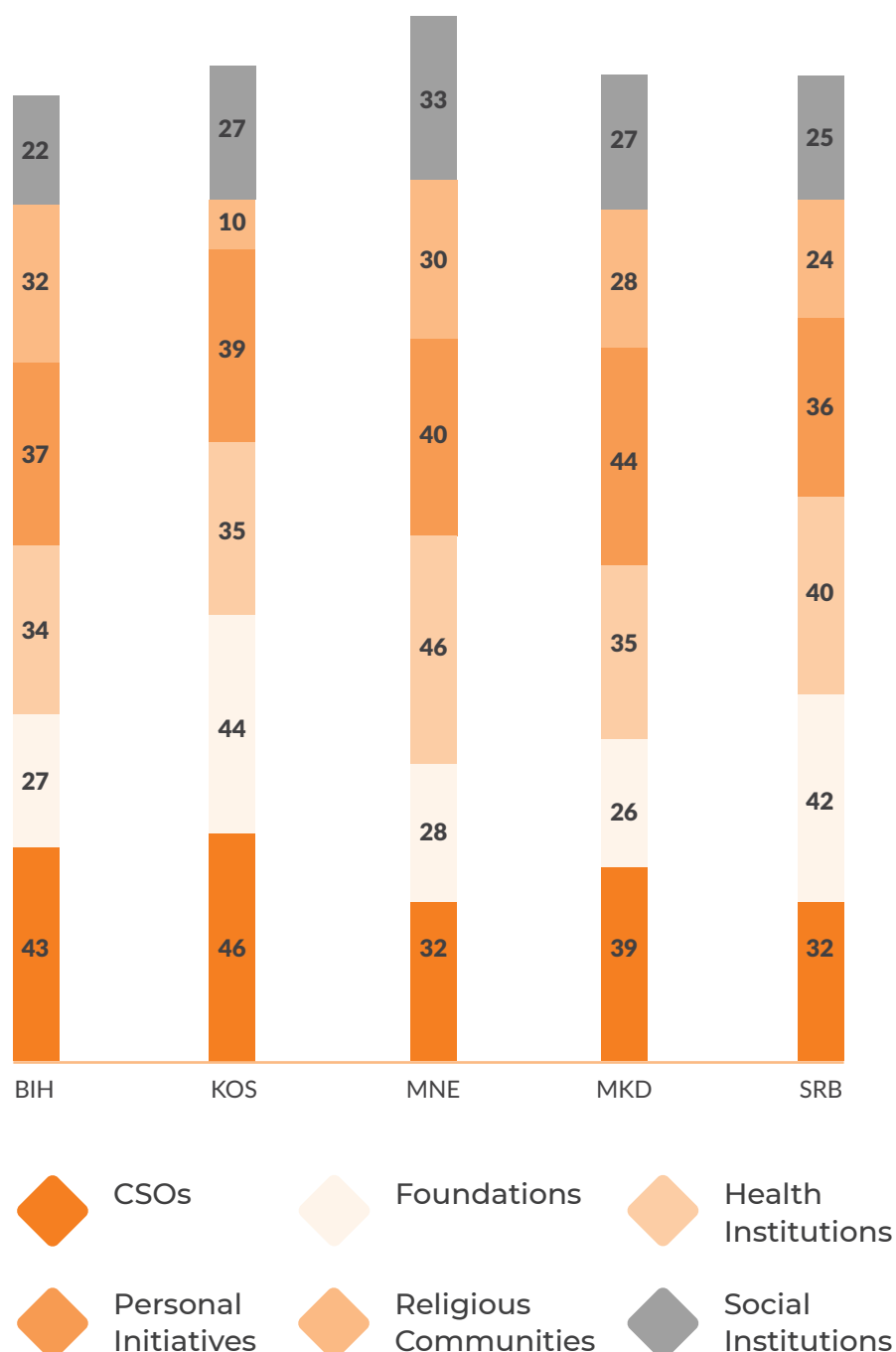
One of the explanations might be that people prefer to use the ways they are used to, and while they are aware of other possibilities, they are not quite ready to use them.

Findings

- The feeling of doing something good is the most prevalent reason that motivates people to support various philanthropic actions. The second reason, in all countries except Kosovo is the importance of the problem.
- The biggest barrier to giving the general public across all countries expresses is their own lack of means, which is followed by lack of trust in all countries.
- In Bosnia and Herzegovina and Kosovo, tax incentives would have significant influence on the choice to give; however, opinions in other countries are pretty much divided.
- As for other factors that can speak to motivation, there is no significant difference when it comes to a choice between giving to local action and action of more general nature, although in North Macedonia and Bosnia and Herzegovina a greater preference was given to actions of a general nature.
- The general public most prefers giving on site directly at events as their method of giving, followed by SMS and depositing money through a bank account.

2.5 TRUST

Q) If you were to support fundraising initiated by the following organizations and institutions, who would you support first?



While this question is not directly mentioning trust, the choice of who the general public would support is somewhat connected with whom people trust. While the results across all countries shows a fair level of variance, the priority ranking includes personal initiatives, CSOs, health institutions, foundations, social institutions and religious communities.

