





COMPREHENSIVE REPORT

Charity Survey



For the third year in a row, Ukraine's public sector is undergoing a sustainability test. Many organizations have had to go through relocation; team loss caused by migration, mobilization, and emotional burnout; search for new sources of funding; and even a radical change in their field of activity. These challenges have been exacerbated by the gradual resource depletion of the target audience of philanthropists and competition for their attention with other organizations.

However, though the third year of the full-scale Russian invasion can be called a year when the war turned routine, this does not mean that Ukrainian society is tired of being involved in charity, and public organizations are tired of providing aid.

While most Ukrainians believe that charity became less common over the past year, the actual Charitable Giving Index did not change dramatically. After a sharp increase in 2022 related to the hostile attack and the unprecedented society solidarity in response to it, the Charitable Giving Index decreased from 7.7 to 6.7 in 2024. Nevertheless, it is still higher than in 2021 (4.5).

Civic sector organizations had to increase their efficiency in order to continue working, promoting change, and helping in the face of lacking resources. Most of them view their work as highly effective, which is confirmed by assistance beneficiaries.

This study presents the key achievements, problems, and growth areas pertaining to charitable organizations. It is now difficult to assess the current processes' significance and impact on the future, as the trends and indicators look contradictory sometimes. Still, we decided to record them in the annual charity survey to feel the spirit of the times. Read more on these findings further.

TABLE OF CONTENTS

Summary	4
Survey Methodology	14
The State of the Charity Sector	24
Ukrainian Society	35
Trust in the Civic Sector	44
Civil Society Sector	51
Engagement Areas	59
Donors and Funding Sources	64
Volunteers	85
Beneficiaries	95
Media and the State	105

Current State of the Charity Sector

The civil society organizations (CSOs) surveyed view their performance as effective, with over 40% rating themselves at 8–10 points and the average score being 6.9 out of 10, which is also a fairly high result. At the same time, 27% of the CSOs believe that their efficiency increased over the past two years, while 35% noted a decrease in efficiency.

Among the aspects of organizational stability, teams' psychological and emotional state is currently in the most favorable condition: 45% assess it as good and 47% as satisfactory, with only 8% assessing it as unsatisfactory. Regarding the regulatory framework and interaction with regulatory authorities, the situation is also quite favorable (44%). Financial stability is the most challenging aspect, with 42% of the organizations considering it unsatisfactory, followed by staffing issues (23%), which is inherent in the Ukrainian market due to the full-scale aggression of the Russian Federation.

Though 45% of the CSOs assess the psychological and emotional state of their teams as positive, when asked how the situation has changed since 2022, almost half (48%) of the organizations noted its deterioration. Also, 44% experienced financial instability and 34% faced personnel shortage.

Current State of the Charity Sector

Most CSOs in Ukraine operate in the education sector (32%), followed by culture (22%) and assistance to the Defense Forces (21%). Healthcare (20%) and human rights protection (19%) also have significant shares. Herewith, among the organizations that assist the army, more than half do not deal with drones. In total, only 6% of the organizations specialize in drones, i.e., this share is less than 10% of the whole sector.

The majority of the CSOs have a small number of employees: 49% have five or fewer people on staff, while 25% work without full-time employees. Over half of the organizations operate within one region, with only 26% of them having nationwide coverage.

Ukrainian people assess the importance and necessity of charity as high — the civic sector was on average rated at 9–10 points on importance and 7 points on prevalence out of 10 possible.

As trends demonstrate, the Charitable Giving Index in Ukraine has declined. After an increase in 2022 due to the full-scale Russian invasion, it decreased by 1 point, from 7.7 to 6.7, but still remains significantly higher than in 2021.

Engagement in the Nonprofit Sector

The public sector mostly engages with Ukrainian society, with 46% of the organizations doing so regularly and 39% at times. A total of 85% of the organizations surveyed engage with the society. Within the sector, the CSOs maintain close contacts as well: 84% interact with each other, of which 44% do this periodically. Further, 39% of the organizations regularly engage with local authorities and 42% with volunteers. In total, about 20% of the NGOs frequently cooperate with the media, business, foreign donors, Ukrainians abroad, and the central government.

Few Ukrainian CSOs have connections with foreign private institutions — only 5% maintain a regular contact with them. Similarly, foreign media are hardly involved, with only 4% of the organizations working with them.

Depending on the organizations' focus, engagement intensity can have certain peculiarities. The CSOs providing assistance to the Defense Forces tend to interact with businesses, Ukrainians abroad, and volunteers. Educational organizations generally engage with local authorities, while healthcare NGOs actively work with the affected population.

Volunteers remain the most reliable partners of the public sector: 67% of the organizations rated them high on interaction effectiveness. Despite the low frequency of engagement, 54% rated the effectiveness of work with foreign donors as high. Also, 50% positively rated those CSOs they currently engage with. The central government of Ukraine, foreign media and foreign businesses, as well as Ukrainians abroad were rated lowest on effectiveness (30% each).

Engagement in the Nonprofit Sector

Analyzing the internal structure of the civil society sector, 44% of the respondents believe that it will remain a network of small and medium-sized organizations in the future. Herewith, 24% suppose that leaders and centers might emerge to which small organizations will gravitate. According to 23%, large systemic organizations will develop, while small ones will join them, and 6% predict the growth of large organizations and a decrease in the number of small initiatives.

Regarding the forms of cooperation within the civic sector, the most developed are the exchange of information and knowledge (44% of the NGOs regularly interact in this way), professional development (36%), joint projects and partnerships (34%), and coordination of meetings and forums (30%). Lobbying for political change and advocacy involves the least cooperation in the sector. This means that the organizations collaborate on current issues, while strategic interaction remains weak. Nevertheless, 62% of the CSOs find joint projects effective and useful, 61% consider the exchange of information productive, and 60% note the effectiveness of professional development and training. Interaction in emergency situations was efficient for 56% of the respondents.

The main barriers to interaction in the civic sector include the lack of experience of new organizations, platforms for joint work, services, and information about other CSOs. Competition for resources (donations, grants, and volunteers) is also an important aspect limiting cooperation.

Ukrainian Society and Charitable Organizations

According to the survey results, 40% of Ukrainians trust charitable foundations and 60% trust volunteers. The most trusted are international (50%) and all-Ukrainian foundations (46%). Local foundations have trust of 44% of respondents, and volunteer initiatives are the most supported ones (70%).

The most well-known charitable organizations include the Serhiy Prytula Charity Foundation and the Come Back Alive Foundation. Their high rate of recognizability owes to their focus on helping the army and significant presence in the media. In general, Ukrainian society is poorly informed about charitable organizations: 43% of respondents could not name a single organization without being hinted.

In the past year, 86% of Ukrainians participated in charity, with 61% of them last month. The main motives were compassion (33%), patriotism (17%), and a sense of duty (16%). The most common forms of charity included financial support (85%), food, clothing, and medicine (53%), as well as volunteering (50%). Over 73% of the population donated money in the last 12 months, with the average total amount donated accounting for UAH 4,991 per quarter.

Donors and Sources of Civic Sector Funding

The main sources of the civil society sector funding in Ukraine are grants (39% of the organizations' budget), donations from legal entities (25%), and donations from the population (31%). Only 5% of funding comes from membership fees. Most organizations that assist the Defense Forces receive a significant share of funds from legal entities and the population, while for non-military projects, grant support remains the main source of financial support. At the same time, only 26% of citizens donate to charitable organizations. Herewith, 68% donate directly to military personnel and 35% to personal initiatives.

CSOs in Ukraine are facing difficulties: Almost 70% noted that it has become harder for them to attract donations for non-military projects, as donors continue to prioritize assistance to the army. The organizations in the rear regions also lack financial support, with donors focusing on the front line and near front line areas. Other ongoing challenges include the complexity of grant programs, competition for resources, and the mismatch between donors' priorities and civil society needs.

Volunteering Prevalence and Engagement in the Nonprofit Sector

Volunteering in Ukraine has become prevalent: Last year, 86% of Ukrainians were involved in charity, of which 43% were engaged in volunteer activities. This figure increased from 39% in 2022 to 43% in 2024. The youth, rural population, and public sector employees are most involved in volunteering.

Volunteers actively help the military (58%), loved ones (39%), personal initiatives (38%), and strangers (31%), while only 9% work through charitable foundations. This highlights the importance of personalized interaction and having specific familiar beneficiaries.

The main problems organizations face in working with volunteers include emotional burnout and a decrease in the share of men due to mobilization. The majority of CSOs involve a small number of volunteers: 37% invited less than 5 volunteers in 2024, while 22% had from 6 to 10 volunteers. Only 11% of the organizations involved more than 10 volunteers. This points to limited volunteer resources and the need to maintain and support existing volunteer workforce.

Beneficiaries and Engagement with Them

Charitable foundations and organizations mostly provide material assistance, household chemicals, hygiene products, and home repair services to the population. In general, 13% of the population received assistance from charitable foundations over the past year, with 62% of them getting assistance in the past month. Women and the elderly predominate among the beneficiaries. It is international humanitarian organizations such as the Red Cross, Caritas, the UN, UNICEF, as well as Ukrainian foundations, in particular the Rinat Akhmetov Foundation, that mainly provide humanitarian assistance to the population.

The majority of beneficiaries are satisfied with the assistance received: 57% rate it at 10 out of 10, and 75% rate it at 8 to 10 (out of 10). Only 7% were dissatisfied (rating it at 0 to 3), which indicates the overall effectiveness of the support provided by charitable organizations.

Gratitude remains an important aspect of engagement with beneficiaries — 38% of the organizations consider it a significant factor in their work. The main barrier limiting engagement is the lack of resources, both human and financial ones.

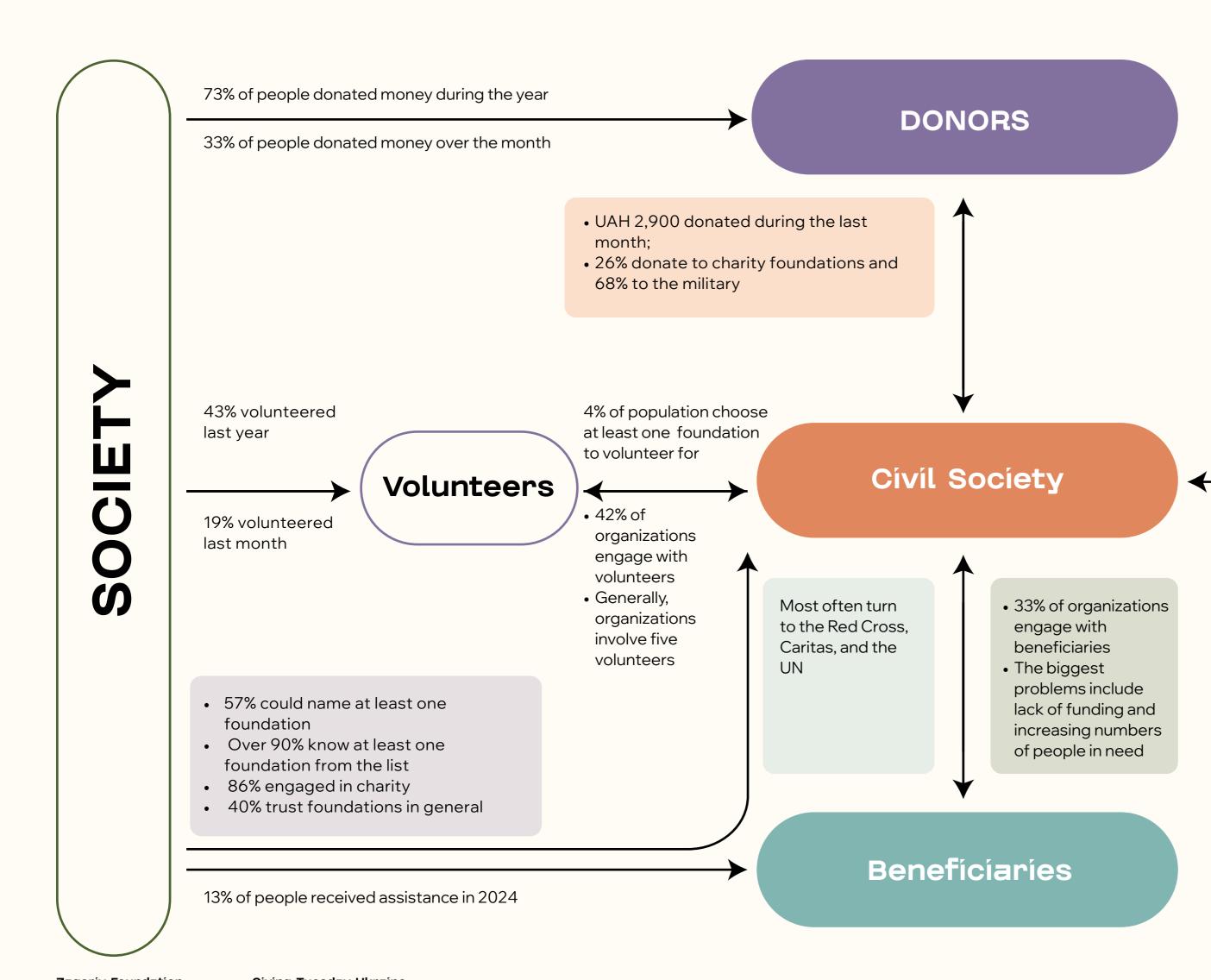
General Aspects

Ukrainian CSOs operate in many areas: education, culture, assistance to the Defense Forces, healthcare, and social protection. Most organizations are small, often working within a single region and relying on limited resources. Their main sources of funding include grants, donations from legal entities, and support from the public, but the instability of funding and competition for resources remain significant challenges that threaten their sustainability.

Charitable giving in Ukrainian society has a non-systemic nature. People tend to prioritize targeted assistance to the close circles rather than organizations.

The limitations faced by the NGOs can be circumvented by expanding cooperation with foreign organizations, businesses, and the media, but currently, the frequency of interaction between these entities is low. Another way to develop when resources are limited is to build horizontal connections in the civic sector.

The organizations actively support beneficiaries by providing material assistance and services, while the level of satisfaction among recipients remains high.



- grant support 39% of the budget
- population 31%
- business 25%
- membership fees 5%
- 20% of organizations frequently interact with business and 18% with foreign donors

39% engage with local authorities and 17% with central authorities

The most common problems include bureaucracy and lack of interest on the part of authorities

- 49% employ less than five people
- 44% of organizations regularly engage with other organizations
- In 2024, 37% of them implemented projects in collaboration with
- 3–5 other organizations
- Rate their own efficiency at 6.9 out of 10 on average

Survey Methodology





SURVEY METHODOLOGY

The study of the charity sector is multi-component and considers a wide range of engagement practices. The main goal of the study is to assess the state of the charity sector, the degree of involvement of Ukrainian society in charity, and the nature of civic sector relationships in Ukraine.

The survey was conducted in three stages:

- 1. Nationwide survey
 - Method: CATI (phone interviews)
 - Sample: 2,400 respondents aged 18+
- 2. Qualitative research with representatives of CSOs and charitable organizations
 - Method: In-depth interviews
 - Sample: 20 representatives of non-governmental organizations (NGOs)
- 3. Quantitative survey of civil society representatives
 - Method: CATI (phone interviews)
 - Sample: 400 representatives, NGO representatives



Population survey

N=2,400



NGO survey

N=400



In-depth interviews

N=20

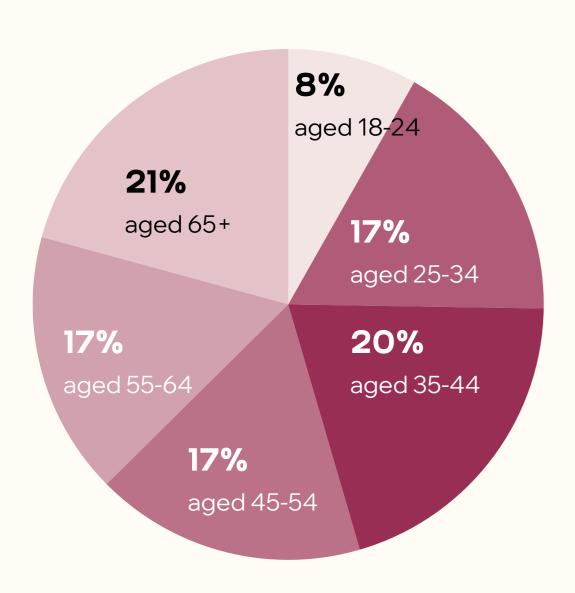
POPULATION SURVEY



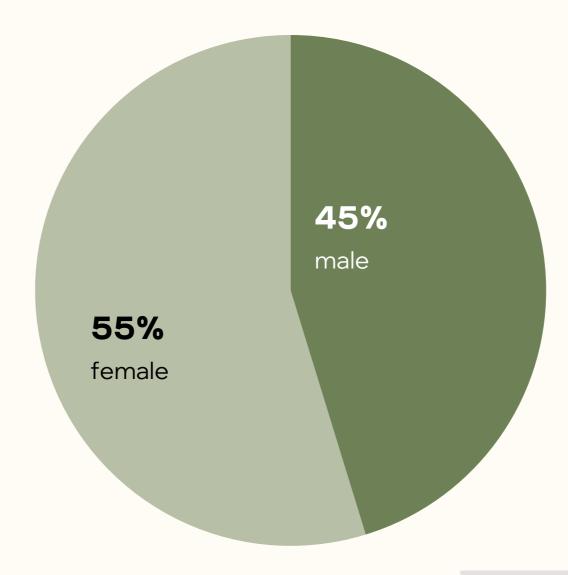
RESPONDENT PROFILE (AGE & GENDER)

S2. Age

N=2,400



S1. Gender



N=2,400

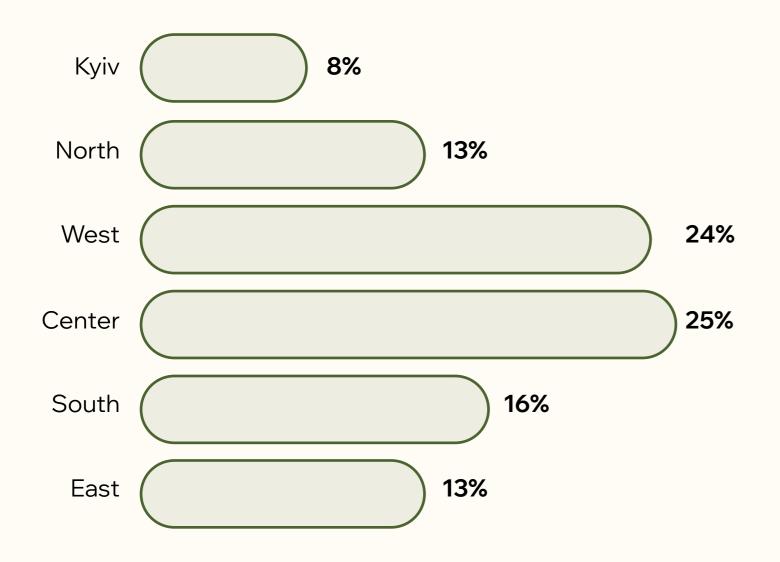
Distribution of the sample by age and gender reflects the structure of Ukraine's population.

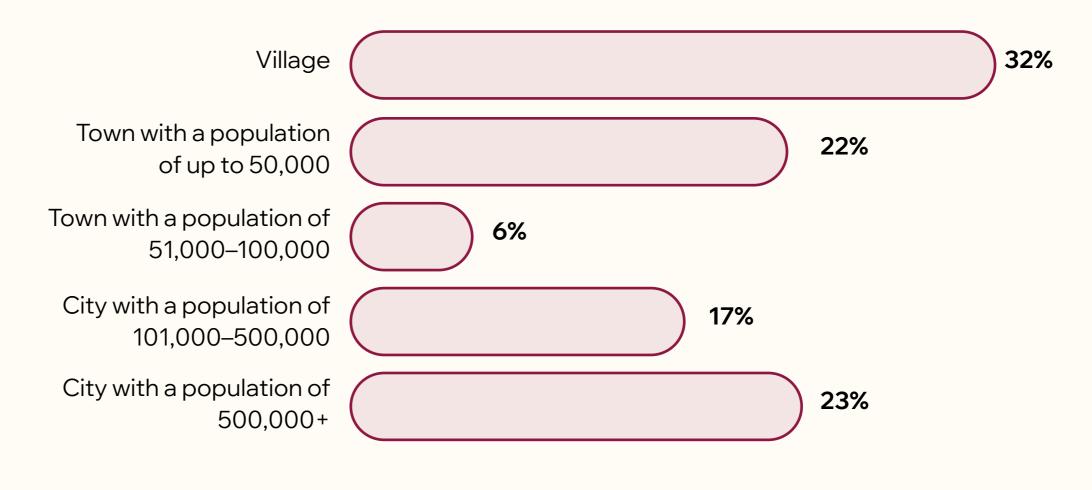
POPULATION SURVEY



RESPONDENT PROFILE (REGION & SETTLEMENT SIZE)

Region Settlement size





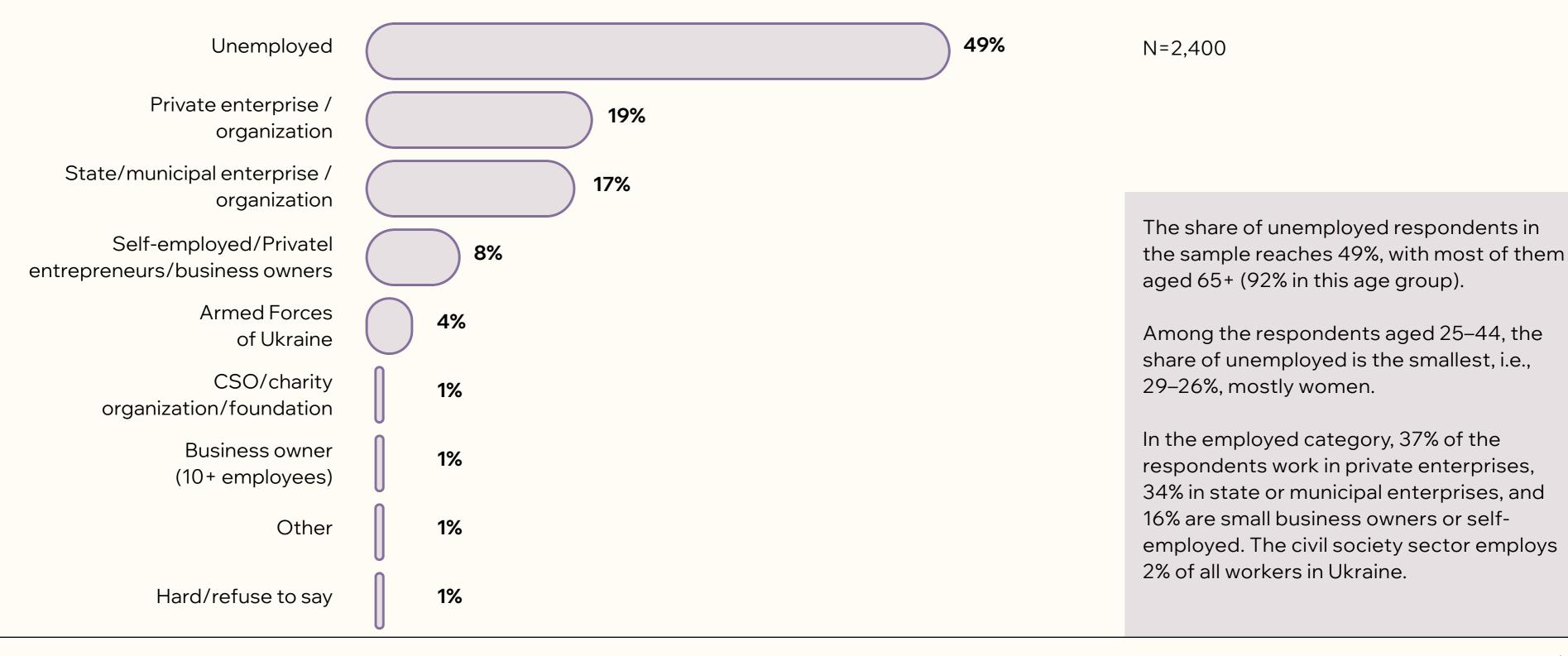
Distribution of the sample by region and settlement size reflects the structure of Ukraine's population.

POPULATION SURVEY



RESPONDENT PROFILE (EMPLOYMENT STATUS)

Q9. What is your employment status?



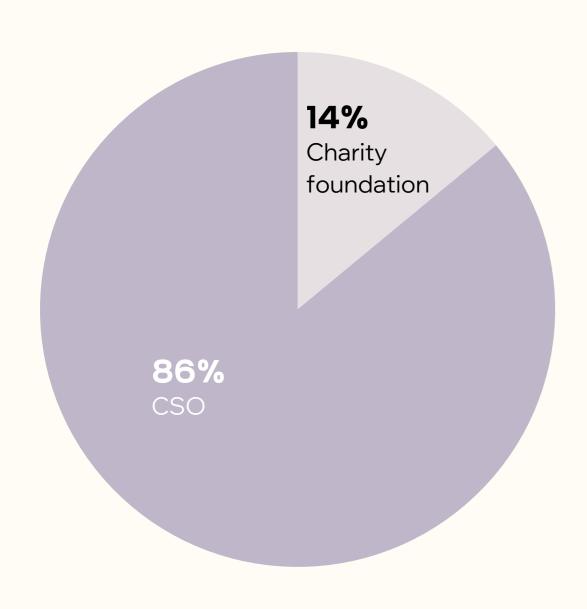


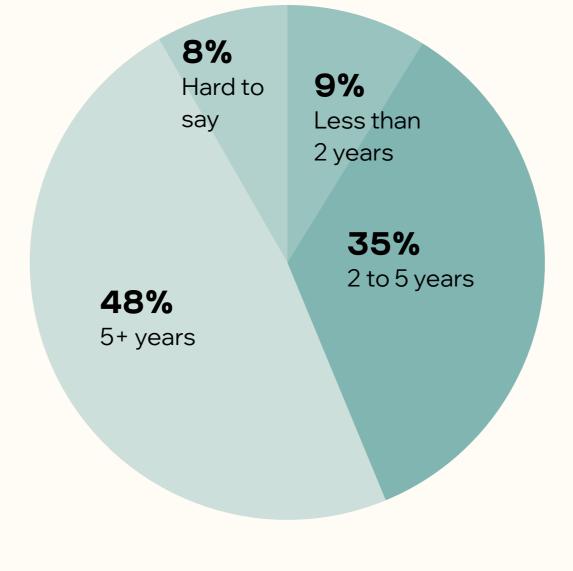
RESPONDENT PROFILE

Q1. What type of organization

do you work for?

Q8. How long has your organization been working in the humanitarian sector of Ukraine?





Most NGOs in the sample are CSOs. Only 9% of the NGOs have been working in the humanitarian sector for less than two years, with almost half working in it for more than five years.

NGO employees rarely change jobs: 42% of the NGOs reported that their employees have been working for them for more than 5 years, while 36% mentioned a period of 2–5 years.

95% of NGO representatives that responded to the questionnaire are heads or top managers of their organizations, while 5% are middle managers (project managers).

