

***People on the Move, Lives on Hold:***  
**A Mapping of Donors Active in the Western Balkans**  
**(2016-2019)**

**September 2019**

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## Addendum: Country Summaries

# 1 Summary

This mapping study was commissioned on the request of Open Society Foundations/OSIFE - Office of the Western Balkans and was designed to contribute to discussions at a Balkan Donors Forum meeting planned for 16-17 September in Skopje, North Macedonia.

The study examines institutional donor engagements in 6 countries: Albania, Bosnia & Herzegovina, Kosovo, North Macedonia, Montenegro and Serbia and consists of two core documents, a regional overview and an Addendum that provides information on country-level specificities. It also explores recent and future donor engagements in the region, views of donors and key stakeholders on key issues and potential recipients of funds in the next 5 years and offers a chance to compare results with a similar study presented at a 2016 Balkan Donors Forum in Belgrade.

The study cannot be seen to present a complete picture of donor activities in the region, but its findings can provide an indication of trends and views across the region.

Particularly noteworthy may be the number of institutional donors found to have been active in the region in the period 2016-2019: 203. This figure excludes private sector giving (corporations and corporate foundations) as well as 21 additional donors identified from the Arab States, China, Russia and Turkey.

The themes most commonly supported by the 203 donors in this period are Rule of Law, Economic Advancement and Education, although some variation in top themes does appear when we look at individual countries. Other themes in which donors frequently fund are Social & Economic Justice, Sustainable Development, Citizen's Activism & Initiatives, Human Rights and Civil Society Strengthening. The principal recipients of funds from the donors surveyed are CSOs, followed by the State (local and national).

By comparison, donors from the Arab States, China, Russia and Turkey were found to be funding principally in the areas of Education, Economic Advancement and Public Health. The vast majority (90%) of these donors provide funding to the State (compared to just under 62% among the larger group of donors).

Questions put to both donors and country-level stakeholders in the course of the mapping revealed where they see opportunities for the region, as well as a number of funding gaps and areas where adjustments in donor approaches would be beneficial.

Despite the very challenging problems facing the region, perhaps the strongest message - heard from donors and stakeholders alike - was the opportunity and hope to be found in the recent increase in grassroots civic activism, sometimes informal or issue-based, sometimes taking the form of movements. These are viewed as signs of increasing citizen engagement in public life and as a dynamic that CSOs and donors need to learn from, reach out to and support in appropriate ways.

For stakeholders from the region, education and improvements in the economy are essential areas for further work, not only over the long-term, but also to reverse the very immediate, growing and increasingly debilitating departure of young people in search of better opportunities elsewhere. Among the donors completing the survey the most common priority was the further strengthening of CSOs.

To achieve the systemic change needed to improve education, opportunities for economic advancement and other key areas, stakeholders felt that donor coordination and collaboration, increased communication between donors and CSOs as well as donor encouragement and support for governmental-CSO or multi-sectoral initiatives were needed.

Other proposed adjustments include:

- Improving the design of interventions through needs assessments and other forms of data and information gathering;
- Seeking partners among domestic organizations rather than large, external organizations or agencies;
- Exploring how re-granting can be complemented by other means of outreach to smaller CSOs outside of main cities and how rules on re-granting can be made more flexible to permit the largest impact.

Lastly, the private sector was explored and found to be most active in supporting marginalized groups, health and education. There are also signs that corporate donors are willing to work with CSOs over the long-term and collaboratively where they find common ground.

**Author's note: The detailed findings of the mapping study will be presented at a session of the Balkan Donors Forum conference in September 2019. It is hoped that elements of the study will also be useful for discussions in other conference sessions as well as for future discussions among donors.**

## 2 Introduction

### 2.1 Background of the study

This mapping study was commissioned on the request of OSIFE - Office of the Western Balkans. It was designed to contribute to discussions at a Balkan Donors Forum meeting planned for 16-17 September in Skopje, North Macedonia. It examines institutional donor engagements in 6 countries: Albania, Bosnia & Herzegovina, Kosovo, North Macedonia, Montenegro and Serbia and consists of two core documents, a regional overview and an Addendum that provides information on country-level specificities.

The study explores recent and future donor engagements in the region, views of donors and civil society on key issues and potential recipients of funds in the next 5 years and offers a chance to compare results with a similar study presented at a 2016 Balkan Donors Forum in Belgrade.<sup>1</sup>

The 2019 study will be shared with donors involved in the research and attendees of the Balkan Donors Forum on 16-17 September 2019 and will be discussed in a Forum session.

The study's research questions and approach were captured in a Terms of Reference agreed with OSIFE - Office of the Western Balkans. This document specified that the study would focus on the work of private foundations, bilateral and multilateral donors as well as private sector donors (companies and corporate foundations).

**The objective of the assignment** was to seek responses to 5 key questions:

- 1) Which donors are currently present in the Western Balkans?
- 2) Overview of funding (issues, type of initiatives, overall size of annual funding, etc.) that mapped donors currently provide/d?
- 3) Which of the identified donors have a strategic interest to remain in the next period (5 years)?
- 4) Overview of the issues and, if possible, available funding for the next period
- 5) Approaches and strategies of donors

The period to be investigated was 2016-2019 (past and current funding) and 2020-2024 (future funding).

The research team was asked to pay particular attention to identifying new or less widely-known donors in the region, including those from the Arab States, China, Russia and Turkey. It was likewise agreed that donor views regarding needs, type of actors to be supported and examples of particularly effective or innovative practices in funding would be complemented by and compared with the views of a group of key stakeholders in each country.

To ensure the confidentiality of all respondents, the report does not attribute comments or quotes nor does it identify specific donor interventions.

***We thank all donor representatives and stakeholders who took part in the study!***

***Additional thanks are due to Catalyst Balkans for allowing us to use GivingBalkans™ data and to Tomas Bueno Momcilovic in particular for his very able assistance.***

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<sup>1</sup> It was agreed that comparisons with the 2016 report would be restricted to striking shifts (if any).

## 2.2 Methodology

The mapping involved a combination of desktop research, a survey and interviews. Desktop research included publicly available documentation for all countries. Findings from the desktop research were compiled and compared with the results of a survey presented to an initial list of invitees to the September 2019 Balkan Donors Forum and a few other donors, using a questionnaire agreed with OSIFE – Office of the Western Balkans. A selection of surveyed and additional donors and a group of stakeholders from each country were interviewed to gather their views.

The types of donors examined in the study are:

- private foundations: originating from outside the region as well as domestic foundations,
- bilateral donors: government funds principally from European governments and North America
- multilateral institutions involved in grantmaking (as opposed to those solely providing loans or other forms of financing)
- private sector donors such as corporations, small and medium enterprises (SMEs) and corporate foundations.

**Desktop Research:** Lists of donors from each country compiled during the 2016 research process and lists provided by in-country resource centers and domestic Open Society Foundations were compared, cross-referenced and used as the first source of donor names. Databases and aggregators were the next source of information.<sup>2</sup> Additional information was gathered from websites and online documents. Where found, the grant databases of development agencies and private foundations proved highly useful. An additional source of information was media coverage of donations provided by foreign companies and governments. Annex 8 lists all sources consulted in this step.

The information generated through these means was used to supplement data resulting from the survey and donor interviews. Information on funding amounts (past and future), future strategies and other questions was often difficult to gather through desktop research. In some cases, the available information required us to make informed or educated approximations of annual spending.

Identifying and gathering information on less widely-known donors, especially from the Arab States, China, Russia and Turkey represented a special challenge in the desktop research as donors from these countries were very poorly represented in all types of sources consulted. The reasons for this may lie in language differences, lack of interaction with European or US-based donor databases and aggregators and limited transparency. Specialized news editorials with daily feeds<sup>3</sup> allowed us to supplement research results with examples of corporate-driven activities and mentioned the occasional donation from an otherwise unmentioned source. Few sources in English, Russian or Serbian originating from the donor countries reported donations that had not been found in sources from the recipient countries. As a final attempt to index missing actors, the websites of organizations known to work in the Western Balkans sometimes provided an overview of activities, though mostly without funding amounts.

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<sup>2</sup> The most comprehensive source for the region was the International Aid Transparency Initiative (IATI), and, for Serbia, the lists of donations reported by the National Bank of Serbia. The NBS publishes all donations for which it served as an intermediary, including, for example, the donations of the Masdar Institute from the UAE to the University of Belgrade, or the monetary donations of the Chinese government for institutions of the various governments in the Western Balkans region. While an attempt was made to find similar lists from National Banks in other countries, no lists were found.

<sup>3</sup> such as the Serbian Monitor.

As with all other data used in this study, public sector loans and investment in businesses were excluded and evidence was sought of at least one grant having been provided in the 2016-2019 period.

**Donor Survey:** The self-reported survey requested both quantitative (in the form of thematic priorities, years of activity, financial information and the like) and qualitative data, including the personal views of respondents. Please see *Annex 2: Survey of Donors Active in the Western Balkans* for a sample of the survey and *Annex 3: List of Survey Respondents*. The number of questions was reduced as compared to the 2016 survey to enable donors to respond quickly and increase response rates, and approximate data was accepted. The survey was sent to 60 organizations based on an initial invitee list for the Donors Forum Meeting and a few additional donors we identified as potentially interested in taking part in the research.

Three of the organizations approached indicated they did not view themselves as donors and thus did not feel they could complete the survey. One referred us instead to a website containing information on its funding in the region. Another asked to be interviewed in lieu of completing the survey. The two donor networks on the list rightly noted that they could not answer many of the questions and subsequently received a tailored selection/set of questions to which they responded by email.

In total, 38 organizations completed surveys (a 63% response rate). The data generated by the donor survey came primarily from private foundations, both foreign and domestic.

**Donor interviews:** Based on survey and research results, 36 donors were selected to provide a balance of types of donors (foundations, bilateral, multilateral and corporate, including a number from the Arab States, Russia and Turkey) and shared with OSIFE – Office of the Western Balkans. They were approached for interviews by email or by telephone.<sup>4</sup> A total of 13 donors were interviewed, including:

- Four donors that had completed the survey. The interviews focused on further exploring some of their responses;
- Three bilateral donors (including in two instances managers of different large programs of a governmental donor) and a representative of the European Commission (NEAR);
- Five additional donors identified in the desktop research.

See Annex 5 for the list of donors interviewed. An interview guide was used, with adjustments made for those that had already completed the survey.

**Corporate Data:** Data on corporate foundations and giving by businesses was drawn from Catalyst Balkans' *Giving Balkans*<sup>™</sup> database.<sup>5</sup> This database, which contains available data on all giving from domestic sources, was used to extract all data on giving by private sector actors (companies, SMEs and corporate foundations) for each of the countries in the period 2016-2018. Information in the database derives from publicly available data gathered by monitoring national, regional and local media in each of the countries and through direct contact with donors and/or recipients. While it cannot be seen as exhaustive, *Giving Balkans*<sup>™</sup> represents the best available source for corporate data in the region given that official data on private sector giving is absent in all of the countries.

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<sup>4</sup> One donor representative was leaving the post and her replacement was not yet prepared for an interview.

<sup>5</sup> Catalyst Balkans supports the development and expansion of locally-sourced philanthropy and increases knowledge exchange in the region, including Croatia. It runs the *Giving Balkans*<sup>™</sup> database that contains information on domestic giving by the private sector (companies, SMEs, corporate foundations), citizens (through mass giving actions), individual and diaspora donors, private local foundations, and other forms of domestic private giving. Public and international funding is not included. See <https://catalystbalkans.org>.

**Stakeholder interviews:** Structured interviews, based on an interview guide, were conducted with 32 stakeholders – larger CSOs, networks (where relevant), media, domestic foundations, representatives of think-tank organizations, and, where possible, Offices for Cooperation with CSOs, a non-elected representative of government (often someone involved with civil society, so not broadly representative of public officials/administration) - from all countries. Interviews were conducted by Skype or telephone. Of those interviewed, 6 were from Albania, 7 from Bosnia & Herzegovina, 5 from Kosovo, 5 from North Macedonia, 4 from Montenegro and 5 from Serbia. See Annex 4 for the Stakeholder Interview Guide and Annex 5 for the list of interviewed stakeholders.

**Data Analysis:** Where not otherwise specified, graphs and other information on donor activities were drawn from completed surveys (donors) and results of the desktop research. The analysis of qualitative responses involved reviewing for repeated comments in the survey and interview responses within and across countries and across the two groups of respondents (donors and stakeholders). By including unattributed respondent comments we have sought to maintain anonymity while simultaneously bringing certain points of view to life.

A number of **limitations** should be taken into account when reviewing the study's results:

- The study was conducted in the months of June-August 2019, a period in which many prepare for or take their holiday, affecting response rates to the survey and interview requests.
- Information gathered on 2019 funding may be incomplete given the study's mid-year timing.
- Though efforts were made to focus on donors' *grantmaking* investments, there is inevitably some mixing of grants and other forms of support across the data.

**Desktop research:**

- With an increase in the number of donors reporting their spending in comparable ways, the quality and completeness of data gathered through desktop research should be markedly improved from 2016. Nevertheless, limited reliable information was found to answer some of questions included in the survey. We have indicated where only survey data was used.
- While triangulation of data was not possible, data cleaning was done to reduce overlaps. Still, the complex picture of funding inflows to the region, inconsistencies in reporting or lack of reporting<sup>6</sup>, and inclusion of both domestic grantmaking foundations and other CSOs engaged in significant re-granting activities has inevitably resulted in some donor funding being counted twice.
- Financial commitments for 2020-2025 were not always available through desktop sources. Where identified, financial commitments were converted into USD.
- For donors from the Arab States, China, Russia and Turkey, public information was very difficult to locate and, where found, details were often lacking.
- With the tools and time available, it was impossible to trace funding, for example from domestically registered companies, back to investors in one of these countries. Cases of this type, where they may exist, are reflected in the private sector results.

**Survey:**

- Donors were asked to provide approximate financial data converted into USD. No standard exchange rate was used.

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<sup>6</sup> Across all types of institutional donors, some provide multi-year or annual budgeted amounts, others provide budget or spending per program or project and some do not provide such information at all.



**Stakeholder interviews:**

- Despite attention being paid to creating a diverse and relevant list of stakeholders, the 4 to 7 interviews per country can only be taken as suggestive of broader views.

**Given its limitations, the report can only offer an indicative picture of donor activities and trends in the region. We nevertheless hope it provides useful input for reflection and discussion.**

**Comparison with 2016 Findings**

While exact replication of the 2016 study was not sought, the 2019 study offers opportunities to compare certain results. The key questions explored remain the same. The principal differences in the methodology are explained below. Where comparison generates striking or otherwise interesting results, we discuss them in the main report.

**Survey:** Some survey questions were reformulated and their number reduced to permit use of the more user-friendly Survey Monkey™ tool, in place of a Word-based questionnaire. A somewhat larger group of survey respondents were solicited for input in 2019 (60 versus 57), with a slightly higher response rate (63% versus 61% in 2016). Twenty of the 2016 respondents completed the survey again in 2019.

**Issues/themes:** The list of themes was also adjusted slightly based on input from OSIFE - Office of the Western Balkans, with Social-Economic Justice made a distinct issue/theme (rather than a sub-theme of Social Cohesion, which was removed) and Election Integrity and Gender Justice & Women's Rights added (the latter had been a sub-theme of Human Rights). A new category, Independent Investigative Journalism, was created to capture work with the independent media and sub-categories such as Freedom of Expression, Assembly and Association were moved to the theme of Rule of Law. Work related to the Green Economy (previously combined with Sustainable Development) was integrated with environmental work to create a new category (Environment and Green Economy). Within the desktop research and survey we also sought to further distinguish activities within the wide-ranging field of Education by creating 2 issues, one for Education – scholarships and the second for Education – other.

**Research:** In comparison with 2016 somewhat more time was available for the desktop research phase. Combined with use of the International Aid Transparency Initiative (IATI) database and a greater number of country-level donor lists and other tools, this resulted in an improved scan of donors in the region. Private sector research was conducted in the same manner and using the same Catalyst Balkans sources as in 2016.

**Interviews:** Additional time permitted interviews to be conducted with donors identified in the desktop research and with a few survey respondents. The interview guide for stakeholders was adjusted slightly to complement questions in the donor survey.

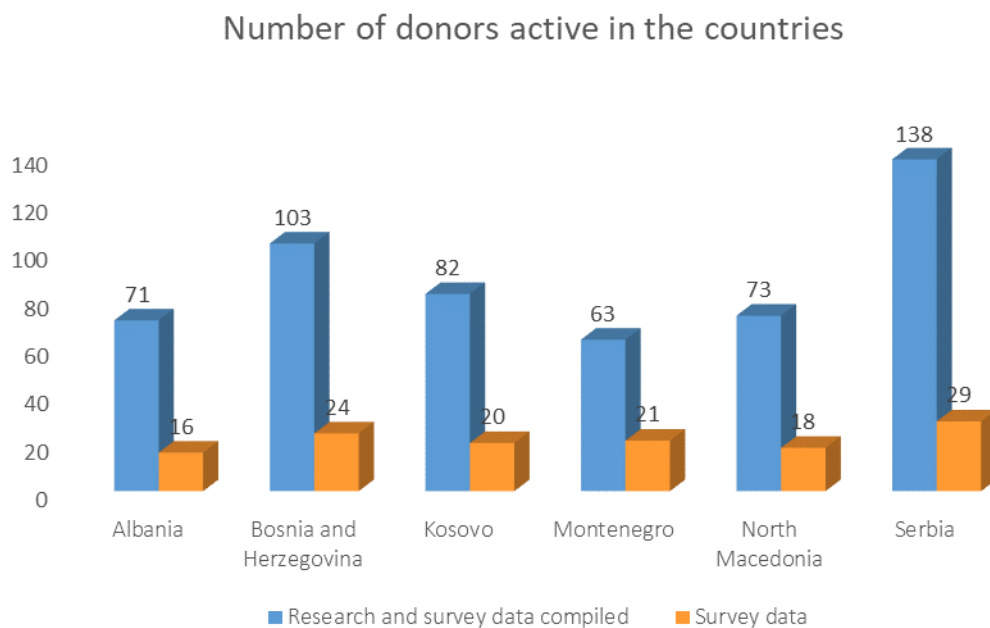
### 3 Research Results

#### 3.1 Past: What Was Done and Where Are We Now?

##### 3.1.1 Regional Overview: Number of Donors, Issues, Types of Funding, Recipients and Investment

The graphs below show the results of the donor survey and additional desktop research as concerns the **number of donors** active in the six focus countries in the period 2016-2019 and the **issues they fund**. The graphs are the result of the available sample<sup>7</sup> generated through a survey and desktop research and cannot thus be taken to represent full documentation of donors in the region in the 2016-2019 period. For comparative purposes, the complete findings (survey and desktop research) are depicted alongside the results of the survey findings alone.<sup>8</sup>

##### Number of Donors



Graph 1. Number of donors active in the 6 countries: comparison of complete & survey findings

The survey and desktop research identified **203 unique donors in the region**.<sup>9</sup> This figure does not include the following: any new donors to the region, donors from the Arab States, China, Russia and Turkey or corporate donors, all of which are discussed separately (see Chapter 3). At least 91 (44.8%) of the donors indicated having a presence in more than one country. Of those surveyed, 28 (73.7%) stated that they fund regional programs (either cross-border programs and/or grant programs in more than one country). Interviews with donors also suggested that some are increasingly making use of regional programming to

<sup>7</sup> See the Methodology section for an explanation of limitations.