However, when looking at the preference per country, the table below shows the top three recipients that the general public would support per country:

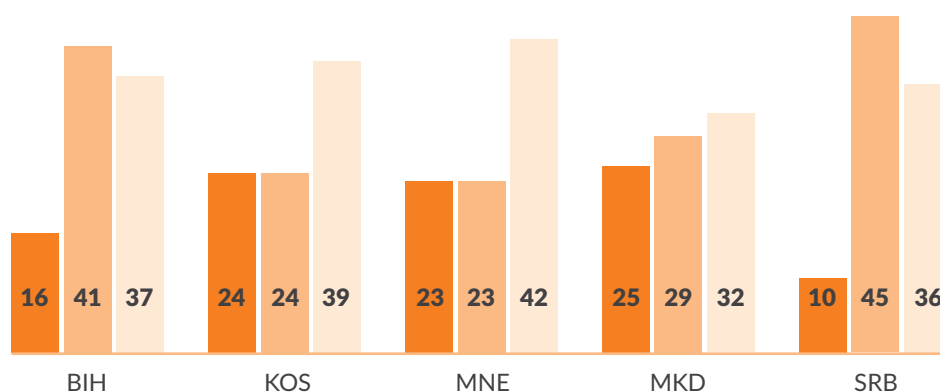
	BIH	KOS	MNE	MKD	SRB
1)	CSO (43%)	CSO (46%)	Health institutions (46%)	Personal initiatives (44%)	Foundations (42%)
2)	Personal initiatives (37%)	Foundations (44%)	Personal initiatives (40%)	CSO (39%)	Health institutions (40%)
3)	Health institutions (34%)	Personal initiatives (39%)	Social institutions (33%)	Health institutions (35%)	Personal initiatives (36%)

Personal initiatives are in top three choices for the general public of all countries. Health institutions seem to be among the first three in all countries except Kosovo. CSOs would be the first choice for respondents from Bosnia and Herzegovina and Kosovo, and the second choice for those from North Macedonia, but are not in the top three in Montenegro and Serbia. Foundations are second choice in Kosovo and first in Serbia but are not in the top three in other countries. Finally, social institutions are in third place in Montenegro, but not among the first three in any other country.

Interestingly, religious communities are not among the top three choices in any country. However, they are most preferred in Bosnia and Herzegovina, followed by Montenegro, North Macedonia, Serbia but hold an extremely low position in Kosovo. It is also interesting to note that this placement corresponds with the general public opinion on religious organizations/communities when they were asked who gives the most.

The proportion of those who think that money is never or rarely misused and those who think that this happens often or always is quite similar in Montenegro, Macedonia, and Kosovo. In these countries, the greatest proportion of the general public believes the raised money to be occasionally misused. On the other hand, most of the general public of Bosnia and Herzegovina and Serbia consider these funds to be often or always misused.

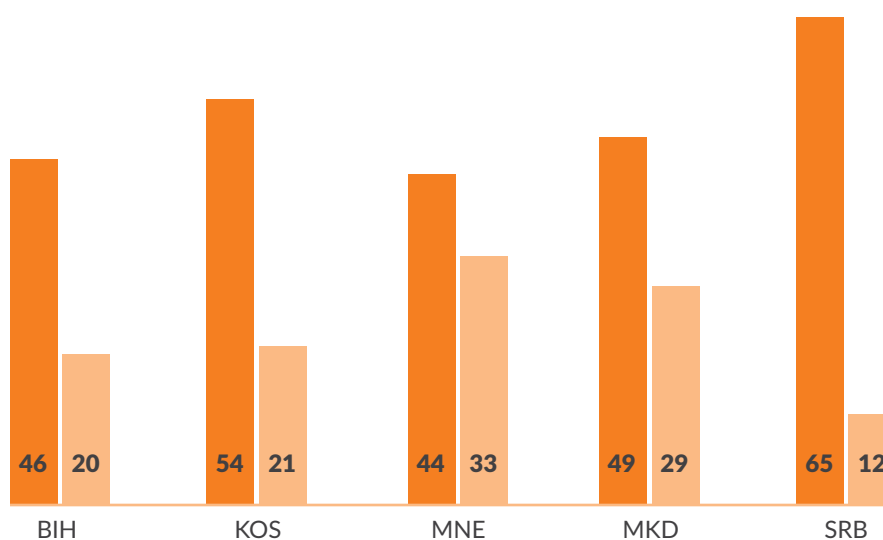
Q) In your opinion, how common is it that money raised in activities aimed at common good is misused? (%)



A) "Never or rarely" "Often or always" "Occasionally"

In all countries, a significant percentage of the general public feel that it is quite important for them to be informed about the amount raised, spent and the final results of the activity. However, that percentage is highest in Serbia which is consistent with their attitude throughout the survey when the question of trust arises (see previous graph – misuse of money and section 2.4. motivation in correlation with distrust). It is also high in Kosovo, and then hits a similar level, slightly below 50%, in North Macedonia, Bosnia and Herzegovina and Montenegro.

Q) How important is it to keep informed about the sum of money raised, about how it was allocated, and about whether the aim of the activity was accomplished? (%)



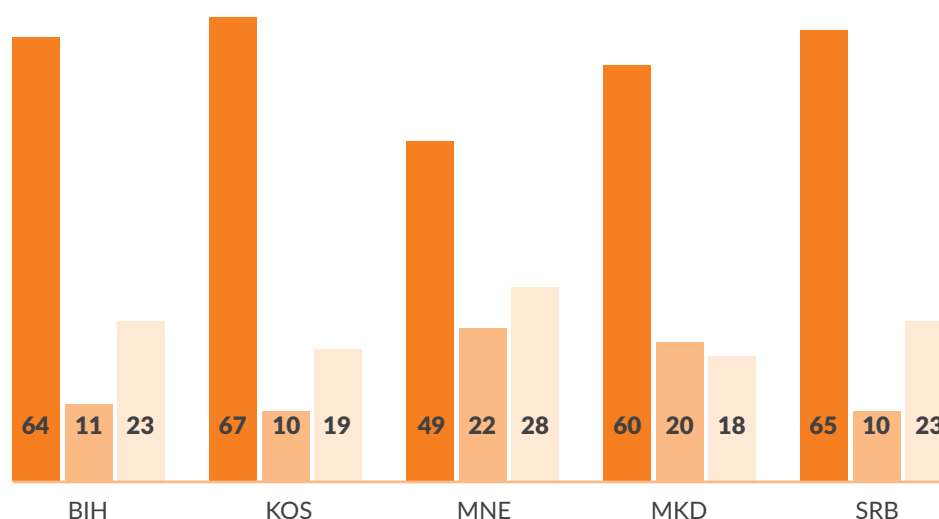
A) "Important" or "Very important" "Not important" or "Low importance"