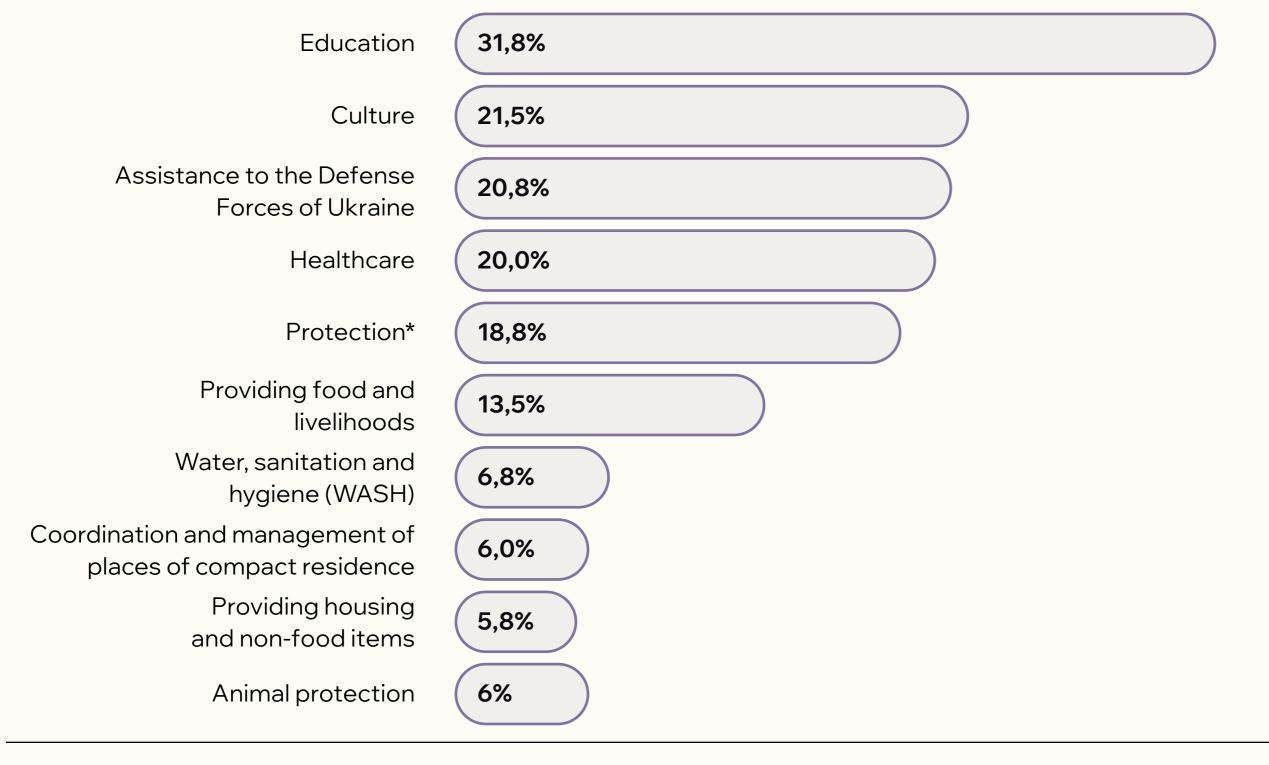
N = 400N = 400



20

RESPONDENT PROFILE (OPERATION AREAS)

Q4. What sector does the organization you work for belong to? (Multiple choice)



N=400, answers showed >5%

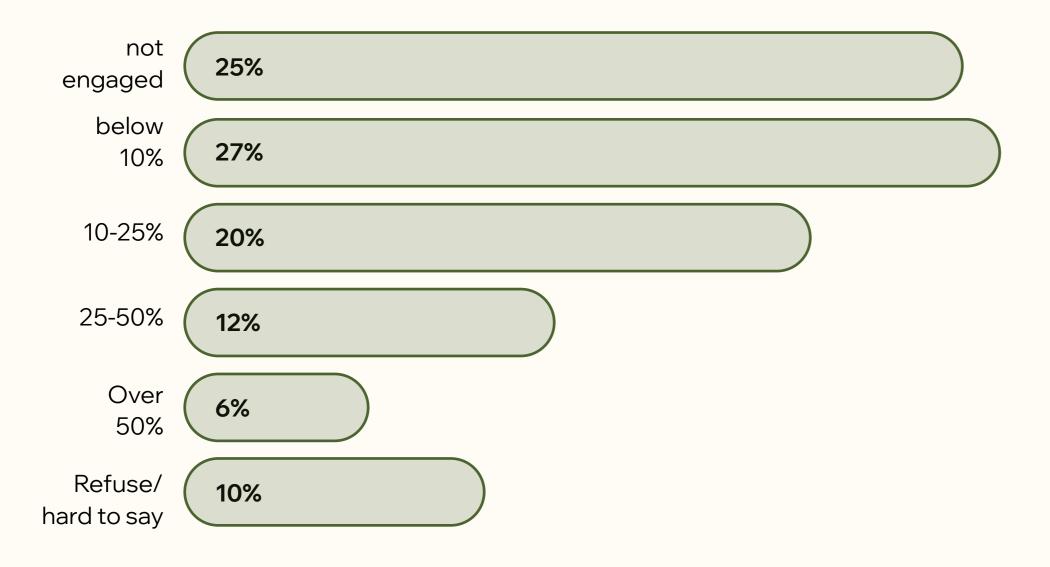
Almost a third of the NGOs surveyed work in education. Approximately one in five NGOs are involved in culture, healthcare, and protection, as well as assistance to the Defense Forces of Ukraine. On average, each NGO works in more than one sector (1.8).

* including child protection, combating gender-based violence, and mine action



SHARE OF DRONES IN NGO ACTIVITIES

Q5.1. What is the share of drones (their production, procurement, supply, etc.) in your assistance to the Defense Forces of Ukraine?



N=83, organizations providing assistance to the Defense Forces of Ukraine

Few NGOs specializing in assistance to the Defense Forces deal with drones; the share of drones in the list of other types of equipment is less than 10%.

Only 6% of organizations specialize in drones, the share of which exceeds 50% of these NGOs' activities.

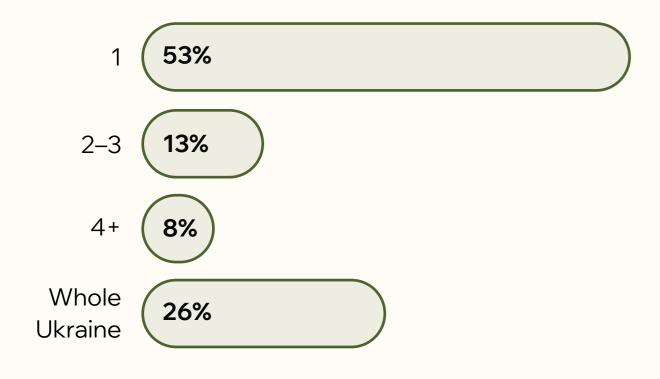


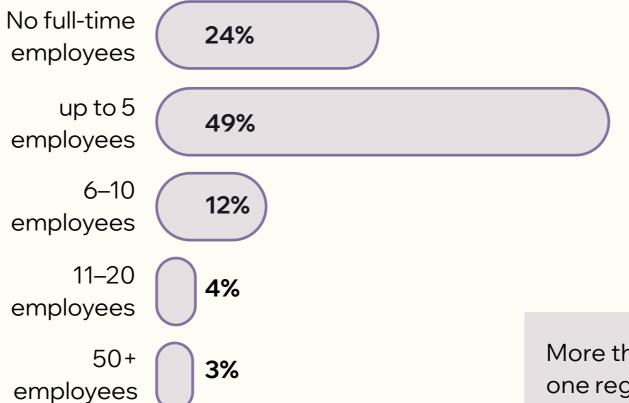
22

RESPONDENT PROFILE (REGIONAL COVERAGE AND SIZE)

Q6. How many regions of Ukraine does your organization operate in?







More than half of the NGOs operate in only one region of Ukraine. However, almost every fourth organization has nationwide presence.

Every fourth organization has no full-time employees, and almost half have up to 5 employees.

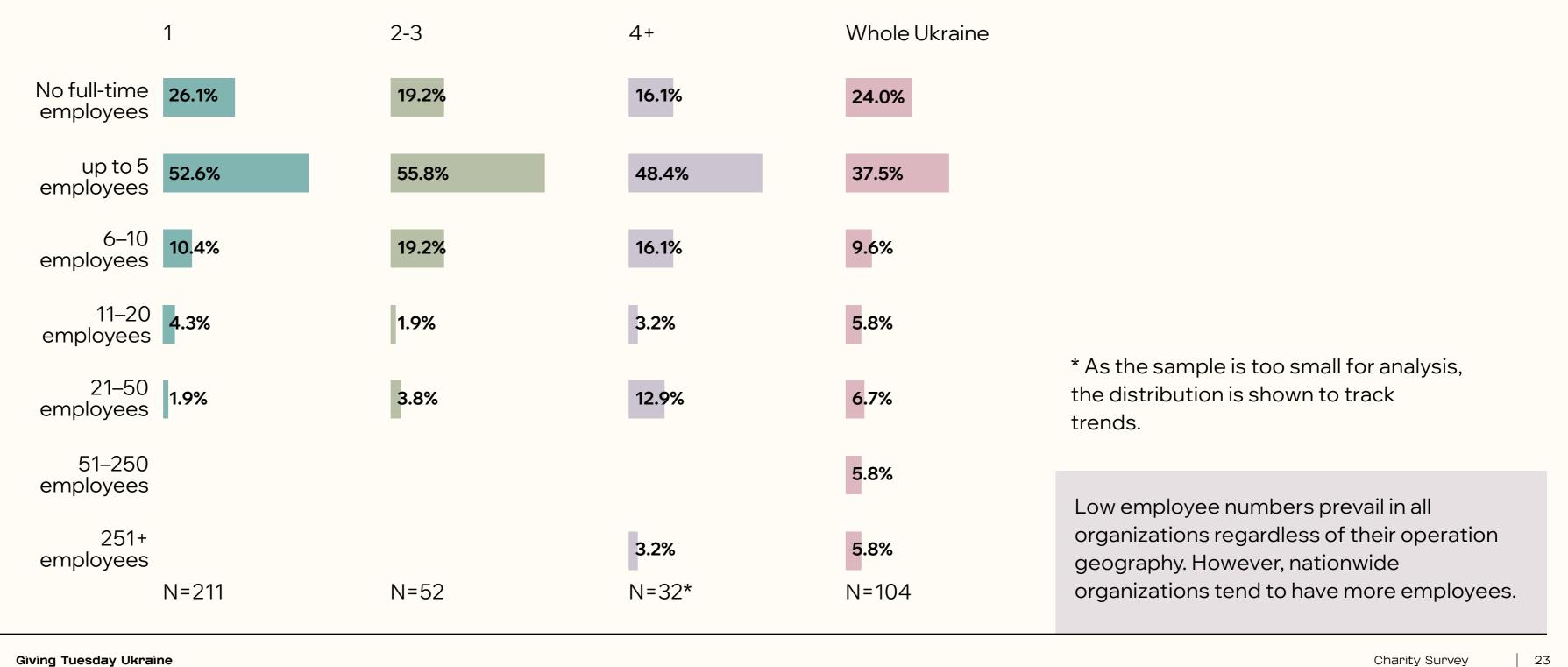
N=83, organizations providing assistance to the Defense Forces of Ukraine

CSOS' STRUCTURE



RESPONDENT PROFILE (REGIONAL COVERAGE AND SIZE)

- Q6. How many regions of Ukraine does your organization operate in?
- Q9. How many full-time employees does your organization currently have in Ukraine?



Giving Tuesday Ukraine **Zagoriy Foundation** Charity Survey

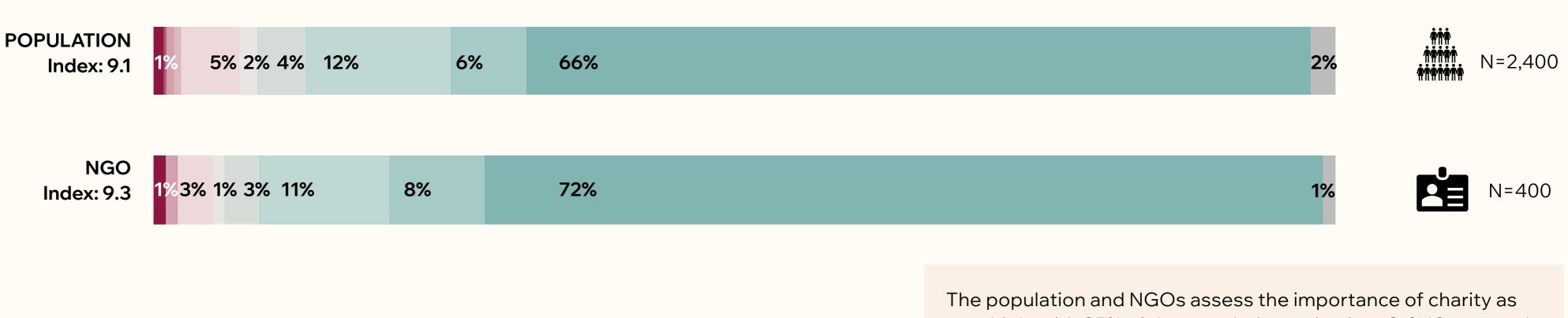
The State of the Charity Sector





IMPORTANCE OF CHARITY

How important/necessary do you think charity is in Ukraine today?



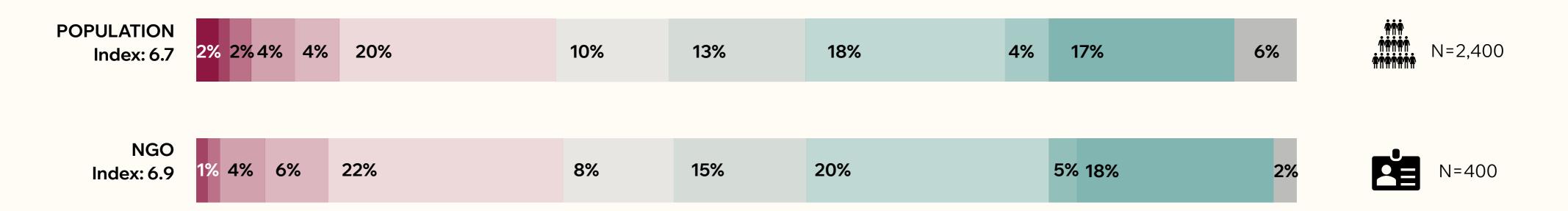


The population and NGOs assess the importance of charity as very high, with 85% of the population rating it at 8-9-10 on a scale from 0 to 10, where 0 means "not necessary at all" and 10 means "vital." NGOs assess the importance of charity as even higher, with 91% rating it at 8-9-10.

NGO scores are slightly higher than those of the population: While the importance index (average score) among the population is 9.1 points, it is 9.3 points among the NGOs.

CHARITY PREVALENCE

In your opinion, how developed/prevalent charity is in Ukraine today?





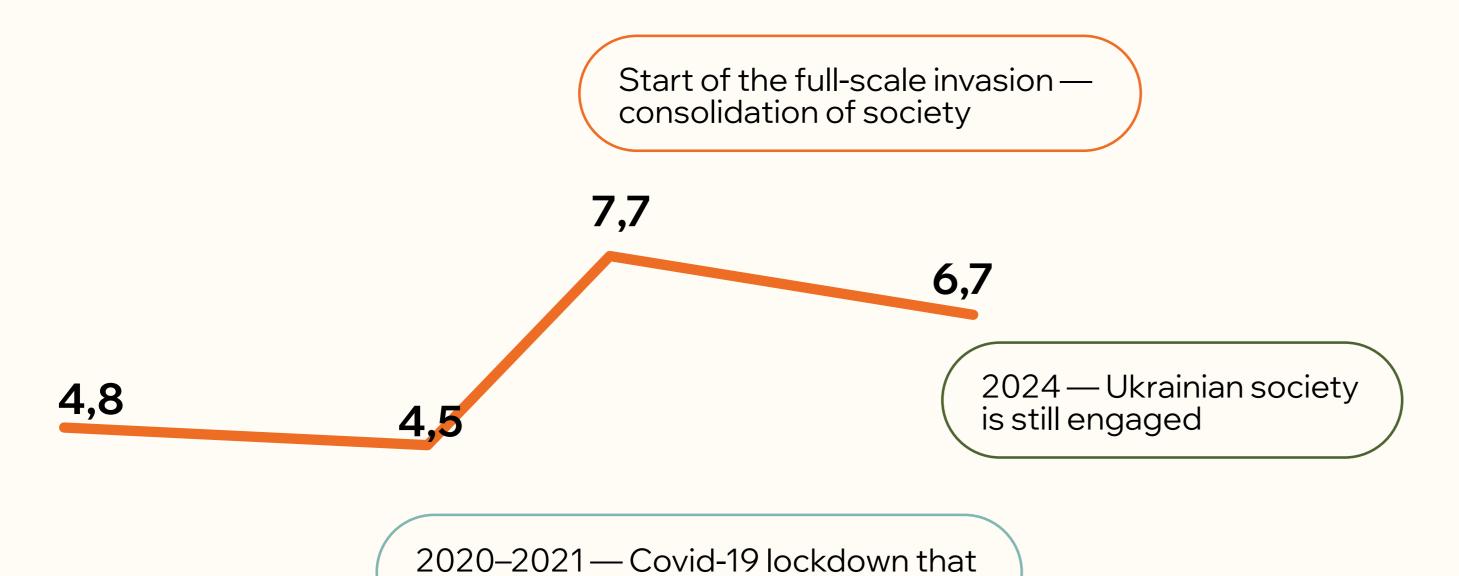
The population and NGOs rate the prevalence of charity almost half as low as its importance. Only 39% of the population and 43% of the NGO representatives rated charity prevalence at the same 8-9-10 points on the scale of 0–10. NGO ratings are also slightly higher than those of the population: Charity Prevalence Index rates at 6.7 points among the population and 6.9 points among the NGOs.

Giving Tuesday Ukraine **Zagoriy Foundation** Charity Survey

CHARITY PREVALENCE



INDEX DYNAMICS



affected the civil society sector

The Charity Prevalence Index increased rapidly (almost twice) in 2022 after the start of the full-scale invasion. In 2024, the index lost 1 point to 6.7, which is still significantly higher than in 2019–2021.

2019 2021 2022 2024

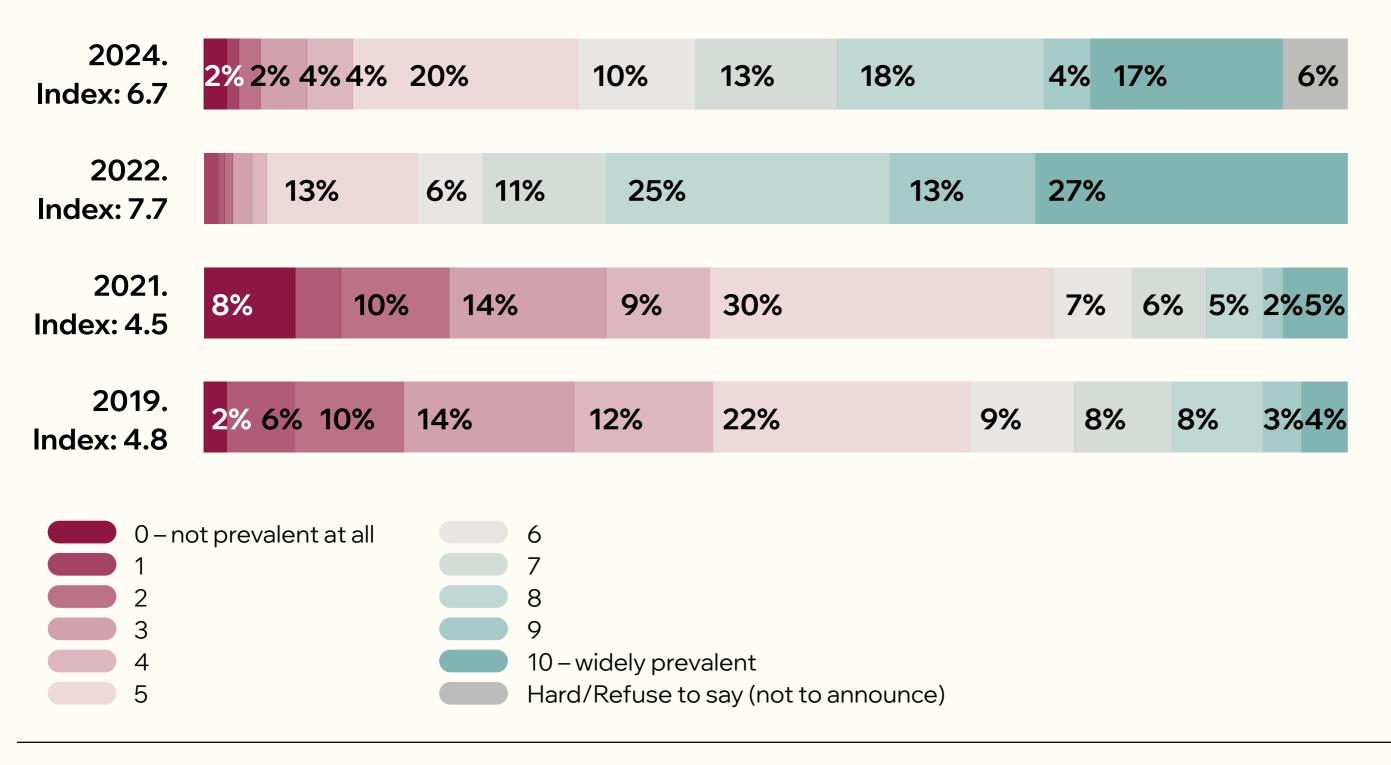
CHARITY PREVALENCE



28

INDEX DYNAMICS

In your opinion, how developed/prevalent charity is in Ukraine today?



In 2024, 38% of the respondents assessed the prevalence of charity as high, rating it at 8+ points out of 10 possible. For comparison, in 2019 there were 15% of such respondents, in 2021—12%, and in 2022—65%. Together with other data from this study, this creates a paradox: Ukrainians assess their involvement in charity at the same level as in 2022 (see p. 40) but consider charity to be less prevalent.

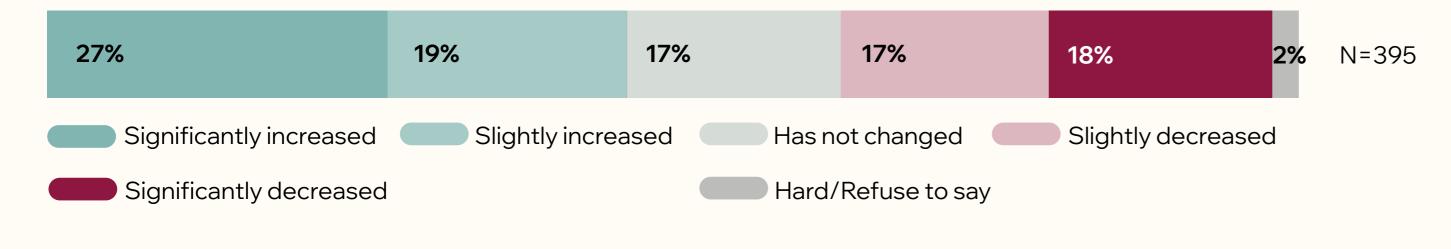
NGOS: PERFORMANCE EFFICIENCY



Q15. How do you assess your performance and efficiency?



Q16. How has the efficiency of your organization changed in the last two years since 2022?



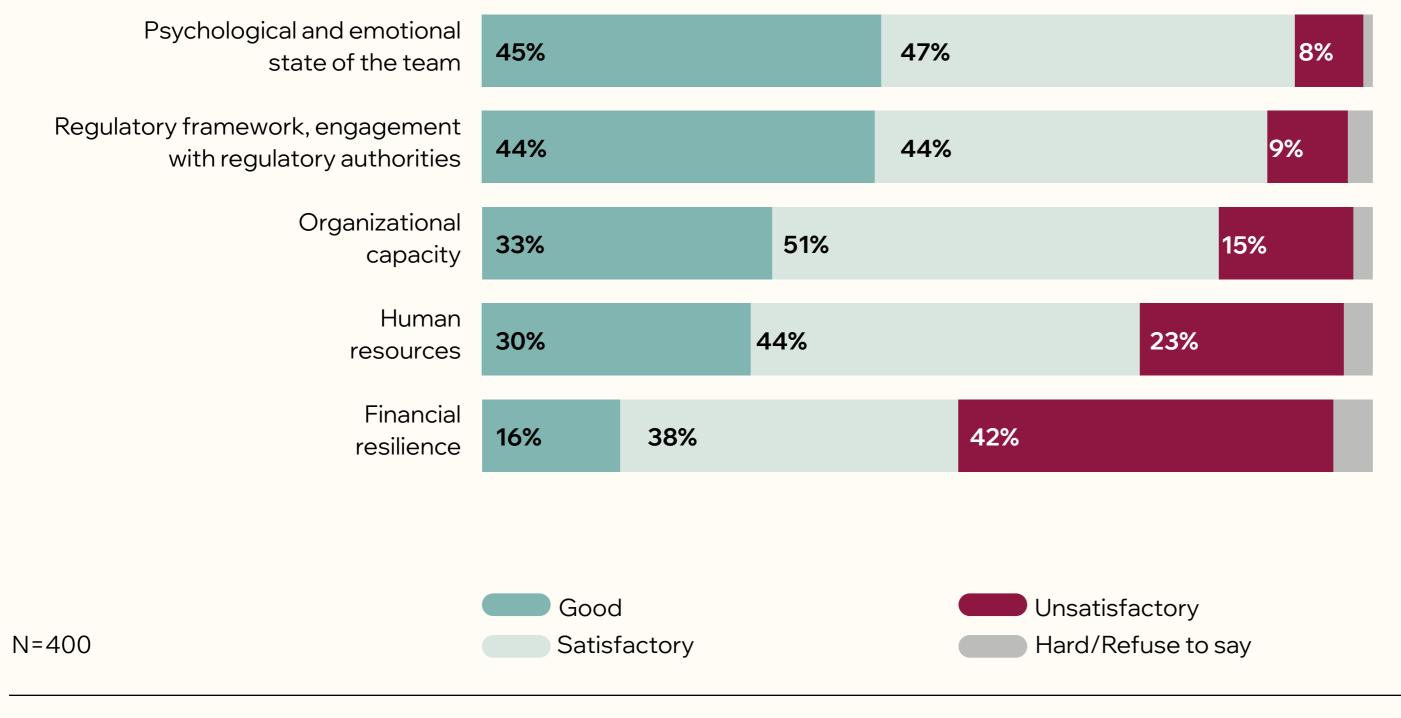
The NGOs assessed their performance efficiency as quite high, with 40% rating it at 8-9-10 on the scale of 1 to 10, where 1 means "extremely inefficient" and 10 means "very efficient." Only 5% rated it at 1-2-3.

Almost half (46%) of the NGOs said their efficiency had increased since the start of the full-scale invasion. However, the share of those who reported a decrease in efficiency was also significant (35%).

NGOS: STATE OF AFFAIRS



Q47. Please, rate how your organization is doing in the following aspects:



The state of affairs in organizations differs in many aspects. The NGOs assessed the psychological and emotional state of the team and engagement with regulatory authorities the highest. Also, 45% and 44% of them, respectively, reported a satisfactory state of affairs in these aspects, with only 8–9% considering it unsatisfactory.

