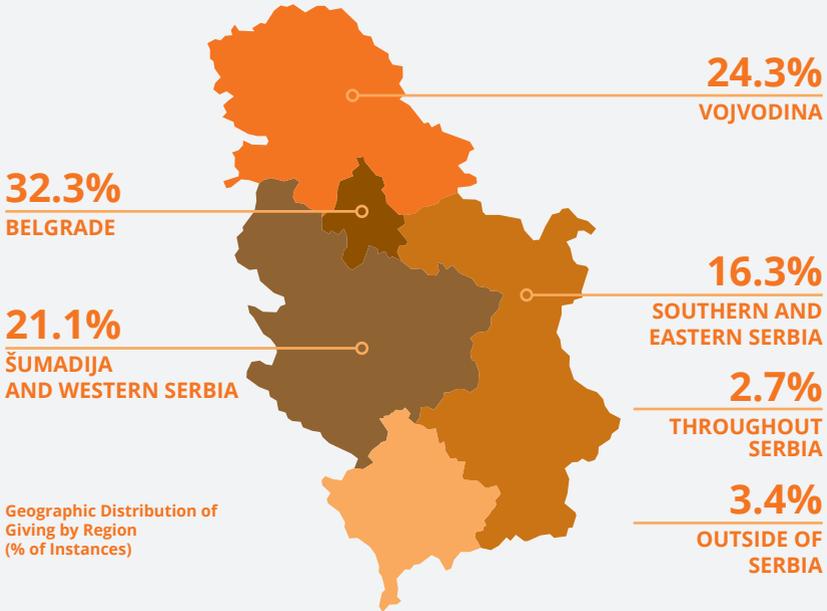




ANNUAL REPORT ON THE STATE OF PHILANTHROPY

QUICK FACTS



3,042

number of recorded instances



€27,146,000

estimated value of donations



€3.8

average donation per citizen

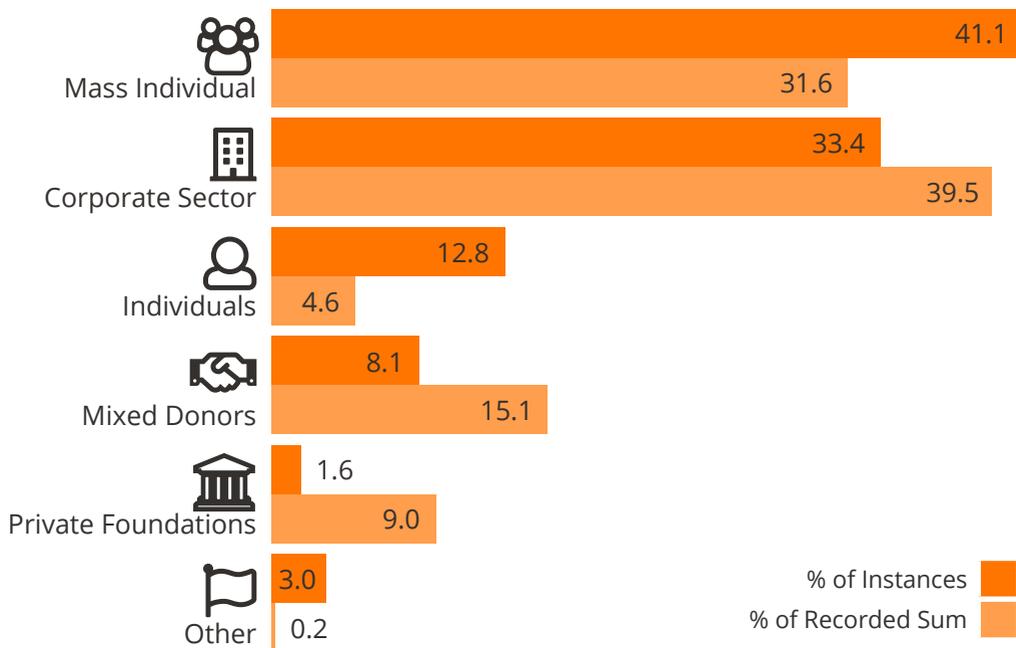


27.8%

increase of giving from 2016

DONORS

DONATIONS BY TYPE OF DONORS (% of instances vs. % of recorded sum)