Findings

- In all countries, personal initiatives are among the top three choices for whom the general public would support.
- Health institutions are also among the top three in all countries except Kosovo.
- CSOs are among the top three in three countries, but not in Montenegro and Serbia; while foundations rate best in Serbia and Kosovo.
- Religious communities, while not in the top three choices in any country, rates best in Montenegro and lowest in Kosovo.
- Distrust and the belief that misuse of funds happens often or always is the highest in Serbia followed by Bosnia and Herzegovina, while the general public from Kosovo, Montenegro and North Macedonia are more optimistic and think that misuse happens occasionally.
- The Serbian general public are consistent in their mistrust, as 65% of them feel that being informed about all aspects of the action is important or very important. The general public in Kosovo follow, as do, in a somewhat smaller measure, the general public of North Macedonia, Bosnia and Herzegovina and Montenegro.
- In all countries, the majority of the general public (over 60%) would be willing to give money in the future.
- Across all countries, the readiness to give up to 10 EUR per individual action is most commonly expressed. Additionally, one-fourth of the Bosnian general public are ready to give between 11 and 30 EUR. A general observation is as the sum of giving per individual action goes up, the percentage of the general public ready to give that amount reduces.

2.6 EFFECTS - IMPORTANCE

Q) In your opinion, how relevant are donations of common citizens, how much can they help society? (%)



A)  "Very" or "rather much".  "No" or "little".  Indecisive

Across the countries, the general public feel that their donations are relevant and that they can help society a great deal, with slight exception of Montenegro, whose general public are most pessimistic. Still even in Montenegro, percentage of the general public that have a positive view towards the relevance of donations from common citizens is nearly 50 percent.

In addition, the majority of the general public across all countries feel that if everyone gave what they could, big enough amounts could be raised to make the needed change, with the highest percentage of this believe being recorded in Bosnia and Serbia. In somewhat lower percentages, the feeling it would never be enough was expressed (most significantly in Montenegro), and about one fifth of respondents in each of the countries believe that only the wealthy can give enough to make a change.

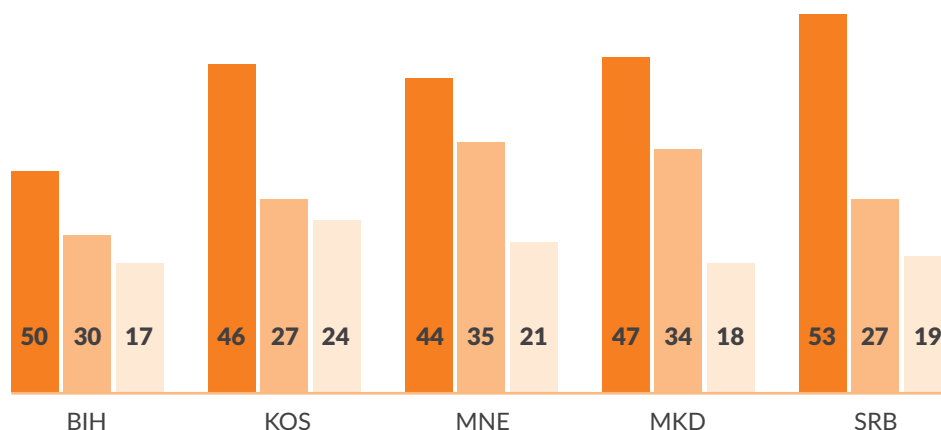
Q) Which of the following statements reflects best your attitude towards donations of individuals for the common good?

Both of the above questions and their similarity of answers across the countries demonstrate a very positive picture of a general public who for the most part believe that they can make a change and are in a sense ready to take responsibility.

Finally, when asked about their opinion on what would encourage donations and what are the main barriers, the general public in all countries are quite unified in their opinions.

Respondents said that more information, better control of activities and official reporting on results (that is, independent reports that some actions yielded the results intended) would all encourage a greater level of donations. Other reasons mentioned included education about the importance of giving, stimulating measures and to a lesser extent, simpler procedures.

Q) Who can make a change? (%)



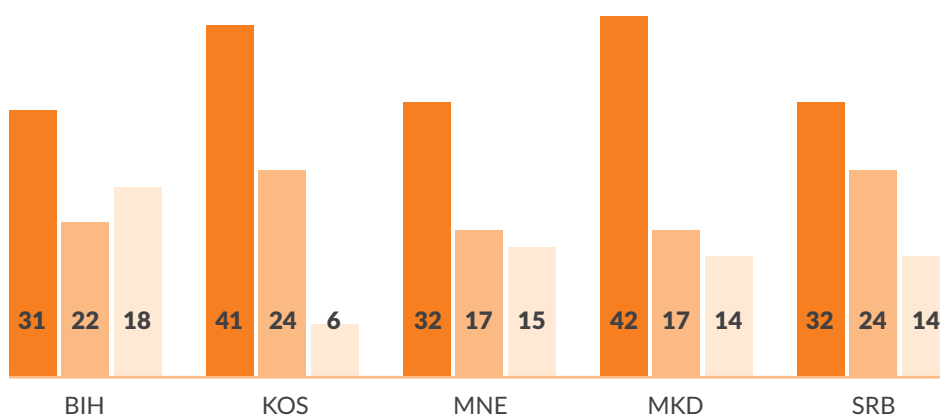
A) "If everyone gave as much as he could, however little that may be, a big enough sum could be raised to contribute to changes for the good."

"Common citizens can help somewhat but it is never enough."

"Only wealthy individuals can give enough money to make donations relevant."