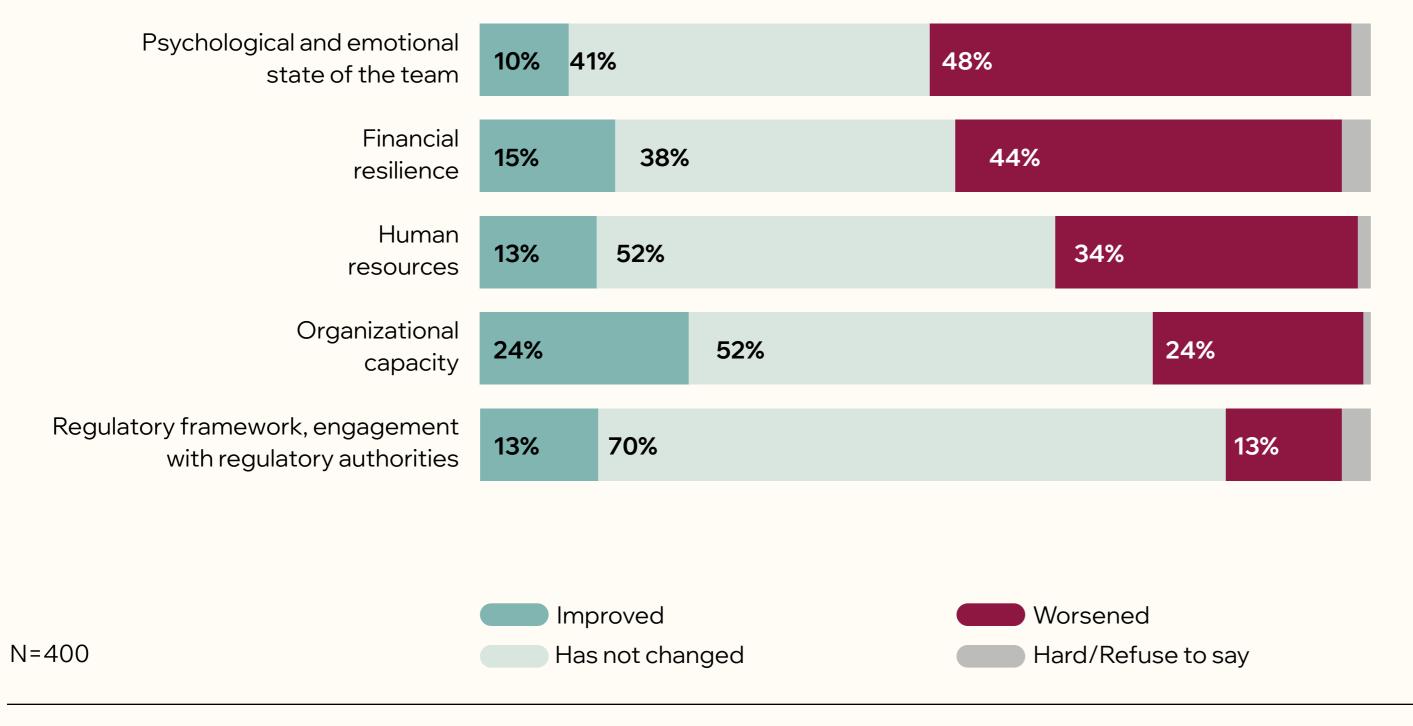
The NGOs assessed their financial resilience worst of all, with only 16% saying it is satisfactory and 42% considering it unsatisfactory.

However, in 4 out of 5 aspects, the share of positive assessments ("good") exceeds the share of negative ones ("unsatisfactory").

NGOS: HOW THEIR STATE HAS CHANGED



Q48. How has your organization's state changed in these aspects in the past two years (since 2022)?



A significant share of the NGOs reported that the state of affairs in their organizations had worsened since 2022. There is no aspect where the share of positive assessments ("Improved") exceeds the share of negative ones ("Worsened"). For example, despite rather positive assessments of the psychological and emotional state of the team, almost half of the NGOs (48%) said that the state of the team had worsened. Financial resilience also worsened significantly, with 44% of the respondents reporting the issue. The parity of positive and negative assessments of the dynamics is observed only in such aspects as organizational capacity and engagement with regulatory authorities. Organizational capacity is the only aspect where a significant share of the NGOs reported an improvement (24%).

THE STATE OF THE CHARITY SECTOR





Trends the NGOs indicated during the war:

- Relocation of organizations from occupied territories
- Establishment of new organizations (humanitarian and military ones)
- New activity areas humanitarian activities by non-humanitarian NGOs
- Development of assistance to IDPs and the military
- Expansion of organizations' activities and capabilities (humanitarian and military areas)
- Financial incomes from donations, including those from abroad

Strategies for adapting to challenges:

- Appealing for help to friends and partners, using accumulated social capital, mutual assistance
- Networking, in particular with international organizations/unions
- Developing cooperation with international foundations and authorities
- Rationalizing funds'/resources' use
- Strengthening organizational capacity and financial resilience
- Scaling and expanding activities
- Strategizing and planning
- Excess efforts of the employees («have worked for three days without a break»)
- The staff working remotely
- Involving volunteers and "growing" employees
- Focusing activities on the most important needs of the target audience
- Redirecting clients to other NGOs



- Closing projects and activity areas in 2022 many areas are notfunded/irrelevant during the war
- Employees fleeing abroad; mobilization
- Lack of personnel/volunteers
- Part of the team works from abroad, the team is dispersed
- Employee fatigue and burnout
- Impossibility to hold open mass events
- Instability/lack/absence of financial incomes ("survival")
- Lack of resources and conditions: lack of premises, electricity, heating, etc.
- · Complexity and high cost of logistics; bureaucratic obstacles to importing foreign aid
- Freezing/suspension/decreased efficiency of activities
- Difficult to cooperate with authorities, authorities engage with the public less, "democracy tools are being rolled back"
- More difficult to regulate NGO activities; regulatory framework complexity
- Difficult to attract international funding for local organizations
- Donors' focus on narrow topics and target audience
- Reduction in funding from donors, loss of interest in Ukraine in 2023–2024

ORGANIZATIONAL CAPACITY



and Human Resource Potential

- Some NGOs have activities aimed at strengthening organizational capacity. These include:
 - Strategy development and implementation
 - Regular coordination meetings
 - Planning
 - Some organizations indicated that they lack the necessary technical capabilities:
 - Premises
 - Access to utilities and/or funds to pay for them
 - Transport and fuel
 - Staff shortages and talent hunger are one of the key NGO problems:
 - Organizations have many open vacancies: lawyers, fundraisers, project managers, psychologists, social workers, medical personnel, and ecologists
 - Male specialists are lacking in all areas, including drivers and loaders
 - Female specialists in frontline regions have difficulties in organizing their own work due to the lack of **offline schools and kindergartens**
 - Some organizations indicated that they **lack funds for salaries** and do not have stable funding, hence **working as volunteers**
 - Most organizations indicated that **mobilization has a critical impact** on personnel



Employee motivation methods:

- Decent salary
- Professional development, employer-paid training
- Trips, retreats
- Psychological support, a corporate psychologist
- Personal development
- Burnout prevention

- Joint corporate events, trainings, leisure
- Empathy, human attitude, understanding of personal needs, healthy relationships, mutual respect, friendly relations
- Events for employees' children
- Presents

Most respondents believe that their employees are **ready to recommend** the organization as an employer. Some indicated that they would like to provide better conditions for employees.



Factors affecting employee loyalty:

- Salary rate
- Comfortable office conditions
- Management attitude
- Atmosphere in the team
- Ability to take sick leave when children are sick
- Psychological support

- Correct distribution of roles and responsibilities
- No overload
- Regular vacations
- Growth opportunities
- Achievement of goals; work results
- Positive feedback from management/beneficiaries



"...do you feel like you are saving millions of people? I guess they are proud of that. For them, this is an important feeling of involvement in change. That's pretty cool."

(veteran, male)

NGO PERSPECTIVES AND DEVELOPMENT





Development opportunities (needs, plans):

- Purchasing equipment (including medical one)
- Purchasing transport
- Developing logistical capabilities of humanitarian NGOs, including warehouses
- Developing social business, attracting investments, generating income for NGO development
- Scaling NGO activities
- Developing new areas, services, and target groups: youth, IDPs, educational programs, employment programs, etc.
- Developing crowdfunding, communication, and audience trust
- Creating a crowdfunding platform that would promote transparency of organizations and unite NGOs
- Developing advocacy at the national and international levels
- Transforming some NGOs into regional resource centers promoting the sector's development
- Strategic planning
- Participating in and monitoring post-war reconstruction

Further steps of NGOs:

- Assessing the organization's capacity and development areas
- Hiring employees necessary to expand activities
- Developing and training staff
- Participating in international conferences, sharing experience
- Developing and implementing services

- Scaling up activities/expanding the geography of activities
- Developing cooperation with international partners and experts
- Developing cooperation with local specialists (psychologists, doctors, etc.)
- Networking with Ukrainian NGOs
- Implementing existing plans and strategies



Most respondents indicated areas for **expanding their activities**, but some NGOsfocused on current activities, seeing no development prospects.



Problems and threats

- Security risks in frontline regions, including a possible Russian offensive
- Lack of conditions for working in winter lack of heating, utilities, etc.
- Lack of organizational capacity to implement projects
- Lack of personnel, the need to expand the staff, the challenge of training and adapting new employees
- Mobilization some organizations risk stopping their work
- Team burnout
- Domestic political events, state policy regarding the civic sector
- Threat of tax audits due to the provided humanitarian aid or assistance to the military, inability to work within current legislation framework
- Too close cooperation with state authorities, which can lead to absorption and loss of identity and autonomy
- Corruption risks when cooperating with state authorities
- Reduction of donors' funding sources, which will not be able to cover the actual needs, lack of funds
- Lack of public relations and networking

The respondents understand the need to work with social problems' causes, trying to act in this regard. However, the NGOs often have to work with the consequences caused by unpredictable crisis events, in particular the war.

Ukrainian Society



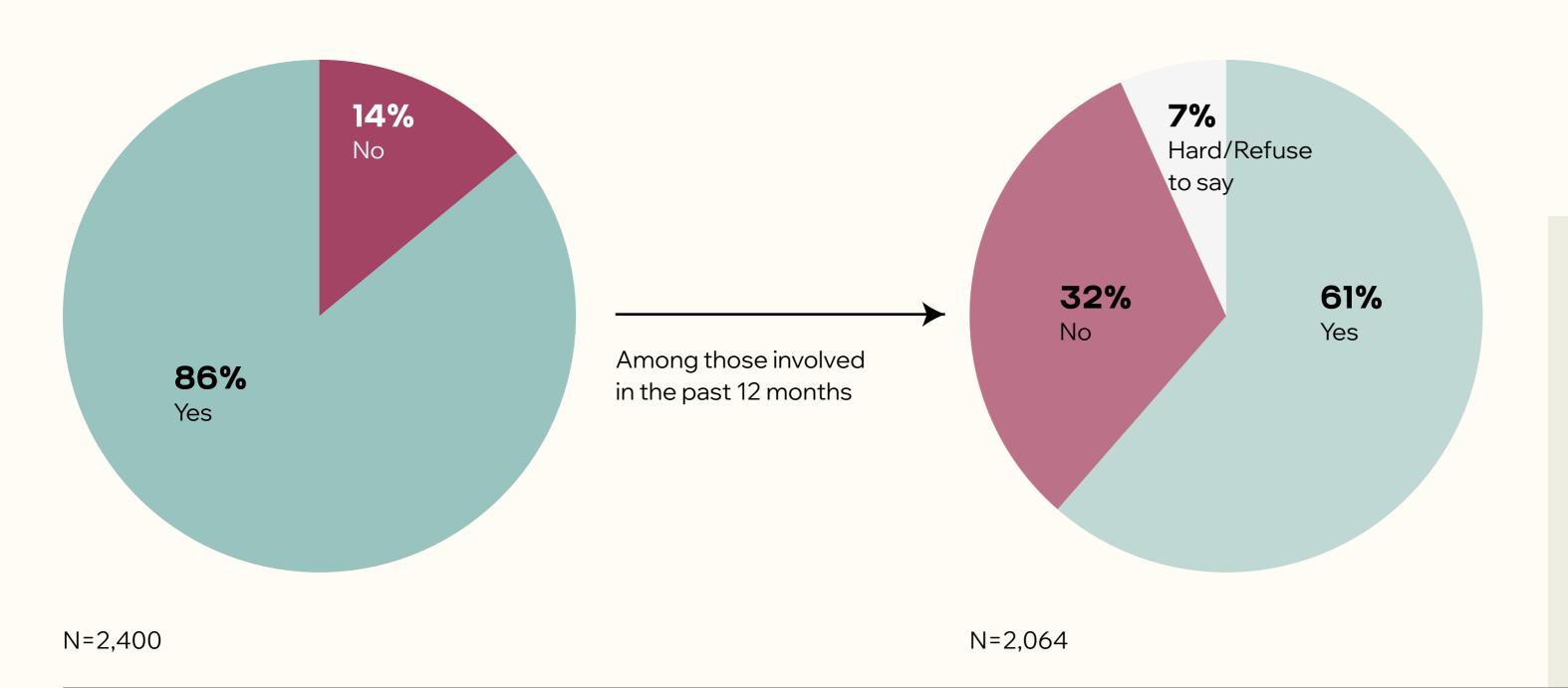


INVOLVEMENT IN CHARITY



Q3. In the past 12 months, did you personally contribute to charity/help someone (financially or with your energy)/volunteer?

Q3.1. In the past month, did you personally contribute to charity/help someone (financially or with your energy)/ volunteer?



86% of the respondents said that during the past 12 months they involved in charity, i.e. helped someone (provided financial assistance / sent money) or engaged in volunteering (provided free services or performed some work for free).

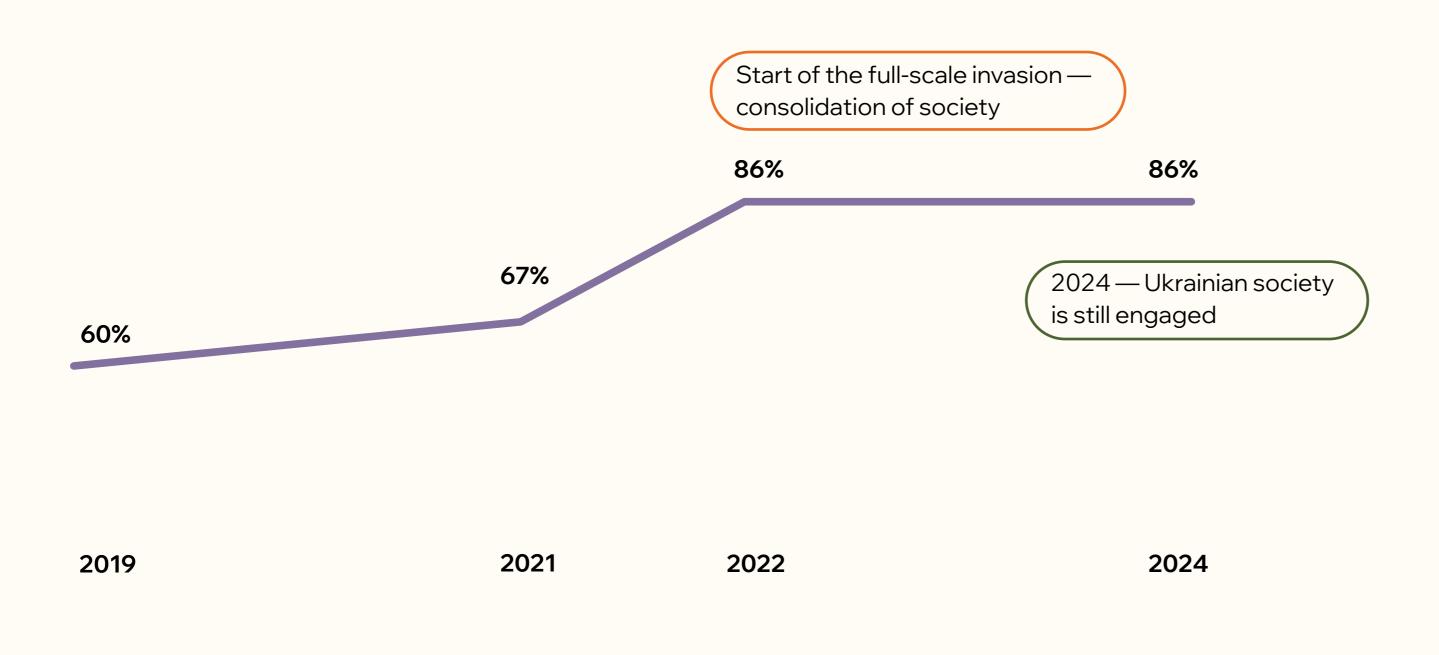
More than 60% of them (i.e. more than 50% of the respondents as a whole) involved in charity in the past month.

Giving Tuesday Ukraine Charity Survey

INVOLVEMENT IN CHARITY:



INDEX DYNAMICS



The share of the population giving to charity (86%) has remained consistently high since 2022, after a rapid increase compared to 2019 and 2021 (+26 and 19 percentage points, respectively).

However, while the Ukrainian society says that the prevalence of charitable giving has fallen, the number of people involved remains stable.

This may result not quite from an actual decrease in aid but from a more critical attitude of Ukrainian society to its volumes.

DONORS: GENERAL PROFILE

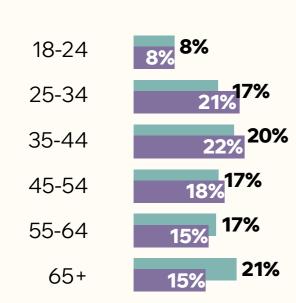


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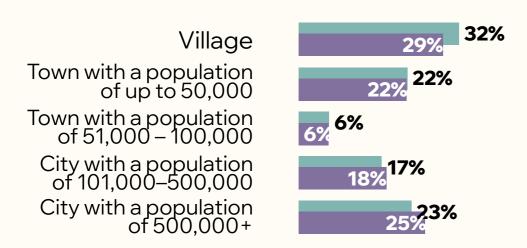




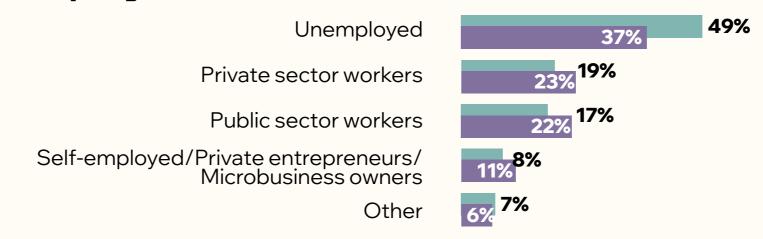
Age



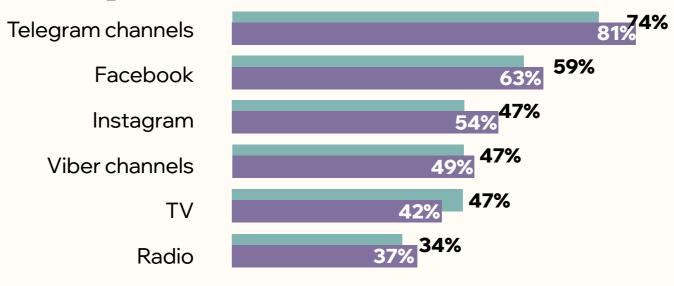
Place of residence



Employment status



Media use (weekly)



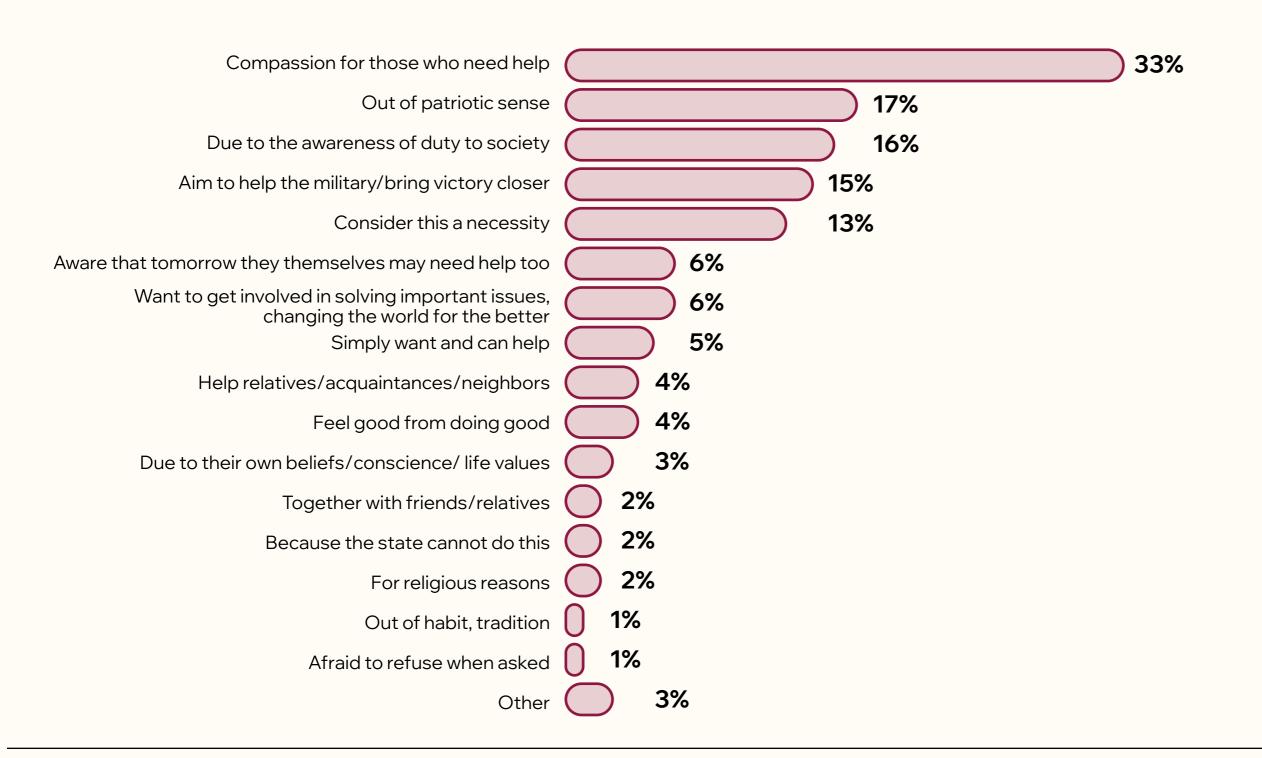


N=1,267; those involved in charity in the past month

REASONS FOR CHARITY ENGAGEMENT



Q3.3 Why do you engage in charity?



N=2,061

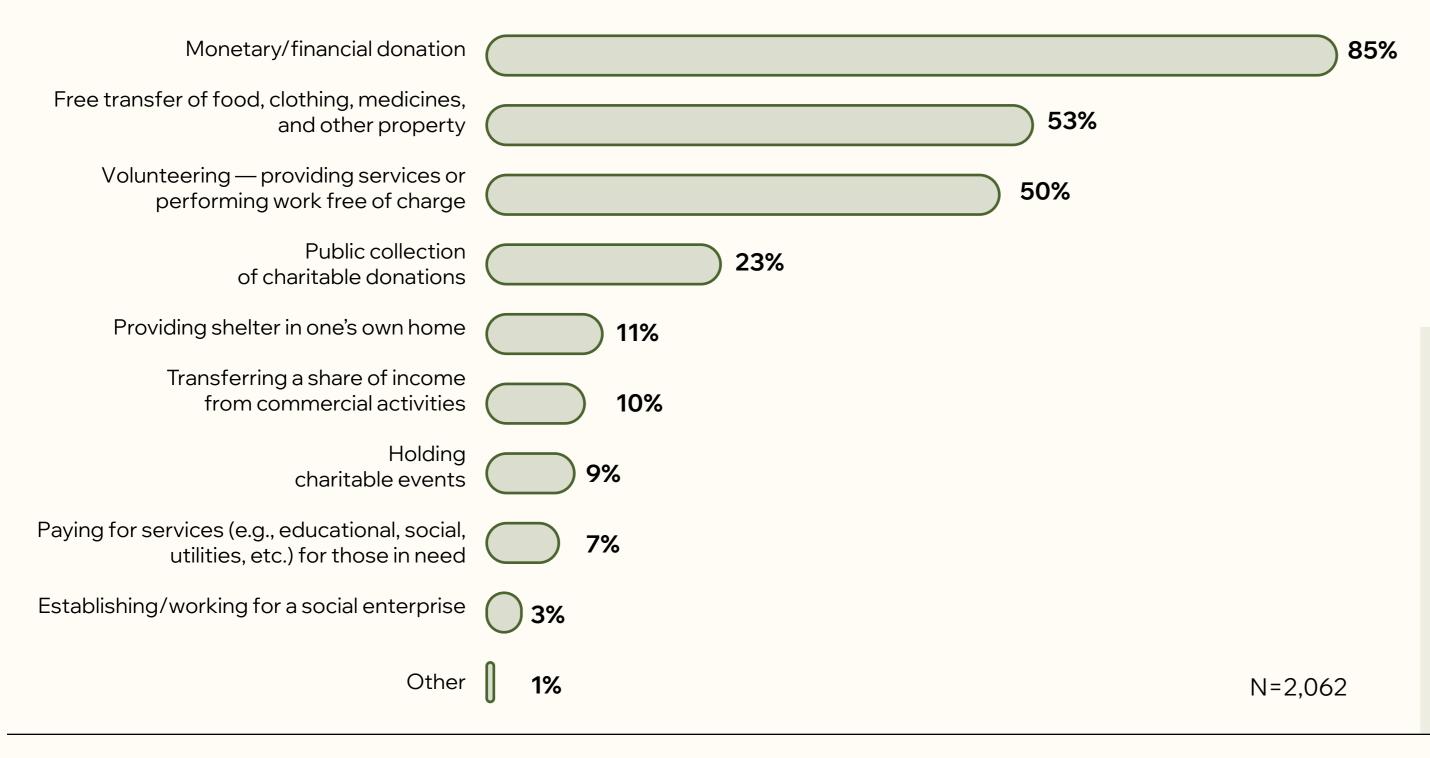
The most common motivation for getting involved in charity is compassion for people in need, mentioned by 33% of the respondents engaging in charity.

A significant share of respondents (15–17%) named socially determined reasons, such as a sense of patriotism, duty to society, and support for the military in order to bring victory closer.

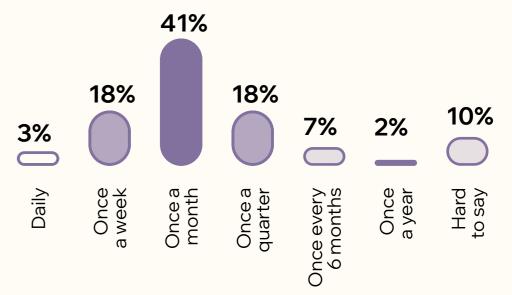
TYPES OF CHARITY ACTIVITIES



Q3.4 What type(s) of charity activities did you perform over the last 12 months?



Q4. How often did you do that?



Monetary donations are the most widespread form of charity, practiced by 85% of those engaged in charity, or 73% of the total sample.