<sup>8</sup> The survey was completed by a greater number of private foundations, including many of those participating in the 2016 and/or 2019 Donor Forum Meetings.

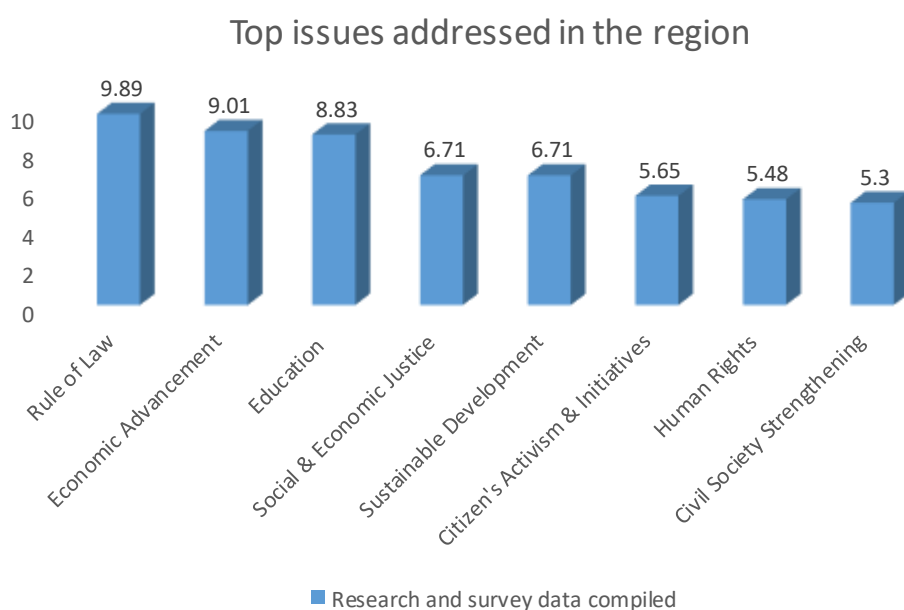
<sup>9</sup> In the desktop research, donors were included based on indications that they had given at least one grant in the region in 2016-2019.

complement or replace in-country funding (the latter especially in the case of Montenegro) and view regional linkages and cooperation as essential in the next period.

We found the largest number of donors in Serbia (138), followed by Bosnia and Herzegovina (103) and Kosovo (82). The number of donors found in North Macedonia and Albania were similar: 73 and 71 respectively. Montenegro shows the lowest number of donors (63), a not entirely surprising result given the closure of various donor programs in past years. The only change in this ranking since 2016 is that North Macedonia has switched places with Albania to become the country with the fourth largest number of donors. For all of the countries, we found an increased number of active donors in 2019. This may, however, be due in great measure to improved tools and increased time for the desktop research.

### Top Issues Addressed

The **top issues addressed** by donors across the region include those which were most frequently identified by donors for the period 2016-2019.<sup>10</sup> Details on the categories can be found in Annex 1.

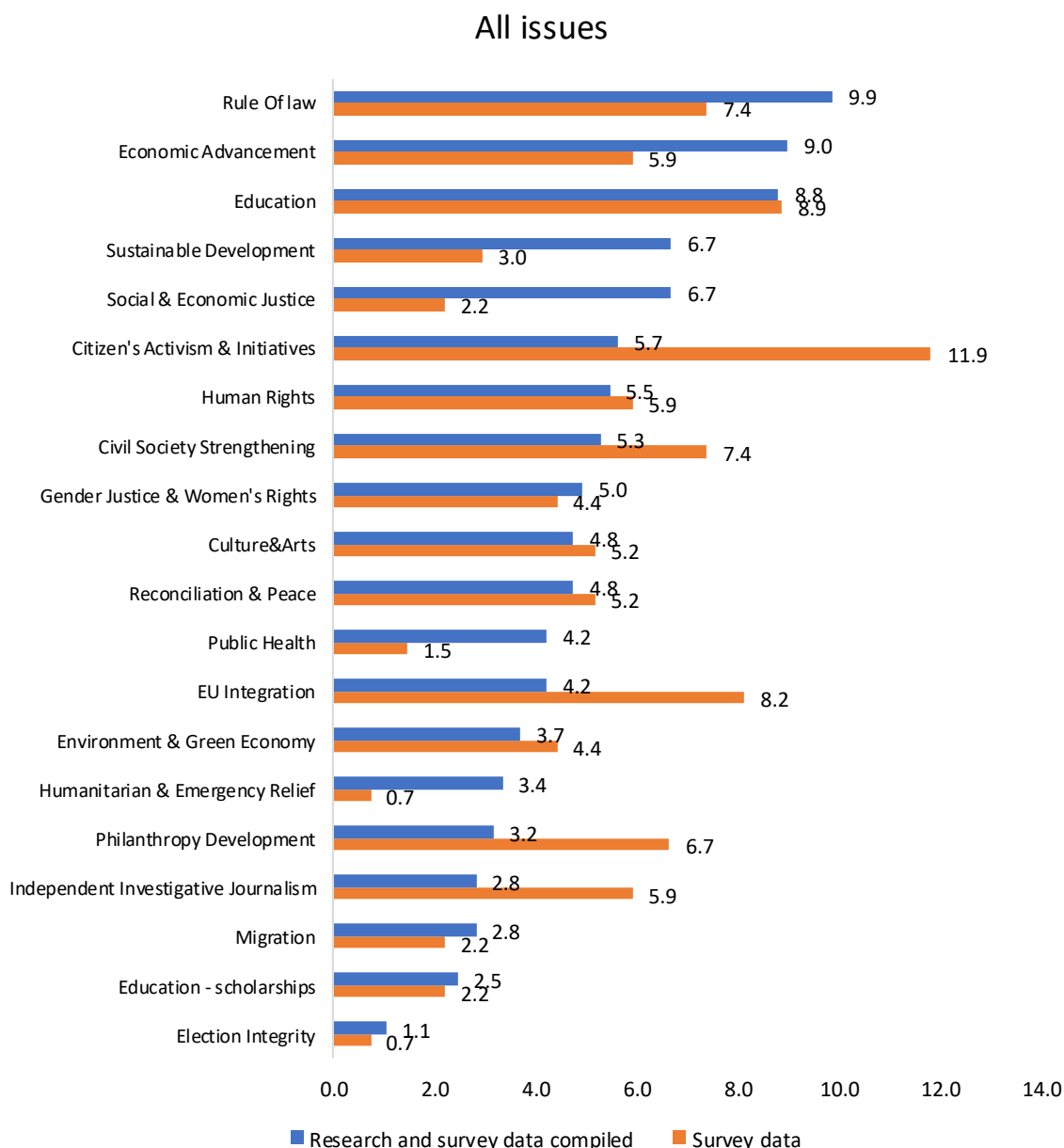


Graph 2. Ranking of top issues regionally: based on complete findings, by frequency of over 5%

From our mapping of donor's thematic engagements (research and survey data combined), **Rule of Law (9.89%)**, **Economic Advancement (9.01%)** and **Education (8.83%)** emerge as the **top three issues** for donors in the region in 2016-2019. The themes of Social & Economic Justice and Sustainable Development (6.71% each) follow. The themes of Citizen's Activism and Initiatives (5.65%), Human Rights (5.48%) and Civil Society Strengthening (5.30%) were also identified by donors with a frequency of over 5%. With some variation across countries (see Country Addendum), stakeholders views on the main issues donors had funded in past years matched those shown in Graph 2, with Rule of Law, Human Rights, European Integration and Economic Advancement mentioned most often.

<sup>10</sup> Each issue category includes a subset of issues. As they are inevitably simplified ways of capturing issues or themes, the placement of one or another topic within a particular issue category may be disputed.

Graph 3 compares the ranking of all the issues (desktop research and survey combined) with the ranking provided by surveyed donors alone. From this comparison, Citizen's Activism & Initiatives, EU Integration, Civil Society Strengthening, Philanthropy Development and Independent Investigative Journalism appear to be especially common themes among the donors surveyed.



Graph 3. Ranking of all issues supported by donors: comparison between complete & survey findings, by frequency (%)

#### *Comparison with 2016 Findings*

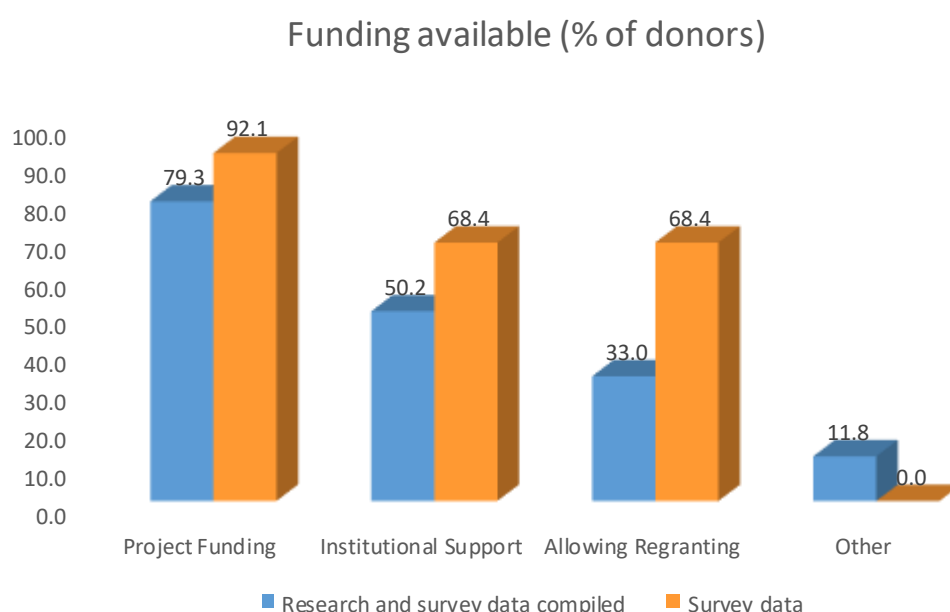
The outcome for Education may appear high, just as it did in the 2016 mapping, and in fact would be even larger if the category Education – individual scholarships, fellowships, etc. shown in Graph 3 were included. Overall however, there seems to have been a slight decrease since 2016 in the frequency (minus 3.4%) with which donors were funding the theme of Education.

Increasing in popularity appears to be the theme of Sustainable Development, where identification of the issue had risen from 4.5% in 2016 to 6.7% in 2019. When combined with the frequency of donors funding

the Environment, support for activities related to environmental questions appears to have increased between 2016 and 2019. There also appears to be a significant decrease (from 12% to 5.48%) in the frequency with which Human Rights is mentioned as a theme. However, much of this is likely due to the creation of two new issue categories in 2019 (those of Social & Economic Justice and Gender Justice & Women's Rights) which split some of the donors active in the broad field of Human Rights across the categories. A slight drop can be seen in the frequency with which donors supported Reconciliation & Peace, from 6% in 2016 to 4.77%.<sup>11</sup>

### Types of Funding

The principal **types of funding** donors provided across the region can be found in Graph 4. Donors can generally offer more than one type of support.



Graph 4. Type of funding provided by donors: comparison of complete & survey data, by % of donors

The results suggest that the majority of donors provide project funding. Many also provide institutional (core) support or re-granting funds, though these forms were more common among survey respondents, which included a larger number of medium-sized or larger private foundations. The provision of re-granting funds in particular appears to be more than twice as common in the surveyed group. Some of this difference may be due to donors not explicitly identifying this type of support in online or other public communication materials. The 'Other' category includes other forms of support such as scholarships, fellowships, research, start-up capital, etc.

### Comparison with 2016 Findings

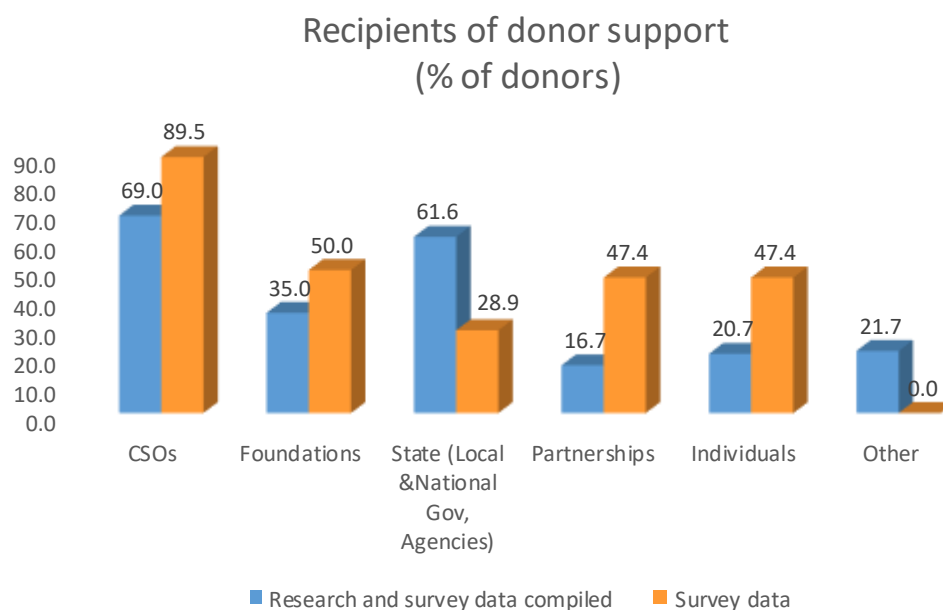
A comparison is difficult for the category of Institutional Support because the significant increase (25.7% in 2016 to 50% in 2019) may be due in part to enhanced data on multilateral and bilateral support to the

<sup>11</sup> Shifts in other issues are not discussed as changes in the issue categories make it quite difficult to assess them correctly.

region, support that can involve larger amounts provided to the state and state institutions in order to increase their capacity. In addition, improved desktop research has made it possible to identify some institutional support that had been placed in the “Other” category in 2016 due to lack of information. Comparisons with 2016 can be done most reliably for the Re-granting category, although the increase in the percentage of donors able to provide re-granting funds is relatively small (30,9 to 33%). However, the frequency of re-granting seems to have increased significantly: based on stakeholder’s insights, the provision of re-granting funds, which was just emerging in 2016, appears to have intensified in the period from 2016 to 2019. An interesting finding gathered from stakeholders has been some unexpected impacts of the increase in re-granting funds. Various points concerning re-granting are discussed in section 3.2.5.

### Recipients of Donor Support

With regard to the **recipients of donor support** shown in Graph 5, between 2016 and 2019 the largest percentage of donors funded CSOs. Support for state institutions (local and national) was also common, reflecting the fact that many bilateral and multilaterals work with government bodies of various types.



Graph 5. Type of recipients of donor support in region: comparison of research & survey data, by % of donors

An important caveat to the figure given for foundations is that it was not always possible to identify support for foundations in the desktop research because they may be included in the broader category of CSOs in donor communications. Some under-reporting may have occurred in the survey for a similar reason. The small “Other” category includes businesses and other types of recipients which could not be placed under one of the main categories.

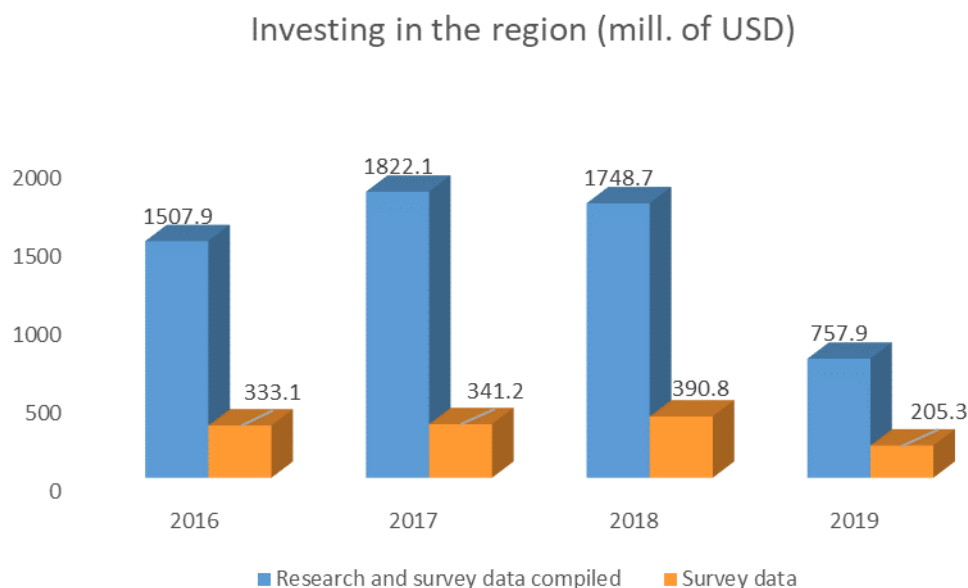
From the point of view of stakeholders, the State and larger NGOs, including a growing number of UN agencies or international NGOs, are the primary recipients of donor funds. In most countries this is seen to be increasing and was particularly noted in Bosnia and Herzegovina, Albania and Serbia. This is discussed further in section 3.2.5.

### Comparison with 2016 Findings

For CSOs the picture seems quite stable. European Union integration processes are likely to have increased the focus of some donors (especially multilaterals and bilaterals) on working with and through

state institutions. However, the significant increase in support for the state since 2016 may, in part, be the consequence of the increased number of donors identified in the desktop research.

The percentage of donors funding partnerships between non-profits and the state and to individuals increased by approximately 4% in the 2019 compiled data and 10% and 20% respectively when only the 2016 and 2019 survey data are compared.



Graph 6. Donor investments in the region, comparison of complete & survey findings, in mill. of USD

### Donor Investments in the Region

While only estimations, the graph of **donor investments in the region** (Graph 6) shows increased investment from 2016 to 2017, followed by a quite stable funding situation in 2017 and 2018. The figure for 2019 is significantly lower (54% of the 2018 figure), though this may be due to the timing of data collection (May and June 2019) or underestimations by donors.<sup>12</sup>

#### Comparison with 2016 Findings

A comparison of expected funding figures for the years 2017 and 2018 is only possible for survey respondents.<sup>13</sup> Looking at these years, we see an eight-fold increase between anticipated and actual amounts for 2017 and an over eighteen-fold increase for 2018. This enormous leap may be attributed in part to difficulties donors faced in anticipating spending at mid-year in 2016 or for 2017 and 2018. Still, the findings among donors surveyed in 2019 seem to suggest that there has also been an upswing in funding for the region since 2016. This is corroborated in some countries (Serbia in particular) by anecdotal comments from donors and stakeholders about donors re-engaging in the region in this period, particularly in response to the deterioration in political conditions.

<sup>12</sup> By comparison, investments of 116 million USD were predicted for 2016 in mid 2016 whereas the figure reported for 2016 in the 2019 survey is 333 million.

<sup>13</sup> This is because figures for this period from the desktop research were not seen to be insufficiently complete and thus not presented in 2016.