As in some earlier answers, the financial situation is seen as a key barrier; to a smaller extent, people being occupied with other problems and the belief that control over how many is spent is not possible are two other barriers. Among other reasons mentioned are the lack of a culture of giving, lack of information, lack of good organization/results, and the lack of measures to stimulate giving.

Three key factors to encourage people to give more (%)



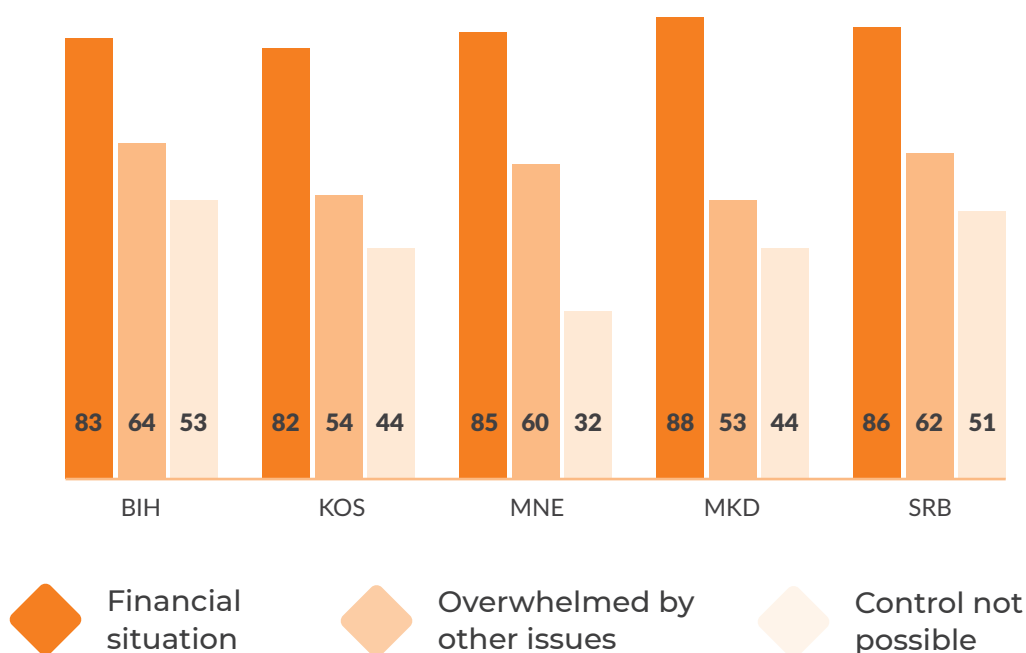
More information

Better control of activities

Official reporting about results

Overall, while the respondent's financial situation is always mentioned as a barrier, when compared with the opinion of the general public that if everyone gave what they could the change could be made, it is fairly possible to conclude that finances are not the real obstacle. In fact, more information - both on actions as well as the results - coupled with building a culture of giving and education could be the way forward in increasing the percentage of those who give and who feel that they are able to make a change by giving.

Three key barriers for people to give more (%)



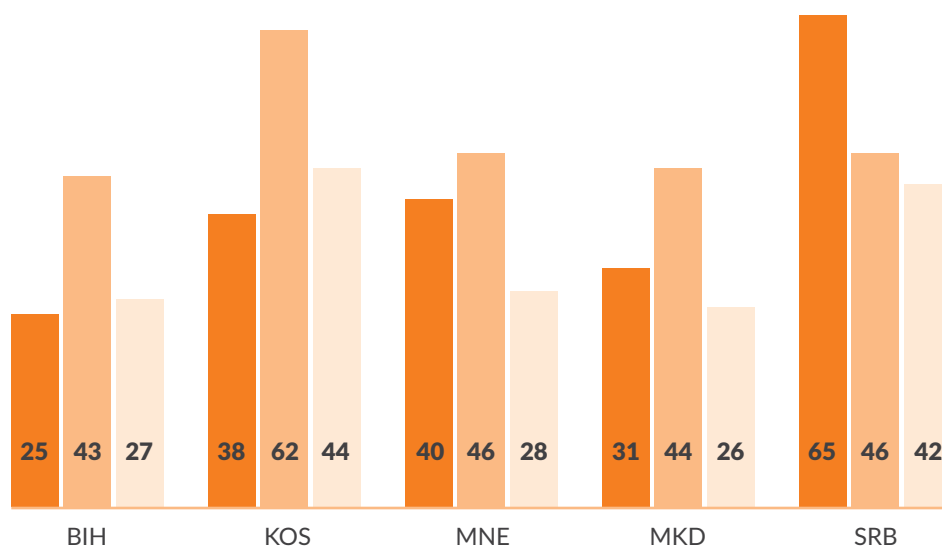
Findings




- In four countries, the percentage of the general public who believe that their donations are relevant and can really help is over 60%; in Montenegro, that percentage is 49%, which is still high.
- In all five countries, the majority of the general public (between 44 and 53%) think that if everyone would give what they could, a big enough amount could be raised to make a change.
- Both of these findings show that the general public have confidence that they can make a change with their donations.

2.7 COOPERATION WITH FOUNDATIONS

In looking at citizen's perception toward foundations, we combined answers to several questions. First graph shows answers on the following questions:

- Q) Have you heard of any foundations that help activities aimed at common good?
- Q) Would you be willing to donate money to a foundation that would allocate it for the common good?
- Q) If you were to support raising funds initiated by the following organizations and institutions, who would you support first?