	2015	2016	2017
% OF INSTANCES	○	○	○
Mass Individual	41.7%	36.8%	41.1%
Corporate Sector	26.8%	31.7%	33.4%
Individual	19.3%	3.4%	12.8%
% OF RECORDED SUM	○	○	○
Mass Individual	15.2%	25.2%	31.6%
Corporate Sector	51.6%	45.4%	39.5%
Individual	16.4%	1.0%	4.6%

KEY POINTS

SAME LEVEL OF ACTIVITY

In 2017 there were 3,042 recorded unique instances of giving for social good in Serbia, which is approximately the same level of activities as in 2016, but the total amount of giving this year is significantly larger.

CITIZENS ARE THE MOST ACTIVE

In 2017, just like in 2016, the most active donors were citizens, through mass individual giving (41.1%), followed by the corporate sector (33.4%) and individuals (12.8%). The rest is made up of activities of private foundations, mixed projects and others.

GIVING FROM DIASPORA FLUCTUATES

The percentage of instances of giving from diaspora is slightly lower than last year (13.2%), but the recorded amount of donations is higher at 7% - which is 5% more than in 2016. The level of activity in diaspora, and its share in the total amount given is marked by year-to-year fluctuations.

UNCHANGED DISTRIBUTION

There are no changes in the geographic distribution of giving in comparison to 2016: Belgrade still receives majority of donations (32.3%), followed by Vojvodina (24.3%). Other regions had a slight, but statistically irrelevant, decrease in percentage of donations.

COMPANIES GIVE THE MOST

If we consider the value of donations, the corporate sector takes the lead with a 39.5% share in total recorded sum, followed by mass individual giving at 31.6%, and mixed donors at 15.1%. The share of giving by individuals has increased slightly compared to 2016.

GIVING TO SOCIAL GOOD IS ON THE RISE

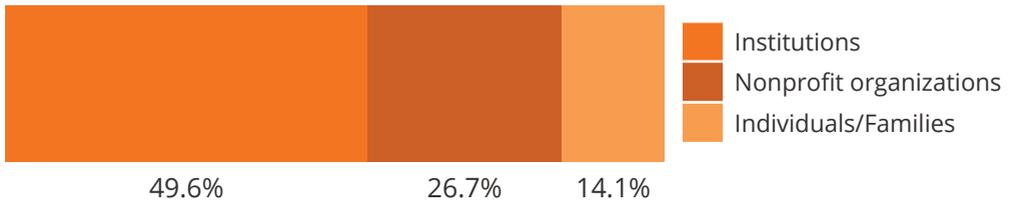
On the whole, mass individual donors continue to have the strongest presence with increased participation in total value of donations. The presence of corporate sector is permanently increasing, while the total amount given is on the rise again, after last year's decrease.



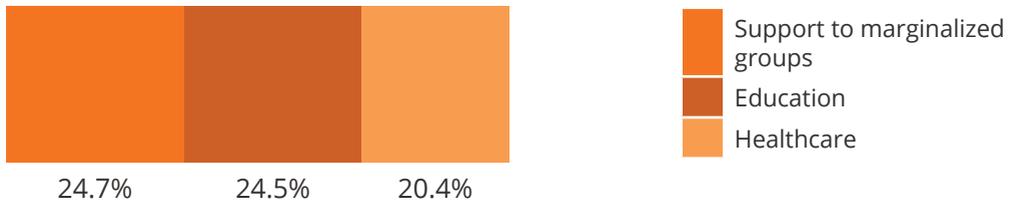
PROFILES OF THE MOST COMMON TYPES OF DONORS CORPORATE SECTOR