## **Investments by type of donor**

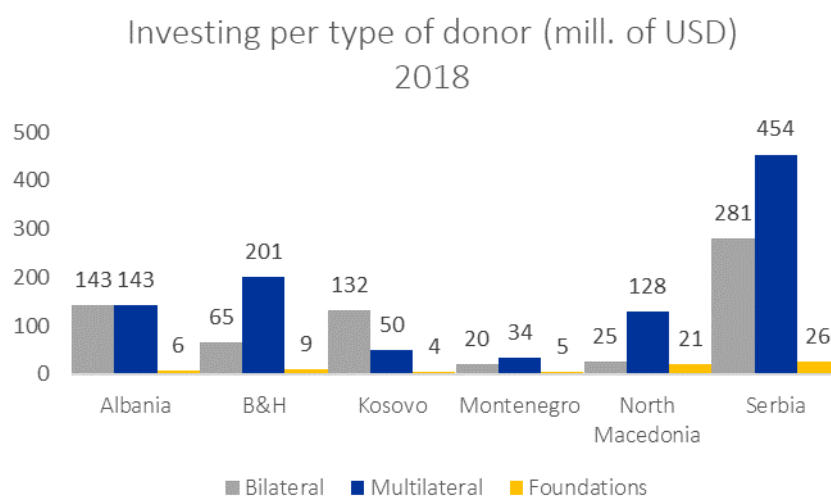
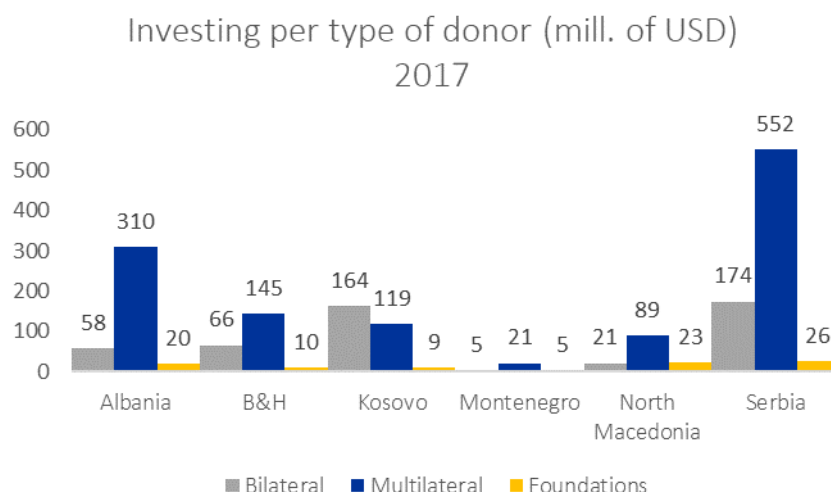
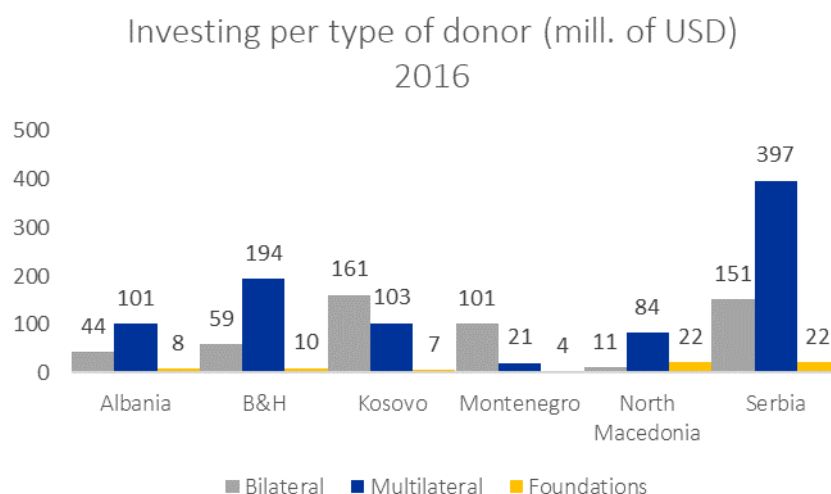
Graph 7 on the next page presents the **investments per country for the years 2016-2018 broken down by type of donor**. The figures must be used cautiously as they are only estimations.<sup>14</sup> From a regional perspective, it shows the investments of multilateral and bilateral donors to far exceed those of foundations. It is however essential to mention here the many comments we heard from stakeholders regarding the instrumental role private foundations have played in supporting CSOs' sustainability through core grants and other means, initiating re-granting as a form of support, and in some cases establishing strong, long-term partnerships with grantees. For stakeholders, the flexibility and openness of a number of foundations is also seen as essential in permitting CSOs in the region to grow and adapt to changing circumstances.

In addition to the particularly rough nature of the data, some of the differences in funding amounts per country over the three years may be due to funding cycles or larger one-time funding commitments and thus the country-by-country details must be taken with some caution. Nevertheless, Albania and North Macedonia seem to have seen significant increases in investments across all donor types in the 2016-2018 period, whereas the picture for Bosnia and Herzegovina appears to be quite stable. The results for Serbia seem to show the responsiveness of multilateral and bilateral donors to the dramatically worsening situation for civil society in the country in these years. The figures for Montenegro also suggest that the decline in investments can be attributed principally to the departure of bilateral donors. However, the results for multilateral donors in Montenegro and the indications of a decline in investment in Kosovo, particularly among multilateral donors and foundations, are more difficult to explain and can only be confirmed with additional research.

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<sup>14</sup> The figures are based on the complete data (research & survey combined). However, estimations had to be used when analyzing the survey data because the survey did not request a breakdown of investments per country per year.





Graph 7.: Research and survey data, Investing per type of donor, per country, per year

### 3.1.2 Perception of Progress

This section summarizes the most frequent responses from stakeholders and donors to questions about the results donors helped to bring about in the last period (since approximately 2016) or recent shifts in donor efforts that appear promising.

In the survey, donors pointed to a variety of accomplishments achieved as a result of their funding. These included legislative or policy changes, project-based achievements (such as development of an App distributing air pollution results to Sarajevo residents or improvements in maternity wards) and new approaches (such as combining peace-building, inter-religious dialogue and arts in peace and reconciliation work or the use of challenge grants to stimulate local giving).

Enthusiasm about the progress made since 2016 is more elusive within the stakeholder group, although some differences were identified per country. Kosovo, North Macedonia and Montenegro appear most positive about recent improvements. For Kosovo, for example, improvements in government transparency on the national as well as local level, recognition of watchdog organizations by local government, an improved enabling environment for civil society and increased visibility and participation of women were mentioned. For Montenegrin stakeholders, issues relating to corruption, human rights and accountability had become more visible and important to the public, especially through the work of independent media. In North Macedonia, accountability and transparency in government were mentioned and increased capacity of CSOs to influence policies.

Stakeholders in the remaining countries were more doubtful about progress. Whereas some pointed to important advances, for example, in philanthropy development in both Serbia and Bosnia and Herzegovina or investments in entrepreneurship and start-ups in Albania, Bosnia and Herzegovina and Serbia, many felt that progress was very slow or non-existent. Explanations for this assessment differed somewhat by country (see Country Addendum) but included: resistance to change on the part of state actors, short-term and/or insufficiently grounded or flexible donor strategies and CSOs' focus on donors and distance from the daily concerns of citizens. The general feeling among stakeholders is perhaps best summed up by a quote from one of them: *"It is as if we got democratization but without a user manual."*

Although, in their view, not directly attributable to donor interventions or the work of CSOs<sup>15</sup>, **an important emergent potential for progress was identified in the recent increase in informal movements, citizen's protests and civic activism and awareness** in most of the countries. This was mentioned by many stakeholders and a large number of donors as perhaps the most exciting development to both monitor and encourage.

### 3.1.3 Particularly Praised Types of Donor Interventions

Stakeholder views on particularly useful donor interventions since 2016 can offer insights for future donor engagements in the region. With regard to different types of donors, various stakeholders acknowledged the **flexibility and longer-term, developmental approaches of private foundations** as compared to majority of bilateral or multilateral donors. At the same time, two bilateral donors were singled out for their particular attention to **building strong partnerships** to deliver clear results over longer (3-5 year) timeframes. Mentioned by one stakeholder was the importance (for both capacity and

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<sup>15</sup> In fact, there are signs that a good proportion of the people involved in these new movements have been CSO activists or in political parties in the past.

results) of being paired by a donor with an organization with greater experience in another country but working in a similar type of context.

Others expressed particular appreciation for the **responsiveness to new needs** recently shown by certain bilateral donors, and especially for their responsiveness to urgent needs such as support for independent media or the emergence of policies aimed at improving conditions for youth.

**Core support** (with examples involving both private and bilateral donors) was recognized as extremely helpful, not only for organizational stability in difficult times but also because it permits CSOs and independent media involved in investigative journalism to respond to immediate needs and rapid changes in the context. Core support was also seen to be especially important for advocacy and CSOs involved in advancing human rights. Even smaller amounts of core funding is seen to be extremely helpful; as one stakeholder noted, what is key is that it be “secure, long-term and flexible”. Further, the financial independence from state and private interests provided by core support was viewed as critical in permitting CSOs to respond in a persistently unfavourable environment.

**Re-granting** was mentioned in a positive light by a number of survey respondents. While appreciating the practice, a number of stakeholders across the countries also expressed concerns about access to these funds, their flexibility and potential for impact given their size and donor rules on providing repeated grants.

Good cases of **donor coordination** to advance particular issues were mentioned. An example was work on social entrepreneurship in one of the countries, where multiple donors, including corporate donors, were working together. One donor was acknowledged for involving other donors on the board of a program it had funded. In another country, bilateral and multilateral donors were praised for partnering on issues such as education or energy efficiency and for thus achieving more together. A few people mentioned cases of donor programs that involved various coordinated components targeting different levels of society. The two examples given were interventions in which bilateral donors funded both the relevant ministry/local governments and watchdog organizations, resulting in improvements in transparency.

### 3.1.4 Identified Gaps

A question about **gaps in the issues addressed by donors** resulted in a great diversity of answers. Among donors, the cross-cutting theme of strengthening civil society was the one most frequently seen to require further attention and investment. Comments touched specifically on the need for more skills development, institutional development, as well as the capacity and opportunities to interact with their governments through monitoring, advocacy or cooperation. As one respondent explained: *“In all our actions, the state system is very hard to change for the better – health, education, women’s rights...”* Perhaps for this very reason, civil society is perceived by donors as needing to become stronger and more effective.

For stakeholders, a major gap is the theme of **Education**. For many of them this seems to be the foremost problem the countries face at the moment because of its implications for keeping young people in the region, improving economic prospects, and fostering positive change and innovation in many areas. The percentage of donors indicating in the issue of Education as a theme is relatively high in the 2016 to 2019 data (though a slight decline is seen over the period), a result that at least implies considerable funding may be going to this theme. However, the piecemeal approach (e.g. of improvements to school infrastructure and equipment) and limited donor coordination and donor-State coordination are seen not to be addressing the systemic improvements needed in this area.

Although there were some positive views expressed regarding anti-corruption efforts in Kosovo, Montenegro and North Macedonia, for many stakeholders throughout the region the **fight against corruption** is seen to be a very serious and persistent gap.

The **delivery of social services** was mentioned as an important gap in several countries. There is a feeling that donor support for this area is limited or has been reduced and that the state is not adequately funding the field.

While recognizing that support for the theme of **Economic Advancement** has increased, stakeholders also pointed to the need to continue and increase efforts in this area, with perhaps more coordination between donors and between donors and the State. Other issues identified as gaps in specific countries are described in the Country Addendum.

Regarding **gaps in the types of recipients** receiving support, donors themselves most commonly identified non-formal groups, civic or grassroots political movements. This matched stakeholder responses, who consistently expressed the concern that more needs to be done to support *“small authentic citizens groups with concrete and strong demands in burning social areas who needs different type of urgent support (that is not always funds)”*. Despite increases in re-granting funds, they also pointed to **small and mid-sized CSOs**, particularly those outside larger cities, as groups that are receiving insufficient support and attention. In some countries, shifts in donor approaches (for example towards re-granting or involving UN agencies or international NGOs) are seen to be taking a toll on mid-sized CSOs with the potential to grow.

An important **type of intervention** that both donors and stakeholders found to be lacking was **institutional or core support for CSOs**. A variety of forms of **capacity building**, from mentoring, coaching and internships to technical enhancements, received multiple votes as well.

Stakeholders also mentioned problems in how donors engage with the countries. Most prevalent were concerns about externally-driven design processes that were not always based on a solid needs assessment and external leadership in many larger programs which, they feel, can transform CSOs into little more than subcontractors. They also acknowledged the role CSOs themselves can play in this dynamic: with CSOs sometimes seeming to be foremost responsive to donor priorities or preferring to remain within their zones of comfort rather than engage with changing societies and new actors such as movements. These and other points about how work is pursued in the countries are discussed further in section 3.2.5.

#### *Comparison with 2016 Findings*

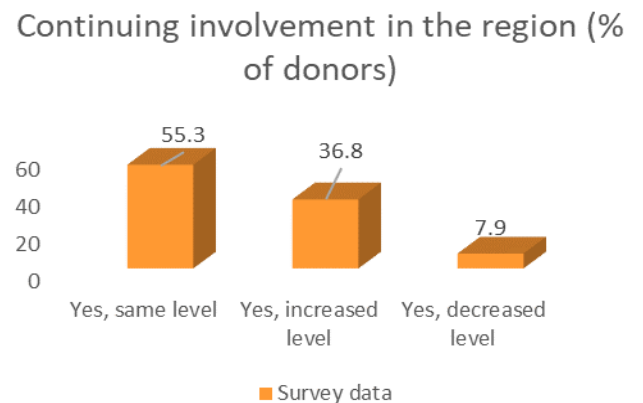
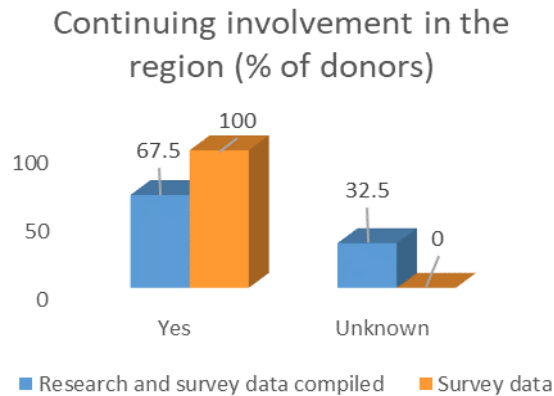
In 2016 gaps were seen in the support for activities linked to Freedom of Expression & Media and Economic Development. In both of these areas the 2019 mapping provides signs of increased donor attention and funding as well as some progress (see section 3.1.3.). What is less clear is whether the 2016-2019 period has seen sufficient attention to what were often referred to as the *“real needs of individuals”*. What we heard from stakeholders in 2019 is that larger CSOs are increasingly perceived as being out of touch with the struggles of citizens. In response to this, stakeholders called for CSOs to forge closer linkages with or create funding or other support opportunities for informal groups or grassroots movements (although without “ruining them”).

Two other gaps raised by stakeholders in 2016 – attention to Education and support for Citizen Participation - also show increases in funding. Still, in 2019, a commonly expressed stakeholder concern is that investments in Education are not sufficiently well-coordinated and structural. While citizen’s activism and participation was seen as a gap in the time of the 2016 report, in 2019 it is identified by donors and stakeholders as both an opportunity and something to be cultivated through re-granting or other means.

## 3.2 Looking to the Future

### 3.2.1 Donors Planning to Remain Active and Expected Funding

Graphs 8 and 9 give an **indication of the number of donors that plan to remain active in the region in 2020-2024**. Captured in Graph 8 is the intention among donors (research and survey combined) to remain engaged in the region.<sup>16</sup> Graph 9 indicates that the great majority of donors that responded to the survey will sustain or increase their current levels of funding.<sup>17</sup> For 32.5% of donors investigated through desktop research it was impossible to identify future financial commitments.

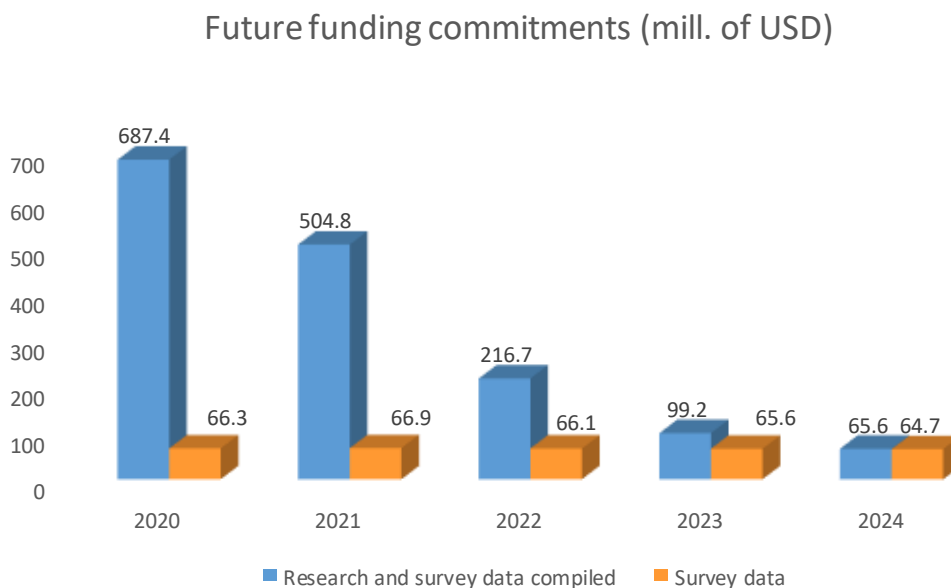


Graph 8. Continued involvement of donors in region: comparison complete & survey findings, by % of donors

Graph 9. Level of continued involvement of donors in the region: survey findings, by % of donors

#### Future Funding Commitments

Graph 10 displays **expected financial commitments per year** in millions of USD.



Graph 10. Future funding commitments: comparison of complete & survey findings, in mill. of USD

<sup>16</sup> For a number of donors found through desktop research this is only an assumption based on the information found rather than on a clearly expressed commitment by the donor. The percentage can therefore only be taken as indicative.

<sup>17</sup> This does not capture differences by country – see Country Addendum for more details.

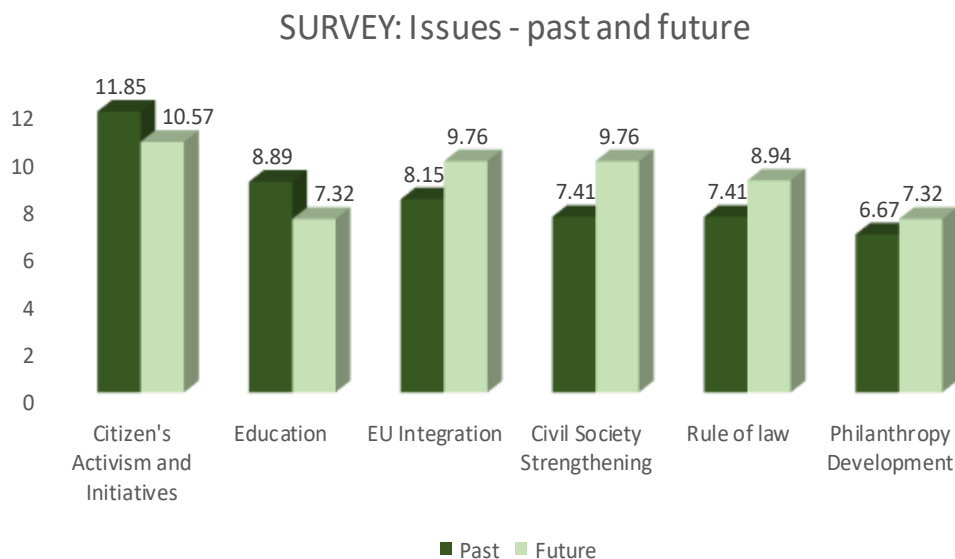
Graph 10 suggests a significant drop in funding each year. Moreover, when compared with 2016-2019 figures (for the research and survey combined) a significant drop in funding is found: from levels of 1.5 to 1.8 billion USD to less than half that figure. While worrisome at first glance, this is likely due in very large measure to the fact that websites and other donor sources do not generally provide future funding amounts.