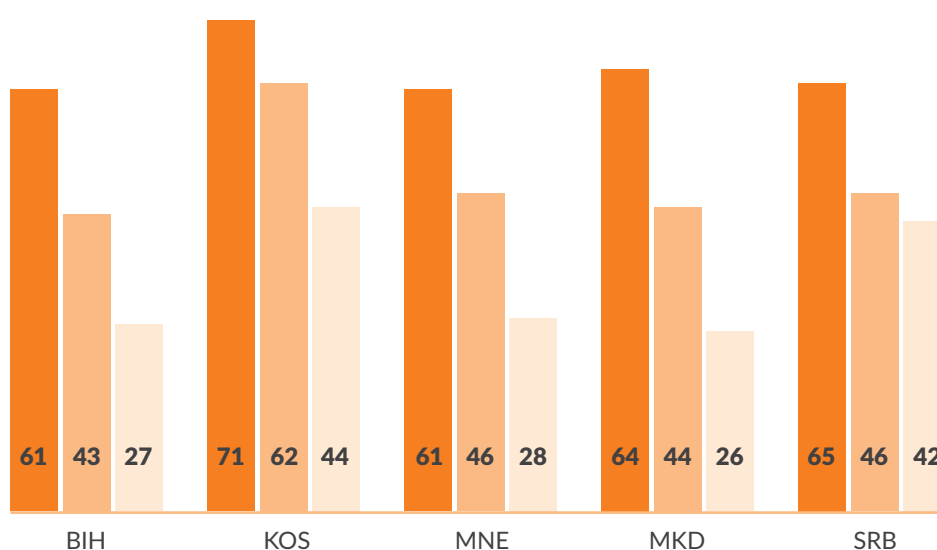
- A)  % heard about foundations
-  % willing to give money to a foundation
-  % that would give money to a foundation among other recipients




In Bosnia and Herzegovina, Montenegro and North Macedonia, while the percentage of those who heard about foundations varies from 25 – 40%, the percentages of those who would give money to foundations is relatively similar (around 45%) as is the percentage of those who would choose foundation among all other recipients (around 26 – 28%). In Kosovo, the percentages are quite higher: 62% of respondents would give to a foundation and 44% would choose a foundation from among other recipients, even though 38% had actually heard of a foundation that supports common good. In these countries, it seems that familiarity with foundations is lower than the percentage of those who would be willing to give money to or would select a foundation to give to over other recipient types.

In Serbia, however, the familiarity with the work of foundations is by far the highest (65%); but then the percentage of those who would give to foundation (46%) and those who would choose a foundation among other recipients (42%) comes in lower than the level of familiarity.

College-educated respondents have heard of foundations at a significantly higher level than others, with the stark difference from other groups found in North Macedonia (18% difference), Bosnia and Herzegovina (12%) and Serbia (10%). Same is true for urban populations, who have heard of foundations more than rural populations; the largest discrepancy of 17% is found in Bosnia and Herzegovina. The second graph compares the following questions:

- Q) Do you think that organizations or foundations that help activities aimed at common good should be financed by citizens' donations?
- Q) Would you be willing to donate money to a foundation that would allocate it for the common good?
- Q) If you were to support raising funds initiated by the following organizations and institutions, who would you support first?



- A)  % who believe that citizens should fund foundations fully or partially
-  % willing to give money to a foundation
-  % that would give money to a foundation among other recipients

The results are encouraging in the sense that across the countries, between 61% and 71% of the general public agree that foundations should be funded fully or partially with their donations.

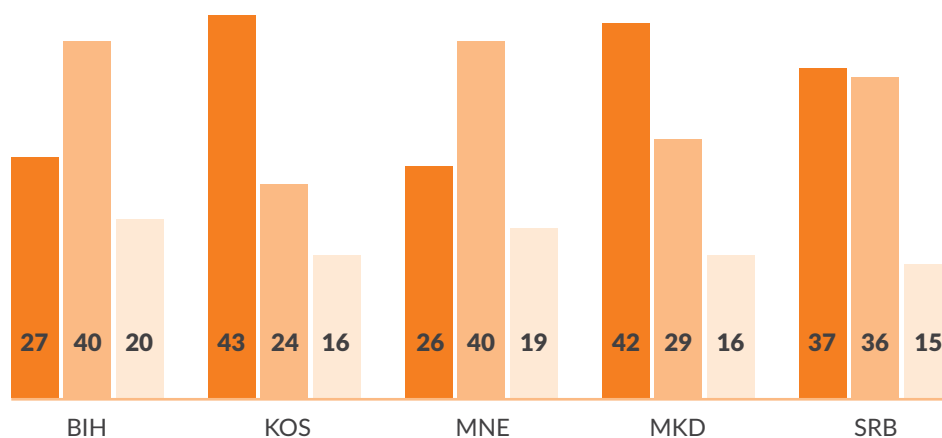
On the other hand, when that percentage is compared to the percentage of those who would be willing to give money to a foundation, the difference is 9% in Kosovo and between 15-20% in other countries. In all countries except Serbia, the percentage of those who would be willing to give to foundations and those who would choose a foundation among other recipients differs again by 15 – 20%. This just confirms that, while the support for the work of foundations is significant, there is more work to be done to turn that moral support into monetary support from citizens.

Serbia is an outlier in this regard, where percentage of those who feel that foundations should be supported by the general public's donations is the same as the percentage of those who are familiar with the work of foundations.⁶ In Serbia, male respondents would opt to support foundations 9% more than female respondents would, which is not the case for other countries where differences are minor. When we add to that the results of the first comparison between percentages of those who would be willing to give money and those who would support the foundation among other recipients, it seems that one possible conclusion is that higher familiarity with the work of foundations may be reflected in more stable financial support to their work.

As for the perceived advantages of giving money to foundations, the general public in Bosnia and Herzegovina and Montenegro rely on the professionalism of the people working in foundations; in Kosovo and North Macedonia they think foundations provide security in terms of how money is used, while in Serbia people are split relatively evenly between these two reasons. Saving time and effort is a significantly less important reason to trust foundations with their money.

Q)

The advantages of giving money to foundations? (%)



A)



"I could rest assured that money would be delivered where it should be."