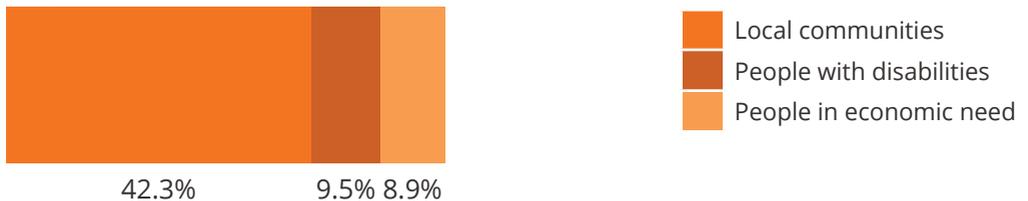
TOP 3 RECIPIENT ENTITIES



TOP 3 THEMES FOR GIVING



TOP 3 FINAL BENEFICIARY GROUPS



EXAMPLES OF CORPORATE SECTOR DONATIONS

Serving as one of the great examples of the corporate sector giving is **Delta Holding**, which is also the company that won this year's VIRTUS Award for National contribution. Delta Holding was rewarded for the "Fund for the Future" program, which offers education, scholarships, and potential employment to students in difficult financial situations. This company also implements "The Third Parent" program that helps families in need, provides professional support, and contributes to poverty reduction. In the last year, Delta Holding was also involved in an endowment project - and gifted the City of Belgrade with a sculpture named "Odavde donde" (From here to there), an artwork done in collaboration between Mrđan Bajić and Richard Deacon. The sculpture was set up in the fall of 2017, and will adorn the footbridge between the Kalemegdan fortress and the Sava pier. The estimated value of donations made by Delta Holding in the previous period is EUR 780,000.

KPMG Serbia is setting a good example, too. During 2017, among other things, this company supported NURDOR's campaign, helped establish an entrepreneurship classroom in Rakovica High School of Economics, supported "Živimo zajedno" association (We Live Together) furnish a space for members and volunteers in an independent living facility in Golubinci, and provided 73 students with internships.

In 2017 amongst SME's, one example stands out: **bakery "Arena" from Prijepolje**, whose owner Ferhat Hođaj caught the eye of the public by announcing that anyone who can't afford to buy bread, can get it for free in his bakeries. What makes this case particularly interesting is that Mr Hođaj, following the rules of his local tax authorities, has to pay the VAT for each bread loaf he gives. Stories like this underline not only the generosity of donors, but also the necessity to change or adapt the tax regulations related to giving for social good.

INNOVATIVE GIVING

A great initiative from 2017 comes from **Marketing Network**. This example brings together innovation, pro bono services, partnership of multiple actors from the corporate sector, and intersectoral partnership. As a way to celebrate its 5th birthday, Marketing Network started a CSR campaign called #KampanjaNaDar (#CampaignAsAGift), supported by as much as 17 different creative, PR and digital marketing agencies in Serbia.

The idea that kickstarted the campaign was to involve all interested agencies that wanted to contribute and give their professional services pro bono to the community, social enterprises and nonprofits. Agencies that participated in the #KampanjaNaDar were McCann Belgrade, Orange studio, Fullhouse Ogilvy, Popular, SuperDot, New Media Team, Smart Vision, Havas Adriatic, MullenLowe and Friends, Degordian, Fusion Communications, April Studio, Web Media Agency, Rod & Rope, Idea+ Communications, LUNA\TBWA and Komunikacijski laboratorij. They created and donated campaigns to social enterprises (Koba Yagi, Eco Beg, Bioidea, DajDaj, Mamin san, Agro Iris, Liceulice), nonprofits (WOOOF Srbija, Živimo zajedno, Šansa za roditeljstvo, Banka hrane, Nepraktična žena, HAE Srbija, Association for the support of youth and children development "ANA", Autonomous Women's Centre, City Organization of Blind People in Belgrade, Association of Mathematicians of Serbia), and to the University Children's Hospital in Tiršova.

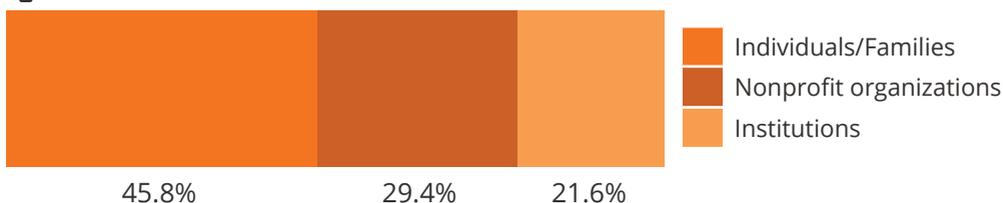
Integrated communications agency Executive Group was the creative partner on the project - they came up with the #KampanjaNaDar concept, and supported its implementation. #KampanjaNaDar i dala podršku u njenoj realizaciji.