The graph also suggests a significant drop in funding among surveyed donors between the period of 2016-2019 and 2020 - 2024. This is partially the consequence of strategy reviews or planning cycles: For example, 35% of donors surveyed indicated having strategies that were in the process of being reviewed or revised (sometimes affecting their ability to identify future funding amounts).<sup>18</sup> A number of other donors have strategies that conclude in 2020 or 2021 and will thus need to return to Parliaments or their governing bodies to seek approval for new strategies and new financial allocations. The decrease can additionally be explained by the fact that only 72% of survey respondents provided answers to this question and some did not provide a funding amount, perhaps because this is not yet available. This interpretation is supported by the fact that the result also seems to be at odds with their strong stated intention to continue and even increase funding as seen in Graph 8.

Most importantly, the fact that expected funding given by survey respondents for the years 2017 and 2018 *in the 2016 study* (41 million and 21.2 million respectively, with 25% of respondents not providing funding amounts) were much less than the actual funding figure reported for these years in 2019 (341 million and 381 million reported by only a slightly larger number of donors) leads us to expect significant growth in the funding figures for 2020-2024.

### 3.2.2 Key Issues in the Future

Shifts in the issues funded by donors in 2016-2019 as compared to those they expect to fund in the next five years (2020-2024) are captured in Graph 12. It reflects the views of survey respondents only.



Graph 11. Comparison of ranking of past and future top issues: from donor survey, by frequency (%)

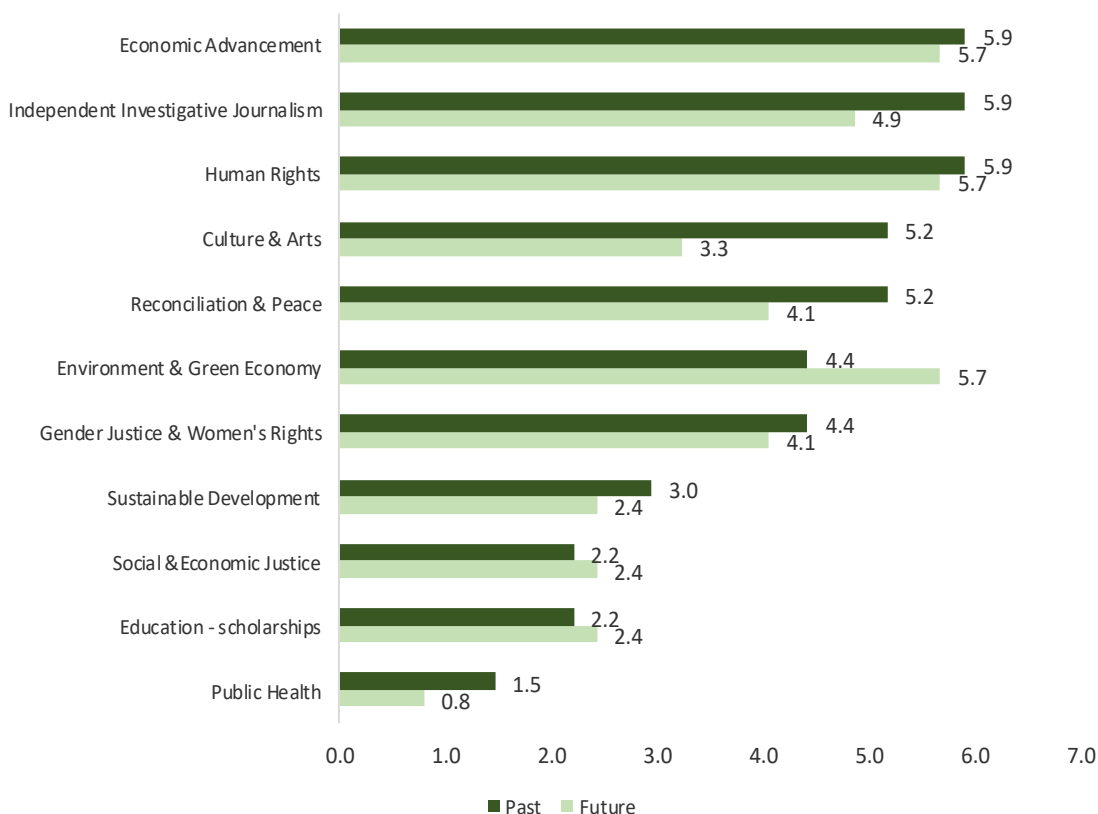
<sup>18</sup> Interestingly, where survey donors added comments to explain the nature of their strategic changes, most mentioned deepening approaches to capacity development of grantees, supporting opportunities for constituency building and public dialogue, and fostering collaboration and innovation.

In 2020-2024 the **top issue** continues to be **Citizen's Activism and Initiatives**. This is reinforced by comments from donors surveyed and interviewed, including those identified through desktop research, who view this theme as a priority. As one donor stated: *"Informal movements, volunteer groups or civic initiatives often have credibility, constituency and mobilization skills, but are often not registered and often lack funding."* One donor gave an example of people who live in the same building and want to build a park around their building. Others spoke of protests or initiatives in response to development projects and environmental issues.

A number of the donors interviewed also expressed excitement about recent growth in these types of voices and initiatives. As expressed in their own words: *"These are new forces that are gradually emerging, especially on the local level as citizens no longer want to rely on government and begin to take actions into their own hands. These should be watched and funded...even if they are small and informal groups. It is happening a bit everywhere."*

This enthusiasm matches the widely expressed interest of many stakeholders in seeing both CSOs and donors **reach out to more grassroots group - including informal ones - and citizens' movements**. Many stakeholders and donors recognize the emergence of informal movements and groups (often local and emerging in response to state or corporate decisions) as a sign of hope for the region that should be encouraged, although not necessarily through grants. Some words of caution also emerge from these discussions: that it is more important to learn from these groups than to advise them and not to seek to transform them into formal civil society groups.

**SURVEY: Comparison of other issues funded in past and plans for the future (%)**



Graph 12. Comparison of ranking of other past and future issues: from survey findings, by frequency (%)

Among the remaining issues (shown in Graph 12), an important increase in funding is anticipated for **Environment & Green Economy** and very small increases appear for Social & Economic Justice and Education – scholarships. All other issue categories show signs of some decline in attention. The area of Public Health and Culture & Arts, in particular, seem to see a relatively large decline.

A separate survey question asked donors to identify themes they personally found important to address in the next period *beyond those that their organizations were already planning to fund in this 2020-2024*.<sup>19</sup> In their responses, we find **Social & Economic Justice** selected as an important theme by over 60% of the donors. As one donor said: *“Socio economic justice is important due to the type of transitions the region is experiencing. Since the 1990s civil liberties have been the focus of donors more than socio-economic change. This is now coming back as a boomerang as people realize that they are being left behind. You can see this in the rise of citizens’ movements or protests, for example those in 2014 in Bosnia where workers protested against their conditions. And people are not involving CSOs in these movements or protests because CSOs are seen as not responding to their problems. This situation is the result of donor funding choices and the fact that CSOs are neither focusing on policy changes in this area nor on supporting specific economic opportunities for people. As a result, CSOs are now seen as isolated from the needs of citizens, are seen as part of the problem, part of the establishment.”*

High priority was also given by surveyed donors to continued work on **Rule of Law** (selected by over 47%) and both **Citizen’s Activism and Initiatives** and **Civil Society Strengthening** ranked third (with over 42%).

Comparisons with stakeholder responses show some similarities between donor plans and views on important issues and those of stakeholders, for example in their shared concern for progress in the areas of Rule of Law (corruption figures frequently among stakeholders’ top concerns) and Civil Society Strengthening. Stakeholders also frequently point to the protection of Human Rights and/or improvements in Social & Economic Justice as key for the future, both of which appear to remain a steady priority for donors.

EU integration is seen as a very important theme for stakeholders, with many simultaneously questioning their government’s willingness or true commitment to making the changes necessary for this step.

Where some divergence is found is in the areas of Education, where donor involvement shows signs of a slight decrease. Instead, for a large number of stakeholders, youth and, closely linked to this, attention to the educational system should be major priorities for the next 5 years. **Educational opportunities for youth, ranging from improvements to school systems, vocational education to youth leadership initiatives are viewed as urgent and are seen as a way to prevent the devastating effects of emigration and “brain drain”.** Educating youth about the past is also seen as a way to help ensure peace in the region. As noted in section 1.3.4., stakeholders feel that a systematic approach to improving education based on greater coordination among actors is critically needed!

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<sup>19</sup> The question was intended to understand what themes would be important besides those their organizations were planning to address. Responses should thus not be confused with those shown in Graph 11. They nevertheless offer a feeling of themes that are important for the region and may be overlooked.



### 3.2.3 Key Opportunities and Challenges

#### Opportunities

For all countries, stakeholders referred to the steps toward **EU integration** as representing a key opportunity for change.<sup>20</sup> A majority of them also noted that structural changes need to be made regardless of EU integration. EU accession and the accompanying structural changes were also mentioned by donors as an opportunity, although somewhat less frequently than among stakeholders. In the case of one donor, accession was seen as a major challenge *“because it touches on all areas of society, depends so heavily on EU. I’m just not sure what will happen if the four countries that are not already negotiating see no future in this direction. And I’m certain that emigration will increase if accession lags.”*

**Increased levels of political awareness and action** (often informal and local, sometimes targeting a very specific development or decision) are also consistently and fervently seen by stakeholders as opportunities to be encouraged (albeit cautiously *“so as not to ruin them”*), learned from and linked to by CSOs. **Young people** are mentioned repeatedly by stakeholders and seen as an opportunity in terms of the potential they can offer to the country (if encouraged to stay) and for their involvement in grassroots initiatives. **Digital tools** (internet communities, data collection for improved decision making) and are felt to be critical to involving a greater number of people in shaping the future of the countries. More details on country-by-country perspectives are captured in the Country Addendum document.

The largest number of donors mentioned **grassroots organizations** and **new or young activists** (among women and generally) as representing opportunities for the countries. As one donor put it: *“I think the citizen mobilizing that as been happening throughout the region shows that citizens are paying attention and have opinions. While not at the scale that would bring about change immediately, it is genuine (outside capitals for example) and, if supported, can create the debates that societies need.”* This donor also mentioned independent media and investigative journalism and the independence of civil society as other important ways to build “a conversation” about the future of these countries.

For a number of donors and numerous stakeholders, the expansion of **domestic philanthropy** (at local level and for topics such as women’s rights) was another emerging opportunity as well as an area for further attention.

A few donors felt that an opportunity lies in **regional exchange**. As explained by a donor representative who hails from the region: *“We, people in Southeast Europe, need to rely more on ourselves. This is why regional cooperation and transfer of knowledge is so important! Clearly, what happens to one country will happen to others.”*

One donor representative also pointed to the link between making use of tangible opportunities for change and the more intangible dimension of (self-)perception: *“People will feel positive when they better see the region’s potentials and opportunities. We are all inspired by what is positive. And the image of the region externally also needs to be changed.”* For this donor, enhanced cooperation in the region was one of the keys to achieving this shift in both hearts and minds.

#### Challenges

For donors and stakeholders alike a major challenge facing the region is the **political context**, most commonly discussed in terms of its instability, lack of respect for the rule of law and the limiting of civic

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<sup>20</sup> This is the case regardless of whether the process has started or is stalled due to disputes, as in Kosovo or (until just recently) in North Macedonia.

space. Stakeholders pointed additionally to **corruption** and **lack of transparency** as enormous problems in which little progress has been made. Skepticism was also expressed about **government capacity or willingness to translate improvements in legislation into improvements in implementation**. Without these, it is felt that emigration of the countries' best and brightest – especially the young – will continue.

For stakeholders there is also a sense that time is being lost due to country-specific problems. For some it is the complex political situations or unresolved status questions the countries face that distract from progress on important issues affecting people's lives. For others, it is the political infighting or, alternatively, the concentration of political power that results in this feeling. As one of the stakeholders noted with frustration: *"We are all waiting for these issues, life is on hold."*

Interestingly, while EU integration is viewed as a key opportunity among stakeholders, it is also seen as significant challenge due to the extent of changes needed – both structural and in terms of implementation – and uncertainty about the commitment of governments and intentions in the EU.

**Funding and fundraising** were raised as particular challenges by many of the stakeholders representing CSOs. Lastly, a recurrent theme for stakeholders is **resistance of government** towards change, new approaches and meaningful engagement with CSOs.

Though many see the emergence of informal, grassroots movements and a growing feeling that governments will not adequately solve people's problems as an opportunity, a few stakeholders also identified **the enhancement of conditions for informal or grassroots initiatives** as a challenge for CSOs and donors because these groups fall outside their standard reach.

### 3.2.4 Potential Recipients

In response to a survey question to identify groups in society that would be able to bring about changes and in whom it would be important to invest, we received the following responses from donors and stakeholders.

For donors, **non-profit organizations** need to continue to be the focus in 2020-2024, with over 84% of donors surveyed indicating them as recipients they would choose to invest in to address the key issues in the coming period. For stakeholders, particular attention should be paid to supporting **organizations engaging in advocacy** (e.g. larger NGOs that can take issues to court and capacity developers with expertise in advocacy), **think tanks**, and **other specialized CSOs**, such as those that can monitor and evaluate political processes. **Groups that can coordinate CSOs or coalitions** were mentioned in Kosovo and **partnerships or organizations promoting partnerships** across sectors in Bosnia & Herzegovina, Kosovo and Montenegro.

Three other groups mentioned frequently by donors are **grassroots organizations**, especially those outside main cities, **informal groups** and **youth** (often mentioned in combination, e.g. youth groups in rural areas). These same recipients are found in a great majority of stakeholder responses across all countries, although the call for more support for activities with and for youth was especially prominent in Albania, Bosnia & Herzegovina and Kosovo. Two Albanian stakeholders mentioned the need to extend work with youth to include young professionals (lawyers, entrepreneurs, etc.). In the 2016 report, all three of these groups were already identified as requiring greater support.

**Independent media** was also identified as requiring increased support, particularly for content production, in various responses from donors and stakeholders.

Some attention was paid by donors and stakeholders to the importance of expanding support for **marginalized groups** such as Roma and migrants or refugees as well as to **women and women's groups**.

A few stakeholders in Kosovo, Montenegro, North Macedonia and Bosnia and Herzegovina mentioned **local government and civil servants**. Targeting this group is seen as a way to strengthen capacity to implement new legislation and new approaches.

Lastly, the need to fund **trade unions, organizations in the economic sphere** (professional organizations, chambers of commerce) **and political parties or politicians** was found in the responses of stakeholders from North Macedonia and Serbia. However, as compared to 2016 responses, these groups are mentioned less frequently. The other groups stakeholders mentioned are generally consistent with what we heard in 2016.

### 3.2.5 Potential Changes and Adjustments in the Way of Working

Interviews with stakeholders were used to explore potential adjustments in the way donors work in the countries that could enhance their support to the region. Quite a few of the respondents also raised points about the way CSOs themselves work. Many of the comments are similar to those found in the 2016 report. To highlight where continuity exists, we have used similar headings to convey the points. Any striking differences are noted in the concluding paragraph.

**Supporting grassroots initiatives.** Stakeholders expressed concern across all countries that small and medium-sized CSOs, often found outside capital or large cities and referred to by one stakeholder as *“the backbone of civil society”*, are being neglected. They feel this is the case despite increases in the availability of re-granting funds. As one said: *Among those in the greatest need are small, volunteer groups at the local level, who care and rely on local foundations and national competitions. Re-granting has helped them to a great extent, but still insufficiently... ”*. For stakeholders, a reason for this situation is an increasing concentration of funding among a small set of organizations over the past few years (also see the funding for international NGOs and agencies discussion below). Through the surveys and interviews donors also identified the importance of funding smaller, local groups in the region. At least one bilateral donor in one of the countries had taken the decision to focus a large program entirely on CSOs outside the capital.

This point was often linked to the need to work towards a better understanding of people’s concerns and learning from informal and grassroots initiatives. As one stakeholder put it: *“Donors policies do not “see” a small organization, and once the donor promotes the project as successful, they nevertheless want to paint [it’s impacts on] small people...”* A group of donors and stakeholders across the countries also highlighted the need to encourage the voices of marginalized communities, such as the Roma or people with disabilities, women and LGBTQ+ people through support for their organizations and initiatives.

**Increasing re-granting is not enough.** While viewed as a positive development by many, some stakeholder comments on re-granting (across various countries) revealed where attention may need to be paid in the next few years. Some felt that amounts remain very small and that in some cases criteria or restrictions given by the donor providing the re-granting funds were limiting the effectiveness of re-granting organizations to strengthen smaller CSOs or reach informal groups. Others felt that donors expected too much change to occur through the provision of small, short-term grants. Another set of comments conveyed the impression that donors are sometimes pushing larger and mid-sized CSOs into the role of grantmaker, something which may not necessarily be a natural or desired role. This, they feel, is diverting important capacity from achieving changes through their core work. From these concerns we deduce that improvements might take the form of increasing flexibility in the size, use, numbers of grants that can be made through re-granting funds and looking for ways to complement financial support for smaller, grassroots CSOs.

**Reducing the emphasis on international NGOs and agencies.** Stakeholders in almost all countries spoke of the importance of reversing the continued (and, in some cases, increasing – see Country Addendum) use of external agencies or non-profits from outside the countries. This is seen to be both bypassing and undermining the capacity of domestic CSOs and thus increasing their fragility. For some it is also transforming larger and medium-sized domestic CSOs into subcontractors of programs whose aims and approach are too often designed and/or driven from outside the region. Assigning more leadership roles to domestic CSOs would be an important step in the right direction.

**Greater attention to needs assessments.** One of the reflections from stakeholders, which echoes one made in 2016, is more careful attention to needs assessments and learning from experiences. As one stakeholder said: *“Donors seem to apply same approach in different countries and repeat the same mistakes. Please do the needs assessment before you go in the country, proper research before investing. There are lessons learned, we need to use them.”* This was seen to be important in achieving progress; for example, successful examples of recent improvements in fields like education were felt to have been possible given in-depth examinations of the needs and gaps. Careful preparation was also seen as critical in ensuring that CSOs focus on themes that lead to real improvements in people’s lives.

**Working across sectors.** In most countries, stakeholders expressed the view that partnerships between sectors were essential to achieving the systemic changes needed in so many areas of society – education, economic development, social services, etc. Donors were often mentioned as important actors in the creation of such partnerships. Though some examples emerged in the mapping (see section 3.1.2) and potential for cross-sectoral collaboration may be expanding (see section 3.3.2), this is an area that is seen to require further financial support and the assistance of donors in bringing partners to the table.

**Coordination and collaboration in the donor community and between donors and CSOs.** In some countries, improvements in donor coordination were recognized in certain fields, for example in the education field. However, with the notable exception of North Macedonia (where donors were widely praised for improving their coordination), a need for increased and improved coordination and cooperation among donors continues to be heard among stakeholders. They view this as a way of tackling the problems of overlapping, increasing impact and effectiveness and finding more sustainable solutions to complex issues. It is also seen - together with greater cooperation or other forms of interaction (such as through monitoring or advocacy) between CSOs and state actors and more cross-sectoral work - as a way of building momentum for systemic change in Education and other key fields.