"I am not sure who to donate money to, so professionals would decide for me."



"I wouldn't have to invest time and effort, because someone else would do it for me."

⁶ Compared to the public opinion survey on philanthropy conducted by Trag/IPSOS in 2012, the percentage of Serbian citizens willing to donate money to a foundation that would allocate it for common good has increased from 30% to 46%.

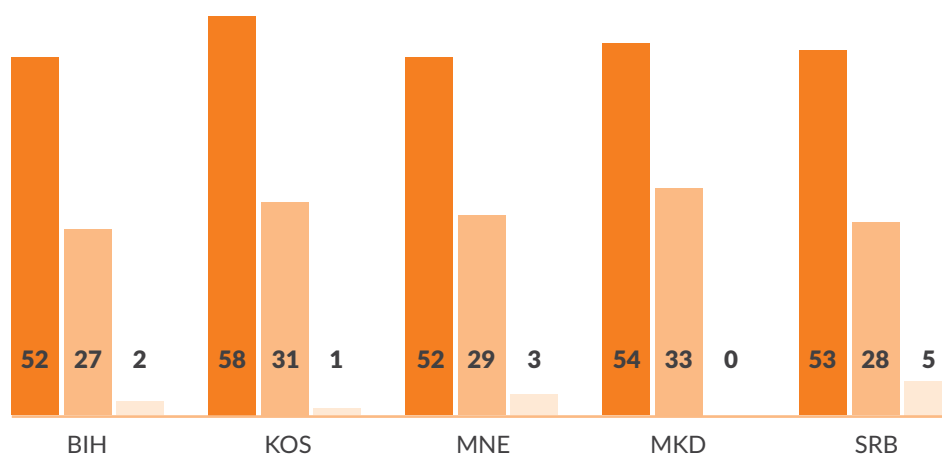
Findings

- Familiarity with the work of foundations is by far the highest in Serbia (65%), around 40% in Montenegro and Kosovo, and lower in North Macedonia and Bosnia and Herzegovina.
- Willingness to give money to a foundation is between 43 – 46% in all countries, except in Kosovo, where more than 60% of the general public are ready to donate.
- Belief that foundations should be financed through the general public's donations is rather high: over 60% in all countries.
- However, except in Serbia, there is no clear correlation between these findings in each of the countries. In Serbia however, percentage of people who are familiar with the work of foundations is exactly the same as percentage of people who believe that foundations should be supported by citizen's donations.
- Moreover, unlike in other countries, there is a very small difference between the percentage of those who are willing to support the foundation and who would choose a foundation among other recipients.
- This speak to the possible conclusion that the higher familiarity, the more stable support could be expected.

2.8 SOURCES OF INFORMATION

Several questions were asked related to the sources of information used by the general public to gain knowledge on giving for common good. The below chart highlights the key answers to the question:

Q) How, from which source, do you usually get informed about activities aimed at common good? (%)



A)  Electronic Media  Web & Social Networks  Print Media

Electronic media are the primary source of information for 52 to 58% of the general public, with Kosovo respondents using this source the most and Bosnia and Herzegovina and Montenegro less so.

Around one third (between 27 and 33%) of the general public use websites and social networks as a primary source. Greatest use of websites and social media is recorded in North Macedonia and in Bosnia and Herzegovina, the least frequent use is recorded.

Print media seems to be least common source of information for the general public about activities related to the common good, being a source for between 0% and 5% of respondents. North Macedonia respondents do not use print media as a source at all for information on activities for the common good, while 5% of the general public in Serbia use print media as a source.

In all countries, between 4 and 5% get their information directly from the organizer.

Trust in media is rather high: from 41% in Bosnia and Herzegovina and Serbia to 47% in North Macedonia, and 51% and 56% in Montenegro and Kosovo, respectively.

There is also a stark difference between women (60% of respondents) and men (45% of respondents) when it comes to using TV as a source, which is not found elsewhere in such size.

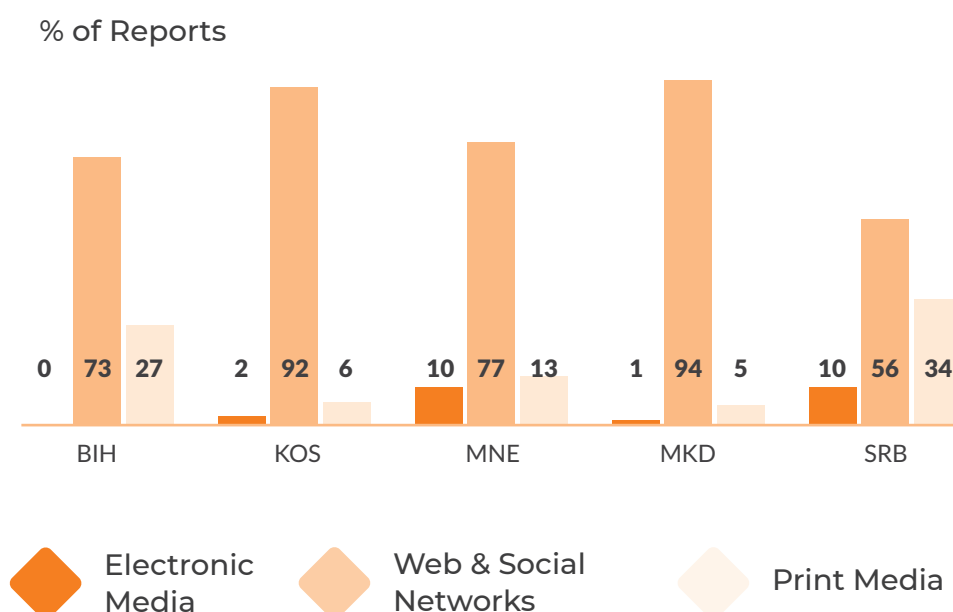
The Giving Balkans database of recorded donations uses press clipping as one of its major sources of information. As such, statistics on which sources of media are most commonly mentioning activities related to the common good are readily available.