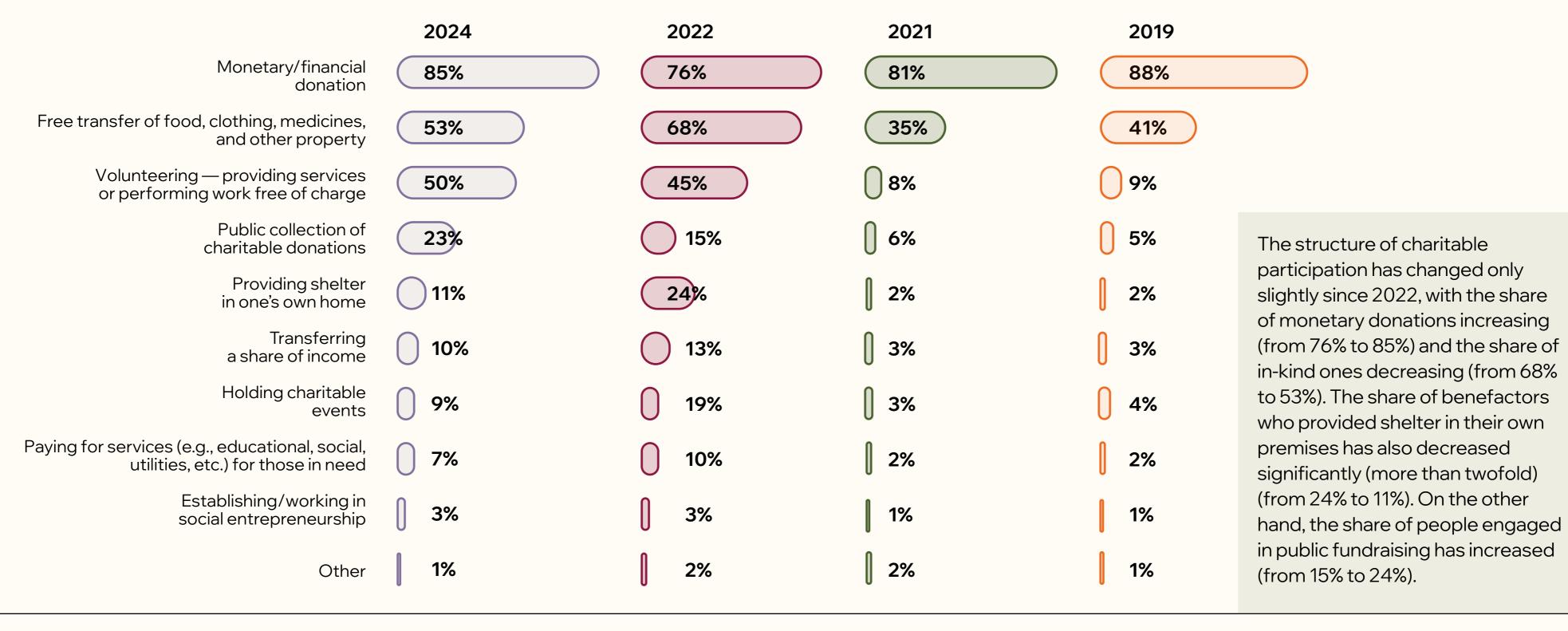
Non-monetary forms of participation rank second, including donations of property, clothes, medicines, and food (53% of those engaged in charity) and volunteering (50% of those engaged in charity, or 43% of the total sample). Approximately 60% of donors engage in charity at least once a month.

TYPES OF CHARITY ACTIVITIES: DYNAMICS



41

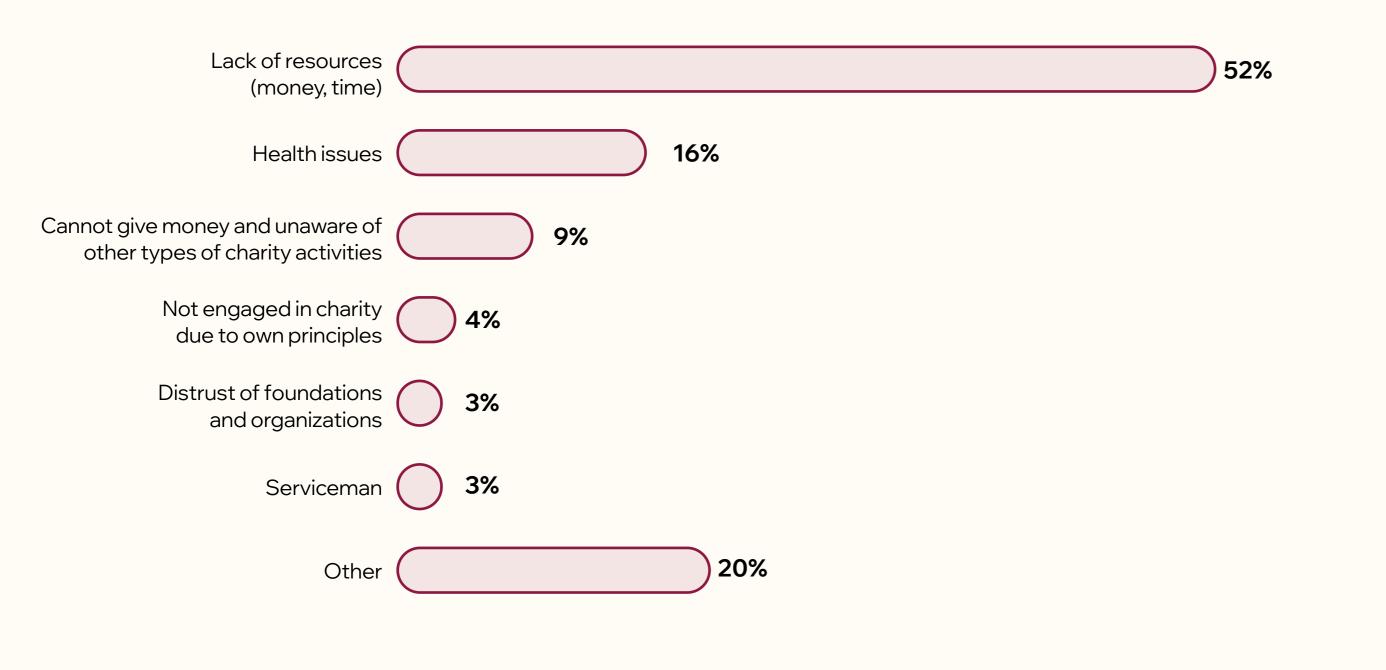
Q34. What type(s) of charity activities did you perform over the last 12 months?



REASONS FOR REFUSING TO GIVE TO CHARITY



Q3.2 Why did you refuse to engage in charity?



N=2,400

People who do not engage in charity generally justify their decision by objective factors, such as lack of resources to help others (52%) and health issues (16%).

Almost every tenth respondent (9%) says that they do not know any other way to engage in charity except for a monetary donation, which is not available to them.

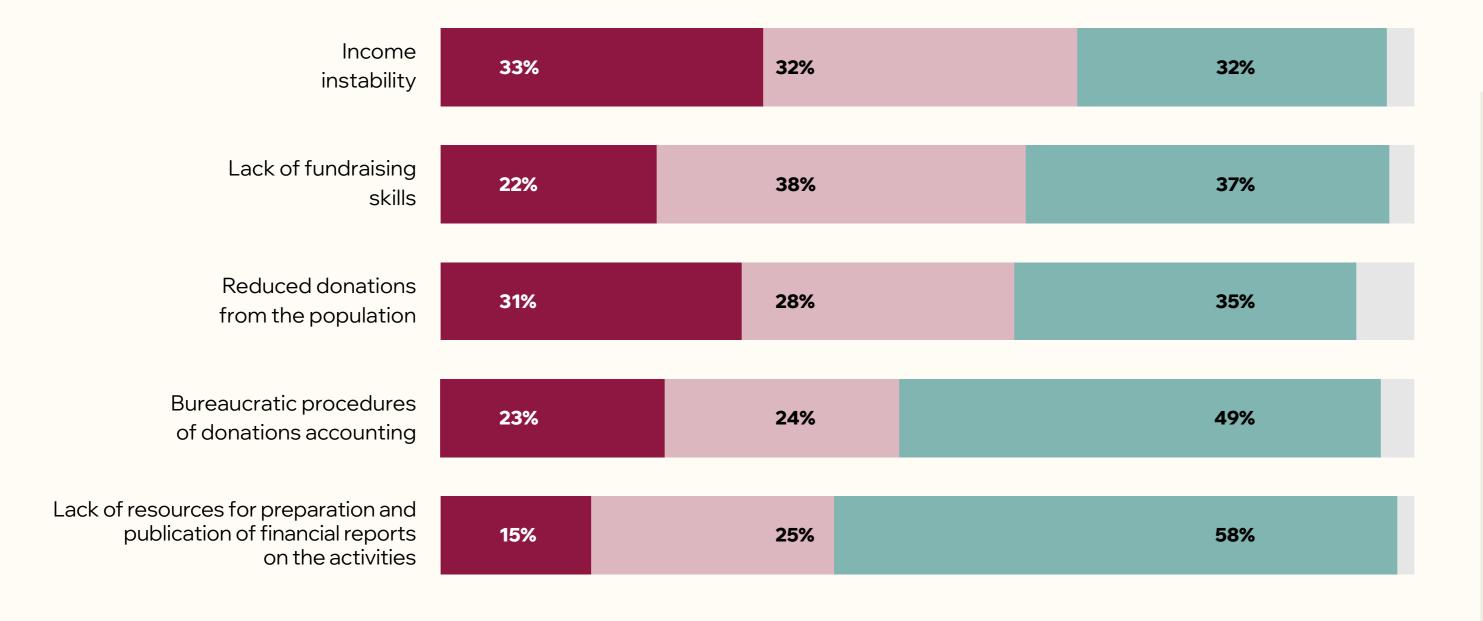
A small share of respondents (3%) explain their choice by distrust of foundations and organizations that arrange charitable assistance. Another 4% (less than 1% of the total sample) do not engage in charity due to their principles.

BARRIERS TO ENGAGEMENT



WITH COMMUNITY AND SOCIETY

Q31. What barriers and obstacles do you face when engaging with community and society in Ukraine and/or abroad?



Regularly

Occasionally

N = 356

(Almost) never

Hard/Refuse to say

The main barriers to the engagement of charitable foundations and organizations with the community and society relate to fundraising: income instability (65% of NGOs say they face such problems at least from time to time), lack of fundraising skills (60%), and reduced donations from the population (59%). Herewith, the problems of instability and reduced income arise regularly. Donations accounting procedures and the inability of NGOs to prepare financial reports are relatively insignificant problems, though they are also faced by a considerable share of NGOs (47% and 40%, respectively).

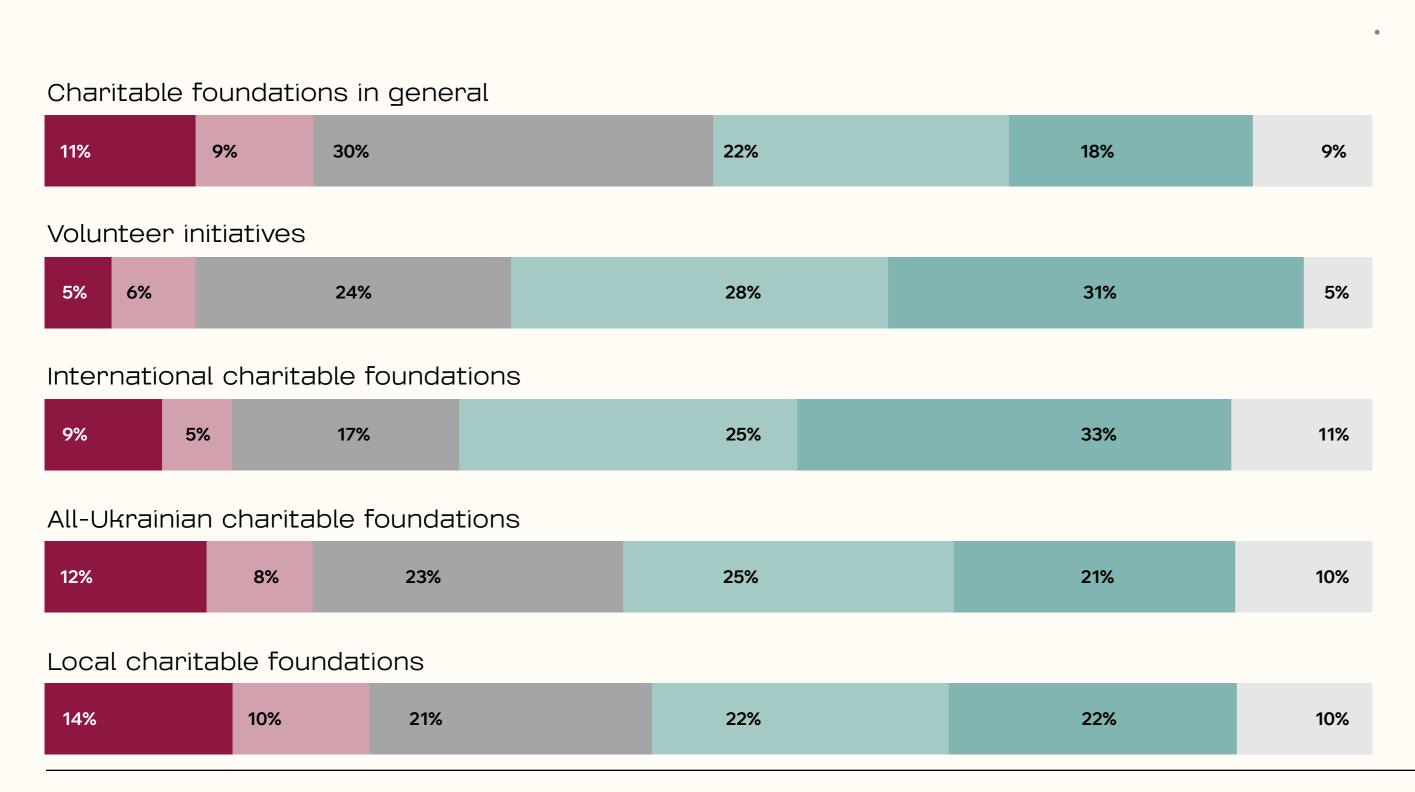
Trust in the Civic Sector





RATE OF TRUST





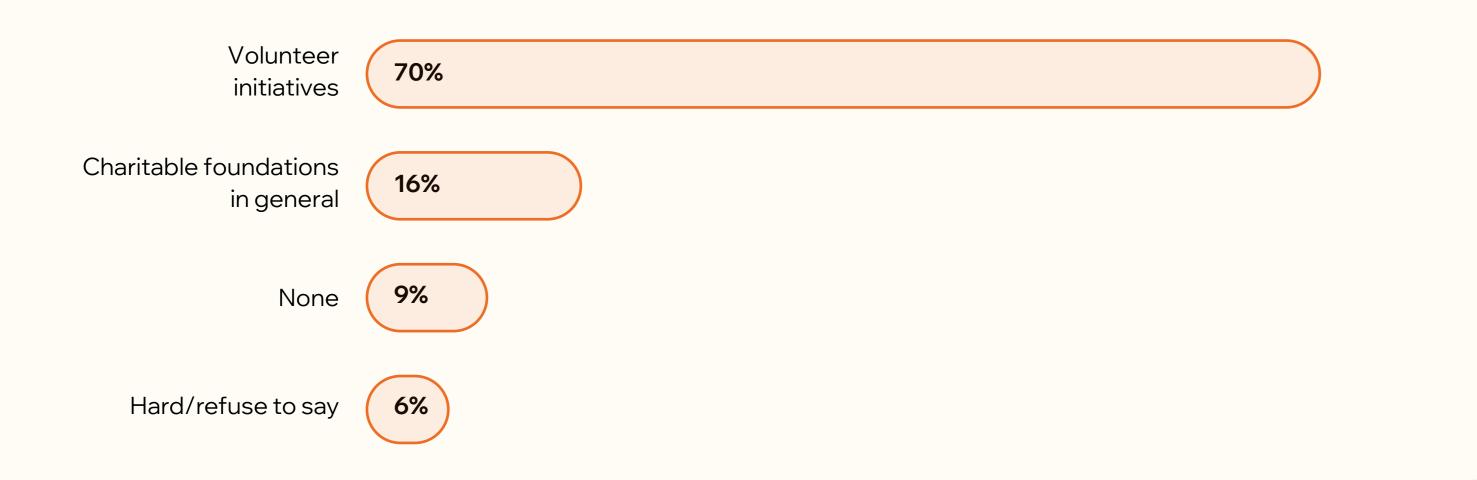


In general, the rate of trust in volunteer initiatives is higher than in charitable foundations: 40% of the population trusts foundations and 60% trusts volunteers. Among charitable foundations, trust in international organizations is higher, with 58% trusting them. Ukrainians hardly see any difference between national and local charitable foundations when it comes to trusting them. The rate of trust in such foundations is 46% and 44%, respectively. However, the rate of distrust in local foundations is higher and amounts to 24%.

WILLINGNESS TO HELP



Q19. Would you rather help charitable foundations or personal initiatives with money/volunteer work?



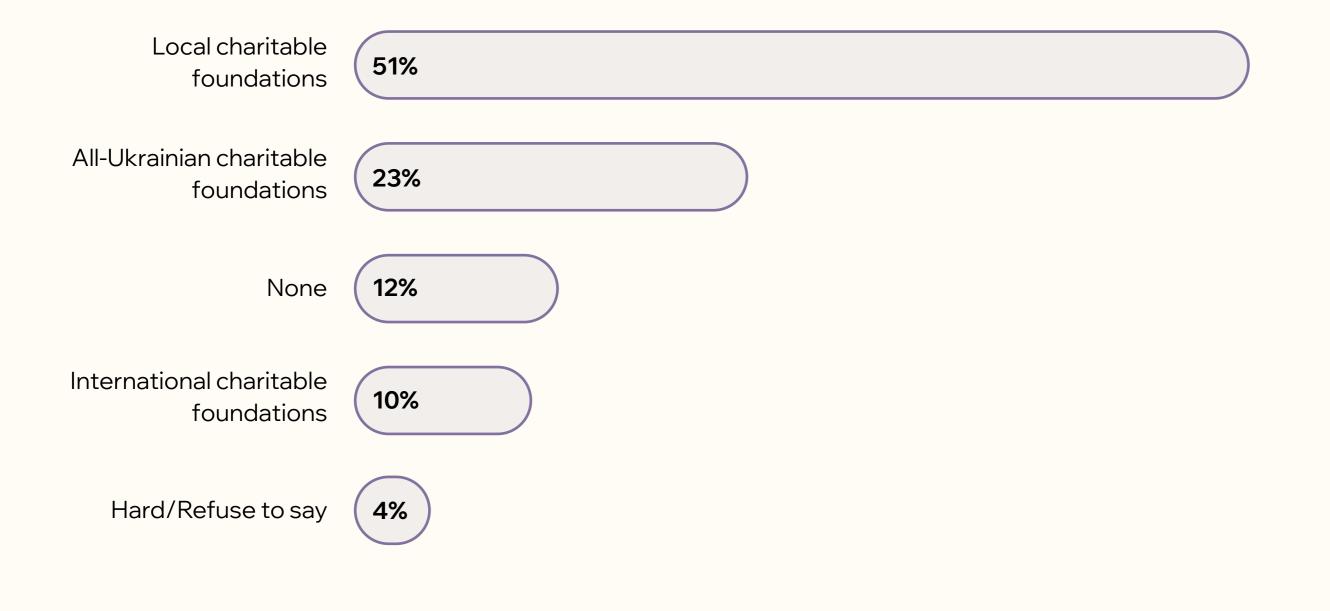
N=2,400

Only 15% of the population said they were unwilling to help anyone or refused to answer. However, most of those willing to help prefer to support volunteer initiatives (70%).

WILLINGNESS TO HELP CHARITABLE FOUNDATIONS



Q20. Who would you rather help with money or volunteer work: international, national, or local foundations?



N = 2,400

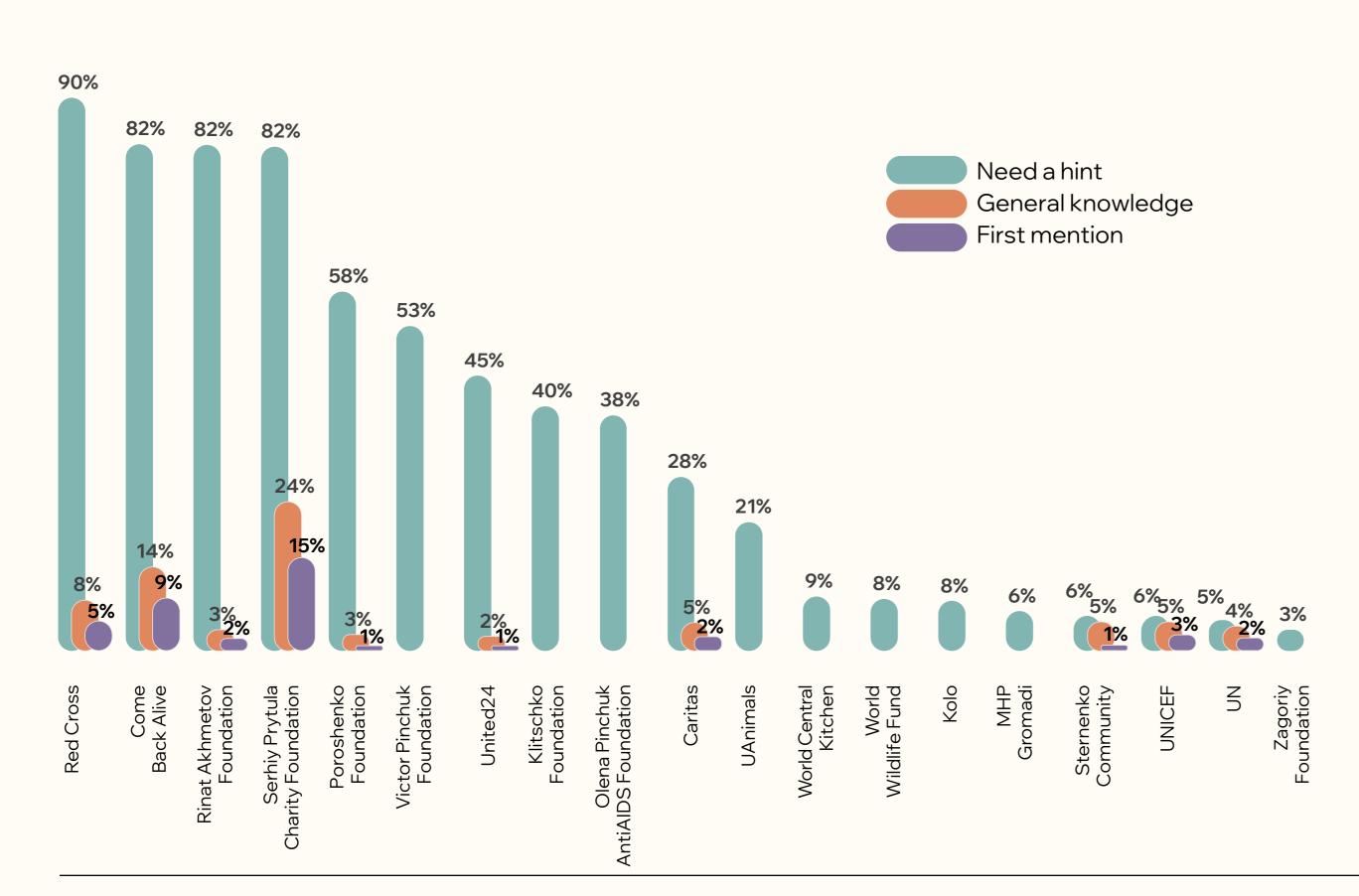
The share of the population unwilling to help charitable foundations or having refused to answer is 16%. The majority of those willing to help charitable foundations rather helped local foundations with money or volunteering (51%).

Only 10% of the population claim they are willing to support international charitable foundations.

This counterintuitive result (despite the higher trust rate in international foundations) may be explained by the fact that international foundations are perceived as the ones providing support to Ukrainians rather than requiring it from them.

RECOGNIZABILITY OF CHARITABLE FOUNDATIONS





General knowledge of charitable foundations is limited to the most media-friendly foundations, such as the Serhiy Prytula Charity Foundation (24%), Come Back Alive (14%), and the Red Cross (8%). For other foundations, the rate of general knowledge is either zero or does not exceed 5%. 43% of respondents could not recall any charitable foundation name without being hinted.

Hinting increases recognizability much (sometimes considerably). In addition to the generally known leading foundations, the Rinat Akhmetov Foundation was mentioned, all reaching an over 80% recognizability rate when hinted.

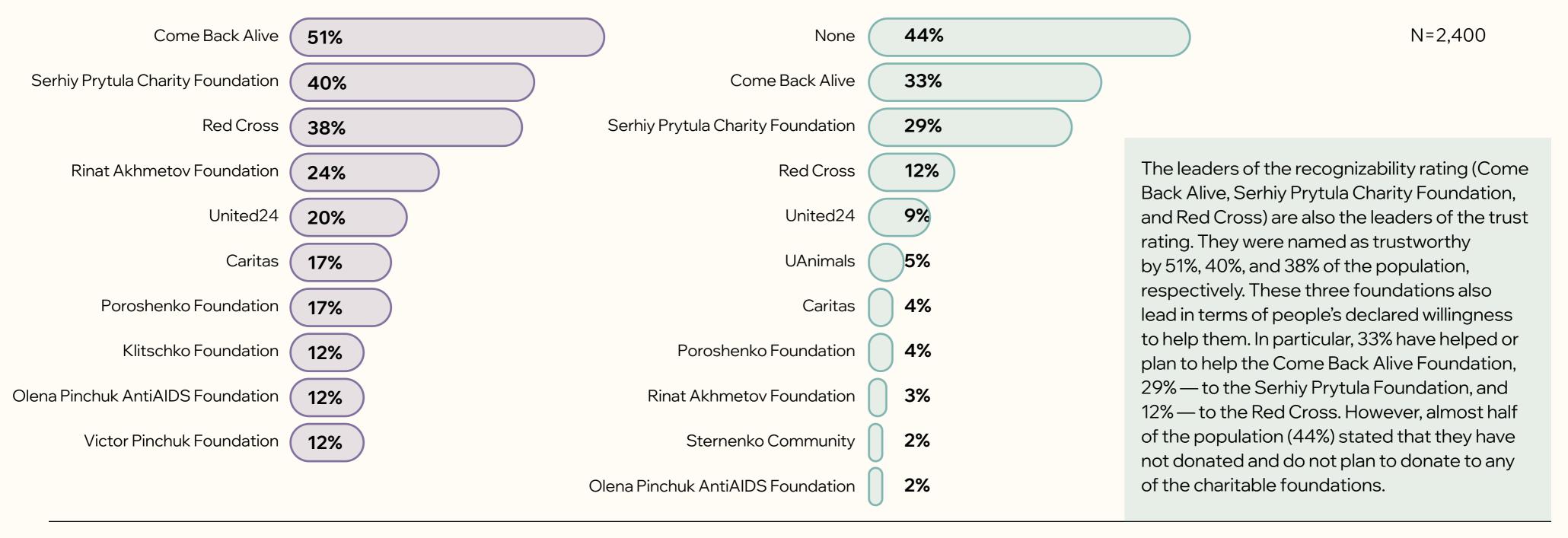
An interesting example is the Sternenko Community, which is generally a little known foundation. However, almost 80% of the people who do know this organization named it without being hinted, which assumes it has a loyal audience.