**Strengthening civil society’s position and capacities.** Most stakeholders felt that civil society at all levels needs to continue to develop. Some of their suggestions included more strategic, long term work by donors as well as more flexibility in grants and greater use of institutional or core support. According to stakeholders and donors, institutional support remains a major need, especially in the face of challenges such as the state’s resistance to important structural changes (especially in education and social services) and diminished space for independent media and civil society actors.

#### *Comparison with 2016 Findings*

As indicated earlier, many of the points discovered in 2019 echo those of 2016. An exception is the need for greater capacity and attention to monitoring and evaluation by domestic CSOs and donors which does not appear as explicitly or as often in the 2019 discussions. We nevertheless heard multiple comments about the importance of enhancing donor practices in understanding the environment in which they are working and drawing upon positive and negative lessons that donors and others have learned.

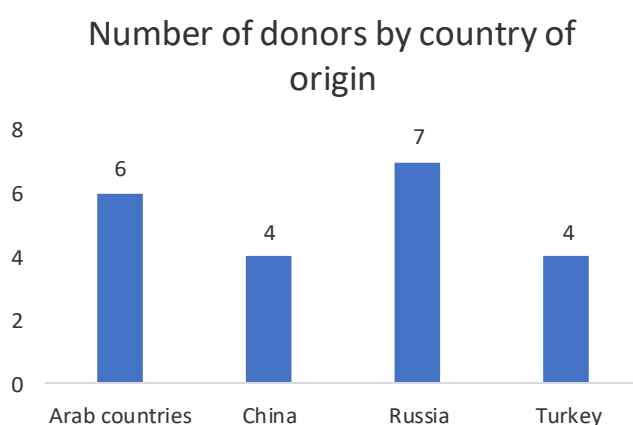
The topic of exit strategies, a lesser theme in 2016, was not raised by stakeholders in 2019. It appears to have been replaced by an interest in philanthropy development and indications by some that investments in this area are critical to the future of CSOs.

### 3.3 Other Donors – Potential New Alliances?

#### 3.3.1 Other Donors in the Region

The mapping study paid special attention to identifying new donors or those not generally represented in donor meetings and databases, including donors from the Arab States, China, Russia and Turkey. This was done by querying donors (in survey and interviews) and stakeholders as well as through an extensive desktop research effort. Very limited information was gathered from donors and stakeholders on new donors in general, although stakeholders did mention increases in corporate giving in the last years and acknowledged the importance of some donors “re-committing” to their countries.

Stakeholders also provided some insights into the general interests of these donors, although without much in the way of specific information. Research efforts to identify such donors were quite extensive given limits in time and available sources, but information remained very difficult to gather (see Methodology for more details of our approach).



Graph 13. Number of donors by country of origin

these origins identified in our research is due to an over-estimation of their giving activities in some circles or because the information is not publicly available. Various attempts to contact a number of the donors in this group met with either no response or referral to very limited information offered by official websites. Though a seemingly small sample, the 21 donors can offer insights into their presence in the region and the themes they support.

Based on these efforts, 21<sup>21</sup> distinct bilateral, foundation and other grantmaking organizations - often with strong links to government - were found for which we were able to trace at least one donation.<sup>22</sup> Three of them –the Turkish Government’s Turkish Cooperation and Coordination Agency (known as TICA), the Government of China and the Mohamed bin Zayed Species Conservation Fund - were active in more than one country in the region.

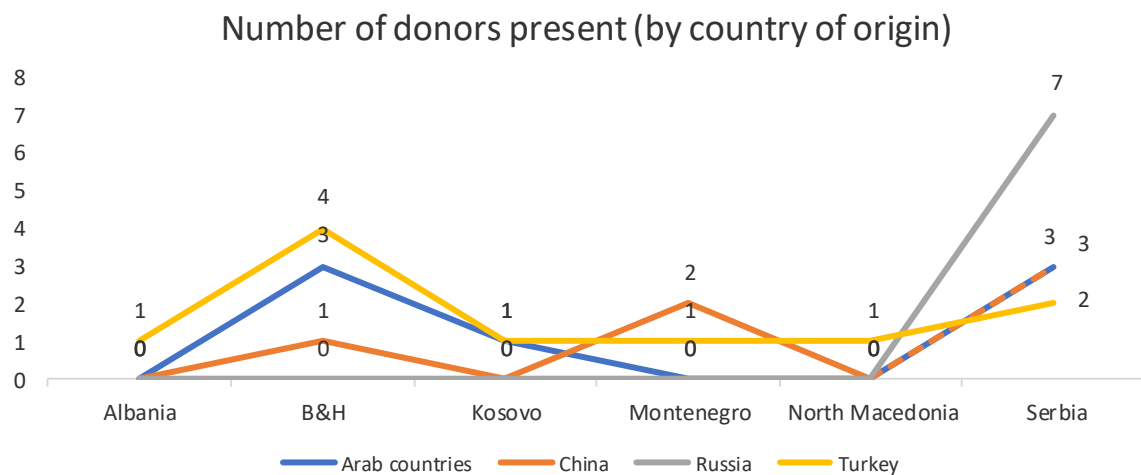
Unfortunately, it is impossible to confirm whether the small number of donors of

<sup>21</sup> One donor from Kazakhstan was counted as of Russian origin.

<sup>22</sup> Another seventeen (17) corporations, the great majority from China, were also found to be active in Serbia around the theme of Economic Advancement. However, information about funding amounts or beneficiaries was lacking. We have concluded therefore that these most likely involved support for large-scale infrastructure such as roads and thus fall outside the scope of this report.

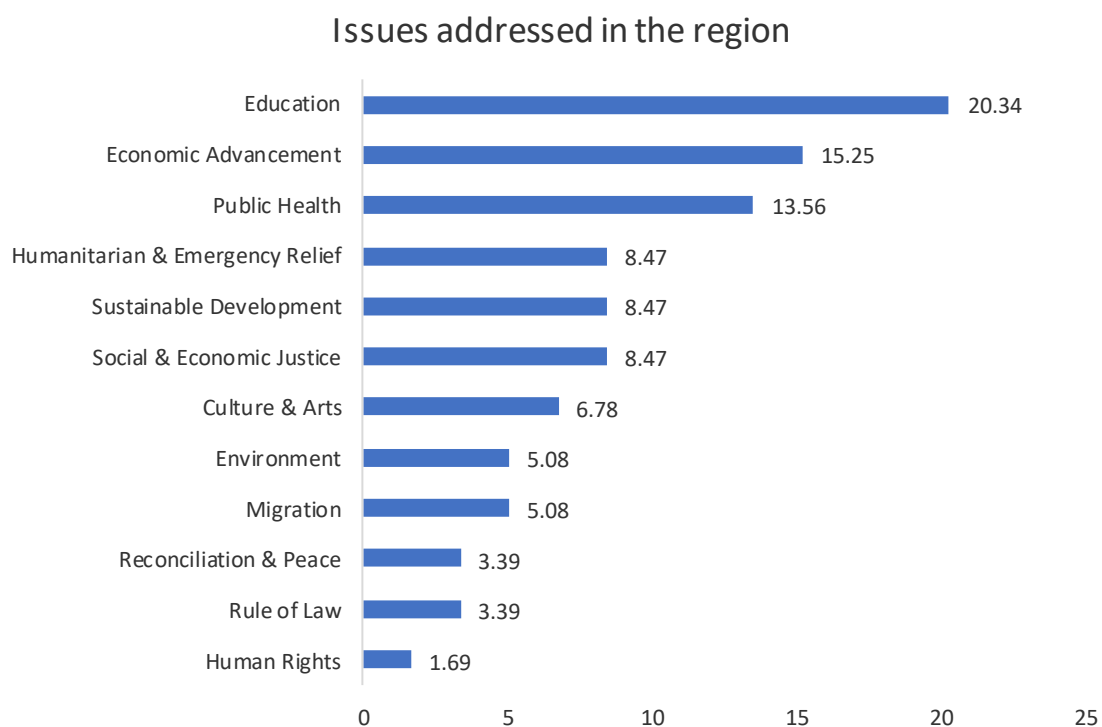
## Geographic Distribution

Interesting, though perhaps not entirely surprising, is the apparent geographic distribution of these donors. As shown in Graph 14, the largest number were active in Serbia (15), followed by Bosnia and Herzegovina (8). For the remaining countries the numbers found were: Montenegro (3), Kosovo (2), North Macedonia (1) and Albania (1). There appears to be an almost singular focus by the Russian donors on Serbia and strong attention among donors from Turkey and the Arab States given to Bosnia and Herzegovina and, in the case of the latter, in smaller measure to Albania and Kosovo. Their limited involvement in Albania and Kosovo seems to be confirmed by the limited responses to this question from stakeholders in these countries.



Graph 14. Presence of donors from Arab States, China, Russia and Turkey, by country of origin

## Top Issues

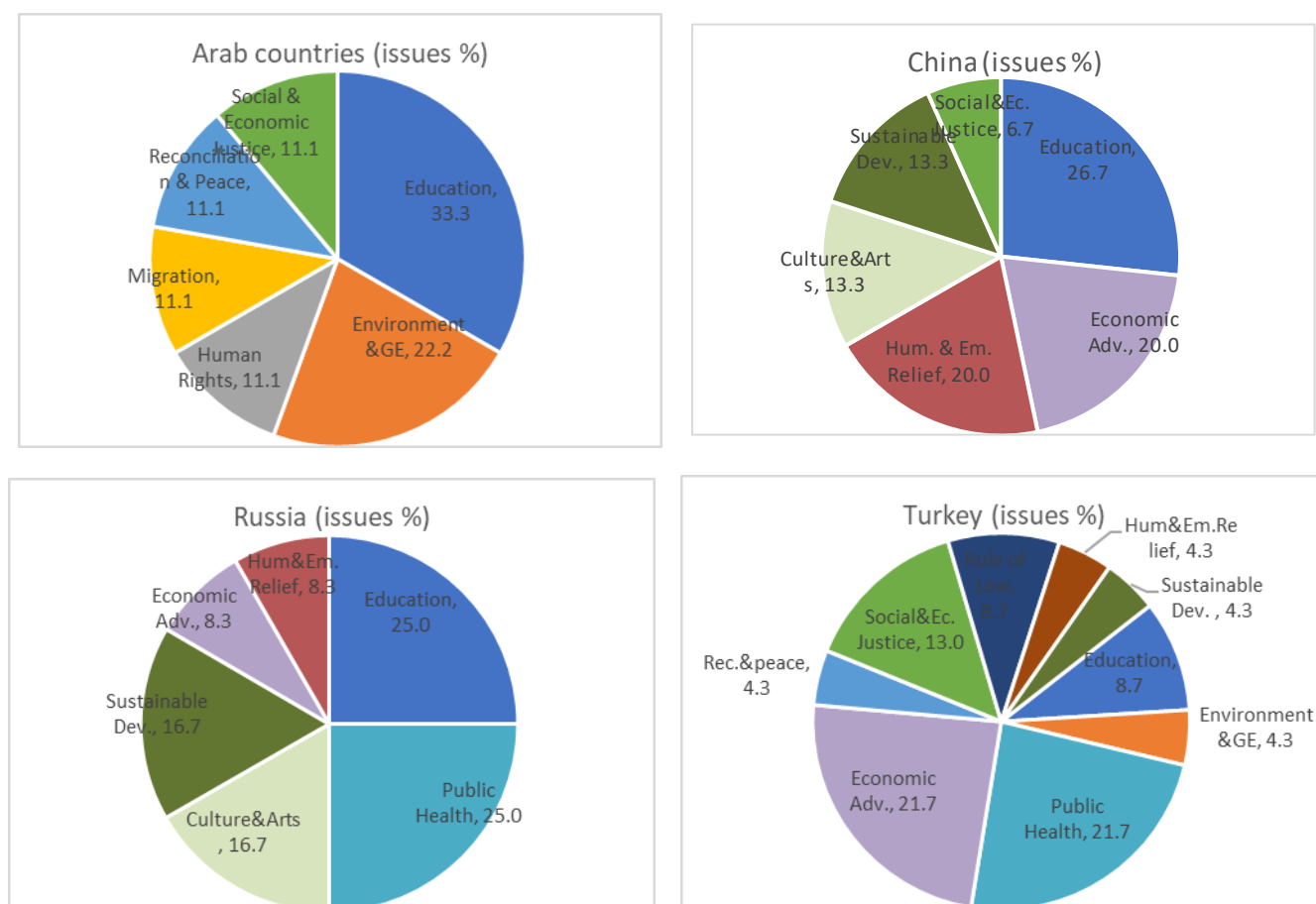


Graph 15. Ranking of issues supported by donors from the Arab States, China, Russia and Turkey (%)

The **top themes** (see Graph 15) among this group of donors in 2016-2019 were **Education** (e.g. vocational training for unemployed or building of schools by TIKa and the educational activities of the Confucius Institute), **Economic Advancement** (e.g. donations of agricultural and technical equipment by the Chinese Government and TIKa's support for agriculture) and **Public Health** (e.g. mobile clinics to a health center by the Russian Humanitarian Mission).

In a second tier we find the themes of **Sustainable Development** (e.g. fostering of innovation and research by the National Science Foundation of China and the development of sustainable rural practices with the help of the UNDP-Russia Trust Fund), **Humanitarian & Emergency Relief** and **Social and Economic Justice** (e.g. inclusive education for children and young people in extreme poverty, supported by the United Arab Emirates). Noteworthy too are the themes less prioritized by donors of this type: Human Rights, Rule of Law and Reconciliation and Peace, although some examples in these areas were also found. A deeper understanding of the thematic preferences of donors from these countries is provided by Graph 16 below. A discussion of each of the donor countries and examples of funding follows.

### Top issues by donor country/region



Graph 16. Top issues supported by donors by country/region of origin (%)

Only a limited number (9 of 38) of donors that completed the survey or took part in interviews commented on a question about other donors present in the region. Two survey respondents indicated that Turkish and Russian donors generally fund the state or groups close to the government. Three other survey responses suggested that these donors (with specific reference to Russian donors in two of the

responses) invest in “the media”, “right wing or populist activities” or “fake news and propaganda”. These views were also heard on occasion from stakeholders though we (not unexpectedly) found no evidence of this type of investments. In the interviews most donors said they knew of the presence of Turkish, Russian, Chinese and Arab donors but had no specific information on their activities. A few expressed a generalized unease or indicated that they had heard concerns about their involvements in the region. One donor and many stakeholders pointed to lack of transparency as an issue among these donors.

Information we received from stakeholders about giving originating from these countries or regions, mainly quite general or anecdotal, is summarized below, followed by examples of giving found through our research into the period 2016-2019.

### **Donors from the Arab State**

The presence of **donors from the Arab States** was particularly acknowledged by stakeholders from Albania, Kosovo, Bosnia and Herzegovina and North Macedonia. In these countries, they were seen to be funding culture, religious activities with schools and religious organizations as well as providing humanitarian assistance. One organization was said to be working on reconciliation processes involving people who had gone to the Middle East to fight. In Kosovo, they were said to have funded humanitarian assistance in the past “through their humanitarian organisations”. For Serbia, a stakeholder specifically mentioned private donors from Arab countries supporting humanitarian initiatives and cultural associations in the Sanjak region.

Specific examples found in the research:

- The Government of the United Arab Emirates (UAE), in conjunction with Dubai Cares, funded a UNICEF-run program aimed at quality and inclusive education for children and young people in extreme poverty in Bosnia and Herzegovina.
- A noteworthy example is the Hedayah Center for Countering Violent Extremism, an organization based in UAE that, together with the Kosovar Centre for Security Studies (KCSS), has a program called Preventing Violent Extremism (PVE). Former and current government officials of Kosovo have also participated in meetings and conferences organized by the Center. Hedayah also organizes the STRIVE Global Program for every country of the Western Balkans except Kosovo.<sup>23</sup>
- Both the Masdar Institute of Science and Khalifa University of Science and Technology supported research projects of the Faculty of Physics of the University of Belgrade.
- The Mohamed bin Zayed Species Conservation Fund provided donations to state institutions of Serbia and Bosnia & Herzegovina for the conservation of several species of fish, vores and beetles.
- The Qatar Charity donated funds to the Government of Bosnia and Herzegovina to aid in the management of refugees and migrant and related logistical issues.

### **Chinese Donors**

The **Chinese** were very consistently identified as investors in infrastructure or business or engaged in trade in the region, and as not being involved in supporting civil society. The examples of giving we obtained spoke mainly to Chinese involvement in the field of Education. The Confucius Institute was mentioned by a stakeholder in Bosnia & Herzegovina as working in the field of education and exchanges

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<sup>23</sup> It is not clear if funding has been allocated to any organization so far.



for children. The same person said that the embassy was involved in furnishing libraries. A stakeholder from Montenegro mentioned that the Chinese embassy had financed travel for journalist. In Serbia, one knew of Chinese companies that had supported associations focused on cultural exchange.

Specific examples found in the research:

- Through its embassy, the Government of China funded the Red Cross Society of Sarajevo. The funds were used for the provision of food for multiple beneficiaries of the Red Cross, equipping the Red Cross soup kitchen and related costs.
- The Government of China donated engineering equipment to the Ministry of Defence of Bosnia and Herzegovina which will be used for defence and civil engineering projects.
- The Government of China donated equipment for humanitarian and emergency relief to the governments of Serbia, Bosnia and Herzegovina and Montenegro. Its investments also include donations of equipment to the Visa Center of the Montenegrin Ministry of Foreign Affairs, various schools, hospitals and fire departments.
- The National Science Foundation of China provided a multi-year grant to the Montenegrin Ministry of Science. It is planning to co-finance 14 additional research projects together with the Montenegrin Government.
- The National Science Foundation of China provided a grant for a Montenegrin research project through the Montenegrin Ministry of Science, and has signed an agreement to co-fund 11 more projects.
- The Confucius Institute established a scholarship program in Serbia for those wishing to perfect their Chinese language skills in China. The Institute also contributes to cultural activities.
- The Sino-Serbian Friendship organization (Srpsko-Kinesko Prijateljstvo) donated funds to the Municipality of Užice to complete construction of a local preschool. The main area of interest of the association is in the area of culture & arts.

### **Russian Donors**

Little was known about **Russian donors**. They were viewed to be as principally concerned with business and investments. Examples from stakeholders were limited but included the Embassy in Montenegro providing scholarships or other educational funds and the Russian Humanitarian Center in Serbia providing financial support to publish books on historical and political issues. In Kosovo a stakeholder mentioned that the Russians support some Serbian structures or CSOs in Mitrovica and possibly other Serbian communities.

Specific examples found in the research:

- The UNDP-Russia Trust Fund is the UNDP involvement in Serbia that is funded by the Russian Government, with an active project called Aid for Trade. The intent of the project is to increase trade and the competitiveness of the agricultural sector in Serbia as well as stabilize income generation in rural areas. The Russian Government provided 4 million USD to establish this Fund.
- Outside of the UNDP-Russia Trust Fund, the Government of Russia donated a helicopter to the fire department of Niš in Serbia.
- The Russian Humanitarian Mission has donated mobile clinics to the Health Center in Požega, provided books to the Center of Russian Studies at the Faculty of Political Sciences of the University in Belgrade, and opened a Russian corner in Rumenka. The Mission has also signed an

agreement with the Municipality of Raška to develop several infrastructure projects in the areas of health and education.