It is interesting to note some startling differences between what the general public says is their primary source of information on activities for common good and where the Giving Balkans sources its information on giving.

While around one third of the general public use websites and social networks as a source, the percentage of recorded donations in those sources is significantly higher: over 90% in Kosovo and North Macedonia; between 70 – 80% in Bosnia and Herzegovina and Montenegro; and 56% in Serbia.

The percentage of recorded donations that come from print media run between 5 and 34%, and is notably higher in Bosnia and Herzegovina and Serbia in contrast to where the general public say they source their information.

Additionally, electronic media are rarely a source for recorded donations, yet serve as the primary source from which citizens source their information on giving for the common good.



Findings

- Across countries, 52 – 58% of the general public use electronic media (primarily TV) as their source of information on activities related to common good.
- Similarly, between 27% - 33% of the general public rely on websites and social media as their sources.
- A very small percentage (between 0 – 5%) use print media as their source.
- These results coupled with the information that in all countries only 4-5% get their information directly from the organizer speaks strongly to the need for philanthropic organizations to change the way they inform the public about the actions. There is no doubt that the web and social networks will become more and more the source to be used; still, given that trust in media is rather high, electronic media, primarily TV is going to be the main source of information for years to come.

3. RECOMMENDATIONS

3.1 RECOMMENDATIONS

For those in the Western Balkans who have an interest in seeing philanthropy continue to be developed throughout the region, the opportunity to conduct this survey and to do so with the same instrument at the same time with is priceless. Not only do the results from individual country reports serve as a weathervane for how the understanding of philanthropy has grown, but also create a foundation for understanding key areas that could be addressed better or more broadly moving forward.

The purpose of this comparative analysis was to lay out the learning gained from comparing the survey results from 5 countries with one another. But a secondary opportunity lies in presenting a set of recommendations for what the sector together can do to improve understanding of philanthropic concepts among the general public, increase the awareness of the roles of different actors within the ecosystem, and continue to instill a greater sense of responsibility and agency for being able to make change happen through the sharing of resources and the giving of time and money.

Catalyst Balkans has clustered its recommendations in seven areas: general, government, citizens, companies, media, civil society, and for further research. These recommendations highlight opportunities rather than shortcomings and assume that all actors in society want and should work together to improve the environment for, understanding of, and engagement in all forms of philanthropy to create an improved society.

GENERAL

- 1) To consciously increase the levels of engagement, connectivity, and dialogue on topics related to philanthropy and increase the conversations between people on what philanthropy is and what it means to each person. By creating shared understanding about what philanthropy is can lead to greater levels of collaboration between demographic strata and types of actors on how philanthropy is done.
- 2) To embrace messages of inclusiveness and agency when privately and publicly speaking about philanthropy. Philanthropy is empowering; philanthropy is about the individual choosing to engage with the collective to make a difference, philanthropy is about we and not about them. An increased shared understanding of 'our' responsibility, 'our' opportunity to make a difference, and 'our' conscious choice to engage in building a better society can result in higher quality impact and in increased levels of collaborative giving.
- 3) To broaden the scope of what one individual, one company, one organization can do to build a better society. The giving of money is indeed of primary importance, but increasing the understanding and acceptance that giving of one's time through volunteering, one's networks and connections, and of one's already existing resources can make just as much of a difference.
- 4) To expand the understanding that each actor in society plays a number of key roles, many of which overlap with other actors. Yet, primary roles of each actor can be supported through the consumption, advocacy, and engagement practices of other actors. Government can

be encouraged to create a more favorable environment for philanthropy when citizens, companies and civil society advocate for it more frequently and more effectively. Philanthropy will be covered more often and more prominently by television media if citizen consumers engage with the media and seek that coverage and if civil society increases its ability to provide better, more compelling stories that make for good television.

TO GOVERNMENT

- 1) To actively engage in providing incentives for citizens and companies alike to be engaged in strategic forms of philanthropy that address the societal causes of existing problems while also alleviating the existing symptoms of those problems.
- 2) To bring together actors across all society to promote the values and positive image of philanthropy. PR campaigns, public acknowledgements, and strategic communications that communicate the value of cross-sector partnerships in achieving change for common good resonate throughout society and can increase.
- 3) To better leverage the understanding of government as accountable to its people and indeed being comprised of its people as a way to actively include citizens in campaigns for common good that pool private and public resources for making change. Government is then seen as a pro-active catalyst for positive joint action rather than as the unresponsive, yet responsible entity that should be worked around in order to achieve change.
- 4) To better contribute to building trust between potential donors and recipients by modeling financial, programmatic, and impact transparency in the work of government, as it engages with philanthropic issues.
- 5) To smartly build a more accountable regulatory system of transparency for all stakeholders that encourages ethical fundraising, incentivizes giving, and ensures the accountability of recipient organizations and institutions to their donors.
- 6) To actively partner with other actors to understand what modifications to existing legal and regulatory framework would result in a more enabling environment that will increase giving of financial and non-financial resources.

TO CITIZENS

- 1) To increasingly recognize their primary role in shaping and driving philanthropy as both a donor and a sometime recipient.
 - Citizens can hold government accountable and advocate for policy and fiscal change.
 - As consumers, they can shape the CSR and corporate philanthropy policies by making choices in how to use their wallet and in providing feedback to companies about what is important to them.
 - Viewers and readers can let media outlets know what their audience expects of them and can seek coverage of more positive human feature stories that profile best practices and impacts found in philanthropy.
 - As constituents and community members, citizens can volunteer and give financial and moral support to civil society organizations, but can also seek accountability, input and responsive development from the civil society organizations that are, after all, an outgrowth of a constitutional right to association and a core building block of any healthy society.
- 2) To more frequently take advantage of opportunities to give when presented with a call to action. Giving more frequently, even in smaller amounts, increases awareness and widens a shared culture of giving, which in turn increases the visibility of and trust in philanthropic actions.
- 3) To give more visibly and not just in terms of financial giving. Giving of one's support on social media and spurring family and friends and community members to action is just an important form of visible giving as the giving of financial resources. Time and networks have as much inherent value, and when given visibly can spur others to give more and give better.