TRUST AND WILLINGNESS TO HELP



Q23. Which of the listed foundations do you trust? (Top 10, >10%)

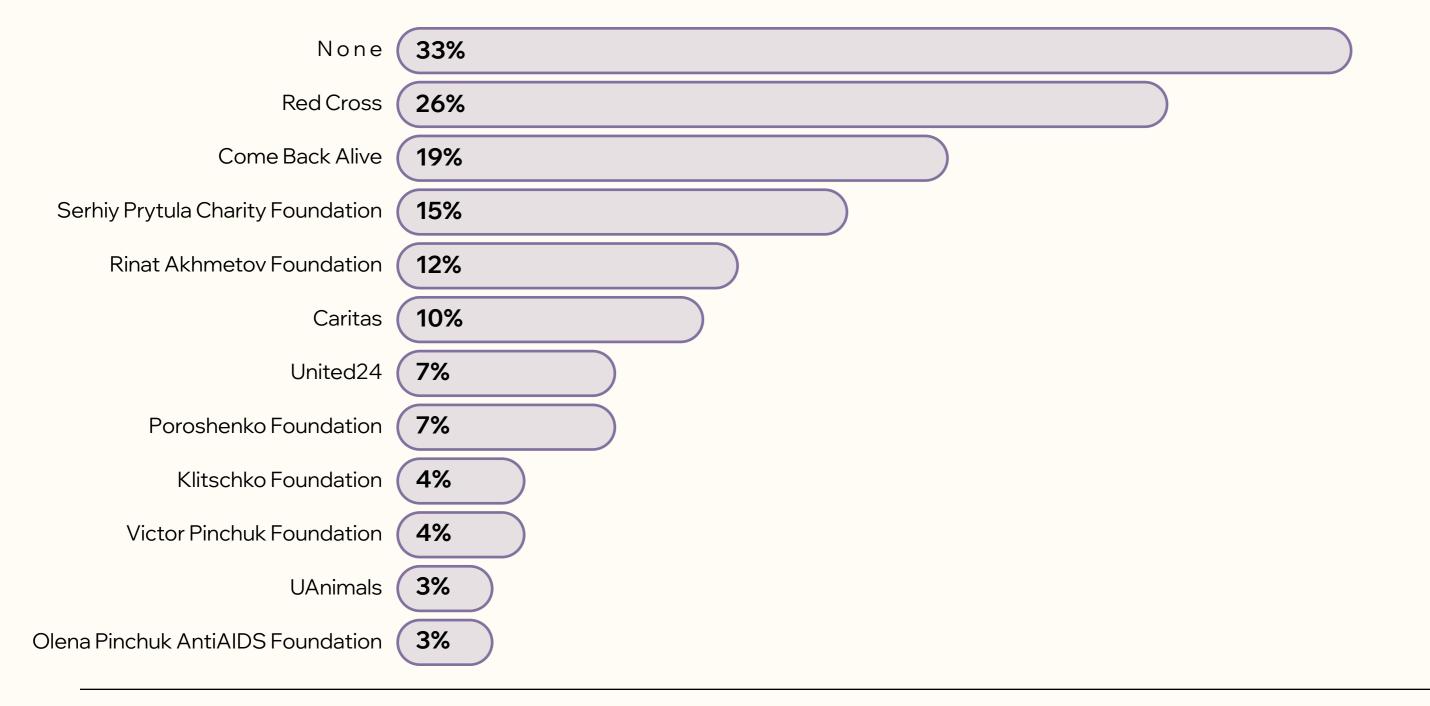
Q24. Which of the listed foundations have you donated or plan to donate funds to? (Top 10, >2%)



WILLINGNESS TO ASK FOR AID



Q25. If you need help, which of the listed foundations will you turn to? (Top 11, >2%)



N=2,400

A significant share of the population (33%) denies the possibility of turning to charitable foundations for help.

The largest share of people are ready to apply to the Red Cross (26%), which confirms the hypothesis that international charitable foundations are perceived as those providing assistance rather than raising funds.

Civil Society Sector





ENGAGEMENT WITH CSOS



BY SECTOR

Q25. How many public or charitable organizations did you implement or were implementing projects with in 2024?

	Education	Providing food and livelihoods	Healthcare	Protection	Assistance to the Defense Forces of Ukraine	Culture
None	13%	17%	11%	13%	8%	23%
1–2	19%	15%	17%	24%	18%	24%
3–5	36%	37%	42%	31%	47%	34%
6–10	20%	15%	17%	17%	17%	11%
10+	10%	15%	13%	15%	10%	8%
Hard to say	2%		1%			

N = 335

The NGOs working in the culture sector are less inclined to engage with other civic or charitable organizations.

The most frequent choice for all NGOs is 3–5 partner organizations, regardless of the sector.

Herewith, this option is most often chosen by the NGOs working in protection and assistance to the Defense Forces of Ukraine (42% and 47%, respectively).

The share of the NGOs that cooperate with 6+ organizations is 27–32% for NGOs in all sectors, except for culture, where it is only 10%.

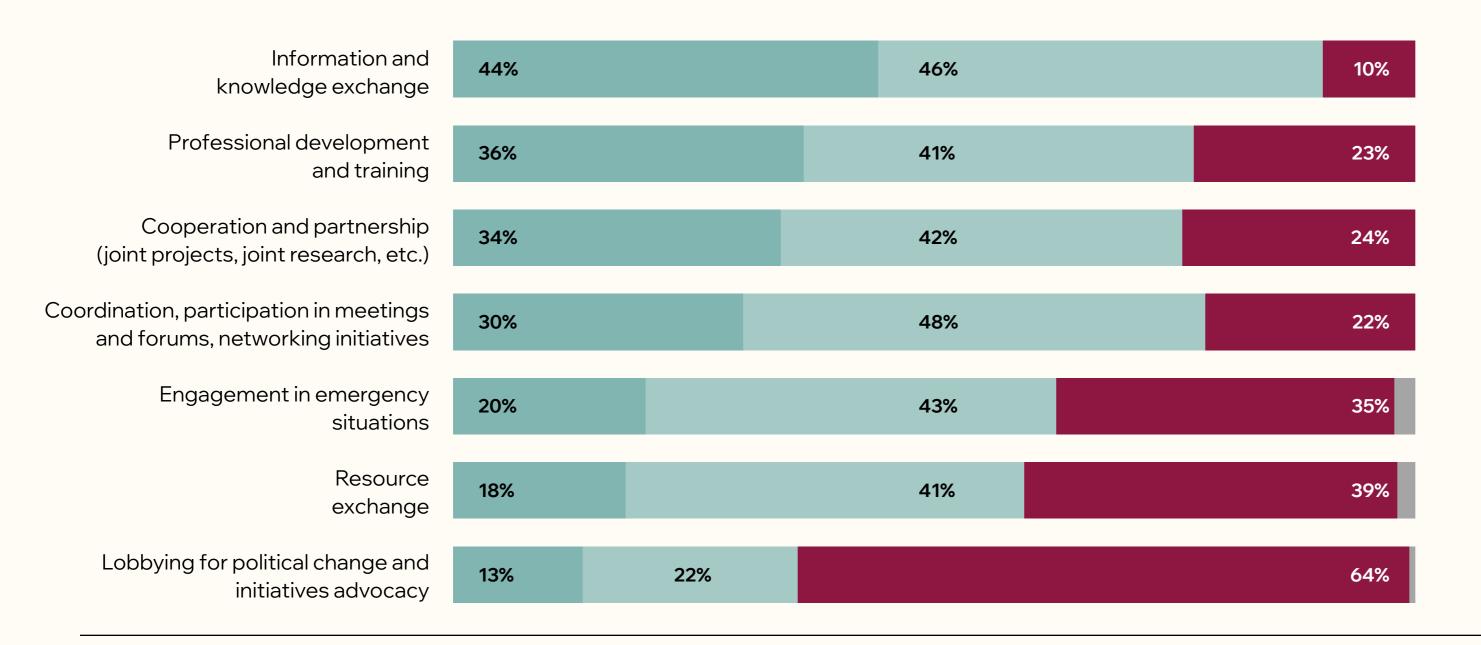
WAYS OF ENGAGING WITH THE CIVIL SOCIETY SECTOR



53

BY SECTOR

Q23. You have indicated that you engage with Ukrainian CSOs. Please, specify ways in which you engage with them.





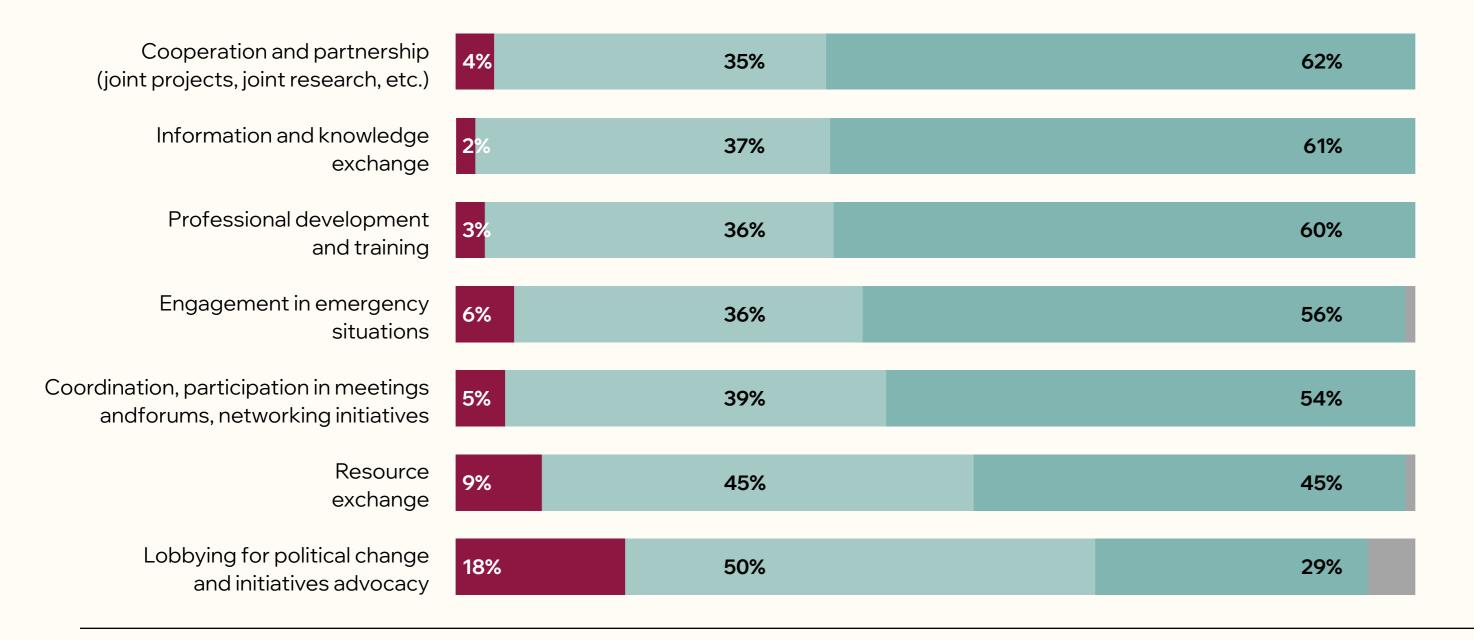
N = 335

The main way of engagement with the civic sector is information and knowledge exchange between NGOs, which is used by 90% of the respondents. Professional development, joint projects, and coordination rank second (76–78% of respondents). About 60% of the NGOs exchange resources and interact in emergency situations, and only 35% have experience in engaging in joint advocacy of initiatives.

ENGAGEMENT EFFICIENCY BY AREAS



Q24. Please assess the efficiency of such cooperation in various areas.



Inefficient (rated at 1–3)

Relatively efficient (rated at 4–7)

Efficient (rated at 8–10)

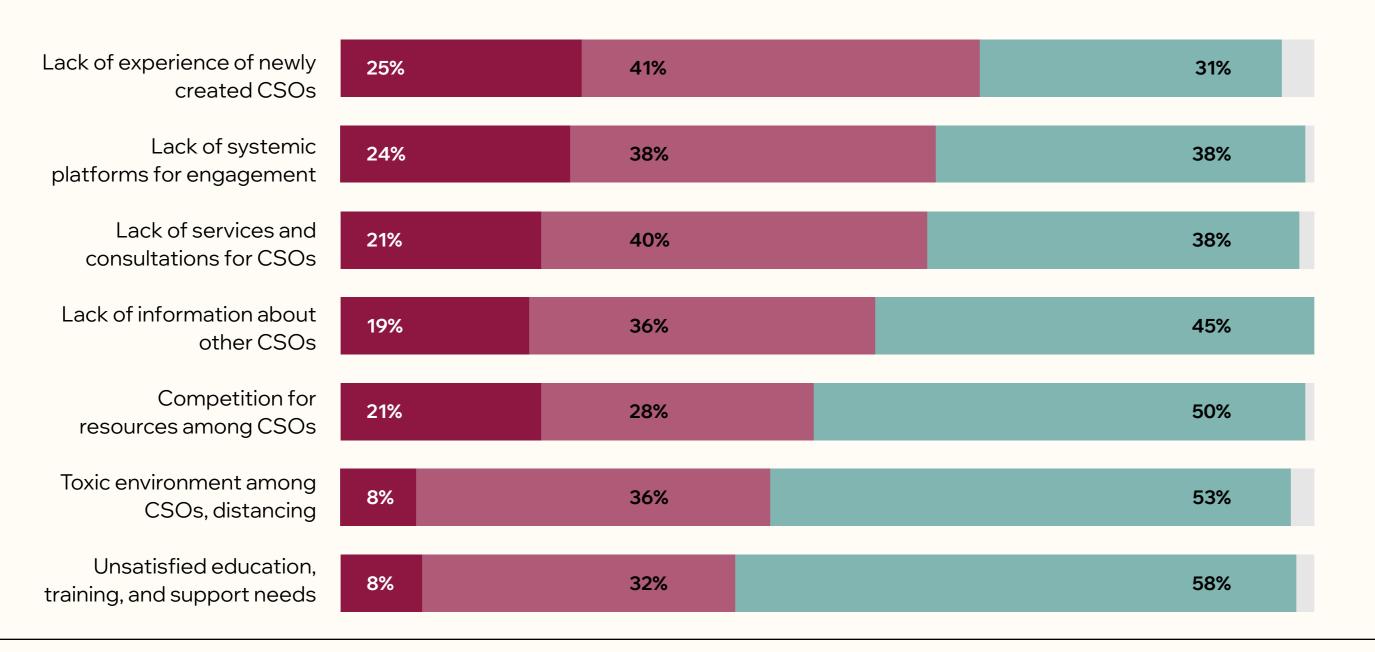
Hard/Refuse to say

The NGOs mostly assess the efficiency of interaction between themselves as high. In most areas, the share of negative assessments does not exceed 10%. The only exception is joint lobbying and advocacy of initiatives. Only 29% of the respondents rate this interaction as highly efficient, while 18% consider it extremely inefficient. It is noteworthy that lobbying and advocacy is the area where Ukrainian NGOs are least experienced.

BARRIERS TO ENGAGEMENT WITH UKRAINIAN NGOS



Q27. What barriers and obstacles do you face when engaging with Ukrainian NGOs?



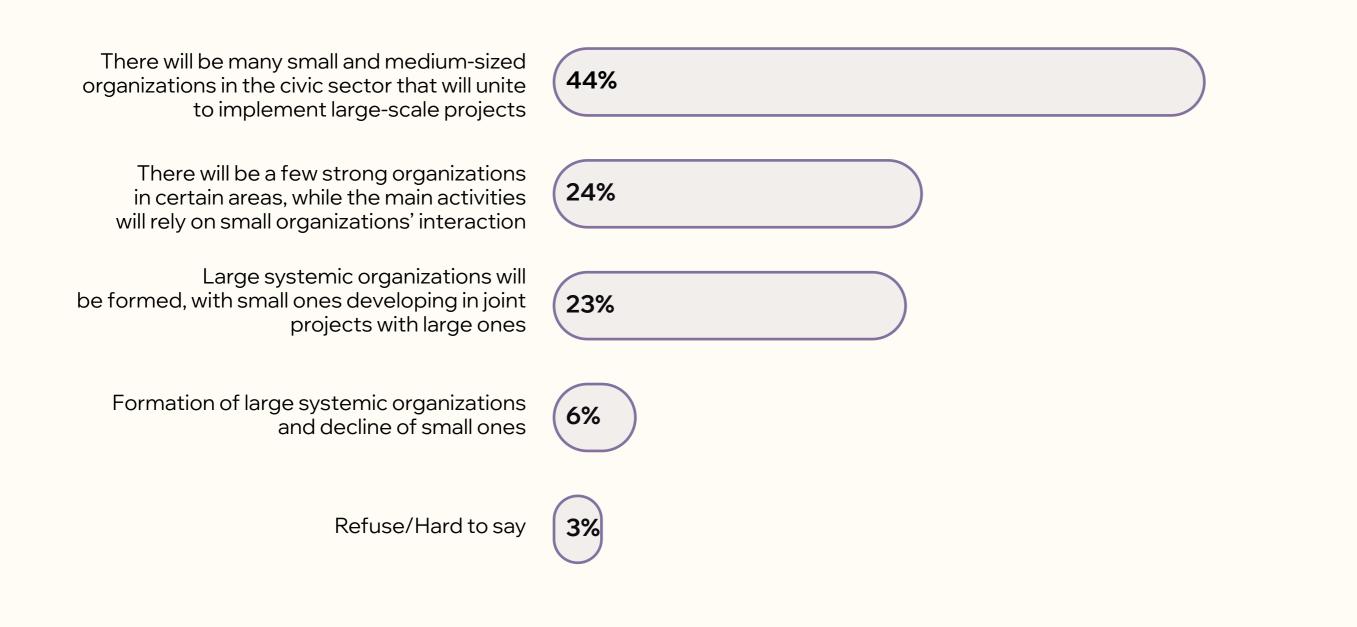


The biggest barrier to cooperation between Ukrainian NGOs is the lack of experience of newly created CSOs. This obstacle has been faced at least occasionally by 66% of the respondents. Another significant barrier is the lack of systemic platforms for engagement (62%) and lack of services and consultations for CSOs (61%). A fairly large share of the respondents (44%) mentioned toxicity and distancing among CSOs.

ENGAGEMENT WITH CSOS



Q26. The development of the civic sector can involve the formation of large systemic organizations or small organizations with strong interconnections. In your opinion, which way should Ukraine's civic sector follow?



N=335

Almost half of the surveyed NGOs having experience of cooperation with other CSOs (44%) believe that the civil society sector will develop through the cooperation of small and mediumsized organizations. Only 6% say that small NGOs will decline as large ones will develop.

CIVIL SOCIETY SECTOR DEVELOPMENT:



BY SECTORS

Q26. In your opinion, which way should Ukraine's civic sector follow?

	Education	Providing food and livelihoods	Healthcare	Protection	Assistance to the Defense Forces of Ukraine	Culture
There will be many small and medium-sized organizations in the civic sector that will unite to implement large-scale projects	45%	46%	39%	38%	45%	45%
There will be a few strong organizations in certain areas, while the main activities will rely on small organizations' interaction	27%	17%	31%	25%	24%	32%
Large systemic organizations will be formed, with small ones developing in joint projects with large ones	23%	23%	24%	25%	22%	20%
Formation of large systemic organizations and decline of small ones	4%	10%	7%	8%	5%	1%
Refuse/Hard to say	1%	4%	0%	3%	4%	1%

The NGOs working in different areas have a very similar vision of the way forward for the civil society sector in Ukraine. Mostly, the organizations working in education, food provision, assistance to the Defense Forces, and culture share the scenario of development of small and medium-sized NGOs. The NGOs operating in healthcare and culture tend to mention the formation of several strong organizations more often.

ENGAGING WITH OTHER NGOS





Positive trends:

- Military and humanitarian NGOs and those that deal with the rights of war victims indicate increased NGO interaction and establishment of formal and informal coalitions.
- Cooperation rate has increased by several times and expanded regionally.
- There are successful advocacy campaigns and many success stories.
- · More initiatives for sharing experiences and joint training have emerged.
- There are online platforms and forums where NGOs exchange experiences.
- At the beginning of the full-scale invasion, military and humanitarian NGOs actively exchanged resources, but due to increased regulation, this turned difficult to do.
- All the surveyed NGOs named several to dozens of partners, with about 10 NGOs on average.
- The NGOs surveyed are partially, but not completely, aware of who their partners work with due to the shared environment where everyone knows each other.



Negative trends:

- Non-military NGOs and those that do not work with the affected population indicate weakened NGO interaction and generally lower activity.
- Among the newly established organizations, there are some unprofessional or dishonest
 NGOs offering a negative cooperation experience, which threatens the sector's reputation.
- Among the NGOs working in one area, relations are often competitive and sometimes toxic, lacking support but involving criticism and devaluation.
- Among other things, competition arises due to lacking resources and reduced donations.
- Opportunities for offline events are limited.



Cooperation and strategies for assisting target audience:

- Discussions in social networks with other NGOs.
- Meetings to which various NGOs are invited are organized by institutions receiving assistance or by local authorities.
- Informal meetings with NGOs assisting institutions/target audience.
- Establishment of humanitarian coordination headquarters.
- Donors facilitate NGO communication regarding the needs of target audience.



Cooperation obstacles and difficulties:

- Working in a unique area, an NGO may lack potential partners.
- Due to numerous project activities and tasks, the time for cooperation is lacking.
- Lack of resources, including funds, for cooperation.
- Competition between NGOs and potential partners.
- Lack of professionalism and dishonesty of NGOs.
- Excess activities regarding certain areas and target groups.



"We carefully select our partners. Since 2022, everyone has become as united as possible. Internal policies may differ. But if we have discussed all this and if we have worked out the forms of meeting and discussing what we need to complete for now, there are no troubles."

(East, military CF)

Engagement Areas



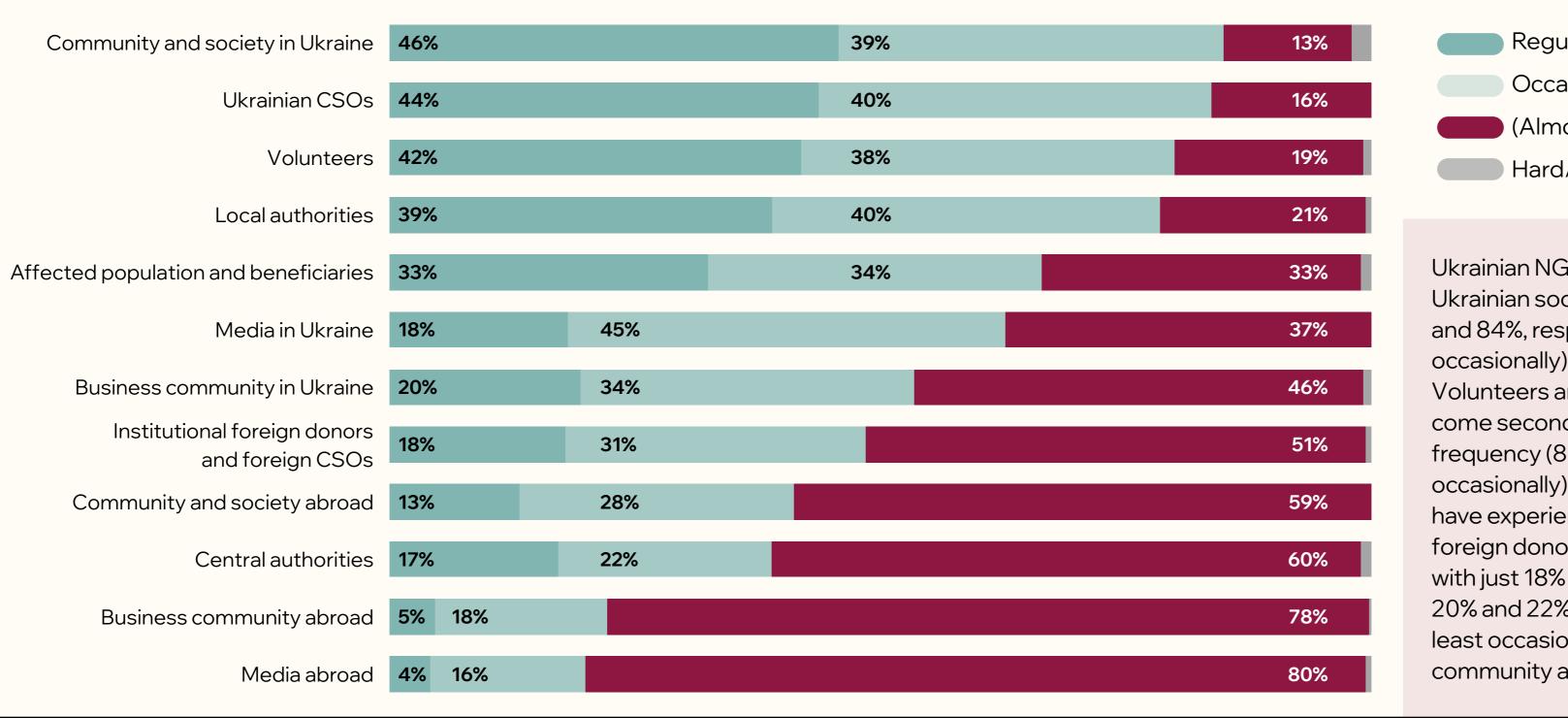


WHO NGOS ENGAGE WITH



60

Q17. Who does your organization engage with?



Regularly
Occasionally
(Almost) never
Hard/Refuse to say

N = 400

Ukrainian NGOs mostly interact with Ukrainian society and each other (85% and 84%, respectively, interact at least occasionally).

Volunteers and local authorities come second in terms of interaction frequency (80% and 79% interact at least occasionally). Less than a half of CSOs have experience of interaction with foreign donors and foreign organizations, with just 18% interacting regularly. Only 20% and 22%, respectively, interact at least occasionally with the business community and media abroad.

WHO NGOS ENGAGE WITH



BY SECTORS

Regular engagement, by sectors:

	Education	Providing food and livelihoods	Healthcare	Protection	Assistance to the Defense Forces of Ukraine	Culture
Volunteers	43%	70%	56%	60%	67%	42%
Community and society in Ukraine	51%	54%	54%	55%	58%	56%
Ukrainian CSOs	48%	48%	45%	57%	54%	47%
Affected population and beneficiaries	31%	65%	51%	61%	47%	30%
Local authorities	46%	54%	44%	48%	46%	34%
Institutional foreign donors and foreign CSOs	25%	31%	29%	40%	20%	19%
Business community in Ukraine	21%	30%	20%	17%	31%	17%
Media in Ukraine	16%	22%	16%	23%	19%	24%
Central authorities	14%	15%	16%	23%	14%	9%
Community and society abroad	12%	11%	14%	16%	22%	13%
Business community abroad	2%	9%	4%	8%	10%	1%
Media abroad	6%	2%	3%	3%	6%	6%

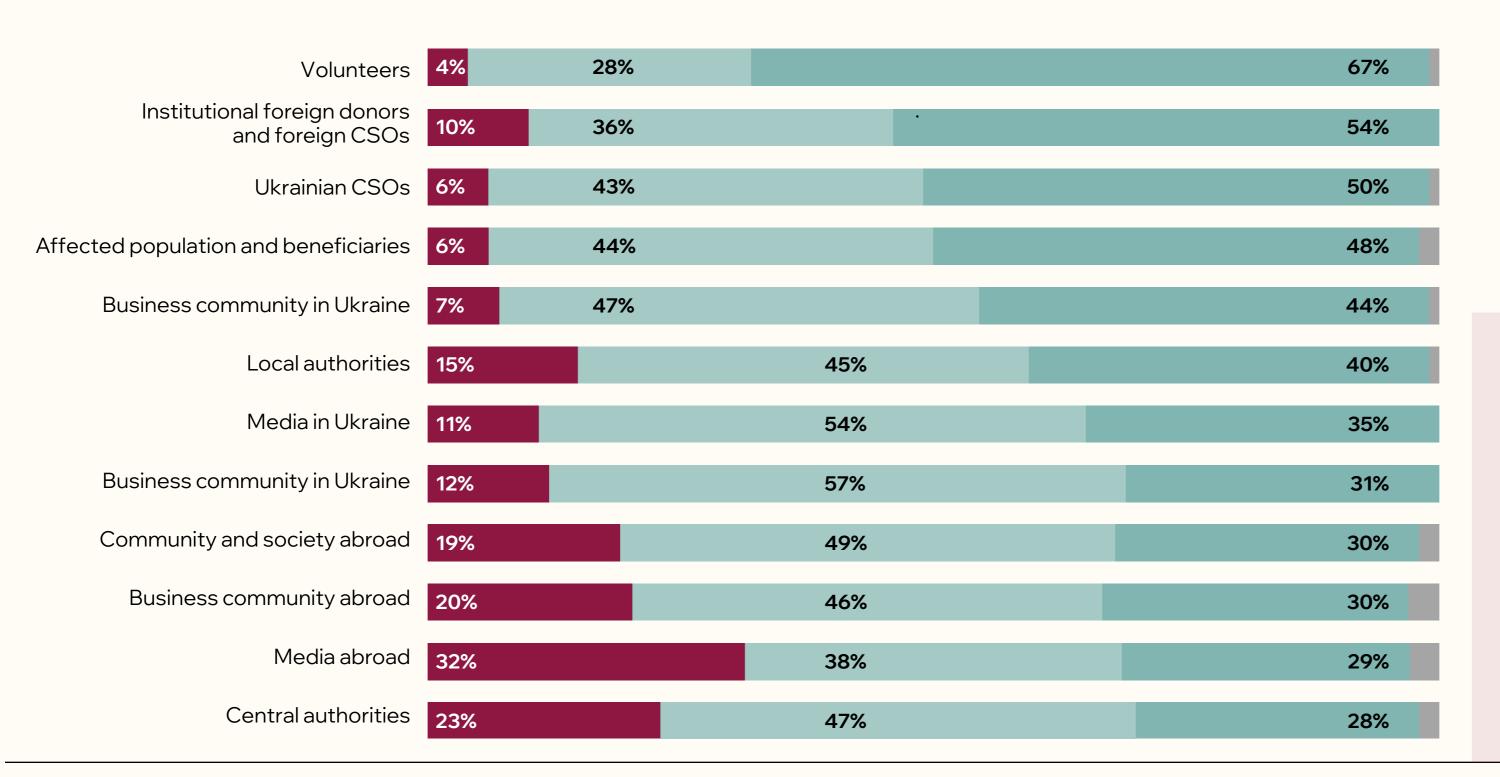
The areas of engagement somewhat vary depending on the sector in which an NGO works. For example, the NGOs providing food and livelihoods tend to interact with volunteers and the affected population more than others. The NGOs working in the Protection sector (which includes child protection, gender-based violence, and mine action) interact with foreign donors and foreign CSOs more. The NGOs assisting the Defense Forces of Ukraine interact with communities abroad more than others.