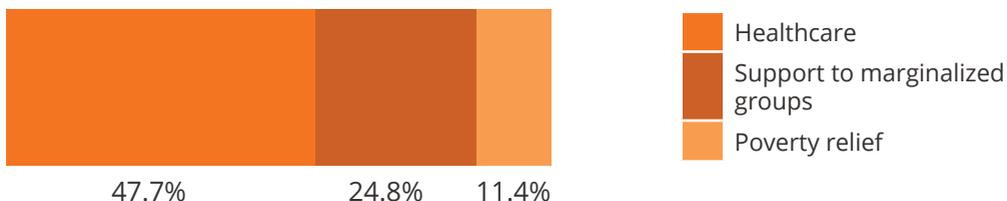
PROFILES OF THE MOST COMMON TYPES OF DONORS MASS INDIVIDUAL



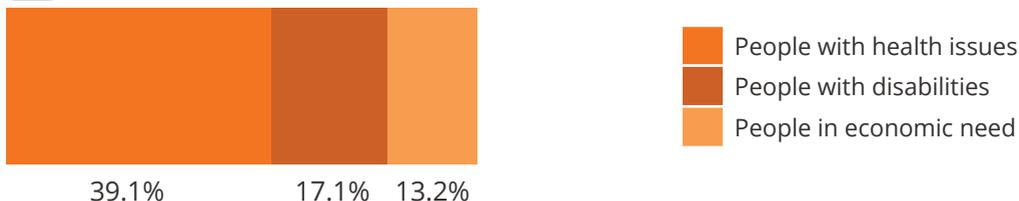
TOP 3 RECIPIENT ENTITIES



TOP 3 THEMES FOR GIVING



TOP 3 FINAL BENEFICIARY GROUPS



CITIZENS IN ACTION

The **Center for Youth Integration** continued their Lemonade Day tradition in 2017 as well. The campaign included a large number of coffee shops in Belgrade, Novi Sad, Pančevo and Šabac, where citizens could buy lemonade and refresh during the summer heat. All revenue was donated to the Center, and used to buy school supplies for children living in the streets and using the services of the Children's Drop-In Center. In 2017, they raised over EUR 2,500.

People also showed exceptional solidarity with their fellow citizens in economic need. It is estimated that in 2017, they bought and donated food products and goods worth over EUR 935,000, through the **Food Bank campaign**, in cooperation with Maxi, Tempo and Shop&Go supermarkets.

Here's an especially interesting example of mass giving – through crowdfunding platforms. **Association Super Grannies** launched a campaign to raise money necessary to open a cake shop where all the work would be done by the grannies from the association. Considering how difficult it is to get employed for the elderly population, this great idea would provide them with a permanent source of income and sustainability in the long run. The Super Grannies only needed the initial capital - and they raised it through Indiegogo, a global crowdfunding platform. This platform is available to people from a large number of countries, and people from Serbia and our diaspora have so far contributed to various projects with over USD 3,700.

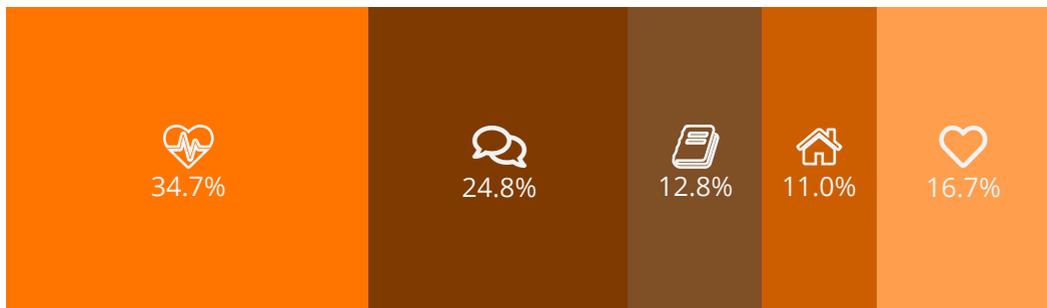
INDIVIDUAL CONTRIBUTIONS

The winner of the VIRTUS Award for individual contribution to philanthropy in 2017 is **Milorad Jurković from Beočin**, known to the public as Stolar Mile (Mile the Carpenter). Stolar Mile received the award for his perennial charity work that helped many people across Serbia. He became famous for the baby feeding chairs he makes and gives away to families for free. So far, he made and donated over 1,000 chairs. In the past years, he expanded his support to include other types of furniture, and gathering other kinds of humanitarian aid (such as food, clothes, shoes, medical aid) for people in need.