- The Russian Center for Science and Culture in Belgrade sponsored festivals and other cultural events in Serbia.
- The Russian-Serbian Humanitarian Center organized workshops and conferences both in Serbia and Russia for medical experts, fire department professionals and other staff from Serbia involved in humanitarian relief.
- The Russkiy Mir Foundation organized and supported humanitarian camps and educational and cultural events.

### **Turkish Donors**

**Turkey** seemed to be the most widely recognized as a donor, with most references suggesting the involvement of TIKA or the Turkish Embassy. One stakeholder mentioned that they were working the most transparently among the four countries/regions. Most references to Turkish donors indicated that are supporting humanitarian assistance, infrastructure, education and cultural and religious activities, with a particular focus on Turkish communities (e.g. in North Macedonia). A stakeholder in North Macedonia said they had not heard of investments in CSOs, but that they tended to cooperate with government (including local authorities), and that this was also the case in Kosovo and Bosnia and Herzegovina. One donor had heard that Turkish donors were active in Southwest Serbia, for example in renovating a cultural center in Novy Pazar.

TIKA was seen to be funding agriculture and economic development in Bosnia and Herzegovina. In Kosovo, the Turkish embassy and TIKA were said to be very present, with large investments “in every city of Kosovo and offices in different cities”. In North Macedonia, TIKA was said to be involved in funding historical monuments and other cultural activities in an effort to make contact with the Turkish community in the country.

Other examples heard from stakeholders included: humanitarian aid and activities (restoring infrastructure and housing) in response to floods, repairing and equipping schools in Bosnia and Herzegovina, the Turkish Educational Fund - Turkish University in Sarajevo, funding for a trade union building for a trade union in Bosnia and Herzegovina, Turkish Government funding for the Cultural Center of Yunus Emre and support for civic activism by the Turkish minority. What emerges from many of these examples is a concern for particular Turkish minorities or Muslim communities in the region.

Once again, specific examples of donations may help to further understand the focus of Turkish funding:

- The Government of Turkey donated funds for the establishment of a Vocational Training Center in northern Bosnia and Herzegovina via the UNDP program and TIKA. The center trains people in economic need to work in professions where need for workers is high.
- The Government of Turkey has donated two CO<sub>2</sub> detectors to the Serbian Ministry of Internal Affairs for use by the border police. The border control near Batrovci intends to use the equipment to detect cases of illegal migrant trafficking.
- The Turkish International Cooperation and Development Agency (TIKA) is involved in all 6 countries, investing in risk reduction and economic skill-building projects in Kosovo, agricultural infrastructure and a hospital in Serbia, greenhouse cultivation in Montenegro, waste water management and law enforcement in Albania and Bosnia and Herzegovina, a high school in North Macedonia, and many other areas.

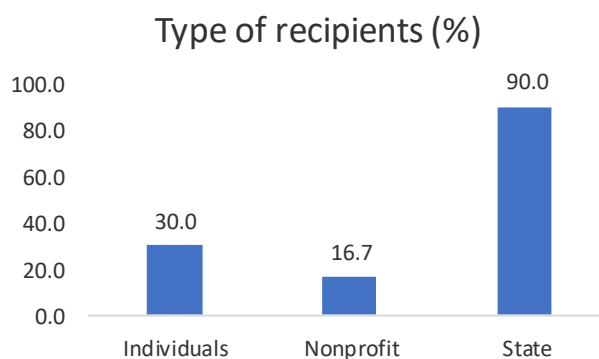
- The Bosna-Sandžak Association in Istanbul donated equipment worth 112.000 USD to the Maternity Ward of the Tutin Health Center in Serbia.
- The Turkish Red Crescent helped the Red Cross Society of Sarajevo with in-kind and cash donations to support migrant and refugee communities face in Bosnia and Herzegovina.

No information was found that provides Turkey's specific priorities in the Western Balkans<sup>24</sup>, but it is understood that approximately 18% of TIKA funding is directed to the region.<sup>25</sup> It is also worthy of note is that TIKA is led by the Turkish Minister of Culture and Tourism.

### Types of Recipients

The **types of recipients** identified for this group of donors differs significantly from those found for other donors. Ninety percent of these donors appear to provide funds to the state, understood to be national and local state actors. From what we can ascertain, funds for individuals are likely to be for scholarships, fellowships and research.

These results also seem to confirm the general impression among stakeholders and some donors that this group of donors focus on support of the state, provide some funding for individuals (exchanges, fellowships etc) and do not commonly fund CSOs.



Graph 17. Types of recipients identified (%)

In summary, while giving in fields such as human rights, etc. appear to be very limited in this donor group, there may be some smaller opportunities for collaboration, particularly with private foundations from these countries. Among the governmental donors, the potential for collaboration appears to be highest with TIKA due to its more structured approach and the generally more favourable to neutral responses of stakeholders to its work in the region. Still, differences in the political orientation of the countries cannot be underestimated, particularly if the funds are governmental or are closely linked to government priorities.

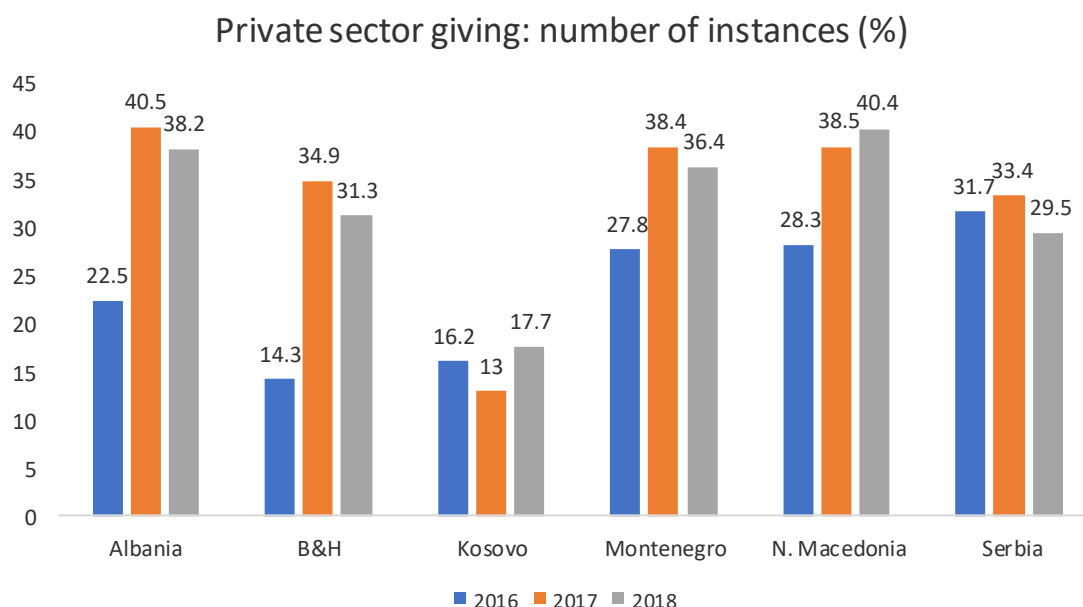
<sup>24</sup> The 2017 Turkish Development Assistance Report (the latest available online) indicates Turkish Government's *global* priorities to be: Social Infrastructure and Services, including education, health, and water and sanitation; Improvement of Administrative and Civil Infrastructure, including equipment provision and construction costs; Economic infrastructure and Services, including transportation and storage, development of communication infrastructure and energy generation, distribution and efficiency; Production, including agriculture, forestry and fisheries, Industry, mining and construction, and trade and tourism; and Humanitarian Aid.

<sup>25</sup> Asli Aydintaşbaş. From Myth to Reality: How to Understand Turkey's Role in the Western Balkans, Policy Brief of the European Council on Foreign Relations, 13 March 2019.

### 3.3.2 The Private Sector as a Potential Ally

In the 2016 study we included some information on corporate giving, illustrated for the year 2015, and raised the idea that enhanced communication with the corporate sector could be beneficial. This study expands the information to cover 2016-2018.

The graph that follows shows private sector (companies, SMEs and corporate foundations) giving by percentage of instances in the period 2016 to 2018. In all countries except Kosovo, corporate giving represents around a third of all cases of giving recorded for the country in the *Giving Balkans™* database.



Graph 18. Private sector giving by % of instances (donations), per country, per year

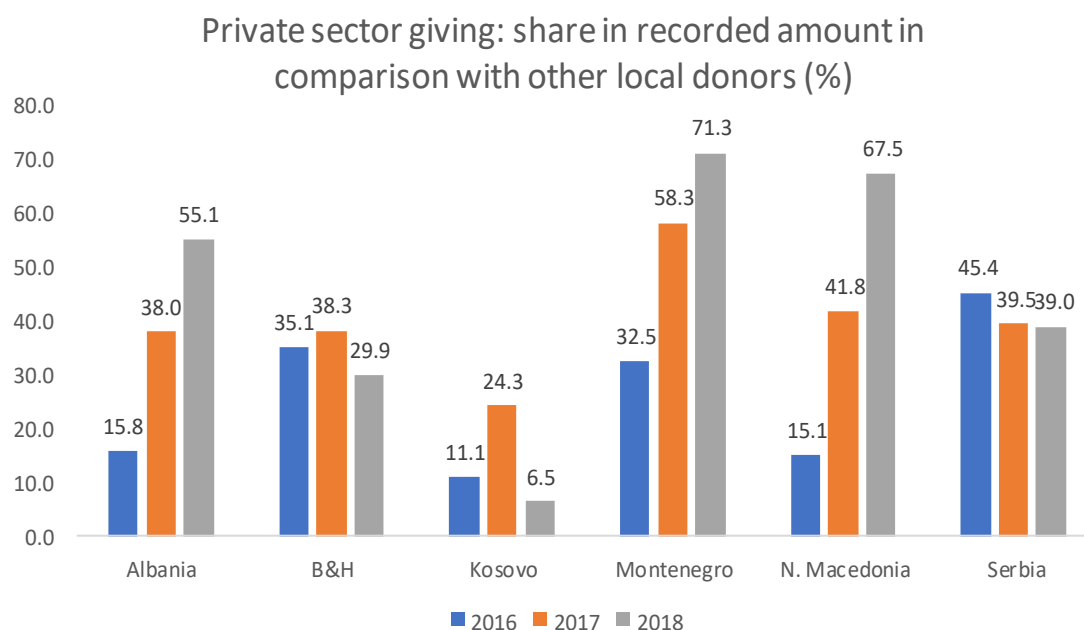
Graph 19 shows that the amounts donated by the private sector represent a significant percentage of all private domestic giving in the country. While small variations can be found over the years, in Albania, Montenegro and North Macedonia the private sector leads in terms of its share in the total recorded amount donated by private, domestic sources. In these three countries, the share of private sector giving grew steadily between 2016 and 2018.<sup>26</sup> A significant retrenchment in amounts of giving appears to have taken place in Kosovo (following a 2017 boom year), which is a consequence of several significant donations in 2017 which were not repeated in 2018. In addition, in 2018 several large campaigns in Kosovo increased the share of donations from individuals.

Bosnia and Herzegovina and Serbia (which started the period with the highest share of corporate giving in terms of percentage of instances) have seen smaller declines over the period, mostly due to an increase in giving by individuals through mass donation events and actions.<sup>27</sup> With these shifts, Montenegro, North

<sup>26</sup> The quite dramatic increase in North Macedonia in 2018 is due in part to a very large corporate donation for infrastructure and it is quite likely that this share will decrease in 2019.

<sup>27</sup> The increase in giving by individuals is largely due to very active private foundations that collect funds for medical treatment for children in other countries. However, there are also signs that in these two countries as well as in Kosovo large campaigns for various causes are starting to attract more attention (and resources from individuals).

Macedonia and Albania now lead in terms of the levels of private sector involvement in private, domestic instances of giving.



Graph 19. Private sector giving share of total recorded amount donated by private, domestic donors: % per country, per year

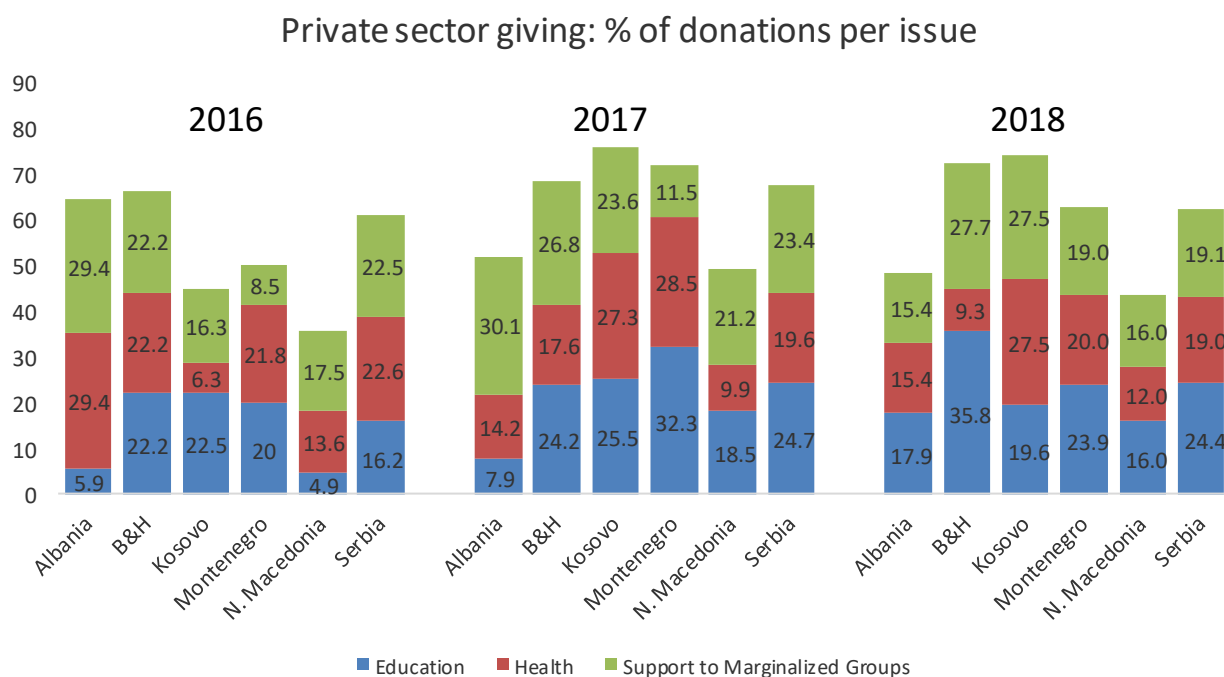
It appears that the **top three issues to which private sector giving is directed are: Health, Education and Support to Marginalized Groups**. The fourth choice of issue per country tends to vary from year to year and is thus not included in the visual representation. The most frequent issues in this next group include: poverty relief or mitigation (e.g. the giving of goods and services to food banks); public infrastructure (support to local governments for capital investments for infrastructure, such as roads, parks and the like); Sports, the Environment and Culture & the Arts.

The **types of donations private sector donors provide** remain similar to what was found in the 2016 mapping study.

- Health - supplies, support for medical services, new equipment and capital investments to health institutions and, less frequently, support to medical treatments for individuals;
- Education - scholarships, occasionally to research projects and providing equipment and capital investments to educational institutions (from kindergartens to universities);
- Support to Marginalized Groups - general support or funding services, equipment, supplies and, in some cases, capital investments.

As presented in Graph 20, the percentage of cases of **donations directed to each of the three top issues** fluctuates from year to year but generally shows growth between 2016 and 2017. The year 2018 is characterized by a decline (with respect to 2017), though sometimes small, in the percentage of donations given to the three themes. Notable exceptions are the dramatic reduction in giving in the field of Health in Albania and in Bosnia and Herzegovina over the 2016-2018 period. Kosovo shows extensive growth in funding for Health over the same period. In North Macedonia, cases of donations for Support to

Marginalized Groups have more than quadrupled, due perhaps to responses to serious flooding in 2016. Despite some decline, the cases of funding for Serbia and Bosnia and Herzegovina present the most stable giving pattern for the three top themes.



Graph 20. Private sector giving: % of instances per issue, per country, per years

Interestingly, education, health and the needs of vulnerable groups are mentioned as particular human capital challenges in the most recent Western Balkans Regular Economic Report (Spring 2019) entitled *Reform Momentum Needed*.<sup>28</sup> This suggests that, broadly speaking, private sector funding choices match the areas of need identified by the World Bank as relevant to the region's economic competitiveness and growth.

A deeper analysis of their specific funding choices would be needed to understand to what degree the most vulnerable groups as per the World Bank Report, namely youth, minorities and vulnerable populations, are targeted by private sector funding. An initial analysis shows that the sector most often provides support for youth and adults in local communities and most often in communities where their headquarters or branches are located. Other beneficiary groups often include: youth (and adults) with disabilities; youth/adults with health issues; children without parental care; and youth or other people who are economically disadvantaged.

It must be added that other marginalized groups also appear as beneficiaries, such as the elderly, single parents, unemployed, youth at risk (living on the street and juvenile offenders), the homeless, people with terminal illness; women and children survivors of violence, women victims of trafficking, and youth from minority groups (Roma). While the percentage of donations directed to these groups is significantly smaller compared to those most commonly supported, the fact that they are receiving donations from

<sup>28</sup> Western Balkans Regular Economic Report No.15: *Reform Momentum Needed*. World Bank Group, Spring 2019.

the private sector demonstrates that it is widening its 'net of support' to include the most marginalized. Differences between the countries also suggest that how much this happens depends on the ability of organizations that advocate and provide services to those groups to attract attention and present their case to private sector actors.<sup>29</sup>

Based on Catalyst Balkans data, the **most common recipients of private sector funding** across all the countries fall into three categories:

- State institutions, such as educational, social, health, cultural and sport institutions, and also, in some cases, local government. Across the countries, the private sector most often supports educational institutions and health and, though with greater variation from year to year, social institutions. While instances of support to local government are much less common, amounts donated can be large in cases of support for infrastructure projects.
- CSO/foundations that support issues and beneficiary groups that work on the private sector's priority issues: health and education and marginalized groups.
- Individuals, most often for scholarships, and in rare cases for health treatments.

In the period between 2016 and 2018 and in all countries, state institutions were the principal recipients of private sector gifts, receiving between 50 and 70% of total donations. In all countries, CSOs/foundations were next, attracting between 20 and 33% of donations depending on the year and country. Individuals and families place third across the countries and years – the only exception being in North Macedonia in 2016, where responses to the floods impact the ranking.

The private sector remains, in comparison with other domestic donors, the leading type of donor in terms of long-term, strategic investments (capital investments, equipment, investments in service provision, research, etc.) despite considerable variation by country. For example, in 2018, the percentage of private sector donations which can be considered long-term investments is 28.2% in Albania, 52.5% in Kosovo, and over 60% in Bosnia and Herzegovina, North Macedonia, Montenegro and Serbia.

There are also indications that the number of companies choosing to publish a Call for Proposals is increasing, particularly in countries in which local, private foundations have established themselves as trusted administrators of such calls. Additionally, companies are slowly increasing their practice of volunteering and to a lesser extent, sharing knowledge in their area of particular expertise (e.g. managing finances, human resources, etc).