ENGAGEMENT EFFICIENCY



62

Q19. Please assess the efficiency of interaction with representatives of various sectors.



Inefficient (rated at 1–3)
Relatively efficient (rated at 4–7)
Efficient (rated at 8–10)
Hard/Refuse to say

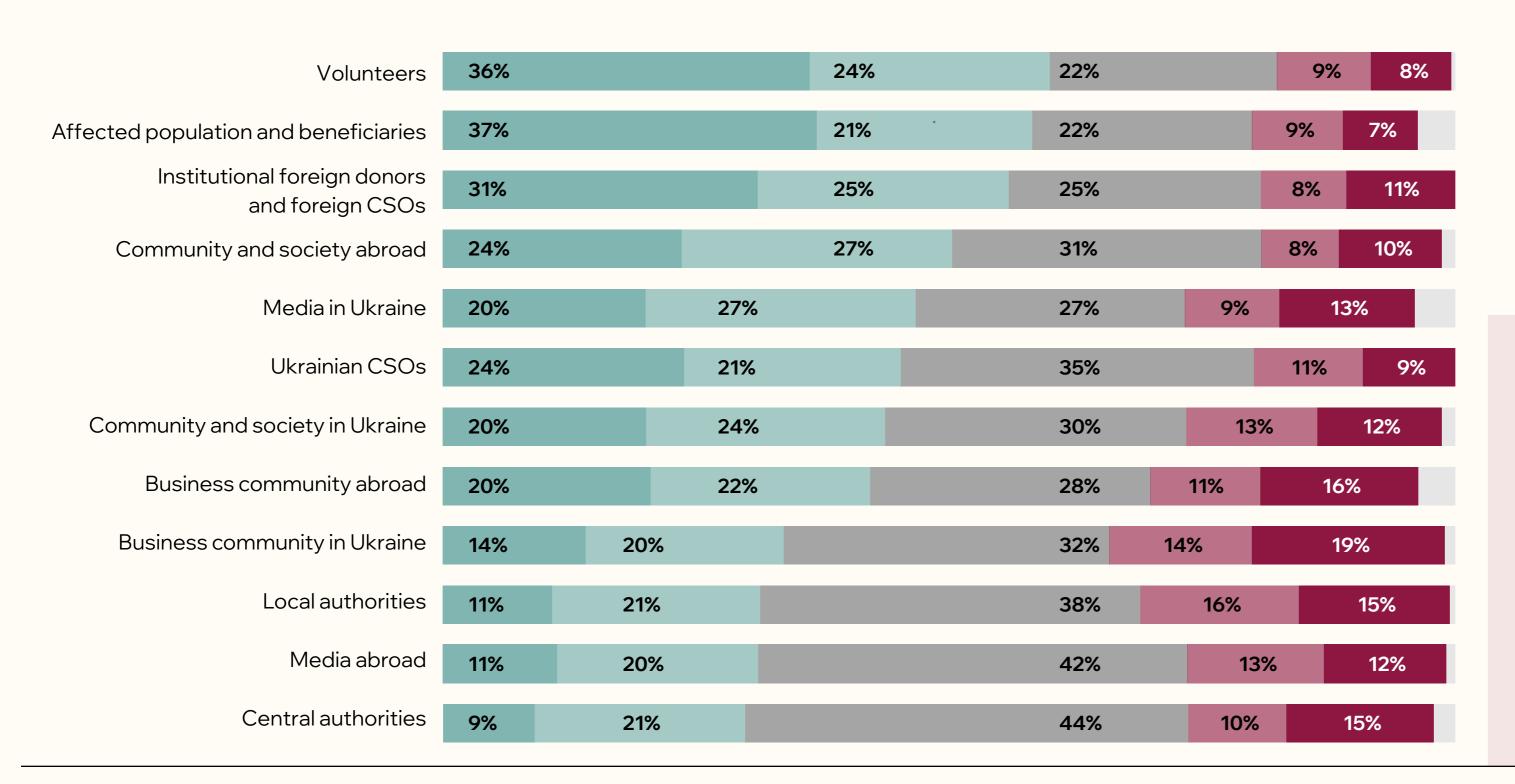
N = 400

Those NGOs that engage with each area at least occasionally were asked to assess the efficiency of such interaction. The assessment used a 10-point scale, where 1 means "extremely inefficient" and 10 — "very efficient." A positive signal is that only "media abroad" received a low efficiency score (32%). In most other areas, over 80% of the NGOs assessed the efficiency of their work as high or medium. The most efficient area is engagement with volunteers.

ENGAGEMENT EFFICIENCY DYNAMICS



Q20. How has the efficiency of engagement in these areas changed in the past two years (since 2022)?



Significantly increased

Slightly increased

Has not changed

Slightly decreased

N = 400

Significantly decreased

Hard/Refuse to say

The NGOs working in the civic sector for than two years also assessed how the efficiency of engagement has changed different areas. In all areas, the share of "increased" answers exceeds the share "decreased" answers, highlighting a positive dynamics.

The largest increase was recorded in engagement with volunteers, affected population, and donors, while the lowest regarded local and central authorities, media, and business in Ukraine.

DONORS AND FUNDING SOURCES

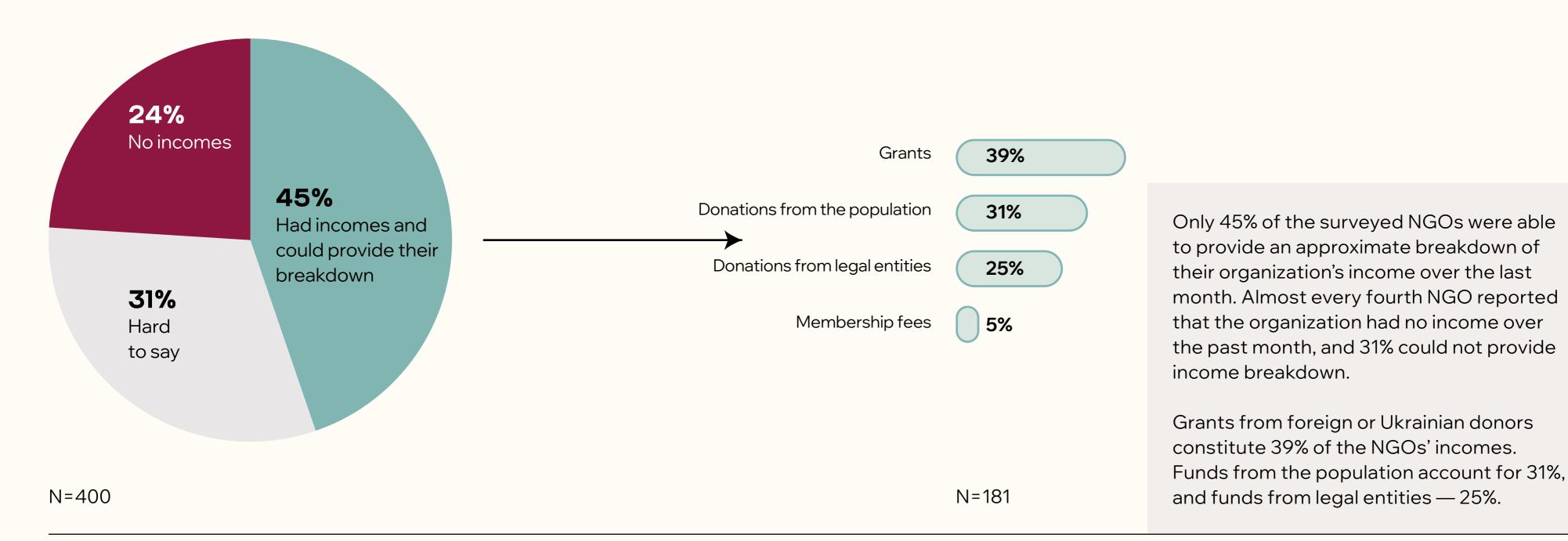




NGO FUNDING SOURCES



Q21. Please consider all of your organization's incomes for the last month. Estimate the approximate share of income from specific funding sources.

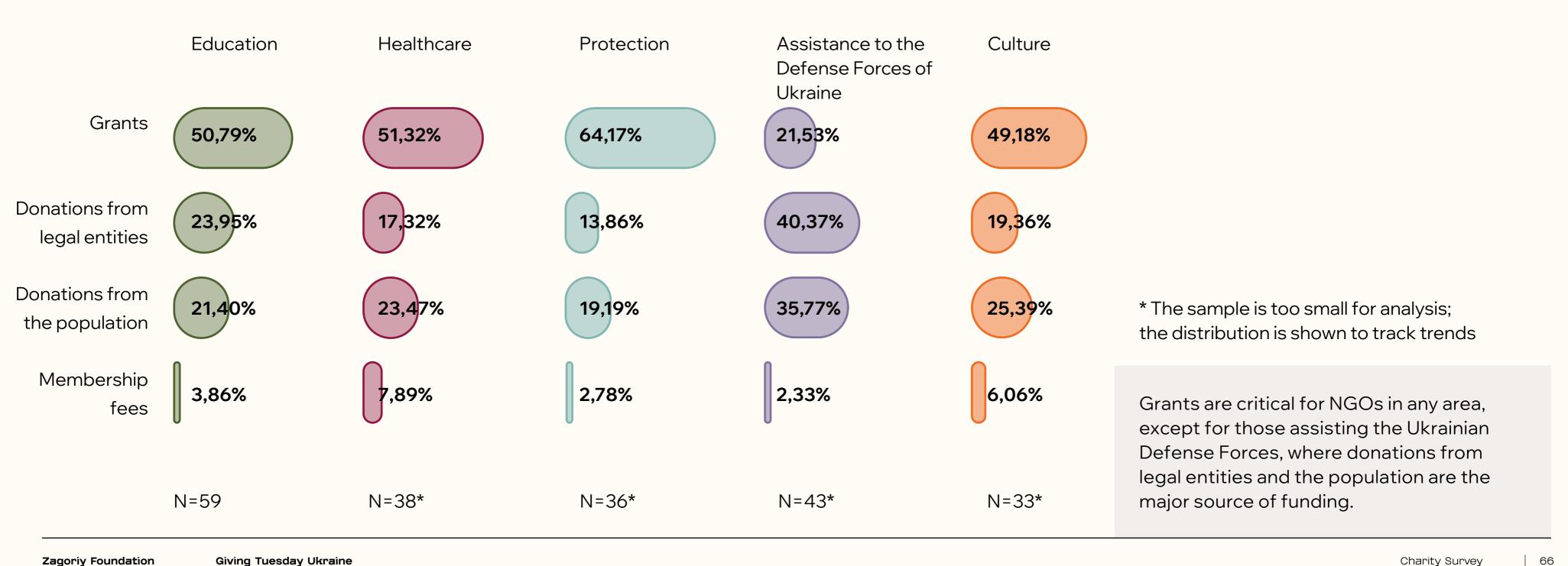


NGO FUNDING SOURCES



SECTORAL DIFFERENCES

Q21. Please consider all of your organization's incomes for the last month. Estimate the approximate share of income from specific funding sources.



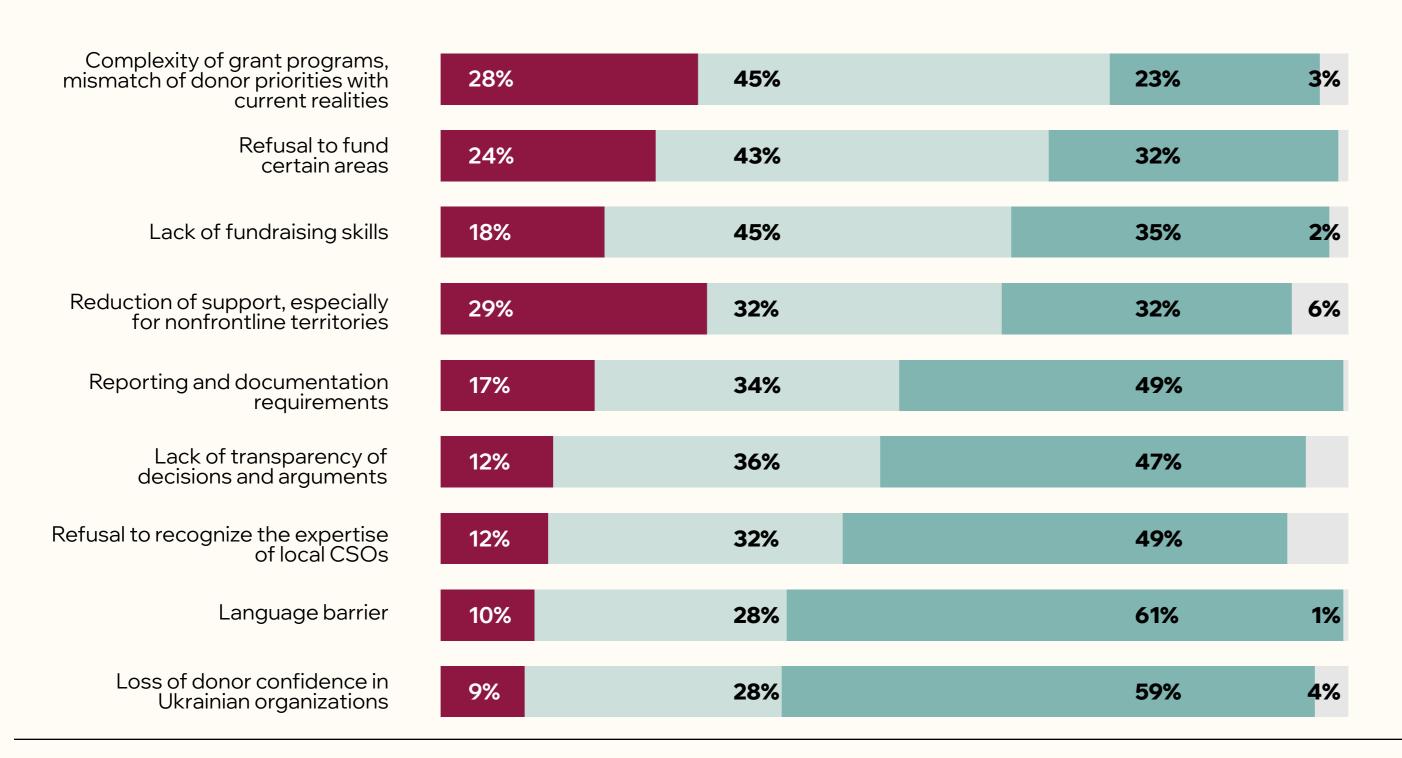
BARRIERS TO ENGAGEMENT



67

WITH DONORS AND FOREIGN CSOS

Q29. What barriers and obstacles do you face when engaging with donors and foreign NGOs?



Regularly
Occasionally
(Almost) never
Hard/Refuse to say

N = 194

Among the main barriers to raising funds from foreign donors and NGOs, the three major ones are interrelated. These regard the complexity of grant programs and, accordingly, the lack of fundraising skills among Ukrainian NGOs. The mismatch of donor priorities with current realities leads to donors' refusal to fund certain areas and reduced support (especially for the "rear" regions). Each of these factors is mentioned by more than 50% of the NGOs that have interacted with donors and international NGOs.

ENGAGEMENT WITH DONORS AND FINANCIAL RESILIENCE





Factors contributing to obtaining grant funds:

- About half of NGOs use grant funds.
- Some NGOs consider themselves financially resilient, as they have several long-term projects and are funded by several different donors.
- Some NGOs, despite having funding from donors, do not consider themselves financially resilient, for they doubt about continued funding and the work of donors in Ukraine in general.
- Thus, few NGOs consider themselves financially resilient.
- Fixed administrative costs and salaries can be afforded by NGOs that receive grant funds.
- Some NGOs indicated they have no offices.
- Several NGOs, in addition to grants, raise funds, in particular from businesses, which increases their financial resilience.

- Several NGOs mainly rely on fundraising and one NGO is funded by local authorities.
- Several NGOs have once had state funding, but most avoid it for fear of increased scrutiny
- Some NGOs do not currently have stable funding; due to the war, their activities have become less of a priority (environment, culture, etc.).
- One NGO plans to cooperate with businesses and one NGO plans to open a social enterprise.
- Some NGOs applied for grant funds but did not receive them.



Factors contributing to obtaining grant funds:

- NGO reputation
- Positive recommendations from donors
- National status
- Sufficient experience in the issue, expertise
- High-quality NGO communication in social networks and on the Internet
- Work in relevant UN clusters
- Relevance of the work area, compliance with donor policies

- Experience in submitting applications and receiving grant funds, implementing projects
- Strong team involving experts
- Experience in cooperation and communication with international foundations
- Experience in informal communication with international foundations' representatives
- Cooperation with foreign embassies and business associations

The most important factors, the respondents believe, are reputation, experience, recommendations, and communication, including materials in English.

In order to develop long-term relationships with donors, NGOs should:

- Demonstrate work results
- Make suggestions
- Send letters of gratitude and sign memoranda
- Constantly communicate and develop partnerships
- Provide regular and high-quality reports
- Be public and cooperate with the media
- Have successful advocacy campaigns
- Participate in international events and conferences



Factors that hinder obtaining grant funds:

- Lack of experience and expertise in the issue
- Local scope of an NGO's activities
- Irrelevance of the work area, inconsistency with donor policies
- Lack of experience in attracting grant funds, communicating, and cooperating with donors
- Insufficient English language skills
- No stable team
- Reduced grant opportunities, especially for "rear" regions
- High competition between NGOs

Since transparency is important, NGOs use the following tools:

- Detailed photo and video reports
- Submission of required reporting forms
- Post-distribution monitoring (humanitarian NGOs)
- Annual financial audits

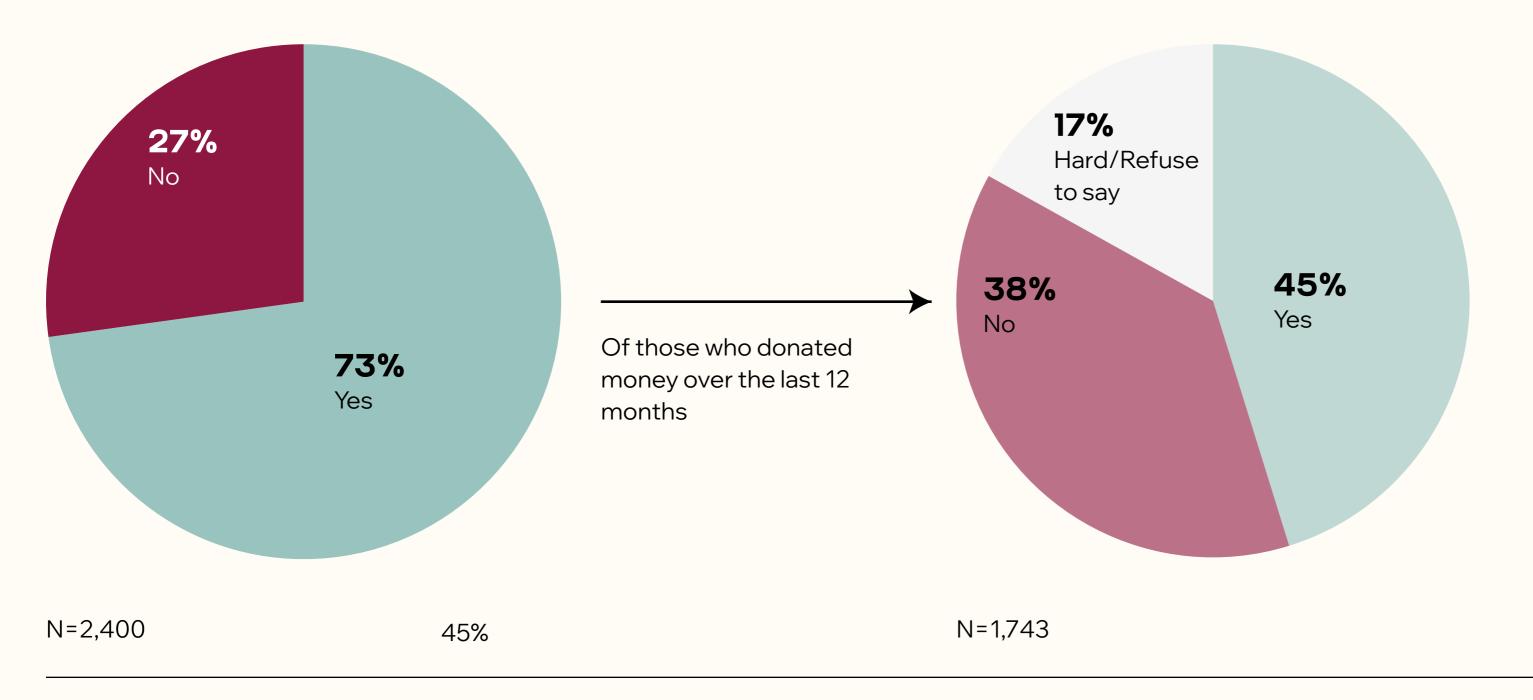
- Beneficiary surveys
- Providing donors with financial and other documentation
- Open reporting in social networks

SHARE OF DONORS AMONG THE POPULATION



Q6. Please specify whether you provided any financial assistance (donated funds) in the last 12 months?

Q6.1. Did you donate funds last months?

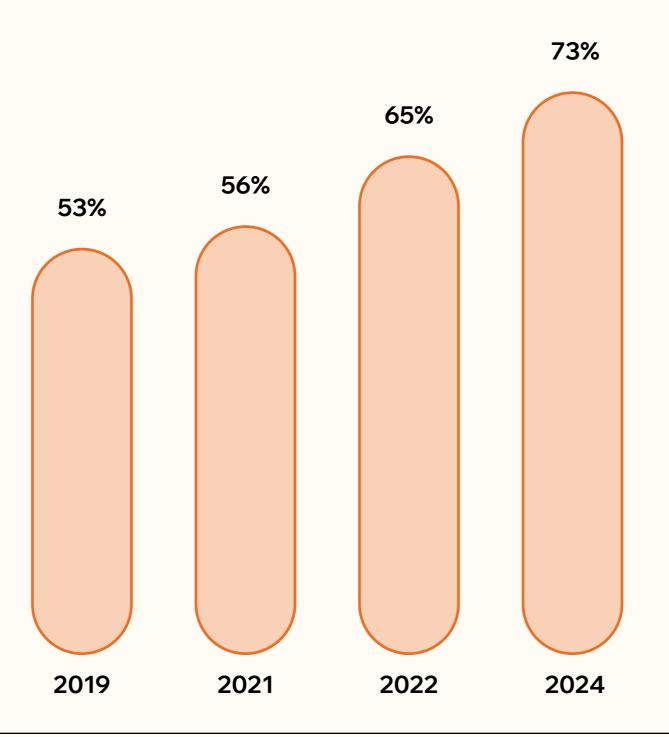


Among the general population, donors (those who donated money as financial assistance in the past 12 months) account for 73%. Of them, 45% (about a third of the general population) donated money last month.

SHARE OF DONORS IN THE SOCIETY: DYNAMICS



70



The share of the population donating funds for charity has been steadily growing since 2019.

However, not all such funds go to charitable foundations and organizations.

AVERAGE DONATIONS OF UKRAINIANS



How much, approximately, did you donate to charity?

Over the past three months

UAH 4,991.64

UAH 9,776.71

N = 2,400

N = 1225

Last month

UAH 840.08

UAH 2,907.79

N=2,400

N=693

In general, one Ukrainian donates almost UAH 5,000 per quarter or UAH 840 per month. The average value is higher for those indicating their involvement in charity: the philanthropists donated an average of about UAH 9,780 per quarter and UAH 2,900 over the past month.