A good example of how young people give for the social good is surely **Jovan Simić from Belgrade**, the awardee of the special VIRTUS Award for the young philanthropist. Jovan is a founder of "Zajedno za život" (Together for Life) association, and, over the last year, he has organized a sports bazaar, a big humanitarian football match in Užice, and a charity dinner with Red Star football players. Through all of these projects he managed to raise over EUR 300,000 for those in need, mostly for children who need medical treatments.

Filip Filipović, a Postman from Kuršumlijska Banja, offers financial support to the most vulnerable, helps rebuild homes and an outpost of the local elementary school. Filip helps the locals from this area in many other ways, too: by providing free van rides for various purposes, delivering food packages, organizing charity dinners, providing Christmas gifts to children, etc.

KEY THEMES FOR GIVING



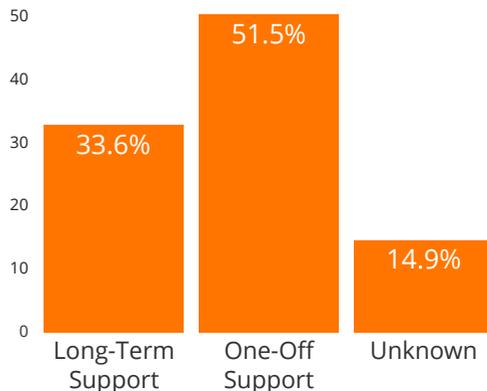
- Healthcare** **over 5%**
seasonal giving
- Support to marginalized groups** **1 - 3%**
culture and arts, sports, environment
- Education** **0.5 - 1%**
public infrastructure, religious activities, animal welfare
- Poverty relief/mitigation** **0 - 0.5%**
emergency management, science, community development, heritage, social entrepreneurship, economic development
- Other themes**

KEY THEMES (by % of Instances)	2015		2016		2017
Healthcare	32.6%	↘	30.2%	↗	34.7%
Support to marginalized groups	26.2%	≈	26.8%	↘	24.8%
Poverty reduction	13.6%	≈	12.9%	↘	11.0%
Education	7.6%	↗	9.1%	↗	12.8%

USE OF DONATIONS

The data on how donations have been used facilitates deeper insight into whether they are provided as one-off support or are intended to assist in pursuing longer-term solutions to specific problems.

In accordance with the methodology used, and the data available, we split donation use into three categories - long-term strategic giving, one-off giving and donations where the purpose remained unknown.