Significant too are the few examples emerging of the private sector forming alliances with civil society to support, promote and advocate for issues. Regionally, the most prominent theme around which such alliances have been created is social entrepreneurship. Private sector activities in this area range from direct support for social entrepreneurship projects to promotional work with the public. In some cases, support is given to civil sector in advocating for improved laws in this field. The environment is an issue where the interests are sometimes the same as those of civil society and sometimes differ. In number of countries, the private sector supports projects to protect the environment, recycling and the like, while the construction of small hydroplants, for example, has been a point of contention.

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<sup>29</sup> For example, support for people with terminal illnesses is demonstrated in Serbia where an organization that is establishing the first hospice in the country is very active and skilled in working with private sector. A similar case involves support for at-risk youth (those living on the streets) due to the work of another organization. In Montenegro, the private sector has supported Roma children, something that is not the case in most of the other countries.

Another case is that of the Governmental Council for Philanthropy in Serbia<sup>30</sup>, comprised of representatives of government, foundations and private sector associations. The hope is to achieve improvements in legal and fiscal framework as to enhance enabling environment for philanthropy, including VAT on donations in goods and services, changes to legislation regarding donations of food, tax incentives and various other issues that were identified as areas for improvement. From these examples, it seems that the trend of finding common ground with civil society, already noticed in 2016, seems to be continuing and perhaps deepening, at least in those areas where interests do not deviate too strongly.

These developments and examples suggest that space now exists for collaborative efforts that involve not only the state and local authorities but also corporations, around key issues (such as education) where common ground can be identified.

#### *Comparison with 2016 Findings*

As indicated earlier, the 2016 mapping study used only the year 2015 for its analysis of private sector giving in the region. Compared to 2015 findings, in 2019 we see an increased percentage of private sector donations which can be considered as long-term investments, with increases ranging from approximately 5 to 10% depending on the country. Private sector donors also appear to have also expanded their practice of working repeatedly with organizations that have gained their confidence.

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<sup>30</sup> The Council was founded on the initiative of the 'Coalition for Giving', which includes the non-profit sector and business representatives. The initiative was accepted by the Prime Minister of Serbia (who also presides over the work of the Council) and representatives of major ministries are members.



## 4 Conclusions and Recommendations

### 4.1 Main Findings

#### Numbers and Other Outcomes

- Data gathering efforts resulted in identification of **203 donors** active in the Western Balkans in the period 2016-2019. This figure represents an increase in the number of donors found in 2016, although a sizeable portion of the increase may be attributed to enhanced desktop research and improved tools recording the presence of donors. The largest number of donors was found in Serbia (138), followed relatively closely by Bosnia and Herzegovina (103). The smallest number was found in Montenegro (63). The numbers of donors in the remaining countries – 82 for Kosovo, 73 for North Macedonia and 71 for Albania - were relatively similar.
- Looking across the full set of data (research and survey), **Rule of Law (9.89%), Economic Advancement (9.01%) and Education (8.83%)** emerge as the **top three issues** donors were engaged with in the region in 2016-2019. Other themes which rank above 5% are Social & Economic Justice, Sustainable Development, Citizen's Activism and Initiatives, Human Rights and Civil Society Strengthening. Findings for top themes at country level are consistent with the top themes (see Country Addendum), albeit with some variations by country. For example, in Bosnia and Herzegovina, Education does not appear among the top five themes, and in some countries Citizens Activism and Initiatives and/or Reconciliation and Peace figure among the top three. Looking to the future (2020-2024) - in this case based on survey data alone - we see small declines in funding for the themes of Civic Activism and Initiatives, Education and Economic Advancement. Among this same group, support for Public Health and Culture and the Arts seem to decline the most in the next period, whereas Civil Society Strengthening and Environment and Green Economy are the themes where investment appears to grow the most.
- Information gathered on **type of funding** reveals that the majority of donors provide project funding, although the percentages of donors providing institutional support and re-granting is also high. The percentage of donors involved in re-granting has increased slightly since 2016. The figures for donor provision of institutional support seem to have doubled, but a considerable portion of the increase may be due to improved desktop research.
- In terms of **recipients of donor funding** in 2016-2019 the largest percentage of donors were funding CSOs, followed by the state. The figure for foundations comes in third position and may, in fact, be higher due to under-reporting resulting from foundations being incorporated into the category of CSOs.
- Based on combined data, **total spending in 2016-2019** was found to be five billion, eight hundred thirty-six million USD. While the figure is more accurate than that identified in 2016, it must continue to be seen as a rough estimate. **Future spending** in the region is too incomplete to be reliable.

#### Stakeholder and Donor Perspectives

- Stakeholder views on the **positive shifts resulting from donor investments** generally highlight changes in legislation and policies. The most positive view on progress made in the past period is found among stakeholders in Kosovo, Montenegro and North Macedonia. In all countries views on progress among both stakeholders and donors seem to be tempered by the many challenges – political, economic and social – they see. In particular, the commitment of governments in the region to structural changes and to accession, prominent in the 2016 report, continues to worry

stakeholders. This concern seems to have worsened as of 2019, perhaps partly in response to growing uncertainty about Europe's own commitment to the region.

- For stakeholders, the **issues requiring greater donor attention** are: Education and other ways (economic growth, etc) of keeping young people from leaving their home countries. Another was corruption. Social services were seen to have been abandoned or insufficiently addressed by donors, and to be suffering from very limited attention or resources from government. For the donors surveyed, the most common issue requiring greater attention was the strengthening of CSOs. Support for investigative journalism and the independent media were viewed as essential responses to state capture in some countries.
- Stakeholders pointed to a number of areas where **adjustments in the ways donor engage with the region** would be beneficial. Among these, re-granting, though also welcomed, was not seen to be without complications. The concerns centered principally around the impacts of re-granting funds on the work of larger and mid-sized organizations that are not grantmakers but have been entrusted with re-granting funds and the ability of small re-granting funds - given the rules set by certain donors - to bring sustained benefits to smaller, grassroots CSOs.
- Another widely noted tendency was that of donors investing in large external NGOs or agencies rather than in capable domestic CSOs. In a number of countries it was noted that this was an increasing trend that was weakening domestic organizations and proving to be less effective and much more costly.
- **Adjustments in the way donors and CSOs pursue change.** There is a feeling across the region that newer forms of civic activism, often informal or issue-based, are important, positive signs of citizens demanding more attention to problems that affect or concern them (e.g. labor rights, the environment). For this reason, many stakeholders expressed the desire to see both donors and CSOs reach out to grassroots organizations, informal groups and citizens' movements. In short, we heard a very powerful set of voices across the six countries saying that these developments should not be ignored!! We also heard many express the importance of learning from these groups (rather than advising them) and of giving them the space and flexibility they may need.
- **Coordination and collaboration** was also very frequently heard from stakeholders as an area where improvements could assist in achieving the kinds of structural changes needed in a variety of fields. Comments centered on donor coordination, increased communication between donors and CSOs as well as donor encouragement and support for governmental-CSO or multi-sectoral initiatives.
- **Key opportunities** were seen to be the growing political awareness and action (and its further stimulation), grassroots level activism and informal movements, with these needing to be encouraged, learned from and linked to by CSOs. Structural changes and EU Integration were seen as very important as well, although also not without difficulties given domestic and EU dynamics. Domestic philanthropy is seen as an opportunity that, given increased attention in recent years, is beginning to bear fruit.
- **The main challenges** identified were the political context, corruption and lack of transparency, and limited government capacity or willingness to implement change. For some, another important challenge was finding a way for donors and especially CSOs to learn from and possibly work with or support informal or ad hoc grassroots initiatives.
- Among the **groups requiring further donor support** in 2020-2024, 84% of donors responding to the survey and many stakeholders indicated non-profit organizations. Grassroots groups (especially outside of larger cities), informal groups and youth were also mentioned prominently. Groups such as

trade unions, professional associations and political parties were mentioned less frequently than in 2016, perhaps in response to the sustained (and in some instances worsening) pressure on CSOs experienced in the past years that make CSOs seem a greater priority at the moment.

- The **private sector** continues to be most active in supporting health and education and marginalized groups. The private sector appears to be an important provider of long-term support to those organizations with which it develops a close relationship. Calls are being used more frequently and there are signs that private sector entities are increasingly willing to work together with CSOs on issues of joint interest.
- **New or lesser known donors** such as those from the Arab States, China, Russia and Turkey are difficult to research given limited information and, in some cases, limited transparency. Based on our findings, Russia is mainly present in Serbia, Turkish and donors from the Arab States are most present in Bosnia and Herzegovina. The majority of their donations are directed to state institutions.

## 4.2 Reflections and Recommendations

The more qualitative findings of the study provide a view on the situation and potential in the Western Balkans and what still needs to be addressed. Recent and positive shifts can be identified in a number of areas that include: the re-engagement of some donors in response to developments in the region, important legislative changes and some improved transparency in government, increased advocacy efforts and occasional victories, examples of donor or multi-sectoral coordination that is bringing results, investments in philanthropy development and a growth in corporate giving. But large questions remain about EU Integration and the political future of the region, the inequities faced particularly by marginalized groups, limited sustainability and capacity of CSOs, support to smaller citizen's initiatives in smaller communities, and certain donor approaches. To support discussion, we share some reflections and recommendations that have emerged for us from the study.

### Reflections

- One of the impressions that this study has left with us is one of increased diversity. As compared to the 2016 survey, there seems to be more diversity in the themes donors address and about which they express concern (i.e. Social and Economic Justice). But we also have the feeling – though difficult to quantify – that there is increased diversity in the responses of stakeholders within countries despite considerable overlap in those consulted in 2016 and in 2019. In addition to raising questions about why this may be the case, it draws our attention all the more to the common elements we found at country level or regionally.
- For the people with whom we spoke, it is a combination of lack of economic opportunities, corruption, chaos or authoritarianism in politics, and the very slow pace of change (and, for some, a worsening of conditions) that is prompting so many to leave the region. The cry we heard to address the flight of the young, of the most educated, and of anyone else who can, was deeply felt and powerful.
- The factors driving emigration also appear to give birth to the view - among donors and stakeholders alike - that people's daily experiences and struggles should be the starting point for donor and CSO efforts in the coming period. Structural changes must bring results in practice, and approaches need to deal with problems both comprehensively and long-term. To make this happen, complementarity in donor interventions needs to be further enhanced.
- For many stakeholders and some donors, external actors, developments and decisions (i.e. EU accession) continue to hold considerable sway over the region. Some feel that without external

pressure and incentives, nothing will change. At the same time, hope for the future is found *internally* in the protest and civic action (local, often grassroots and very often informal) and movements that have been appearing across the region in the last few years. While expressed as only a thread of hope in 2016, these now appear to many to be a key to internally-driven change. Whether CSOs and donors can learn from and work with them effectively is the lingering question.

- The survey and interviews with donors suggest a shift in strategy among some donors towards funding regional programs, working on particular themes regionally or doing so *in combination* with in-country funding. More research would be needed to confirm this trend. Equally importantly, this seems to go hand in hand (although we do not know which hand came first!) with a greater emphasis among stakeholders than we saw in 2016 on the potential to build capacity through learning and exchange within the Western Balkan region and to jointly solve problems and generate opportunities through cross-border efforts.

## Recommendations

Building on what we heard in the mapping study, we share some thoughts on how donors and CSOs might proceed in their involvements in the region.

- Coordination and cooperation should become the standard practice. The EU in particular, as the largest donor in the region, needs a comprehensive strategy and, as donor put it: “a bold vision for the region”. But it is also critical for a great many stakeholders that the EU and other governmental and private donors seek and then engage with greater complementarity in the countries. Without this, advances in multiple arenas are felt to be piecemeal or even contradictory and much less sustainable.
- Given the strong call for enhanced cooperation among donors (and between donors and CSOs), and some stakeholder comments about donor transparency, there may be a benefit in considering whether simple web-based tools could be found (and adequately managed) to capture investments in the countries and in the region in sufficient detail to permit donors to identify where their interests intersect.
- Donors can demonstrate their trust in the capacity they have helped to create by selecting domestic partners as grantees, partners and leaders of initiatives. Where capacity still need to be enhanced among domestic CSOs (and stakeholders acknowledge it still does), this can be supported through targeted interventions, by partnering organizations with others (including regionally or beyond), through core support and through the forging of long-term relationships between donors and domestic CSOs based on partnership, open dialogue and learning.
- New forms of activism and movements of various types represent an important force for change to be cultivated. Few ideas were heard about *how* to link to and support these types of groups. But to find these paths it is important that CSOs stop, listen to, and learn from these initiatives. Donor support in finding ways to do this that do not interfere with the natural emergence, methods and trajectories of these initiatives could result in a broader base of support for the work of CSOs as well as greatly improve these societies.
- Local, grassroots groups – whether organized or informal – are seen as important spaces for civic engagement and activism around people’s concerns. They are thus an important force for change over the short and longer-term. In addition to expanding their access to resources, here too it would be key to find ways of learning from them as well as other ways of supporting them in their work.

- Re-granting, though important, cannot fully solve the problems of grassroots CSOs and not all larger CSOs are natural grantmakers. In some cases re-granting may not make the best use of CSO capacity and interests. In others, adjustments to re-granting rules of donors might include permitting more flexibility in the size, use, types of recipients and number of grants that can be made and, at the same time, looking for ways to complement financial support to smaller, grassroots CSOs.
- The regional dimension must not be forgotten. Encouraging regional learning and exchange opportunities is an important strategy for change according to some stakeholders and one that could be further encouraged and supported. An even larger number of donors seem to agree and call additionally for greater attention to joint problem-solving to address the many problems that transcend the borders of individual countries in the region. As one donor put it, *“Donors and CSOs need to lead the way, to be pioneers in this sort of cooperation!”*

## Annex 1: Issue Categories and Subcategories

Theme	Includes
Human Rights	human rights (advancing/defending defenders, social inclusion and equal treatment under the law etc.); LGBTQ+; minorities, incl. religious minorities; people with disability; children; trafficking, etc.
Gender Justice & Women's Rights	fighting violence against women; sexual & reproductive rights; labor & economic rights; political participation; women's activism
Reconciliation & Peace	conflict resolution; transitional justice; political and security cooperation; tolerance; civic education for conflict resolution; fighting extremism/radicalization
Citizen's Activism & Initiatives	civic activism & participation; citizen's movements; youth activism & participation; building democratic practices (all levels)
Education	higher education; scholarships; fellowships; study trips & exchanges; early childhood education & development; integrated education
Rule of Law	freedom of expression; freedom of assembly; freedom of association; good governance; accountability; transparency; decentralization; institution-building; anticorruption; reform of public institutions; judiciary reform; Parliament strengthening
Social & Economic Justice	social & economic wellbeing of marginalized groups; labor rights; governance of labor market; fair economic practices of companies; progressive economic policies; battling extreme economic insecurity
Economic Advancement	Entrepreneurship; start-ups; social business development; unemployment (including youth & women); economic growth; agriculture; competitiveness; support to SMEs; employability/vocational education; IT infrastructure and education; fighting the grey economy; transport & other infrastructure (water, energy etc. that is not based on sustainable approaches)
Philanthropy Development	at national and local levels
Independent investigative Journalism	independent journalism; investigative journalism; independent media
Culture & Arts	culture; arts; cultural heritage (architecture and related aspects)
Sustainable Development	sustainable water management and sanitation; renewable energy and energy efficiency; waste management; sustainable consumption and production patterns; sustainable industrialization; fostering innovation
Public Health	general, equal access to health services
Migration	migrants; refugee & IDP support and rights
Humanitarian & Emergency Relief	relief; disaster preparedness
EU Integration	support to EU integration processes and civil society inclusion; Euro–Atlantic cooperation; regional cooperation on issues connected to EU integration and Euro–Atlantic cooperation
Environment & Green Economy	forests; water; conservation; biodiversity; climate change
Civil Society Strengthening	support to civil society and foundations; community foundation organizational and program development
Election Integrity	fair and open elections

## **Annex 2: Survey of Donors Active in the Western Balkans**

*Note:* The Survey was conducted using an online Survey Monkey tool that could not be easily merged with this document. The formatting of the questionnaire has thus been simplified for the purpose of this annex, although with no changes in the information requested. An asterisk indicates a required question.

### **MAPPING OF DONORS IN THE WESTERN BALKANS**

Dear Madam/Sir,

We kindly ask you to complete this survey on the suggestion of The Open Society Foundations/OSIFE. The survey is part of wider research commissioned by OSIFE to examine the current socio-political momentum and new realities in the Balkans and to consider their impacts on what donor organizations support and how they operate in this context.

As a donor with significant knowledge and experience of the region, it would be important to hear from you about your work and views on a number of issues. Your input will allow us to prepare a report that can underpin discussion of donor responses to developments in the region, will serve as an update to a similar survey conducted in 2016 and may also help generate opportunities for collaboration. The report will be shared with you once completed and will also be presented at a Balkan Donors Forum meeting in September 2019.

The survey investigates institutional forms of giving in 6 Western Balkan countries (Albania, Bosnia & Herzegovina, Kosovo, North Macedonia, Montenegro and Serbia) and includes regional work across these countries.

Please note that all the questions relate only to your work in the target countries. In addition, we kindly ask you to convert to USD all figures that relate to funding amounts.

The information you provide will be kept confidential in its details as the report will aggregate inputs received and will not attribute any quotes taken from the surveys.

We would greatly appreciate your contribution! Please respond by 18 June 2019.

**IMPORTANT NOTE:** We are aware that many of your organizations provide certain information online or that you may have documents containing information relevant for this research. If you feel the information requested in specific questions is available online or in existing documents, please indicate this and/or send the documents to [jszanton@posteo.org](mailto:jszanton@posteo.org) and we will do our best to extract the relevant information. We believe this may be true particularly in Part 1 of this survey, which requests information on your work in 2016-19.

Thank you very much in advance for your assistance!

## **2. YOUR DATA**

\*1. Name of the organization

\*2. Name of the person completing survey

\*3. Position of the person completing survey

\*4. Please indicate type of organization

- ☐ Private foundation from the region
- ☐ Private foundation outside of the region
- ☐ Operating organization/institute from the region
- ☐ Operating organization/institute outside of the region
- ☐ Bilateral donor
- ☐ Multilateral donor/organization
- ☐ Other

If your answer is "Other", please specify

3. PAST/PRESENT ACTIVITIES AND FUNDING

\*5. To/for which of the following countries did you/do you provide funding in 2016-2019?

Please include funding of organizations in the country, operational programs of your organization as well as funding to organizations based in other countries for work in one of the target countries.

- ☐ Albania
- ☐ Bosnia and Herzegovina
- ☐ Kosovo
- ☐ North Macedonia
- ☐ Montenegro
- ☐ Serbia

\*6. Did/do you provide funds for any of the following types of regional activities involving all 6 countries or any subset of these countries?

- ☐ Yes, regional, cross-border work
- ☐ Yes, regional – same program/grant in more than one country
- ☐ No

7. Please select the top 3 themes/issues your organization funded in the region in 2016-2018 and your priority themes for 2019.

Issue/Theme	2016	2017	2018	2019
Human Rights				
Gender Justice & Women's Rights				



Reconciliation & Peace				
Citizen's Activism & Initiatives				
Education (for individuals –scholarships, fellowships, research)				
Education - other				
Rule of Law				
Social & Economic Justice				
Economic Advancement				
Philanthropy Development				
Independent Investigative Journalism				
Culture & Arts				
Sustainable Development				
Public Health				
Migration				
Humanitarian & Emergency Relief				
EU Integration				
Environment & Green Economy				
Civil Society Strengthening				
Election Integrity				

Please add other issues/theme if any	2016	2017	2018	2019

8. Please indicate the total amount of funding you provided/will provide in grants or support to other organizations or invested/will invest in your own programs in the Western Balkans in 2016 - 2019.