Society in general

Donors

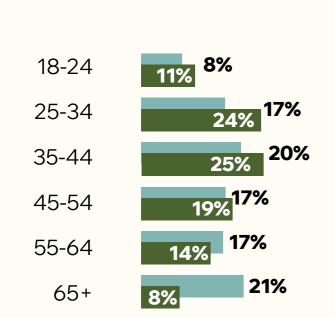
ACTIVE DONORS: GENERAL SURVEY



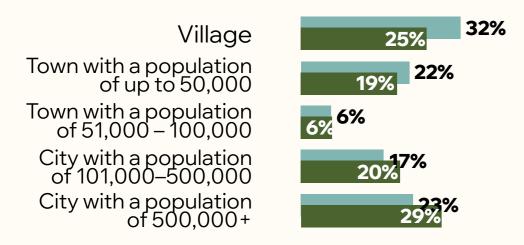




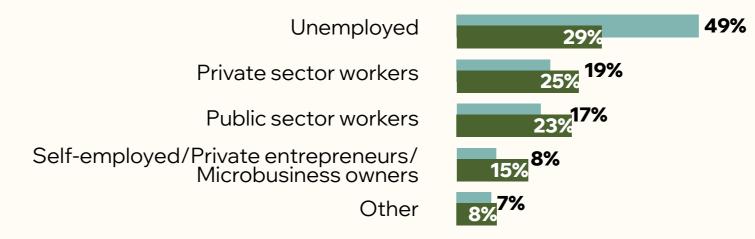
Age



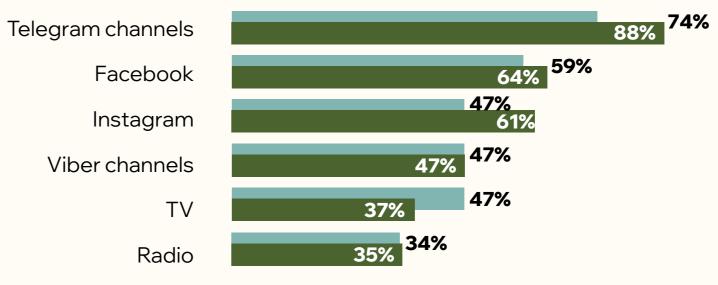
Place of residence



Employment status



Media use (weekly)





N=788; those who donated money last month

Zagoriy Foundation Giving Tuesday Ukraine

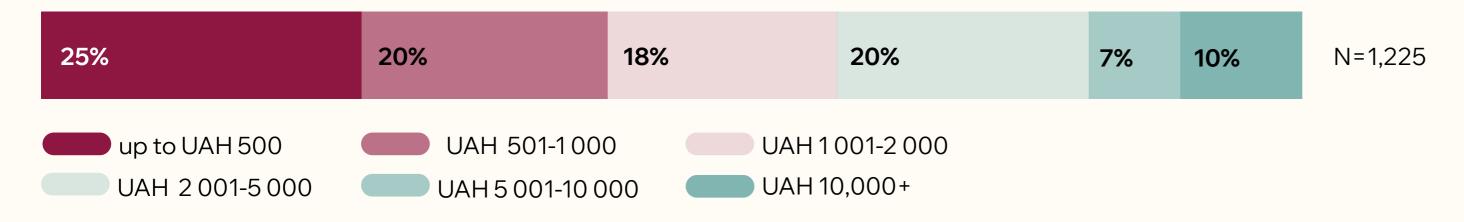
HOW MUCH UKRAINIANS DONATE



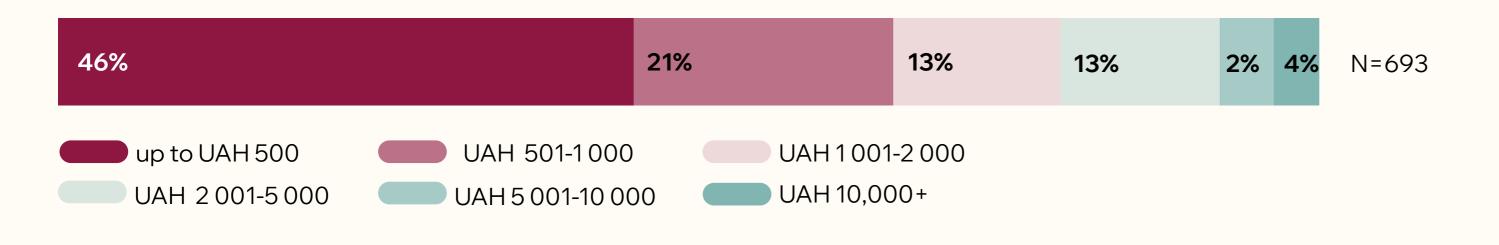
73

How much, approximately, did you donate for charity?

Over the past three months



Last month

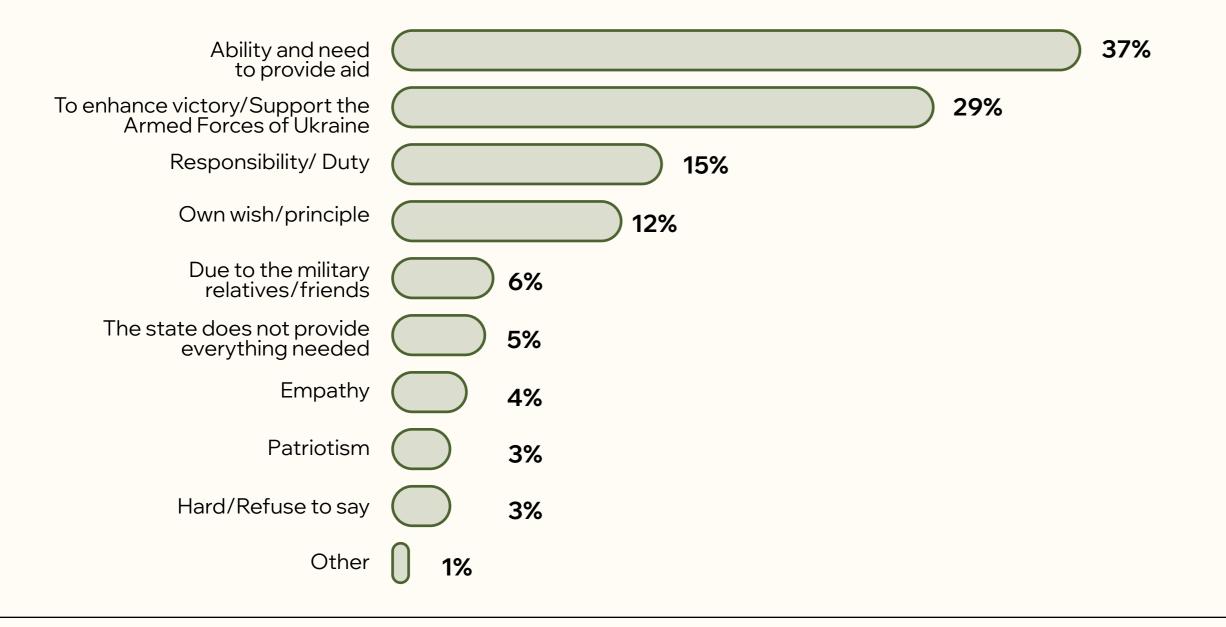


63% of the philanthropists donate less than UAH 2,000 per quarter, 67% donate less than UAH 1,000, and 10% donate UAH 10,000+.

REASONS TO DONATE FUNDS



Q36. Why do you generally provide aid?



N=1,742; those who provided aid over the past year

The main motive for providing financial assistance is the ability and need to do this. This reason was mentioned by 37% of the respondents.

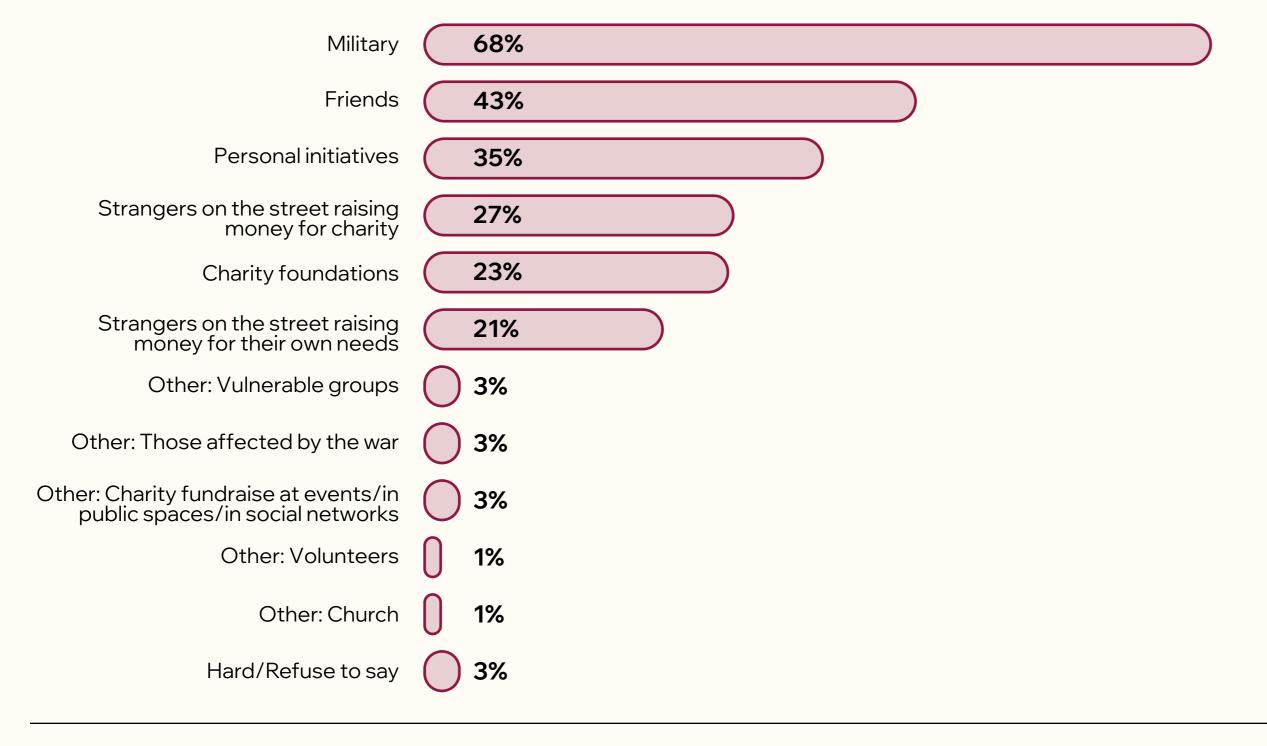
29% of the respondents donate to support the Armed Forces of Ukraine, while another 15% consider the need to help as their duty.

«Obvious» reasons, such as unsatisfactory state support, are much less popular than emotional factors and were mentioned by only 5% of the respondents.

FINANCIAL AID BENEFICIARIES



Q35. You have mentioned that you had provided financial assistance over the last 12 months. Please indicate who you provided it to.



N=1,742; those who provided financial aid over the last year

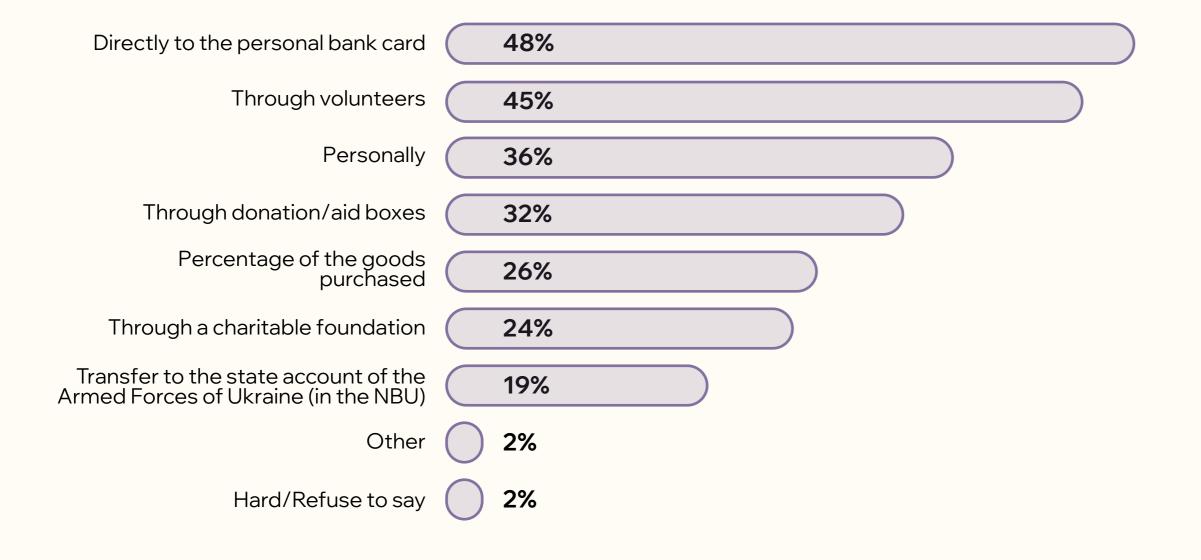
Among the financial assistance beneficiaries, personal contacts (friends or friends' friends) prevail: In general, 88% of all donors focus on specific military and close people or other personal initiatives.

Only 26% of the donors donate to charitable foundations, which is less than the general sporadic assistance to strangers on the streets (35% of the respondents donate to strangers raising for charity or personal needs)

SUPPORTING THE DEFENSE FORCES OF UKRAINE



Q35.1. Please consider your aid to the Defense Forces of Ukraine. In which way did you provide it?



N=447; those providing aid through charitable foundations

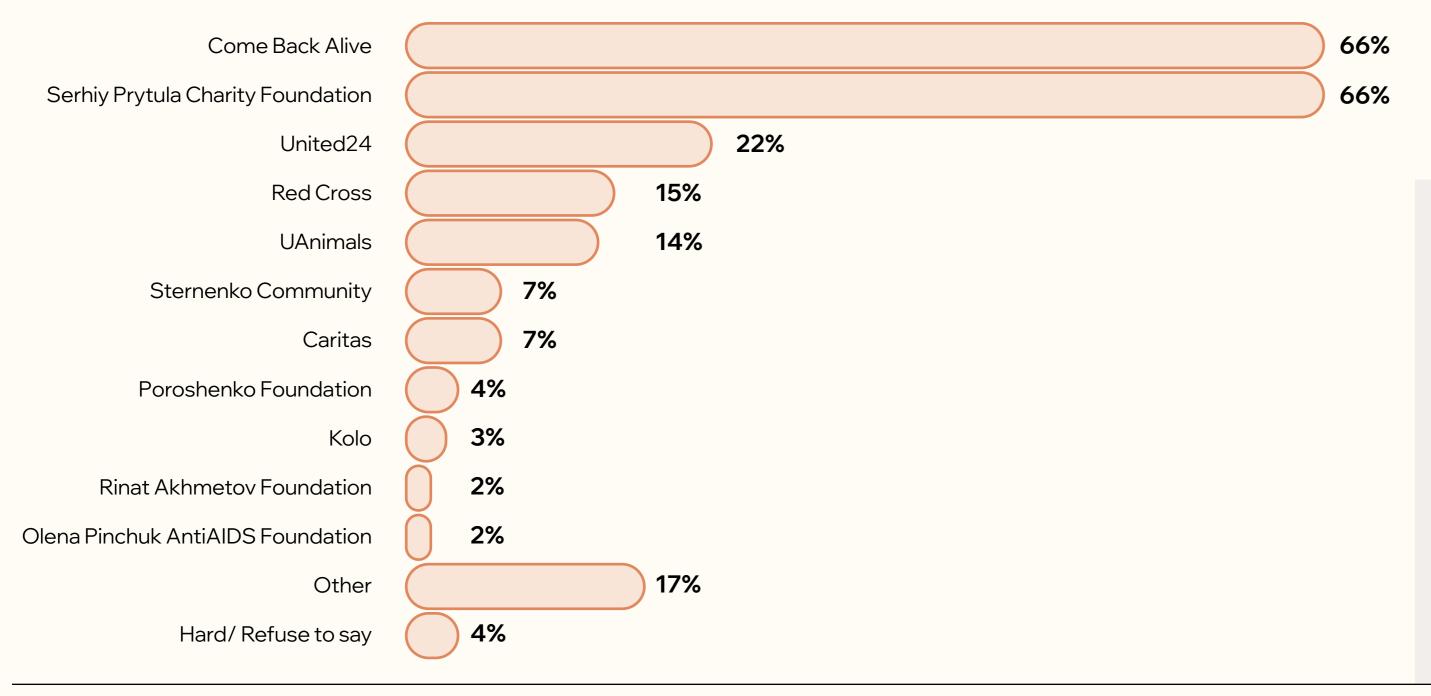
The trend of donating funds personally/ directly to beneficiaries (at most, through volunteers) is relevant with regard to the Defense Forces of Ukraine as well. 82% of those who provided financial aid over the past year resorted to this way of providing it.

The share of the donors aiding through charitable foundations is approximately the same as in the general case — 24%.

AIDING THROUGH CHARITABLE FOUNDATIONS



Q37. Which charitable foundations did you provide financial aid to? (TOP answers, >1% mentions)



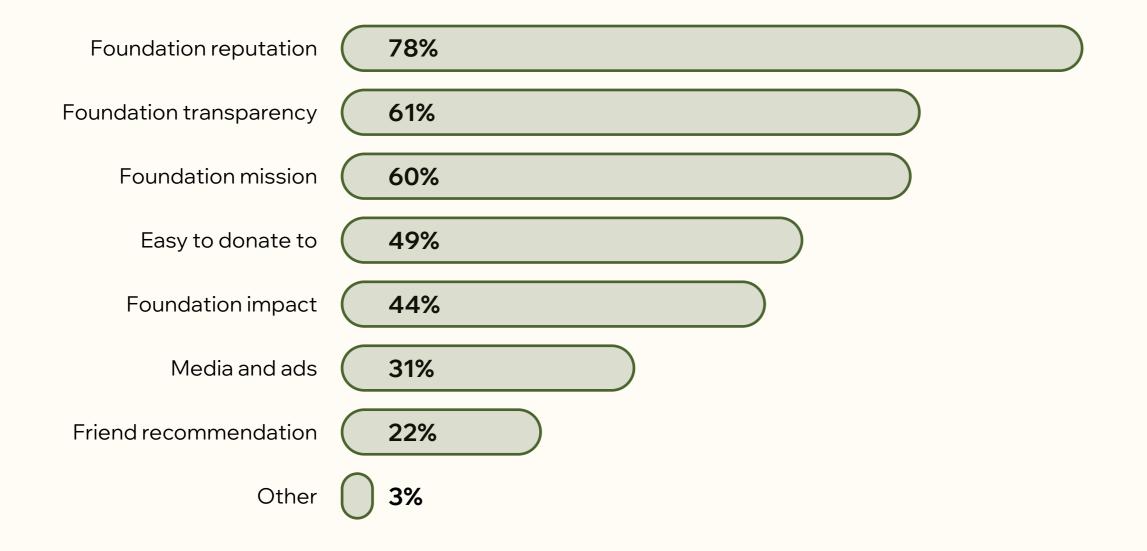
N=1,742; those who provided financial aid over the last year

Considering that the Serhiy Prytula
Charity Foundation and Come Back Alive
are the most recognizable charities, it is not
surprising that 84% of those providing aid
through charitable foundations interacted
with one of these organizations (2/3 of
the respondents with each of these two
foundations). The other two leaders in
the recognizability rating, the Red Cross
and the Rinat Akhmetov Foundation,
apparently built their recognition through
providing aid rather than attracting it: 15%
donated to the Red Cross, and only 2% to
the Akhmetov Foundation.

REASONS FOR CHOOSING SPECIFIC CHARITIES



Q38. Why did you choose exactly this foundation(s)?



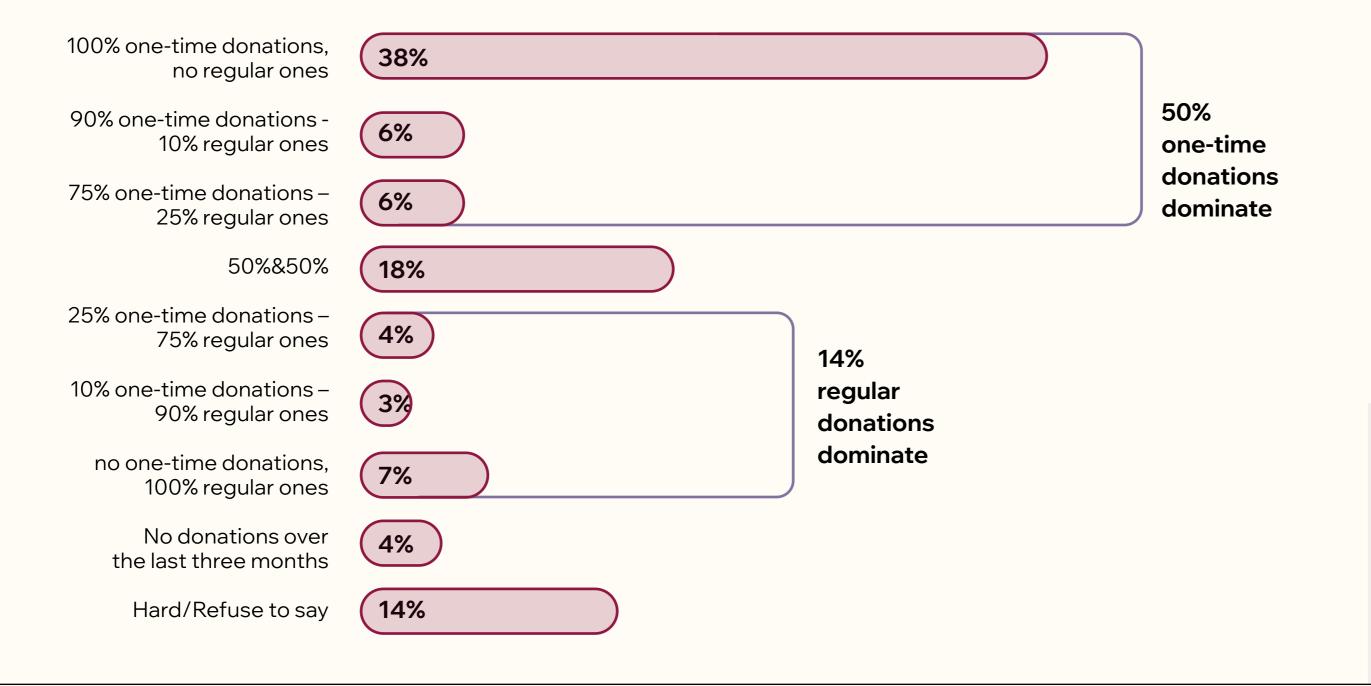
N=430; those providing aid through charitable foundations and could name them

Reputation is the main factor in choosing a particular foundation. 78% of the respondents mention reputation directly, while about 60% name such factors as «transparency» and «mission,» which are also aspects of reputation.

REGULARITY OF DONATIONS



Q39. Consider all the donations you made over the last three months. What is the percentage breakdown of regular and one-time donations? What would be their ratio?



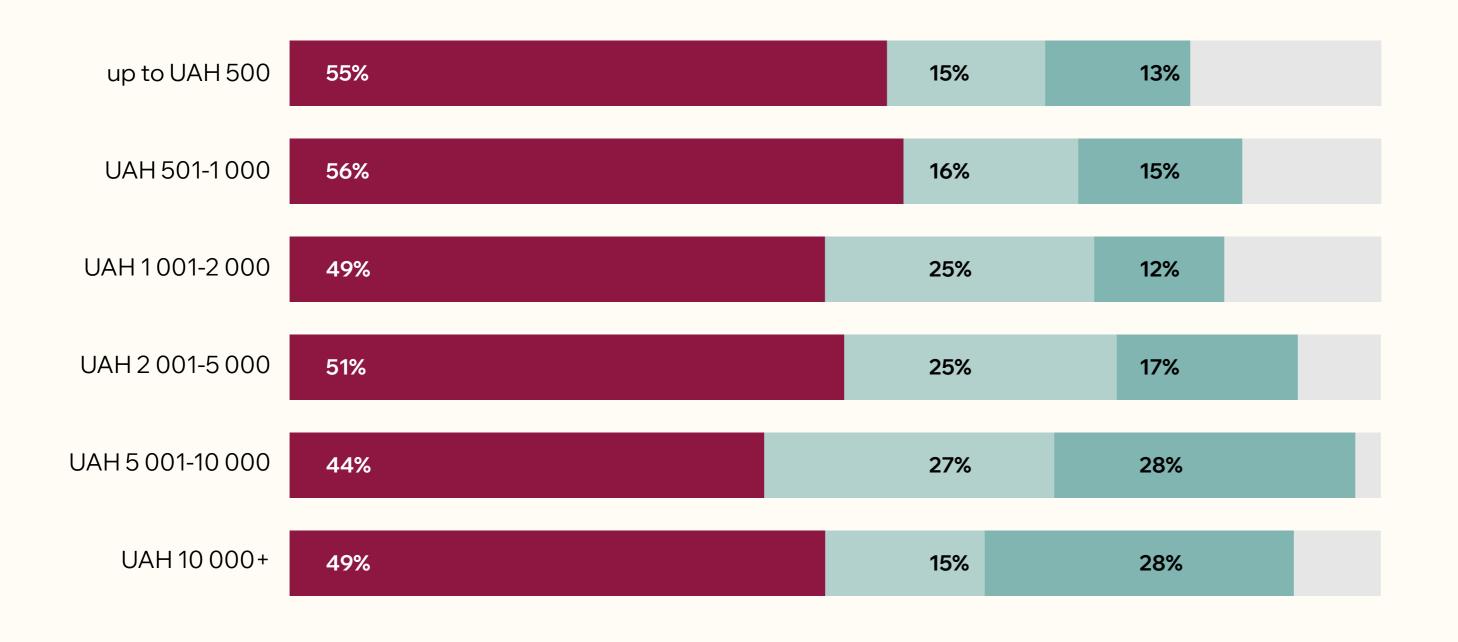
N=1,742; those who provided financial aid over the last year

Half of the respondents practice less of regular donations (donation subscriptions), while 38% make no regular donations at all. Only 14% of the respondents make more of regular donations, with only 10% having more than 90% of regular donations in their charity "portfolio."

DONATION TYPES BY AMOUNT



Q39. Consider all the donations you made over the last three months. How would you divide them into regular and one-time donations in percentage terms? What would be the ratio?



Mostly one-time
50/50
Mostly regular

N = 356

Hard to say/no donations over the past 3 months

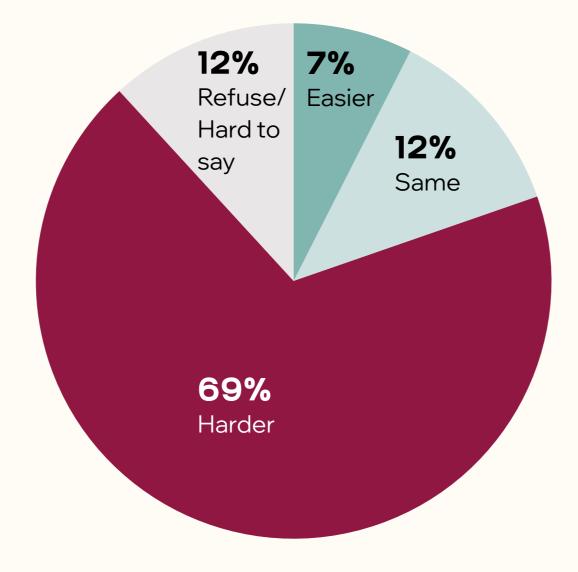
All the donors demonstrate the tendency to make one-time donations, regardless of their amount. Herewith, those donating smaller amounts show a more pronounced tendency to make one-time donations.

Among those donating on average UAH 5,000+ per quarter, 28% make regular donations.

FUNDS FOR NON-MILITARY PROJECTS



Q22. In your opinion, has it become easier or harder to raise funds from the population for nonmilitary projects compared to 2022?



N = 254

Almost 70% of the NGOs report that it has become harder to raise funds from the population for nonmilitary projects compared to 2022.

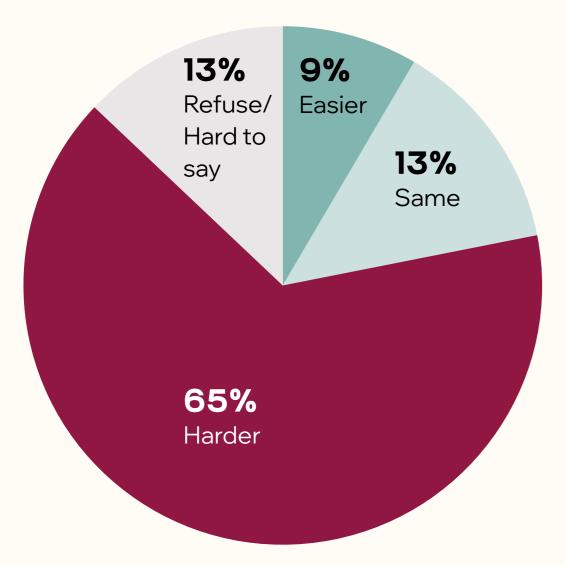
FUNDS FOR NON-MILITARY PROJECTS



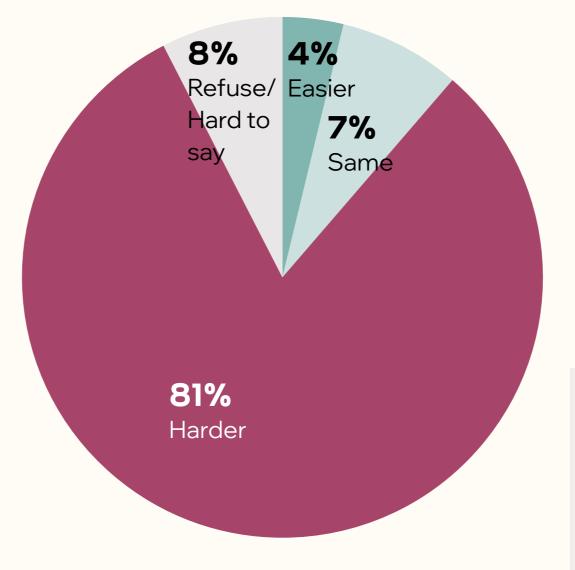
ORGANIZATIONS' OPINIONS BY AREA

Q22. In your opinion, has it become easier or harder to raise funds from the population for nonmilitary projects compared to 2022?