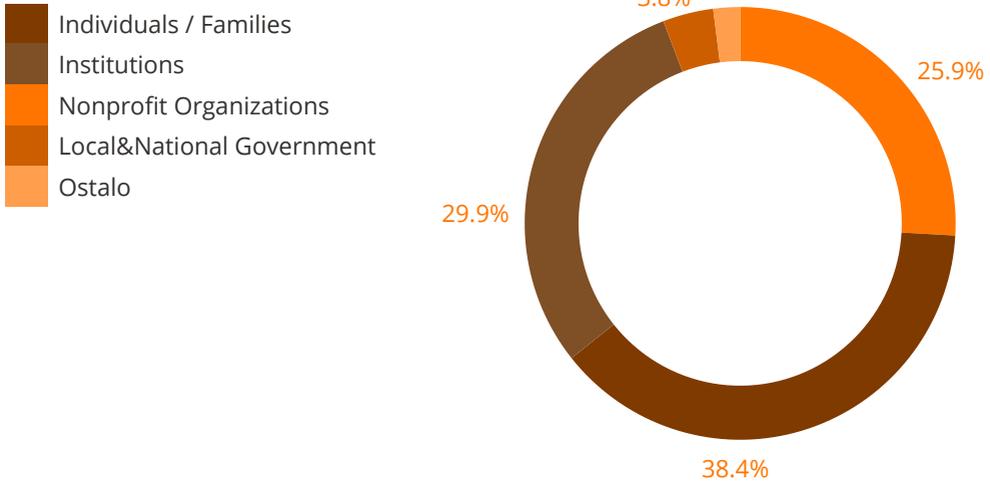
EXAMPLES OF STRATEGIC GIVING

A good showcase of giving with long-term effects comes from [ERSTE Bank Novi Sad](#), and its “Step by Step” program, which provides startups, social enterprises and new business ideas with relevant and continued support during their development. This program created new jobs and led to self-employment, raising financial literacy of the public, and social and economic development of groups that are excluded from the financial market. The estimated investment in this program during the last year was EUR 350,000.

Donations focused on equipment and capital investments are still frequent in the business sector. In 2017, we would single out [Addiko Bank's](#) EUR 15,000 donation for the “Sensomotoric Garden for Visually Impaired Students of 'Veljko Radmanović' School” project.

USE OF DONATIONS (% of Instances)	2015		2016		2017
	○	—	○	—	○
Long-term support	29.6%	↗	32.8%	≈	33.6%
One-off support	56.6%	↘	53.5%	↘	51.5%
Unknown	13.8%	≈	13.7%	↗	14.9%

RECIPIENT ENTITIES

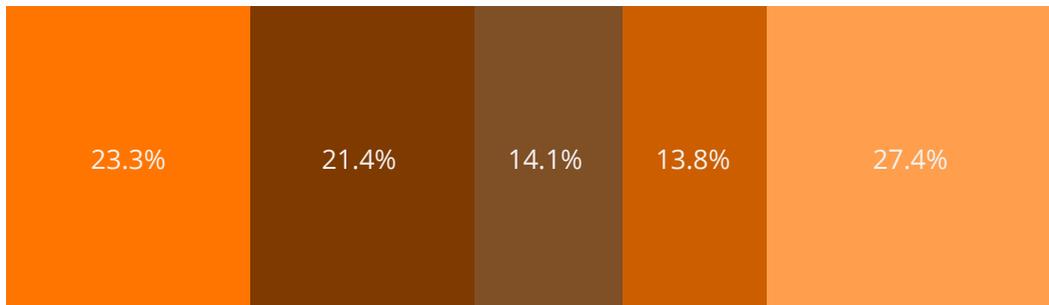


In comparison to 2016, there are two main differences when it comes to the distribution of activities aimed at different types of recipient entities: a drop in the activities aimed at individuals/families, and a rise in support for nonprofits.

When it comes to distribution of the amounts aimed at different recipient types, support to institutions remains at the same level as in 2016, while support to individuals/families and local and national governments decreases. As in 2016, the biggest surprise is the significant rise in the amounts aimed at nonprofit organization, by as much as 16.2%. Although this increase is the result of bigger amounts raised by a dozen of nonprofits, the rise is nonetheless encouraging.

BENEFICIARY ENTITIES (% of Instances)	2015		2016		2017
Individuals/Families	45.0%	≈	44.8%	↓	38.4%
Institutions	31.2%	≈	30.7%	≈	29.9%
Nonprofit organizations	16.3%	↑	18.0%	↑	25.9%
Local/National government	2.7%	↑	3.1%	≈	3.8%

KEY BENEFICIARY GROUPS



- 2 – 4%**
elderly, single parents, general population, talented youth, children without parental care, people living in other countries, women with infants
- 1 – 2%**
street children
- 0 – 1%**
homeless, juvenile offenders, ethnic minority population, religious/faith communities, refugees/IDPs, people in need of palliative care, women and children survivors of violence, migrants, unemployed

TRENDS IN KEY FINAL BENEFICIARY GROUPS (% of Instances)

	2015		2016		2017
People with health issues	21.5%	↘	17.2%	↗	23.3%
People in economic need	13.7%	≈	13.9%	≈	13.8%
People with disabilities	15.1%	↗	17.3%	↘	14.1%
Local communities	17.0%	≈	16.3%	↗	21.4%



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This research does not include Kosovo.
*This designation is without prejudice to positions on status, and is in line with UNSCR 1244/1999 and
the ICJ Opinion on the Kosovo declaration of independence.*