Please exclude the operational costs (staff salaries, travel, etc.) for your own programs and provide figures in USD. If you did not provide funding, please enter 0.

Year	Amount
2016	
2017	
2018	
2019	

9. If you provided/are providing grants to other organizations in 2016-2019, please help us better understand your grant-making approach by ranking the following list by the type of funding you most commonly provide to the 6 countries.

Please rank all options, with 1 indicating the highest and 3 the lowest frequency of each type of support.

Type	Ranking
Project Activities	
Institutional (core) funding	
Re-granting funds	

10. Please rank the following options to indicate which of the following are the most common recipients of your grant-making.

Please rank all answers from 1 to 6, with 1 indicating the most frequent, 5 the least frequent type of recipient of your support and 6 indicating Not Supporting.

Type	Ranking
Non-profit organisations	
Foundations	
State institutions/ local governments/national governments	
Partnership between non-profit and State	
Individuals	

11. Please share up to 5 examples of the most important results of your funding (positive changes that happened in any theme).

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12. Please give one or more examples of the types of interventions you funded that you feel were exceptional in terms of approach or results achieved.

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13. What gaps do you see in terms of issues addressed, types of recipients or something else in the period 2016-2019?

Issues covered	
Types of recipients	
Types of interventions	

#### 4. FUTURE STRATEGY AND PLANS

14. Does your organization plan to continue its involvement in the Western Balkans beyond 2019?

- Yes, at the same level of funding
- Yes, at an increased level of funding
- Yes, at a decreased level of funding
- No

Comments:

15. To/for which of the following countries do you plan to provide funding in the period 2020 - 2024? When responding, please include funding of organizations in the country, operational programs of your organization as well as funding to organizations based in other countries for work in one of the target countries.

- Albania
- Bosnia and Herzegovina
- Kosovo
- North Macedonia
- Montenegro
- Serbia
- None

16. Will you provide funding for regional activities across all 6 countries or any subset of these countries in the period 2020 - 2024?

- Yes, regional, cross-border work
- Yes, regional – same grant in more than one country
- No

17. Please select the top 3 themes/issues your organization plans to support in the region in the period 2020 - 2024.

Issue/Theme	2020	2021	2022	2023	2024
Human Rights					
Gender Justice & Women's Rights					
Reconciliation & Peace					

Citizen's Activism & Initiatives					
Education (for individuals –scholarships, fellowships, research)					
Education - other					
Rule of Law					
Social & Economic Justice					
Economic Advancement					
Philanthropy Development					
Independent Investigative Journalism					
Culture & Arts					
Sustainable Development					
Public Health					
Migration					
Humanitarian & Emergency Relief					
EU Integration					
Environment & Green Economy					
Civil Society Strengthening					
Election Integrity					

Please add other issues/themes if any	2020	2021	2022	2023	2024

18. Please indicate the total amount of funding you plan to provide in grants/support or as investments in your own programs in the period 2020 - 2024.

Please exclude operational costs for your own programs and provide amounts in USD. If you do not plan to provide funding please enter 0.

Year	Amount
2020	
2021	
2022	
2023	
2024	

19. Has or will the approach/strategy of your organization change in any way (type of funding or recipients, more/less operational programs, etc.) as compared to the previous period (2016-2018)? If yes, please explain how and why

- Yes, it changed recently
- Yes, it is currently in the process of being reviewed and revised
- Yes, it will change
- No

Please explain how and why.

20. What themes/issues do you think will be critical in the coming 5 years beyond those that your organization already plans to fund?

Human Rights	
Gender Justice & Women's Rights	
Reconciliation & Peace	
Citizen's Activism & Initiatives	
Education (for individuals –scholarships, fellowships, research)	
Education - other	
Rule of Law	
Social & Economic Justice	
Economic Advancement	
Philanthropy Development	
Independent Investigative Journalism	
Culture & Arts	
Sustainable Development	
Public Health	
Migration	
Humanitarian & Emergency Relief	
EU Integration	
Environment & Green Economy	
Civil Society Strengthening	
Election Integrity	

Other themes/issues


21. What types of recipients would you choose to invest in to address the key themes/issues in the region in the next 5 years?

Type	
Non-profit organisations	
Foundations	
State institutions/ local governments/national governments	
Partnership between non-profit and State	
Individuals	
Other	

If your answer is "Other", please specify.

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22. Do you see any opportunities to achieve significant results around the themes/issues your organization addresses and any others you have mentioned above in the coming 5 years?

- Yes
- No
- Not sure

If your answer is yes, please explain what specific opportunities you see.

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23. Do you see any challenges in bringing about significant results around the themes/issues your organization addresses and any others you have mentioned above in the coming 5 years?

- Yes
- No

- Not sure

If your answer is yes, please explain what the specific challenges.

24. Do you know of any new funders (including from Russia, Turkey, China or any of the Arab countries) or important new sources of support that are active in one or more countries?

- Yes
- No

If yes, please name them and (if possible) indicate what types of themes/issues they may address.

25. Please add anything that you feel might be important.

Thank you!

### Annex 3: List of Survey Respondents

Donor Institution	Country
<i>Private Foundations (International)</i>	22
BHF Bank Stiftung	Germany
CS Mott Foundation	USA/UK
Civil Rights Defenders	Sweden
European Climate Foundation	Netherlands/Germany/Belgium/UK/France/Poland
European Fund for the Balkans	Serbia
Friedrich-Ebert-Stiftung Dialogue Southeast Europe	Germany
German Marshall Fund – Balkan Trust for Democracy	US/Serbia
Heinrich Böll Foundation	Germany/Serbia
King Baudouin Foundation	Belgium
Oak Foundation	Geneva
Open Society Foundations (five countries)	USA & domestic foundations in 5 W.Balkan countries
Pestalozzi Children’s Foundation	Switzerland
Porticus	UK/Netherlands/USA/Germany-Switzerland-Austria
Regional Cooperation Council	Bosnia & Herzegovina
Rockefeller Brothers Fund	USA
Roma Education Fund	Hungary
Sigrid Rausing Trust	UK
Trust for Mutual Understanding	USA
<i>Bilateral and Multilateral Donors</i>	6
Embassy of the Netherlands to Serbia & Montenegro	Bilateral, Netherlands
European Bank for Reconstruction and Development	Multilateral
European Endowment for Democracy	Multilateral
USAID Kosovo	Bilateral, USA
USAID Serbia	Bilateral, USA
World Bank Group - Serbia Country office	Multilateral
<i>Domestic Foundations and Organizations</i>	10
Ana and Vlade Divac Foundation	Serbia
Foundation Jelena Santic	Serbia
Fund B92	Serbia
Fund for Active Citizenship	Montenegro
Heartefact Foundation	Serbia/region
HORUS	North Macedonia
Mozaik Foundation	Bosnia & Herzegovina
Trag Foundation	Serbia
Tuzla Community Foundation	Bosnia & Herzegovina
Slavko Curuvija Foundation	Serbia



## Annex 4: Sample of Interview Guide for Stakeholders

OSIFE - Office of the Western Balkans has asked our team to work on the paper that would help map donors still present in the Western Balkans, but also to gather the perceptions of important stakeholders from each country, and you are one of the stakeholders whose views we consider important to include. We would like to stress that your name will be mentioned in the list of people interviewed, but no quote or opinion will be attributed in the report so your anonymity will be protected.

### Orientation Questions:

- 1) What is your view on the funding provided by donors (private foundations, bilateral and multilateral donors) in your country over the past couple of years (say period from 2016 to 2019)?
  - 1) What issues that have been funded and do you feel they respond to the greatest needs?
  - 2) In your opinion, are there significant differences between private foundations, bilateral/multilateral donors and corporate donors in terms of whether they respond to significant needs, or any other notable differences?
  - 3) Recipients – who were the most common recipients of their support (e.g. large CSOs, smaller CSOs, government (and its institutions), independent agencies (e.g. ombudspersons); if CSOs were they service providers, advocacy organizations, think tanks or something else?
- 2) What, in your perception are the most important results of that funding within specific themes<sup>31</sup> (positive changes that happened due to foreign donor's presence & support)? Can you give one or more positive examples in terms of approach and results achieved?
- 3) What are the "gaps" in terms of issues, types of recipients, types of funding or something else?
- 4) Are there some donor approaches and/or strategies that you think have had negative effects and, if yes, can you give an example?
- 5) Have you seen any positive shifts in the past 4 years in terms of how donors cooperate with one another, with civil society or others, or in any other areas of donor engagement in the region? If yes, can you give an example?
- 6) What do you think will be the key issues, needs in your country in the next 5 years?
- 7) In your view, what specific opportunities for progress around those issues/themes do you see in the coming five years?
- 8) In your view, what are the key challenges and/or risks related to those issues/themes that you mentioned as key needs/issues during the coming three to five years?

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<sup>31</sup> By "theme" we generally mean areas such as Human Rights, Gender Justice & Women's Rights, Reconciliation & Peace, Citizen's Activism & Initiatives, Education (for individuals-scholarships, fellowships, research), Education –Other, , Rule of Law, Social & Economic Justice, Economic Advancement, Philanthropy Development, Independent investigative journalism, Culture & Arts, , Sustainable Development, Public Health, Migration, Humanitarian & Emergency Relief, EU Integration, Environment & Green Economy, Civil Society Strengthening, Election Integrity. You are also free to formulate themes not included here or use your own words.

- 9) What key particular groups in society would be able to bring about the changes you think must be made? In other words, who would it be important to invest in? Are there any important types of recipients that until now haven't been supported?
- 10) Do you know any donors from Russia, China, Arab countries or Turkey that provided support in your country? If yes, which are they? What themes they supported? Who were recipients of their support?
- 11) Do you perhaps know of any new types of donors and/or names of specific donors that might be interested in investing in the Western Balkans or in your country specifically?
- 12) Is there anything else that you think might be important and we haven't asked?

**Annex 5: List of Interviewed Stakeholders****ALBANIA**

Organization	Person interviewed	Position	Contact
Partners for Democratic Change	Juliana Hoxha	Director	director@partnersalbania.org
Government Agency for CSO Support	Erion Banushi	Head of Sector for International Cooperation and Program Development	erionbanushi@gmail.com
Partnere per Femijete	Ingrid Jones	Director	ijones_ppf@yahoo.co.uk
Mary Ward Lareto Foundation	Imelda Poole	President	imeldapoole@gmail.com
BIRN Albania (media)	Kristina Voko	Executive Director	kristina.voko@birn.eu.com
European Movement Albania	Gledis Gjipali	Executive Director	gledis.gjipali@em-al.org

**BOSNIA AND HERZEGOVINA**

Organization	Person interviewed	Position	Contact
Network for Building Peace	Goran Bubalo	Coordinator	goran.bubalo@mreza-mira.net
BUKA Magazine	Aleksandar Trifunovic	Editor	aleksandar.trifunovic@gmail.com
SOS Children's Village	Besic Maria Theresa	National Public Funding Adviser	MariaTheresa.Besic@sos-ds.ba
Foundation Hastor	Seid Fijiljanin	Director	seid.fijiljanin@fondacijahastor.ba
IN Foundation	Branka Ivanovic	Executive Director	cnfceeibih@gmail.com

**Local Donors (invited to the September meeting)**

Organization	Person interviewed	Position	Contact
Mosaic Foundation	Zoran Puljic	General Manager	zoran.puljic@mozaik.ba
Tuzla Community Foundation	Jasna Jasarevic	Director	jasna@fondacijatz.org

**KOSOVO**

Organization	Person interviewed	Position	Contact
Syri I Vizionit	Veton Mujaj	Director	veton.mujaj@syriivizionit.org
Kosovar Civil Society Foundation	Fatmir Curri	Programme Director	fatmir.curri@kcsfoundation.org
Kosovo Parliament	Valdete Idrizi	Advisor to the Speaker of Parliament	valdeteidrizi@yahoo.com
Association Integra	Kushtrim Koliqi	Executive Director	kushtrim.koliqi@ngo-integra.org
BIRN Kosova	Albulena Sadiku	Deputy Director	albulena@jetanekosove.com

## NORTH MACEDONIA

Organization	Person interviewed	Position	Contact
BCSDN (former executive director)	Tanja Hafner Ademi	Consultant	tanjahafnerademi@gmail.com
Macedonian Centre for international cooperation	Gonce Jakovleska	Director	gjk@mcms.mk
HORUS Foundation	Branko Dokuzovski	Executive Director	branko@horus.mk
Macedonian Civic Education Center	Loreta Georgieva	Executive Director	lgeorgieva@mcgo.org.mk
Macedonian Centre for European Training	Aleksandar Kolekeski	Senior researcher	kolekeski@gmail.com

## MONTENEGRO

Organization	Person interviewed	Position	Contact
Center for NGOs development CRNVO	Ana Novakovic	Director	ana.novakovic@crnvo.me
MANS	Vanja Calovic	Director	vanja.calovic@mans.co.me
Directory for Cooperation with NGOs, Ministry for Good Governance	Marija Jankovic	Advisor	marija.jankovic@mju.gov.me

### Local Donors (invited to the September meeting)

Fund for Active Citizenship fAKT	Anica Maja Boljevic	Director	maja@faktcg.org
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## SERBIA

Organization	Person interviewed	Position	Contact
Civic Initiatives	Bojana Selakovic	Program Director	bojana@gradjanske.org
National Coalition for Decentralization	Mladen Jovanovic	Board member	mladen.jovanovic@decentralizacija.org.rs
BIRN	Tanja Maksic	Coordinator	tanja.maksic@birn.eu.com
Office for Cooperation with Civil Society	Stepanovic Zarko	Director	zarko.stepanovic@civilnodrustvo.gov.rs
Ne da(vimo) Beograd	Dobrica Veselinovic, Radomir Mikovic, Natalija Simovic	Members	dobrica.veselinovic@gmail.com

## **Annex 6: Interview Guide for Donors**

### **I. Interview Guide for Institutional Donors**

1. To/for which of the countries are you funding in 2019 and what countries do you expect to support in 2020-2024? Please include funding of organizations in the country, operational programs of your organization as well as funding to organizations based in other countries for work in one of the target countries.
2. Do you provide any regional funding (for cross-border work or same program/grant in more than one country) and will you continue to do this in the period 2020-2024?
3. What themes/issues are you focusing on in 2019? Will these continue to be your focus in 2020-2024?
4. Can you give an example of a typical grant: who receives it, how large is it, what is it used for?
5. Please give one or more examples of the types of interventions you funded that you feel were exceptional in terms of approach or results achieved.
6. What gaps do you see in terms of issues addressed, types of recipients or something else in the period 2016-2019?
7. What themes/issues do you think will be critical in the coming 5 years beyond those that your organization already plans to fund?)
8. What types of recipients would you choose to invest in to address the key themes/issues in the region in the next 5 years?
9. Do you see any opportunities to achieve significant results around the themes/issues your organization addresses and any others you have mentioned above in the coming 5 years?
10. Do you see any challenges in bringing about significant results around the themes/issues your organization addresses and any others you have mentioned above in the coming 5 years?
11. Do you know of any new funders (including from Russia, Turkey, China or any of the Arab countries) or important new sources of support that are active in one or more countries?
12. Would you like to add anything that you feel might be important?

### **II. Interview Guide for Donor Networks**

1. Do you know of any recent donor interventions in these countries that you feel were exceptional in terms of approach or results achieved? If yes, please briefly describe them.
2. Are you aware of any new funders (including from Russia, Turkey, China or any of the Arab States) or other new sources of support for these countries? If yes, please name them and (if possible) indicate what themes/issues they may address.
3. Please share any new trends in giving in these countries that you may have come across, for example trends in the types of themes/issues donors fund or are interested in, types of recipients or forms of giving, etc.

## Annex 7: List of Interviewed Donors and Networks

### FOUNDATIONS

Organization	Person interviewed	Position	Countries active
Heinrich Böll Foundation	Walter Kaufmann	Head Eastern and SE Dept	All
European Fund for the Balkans	Igor Bandovic	Senior Program Manager	All
GMF of Balkan Trust for Democracy	Natasha Petrovic	Senior Program Officer	All
Help - Hilfe zur Selbsthilfe Foundation	Timo Stegelmann	Deputy Managing Director, Head of the Finance Department and responsible for our projects in Southeast Europe	Bosnia & Herzegovina, Kosovo, Montenegro, Serbia
National Endowment for Democracy	Ivana Cvetkovic Bajrovic	Associate Director for Europe	All
Rockefeller Brothers Fund	Mia Vukojevic	Program Director, Western Balkans Program	All
Albanian-American Development Foundation	Martin Mata, Aleksander Sarapuli	Co-CEOs	Albania

### BILATERALS

Organization	Person interviewed	Position	Countries
Swiss Cooperation Office - Serbia	Petar Vasilev	National Programme Officer for Governance Embassy of Switzerland Swiss Cooperation Office in Serbia	Serbia
Swiss Cooperation Office - Serbia	Sascha Müller	Head of Governance Unit and Regional Governance Advisor	All except Montenegro
USAID - Civil Society Programs	Erin McCarthy	Senior Civil Society Advisor, Bureau for Europe and Eurasia	All except Montenegro
USAID- Balkan Media Program (BMAP - regional)	Olesia Gardner	Program Officer, Media, Democracy	All except Albania
Swedish International Development Cooperation (SIDA)	Torgny Svenungsson	Head of Unit, Western Balkans, Turkey, Latin America and thematic support	All (Montenegro only in cooperation with other countries)

#### MULTILATERALS

Organization	Person interviewed	Position	Countries active
European Commission, Directorate-General for Neighbourhood and Enlargement Negotiations (DG NEAR)	Colin Wolfe	Head of Western Balkans Regional Cooperation	All

#### DONOR NETWORKS

Organization	Person interviewed	Position	Countries active
ARIADNE	Julie Broome	Director	n/a
DAFNE	James Magowan	Co-ordinating Director	n/a

## Annex 8: Sources

### Databases

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### Organizations

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- Bosana Foundation: <http://bosanafoundation.org/>
- Care International: <https://impact.care-international.org/2017/reach/countries>
- Charles Stewart Mott Foundation: <https://www.mott.org/grants>
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- Community Building Mitrovica: <http://www.cbmitrovica.org/publications>
- Community Development Fund (CDF): <http://kcdf.org/programs/>
- Confucius Institute in Belgrade: <http://konfucije.fil.bg.ac.rs/wp/category/aktivnosti/>
- Confucius Institute in Novi Sad: <http://konfucije.ff.uns.ac.rs/aktuelno/>
- Cultural Heritage without Borders: <http://chwb.org/where-we-work/>
- Danish Embassy Serbia: <http://serbien.um.dk/en/News>
- Danish Refugee Council (DRC): <https://drc.ngo/where-we-work>
- DFID: <https://devtracker.dfid.gov.uk/>
- Ehlers-Danlos Society Foundation: <https://www.ehlers-danlos.com/news/>
- European Union: <http://open-data.europa.eu/en/data>
- European Union: <https://cordis.europa.eu>
- Fond B92: <http://fondb92.org/sr/naslovna.1.1.html>
- Fondacija „Dušan Kešelj“: <http://www.dusankeselj-fond.org/>
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- Robert Bosch Foundation (Robert Bosch Stiftung): <https://www.bosch-stiftung.de/en/node/3486>
- Rockefeller Brothers Fund: <https://www.rbf.org/grants-search>
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