TO COMPANIES

- 1) To provide increased opportunities for collaborative cross-actor giving through broadened usage of best practices in cause-related marketing, consumer voting for community projects, point-of-sale round up schemes, loyalty point donation, affinity card, employee volunteering and matched giving programs, and donation box placements in stores.
- 2) To leverage the in-house consumer market research, marketing, PR and CSR skillsets to craft and deliver more meaningful messages that go beyond brand identity and that build trust, a sense of belonging and community among all actors for a shared sense of responsibility, and for a better society.
- 3) To demonstrate transparency in corporate giving and thus build trust by creating open calls for proposals, and publicly disseminating allocation choices and impact reports to

increase the understanding of both the reach and depth of corporate giving in and among the communities they serve.

- 4) To advocate both locally and nationally for an improved enabling environment and to urge the trade, industry, business and professional associations of which they are members to work together towards common solutions for an improved environment for philanthropy.
- 5) To better listen to their community members and to find ways of demonstrating a responsiveness that shows the corporate sector to be just as much about being a good corporate citizen as it is about building a brand or making a sale; this form of community feedback loops encourages trust, a deeper and more pervasive form of brand identity than that which name recognition achieves.

TO MEDIA

- 1) To better utilize the power of their medium to promote solidarity, identify solutions and facilitate the bonds of society through choosing solution-based journalism approaches and increasing the coverage of human-interest stories that highlight opportunities for other actors in society to help be a part of the solution.
- 2) To increase the level of objectivity and thoroughness in reporting on instances of philanthropy or opportunities for giving. Increasing the level of information in a story to include who, what, when, where, why, how, and how much gives the audience more of an opportunity to engage. Printing or displaying ways to donate (bank account numbers, web site URLs, drop-off points, phone numbers) has been shown to exponentially increase the levels of resources raised based on media coverage.
- 3) To increase the educational and informational outreach of their media to engage their audience in topics related to the how and why of philanthropy and thus educating them to be better and more engaged members of society.
- 4) To disaggregate the marketing components of the media from the human interest and news components of the media business; whereby recognizing the societal value of increasing coverage of corporate philanthropy to spur further growth in the sector as a whole.

TO CIVIL SOCIETY

- 1) Be the change you want to see. Embrace community engagement. Practice transparency. Build cross-actor partnerships. Tell better stories. Share impact. Never fail to call others to action.
- 2) To better understand that civil society has citizens as their primary stakeholder and the best way to build awareness about the role of civil society and to increase trust in civil society is to improve the relationship with the citizens in their community. Build feedback loops, provide opportunities for volunteering, hold open houses, and ask your constituents what they want, need and expect from you.
- 3) To increase advocacy efforts with the corporate, media and government stakeholders to create a more open, trusting, transparent and enabling environment for philanthropy.

Advocacy is not limited to just laws and regulations, but also for improved practices, behaviors, and decision-making processes.

- 4) To improve skillsets in direct fundraising from individual and corporate sources; better calls to action, easier mechanisms for giving and communication of results and impact back to donors. All of this contributes to improved resources, higher visibility and increased levels of trust.

FOR FURTHER RESEARCH

- 1) To continue conducting biannual public opinion polls in each of the countries in order to create a trend continuum for the region that coupled with the recorded giving data records will provide a broad and deep snapshot of the state of philanthropy in the region.
- 2) To conduct purpose-specific qualitative interviews which aggregate purpose of donation, use of donation, and final beneficiaries to understand how the public makes choices and what specific ideological preconditions exist, both by region and by affiliation on the “political compass.” Based on this research, it would be possible to index and map the acceptability of topics by country, by region and by community.
- 3) To carry out qualitative follow-up with identified donors to work towards the development of donor personas that can be used by nonprofit organizations and institutions to send messages that resonate with potential donors.
- 4) To examine through quantitative and qualitative methods the corporate and small and medium enterprises subset of donors. To understand more deeply what motivates companies to give and to begin to track the changing opinion of the corporate sector stakeholders over time.
- 5) To perform opinion surveys among individuals engaged in nonprofit organizations and conduct cross-indexing by role (from directors to volunteers) to see where the members of this sector are both similar and different from the views of broader public opinion. This may help the sector to better understand how some in the nonprofit sector may be reacting to the wrong cues and/or may help those engaged in the non-profit sector to help the nonprofit proactively set key topics.
- 6) To carry out more detailed analysis of media publications per topic, which would show where the public and the media (mis)align, and where the media define the agenda.
- 7) To analyze the effect of negative reporting on public opinion, and the topics (e.g. healthcare) where negative reporting is prevalent. Similarly, analyzing the effect of “moral outrages” on philanthropic giving (i.e. donations when one is outraged by a story or an event; donations reactive to salient cues).

4. ANNEXES

4.1 LIST OF RESOURCES

- 1) Survey on philanthropy in Bosnia and Herzegovina, Kosovo, North Macedonia, Montenegro and Serbia (per country and comparative presentation), Ipsos, 2018
- 2) Giving Balkans recorded giving database (www.givingbalkans.org), Catalyst Balkans, 2018
- 3) Quick Facts – Annual Reports on the State of Philanthropy in 2018 for Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia, and Serbia, Catalyst Balkans, 2018
- 4) Global Philanthropy Environment Index 2018, GPEI European Edition, IU Lilly Family School of Philanthropy