Organizations NOT focusing on the assistance to the Defense Forces of Ukraine



Organizations focusing on the assistance to the Defense Forces of Ukraine



81% of the "military" organizations claim that raising funds for non-military projects has become harder compared to 2022. Among the non-military organizations, the share of those who believe that raising funds for non-military projects has become easier is higher than among the military ones.

N=254

CROWDFUNDING AND COOPERATION WITH BUSINESS





Factors contributing to obtaining grant funds:

- Few organizations have fundraising specialists and a crowdfunding strategy.
- Some organizations try to develop crowdfunding and cooperation with businesses.
- NGOs often believe that these areas are difficult to develop during the war for non-military and non-humanitarian organizations.
- Just few NGOs named individual businesses that support them: Gramarly, Oleina, Vivat, Group of Companies "Factor," Nova Poshta, and local companies.
- The respondents do not know whether companies help other NGOs.
- Entrepreneurs can make donations anonymously.
- Few organizations actively and successfully raise funds through crowdfunding and cooperation with businesses, but there are successful cases.

Crowdfunding activities and strategies:

- Training and strategy building
- Using crowdfunding platforms, including international ones («Dobro.ua»)
- Engaging specialists



Positive experience of cooperation with businesses:

- Meeting with businesses
- · Searching for a mutually beneficial cooperation format
- Engaging businesses through personal contacts
- Establishing stable support from (several) local businesses



Negative experience of cooperation with businesses:

- Refusals to cooperate
- Business representatives are not interested
- Donations at the level of average donors
- During the war, businesses have no extra funds



"We've got no particular plans yet, since, firstly, there are fewer businesses in Ukraine now. Which businesses can we at all talk to about charity? Most businesses that are still alive in Ukraine donate to the Armed Forces of Ukraine, and we can't compete there."

(Pivden, a culture NGO)



"[W]e've raised these UAH 23.5 million — all coming from businesses and people. That's not about grants. Grants are not included here. I mean, we have... There is, for example, a meat processing plant, and they donate some money. There is an enterprise, well, not an enterprise but an institution, «Zhytomyroblenerho.» That is, a municipal enterprise. There is a health care institution — a Center for Disease Prevention. It used to be a sanitation station, and they raise funds. They raised UAH 2 million. There are entrepreneurs offering funds in different ways."

(Center, a youth NGO)

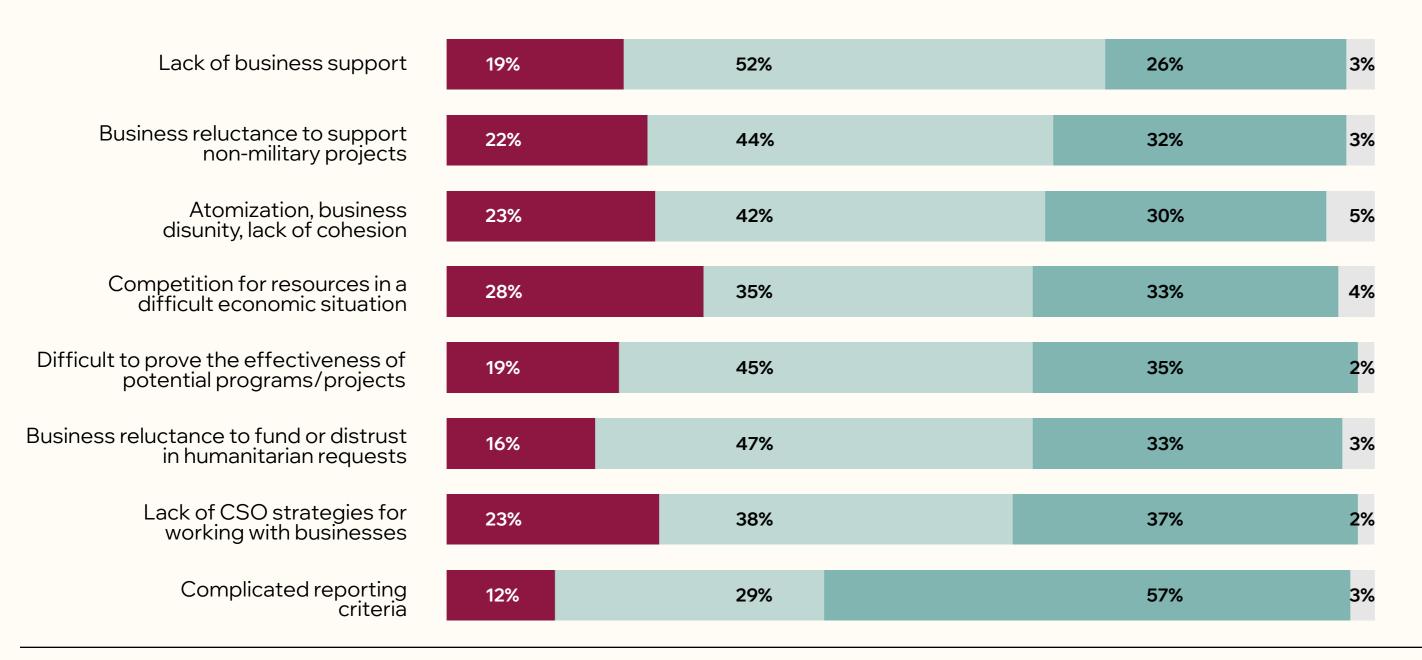
BARRIERS TO ENGAGEMENT



84

WITH BUSINESS ENVIRONMENT

Q41. What barriers and obstacles do you face when engaging with business environment in Ukraine and/or abroad?



The civic sector does not get business support, as 71% of the NGOs engaging with business say. This relates to both business reluctance to support humanitarian projects and competition with business for resources. Like with the media, the NGOs often lack a strategy to work with businesses.

N = 231

Regularly

Occasionally

(Almost) never

Hard/Refuse to say

VOLUNTEERS



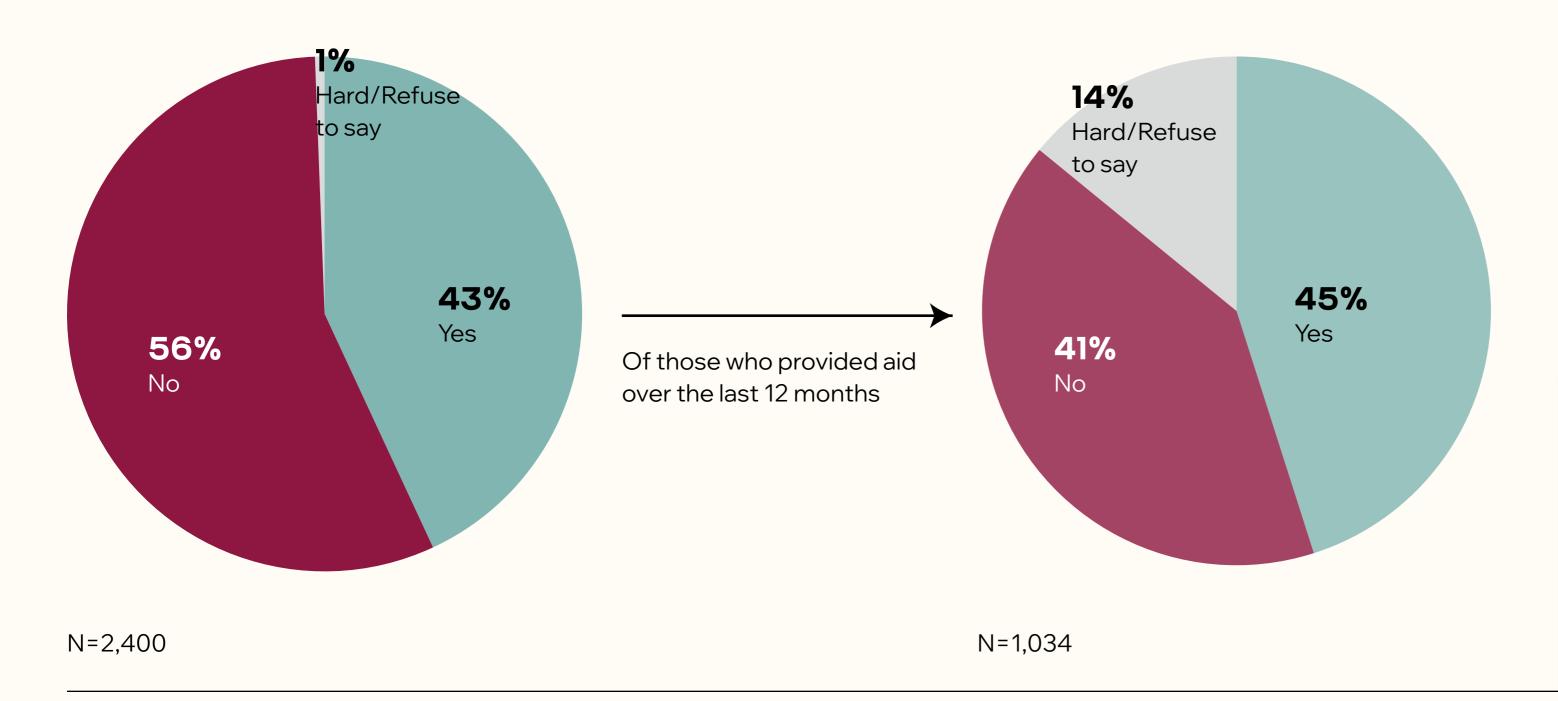


SHARE OF VOLUNTEERS AMONG THE POPULATION



Q5. Please specify whether you provided free services or performed some work on a nonprofit basis in the last 12 months.

Q5.1. Did you do that during the last month?

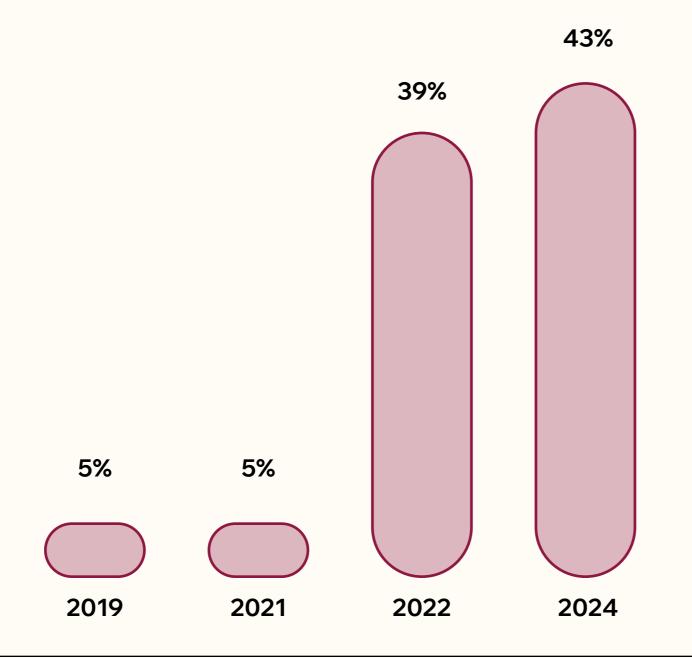


Among the general population, volunteers (those who provided free services or performed some work on a nonprofit basis in the last 12 months) account for 43%. Of them, 45% volunteered last month (appr. 19% of the general population).

SHARE OF VOLUNTEERS IN THE SOCIETY: DYNAMICS



87



The share of the population involved in volunteer activities has grown rapidly since the beginning of the fullscale invasion, and continues to grow in 2024.

VOLUNTEERS: GENERAL SURVEY

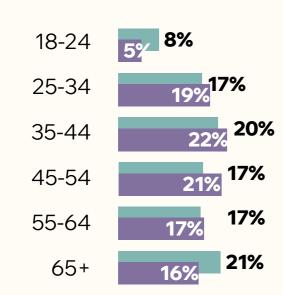


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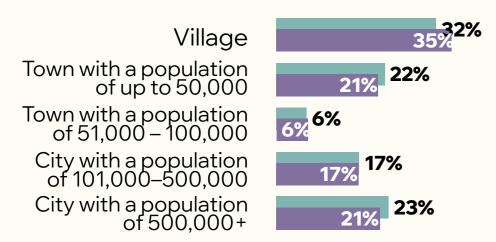
Gender



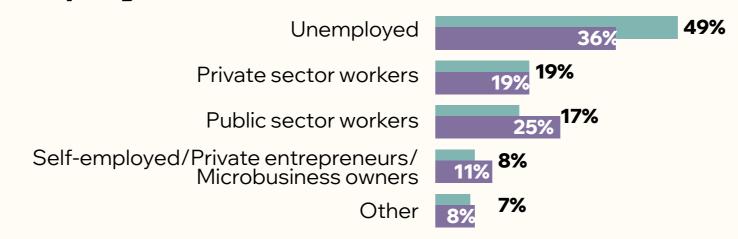
Age



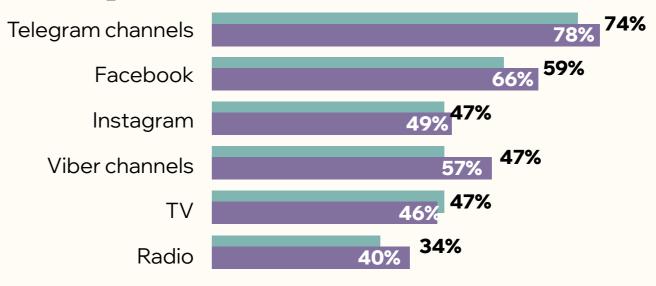
Place of residence



Employment status



Media use (weekly)



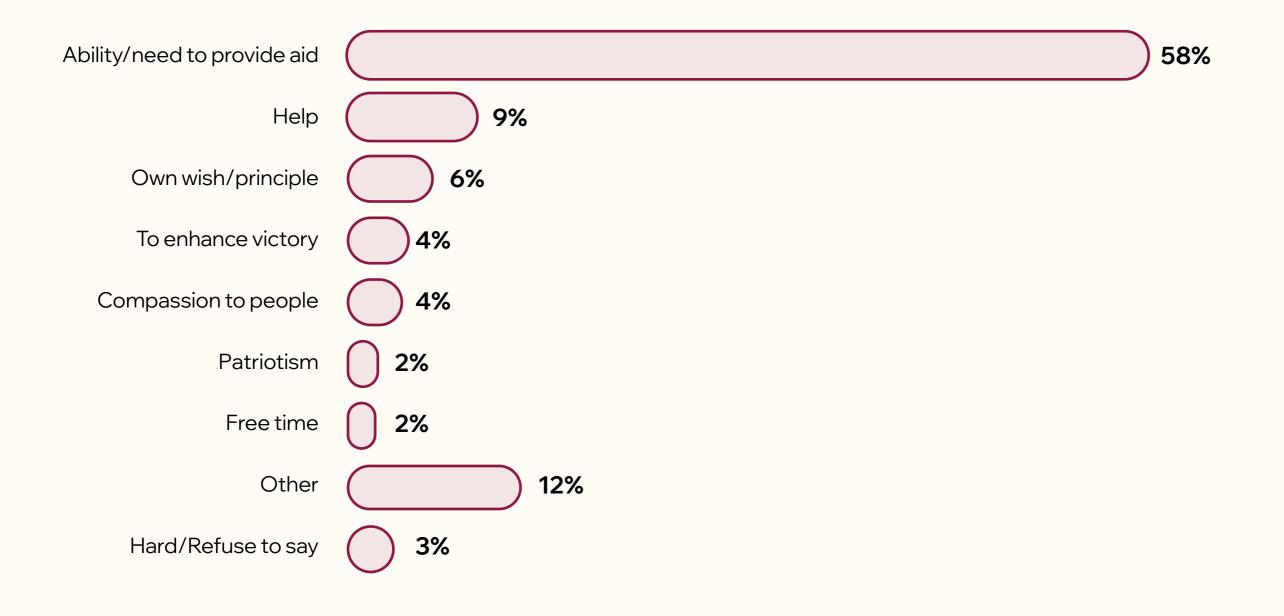
Society in general
Donors

N=320; those who received assistance from charitable foundations and organizations over the last year

BENEFICIARIES OF VOLUNTEERING



Q41. Why did you decide to join this work/initiative?



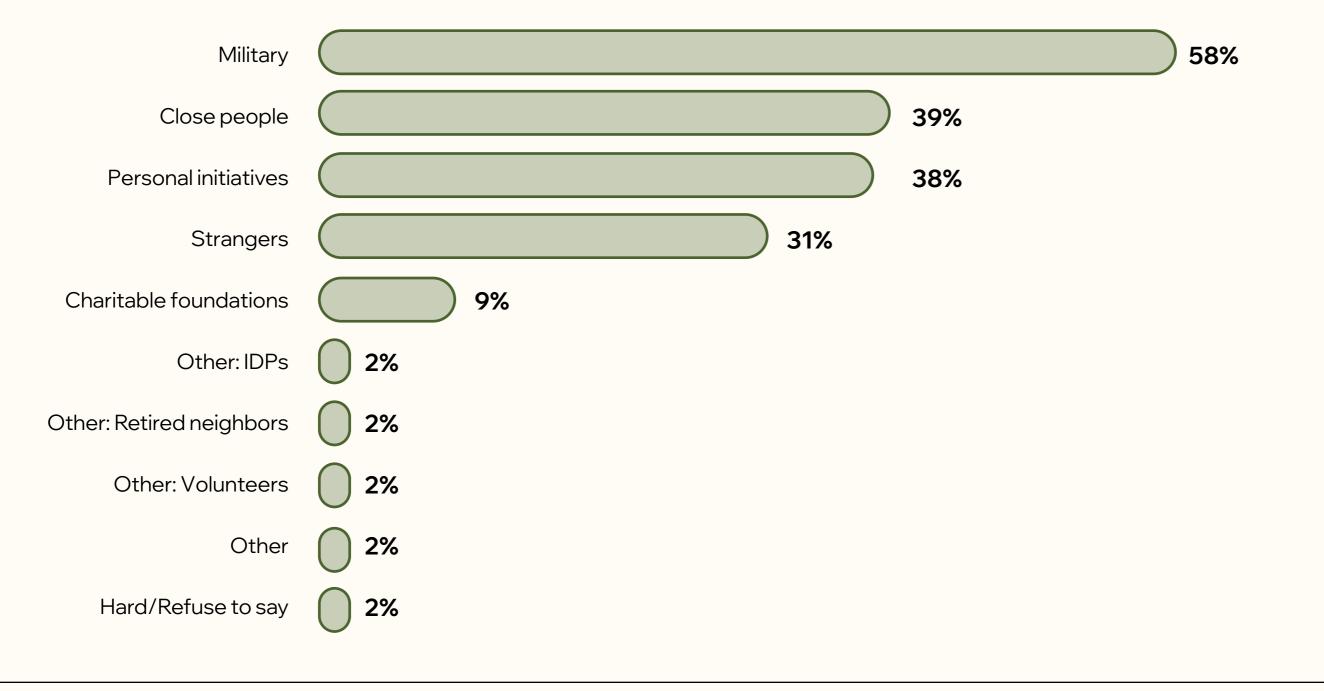
N=1,034; those who provided free services or performed work on a nonprofit basis over the last 12 months.

Volunteers do not reflect on the reasons that motivated them to engage in nonprofit work. The most common answer is "ability and need to provide aid: 58% of the surveyed indicated this reason.

BENEFICIARIES OF VOLUNTEERING



Q40. You have mentioned that you had provided free services or worked on a nonprofit basis in the last 12 months. Whom exactly did you help?



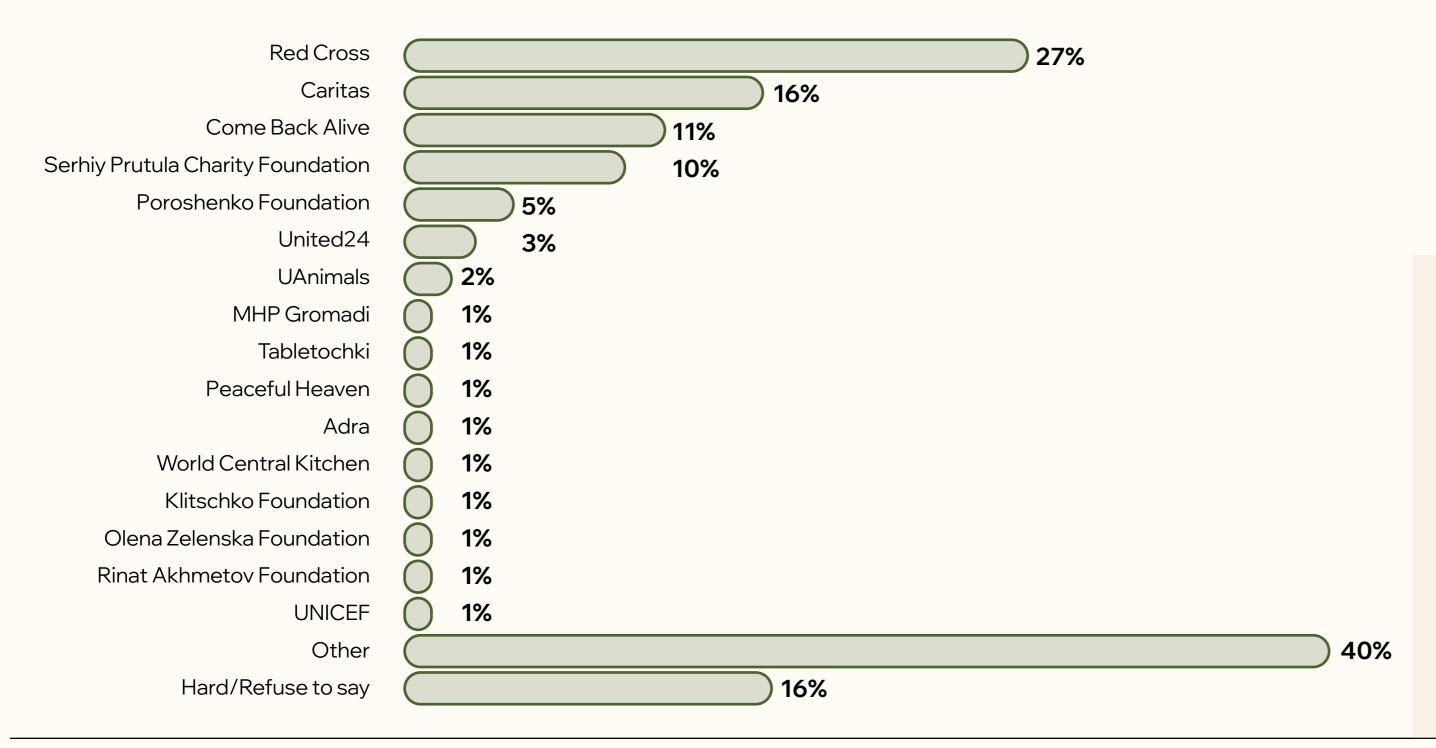
N=1,034; those who provided free services or performed work on a nonprofit basis over the last 12 months.

The respondents with volunteering experience in the last 12 months mostly helped the military (58%). Next come close people, relatives (39%) and personal initiatives (38%). Only 9% of the population were engaged in volunteering for charitable foundations. Thus, volunteering in Ukraine is spontaneous and has not yet become institutionalized.

VOLUNTEERING FOR CHARITABLE ORGANIZATIONS



Q42. What charitable foundations did you help on a nonprofit basis?



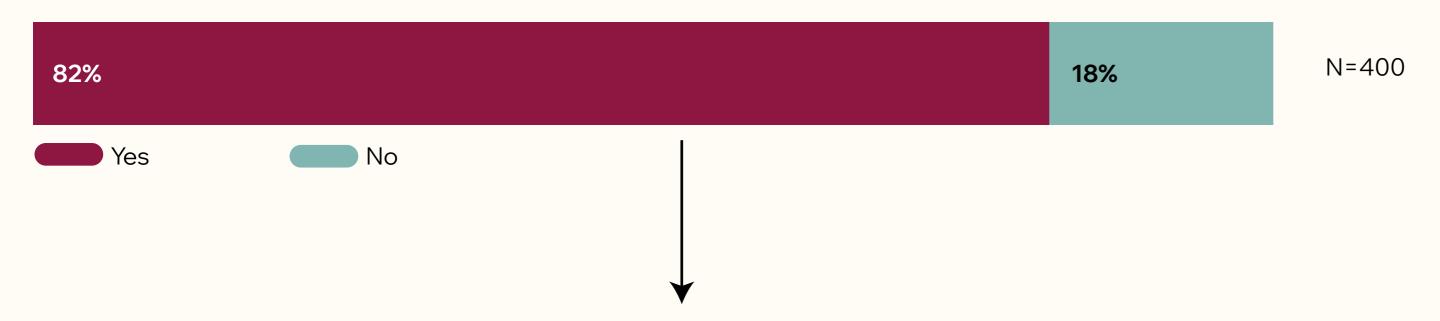
N=95; those who helped charitable foundations

Only 9% of those engaged in volunteering helped charitable foundations (4% of the general population). Among the foundations they have helped, the Red Cross is the most popular one (27% of those who have helped charitable foundations). Caritas ranks second (16%). The third place is shared by Come Back Alive and Serhiy Prytula Charity Foundation (11% and 10%, respectively). In general, volunteer assistance is very uneven. A significant share of people (40%) help local foundations whose recognizability level is less than 1%.

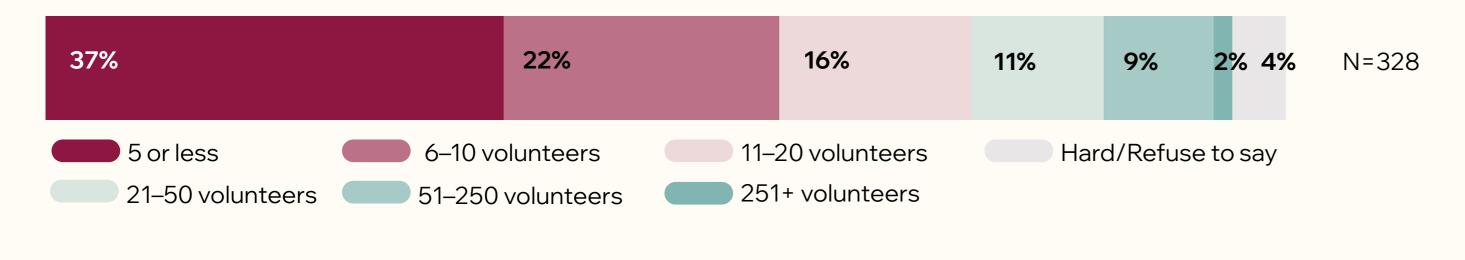
NGOS: INVOLVING VOLUNTEERS



Q12. Do you involve volunteers (people who work voluntarily on a nonprofit basis) in implementing your projects?



Q13. How many volunteers did you involve in project implementation in 2024?



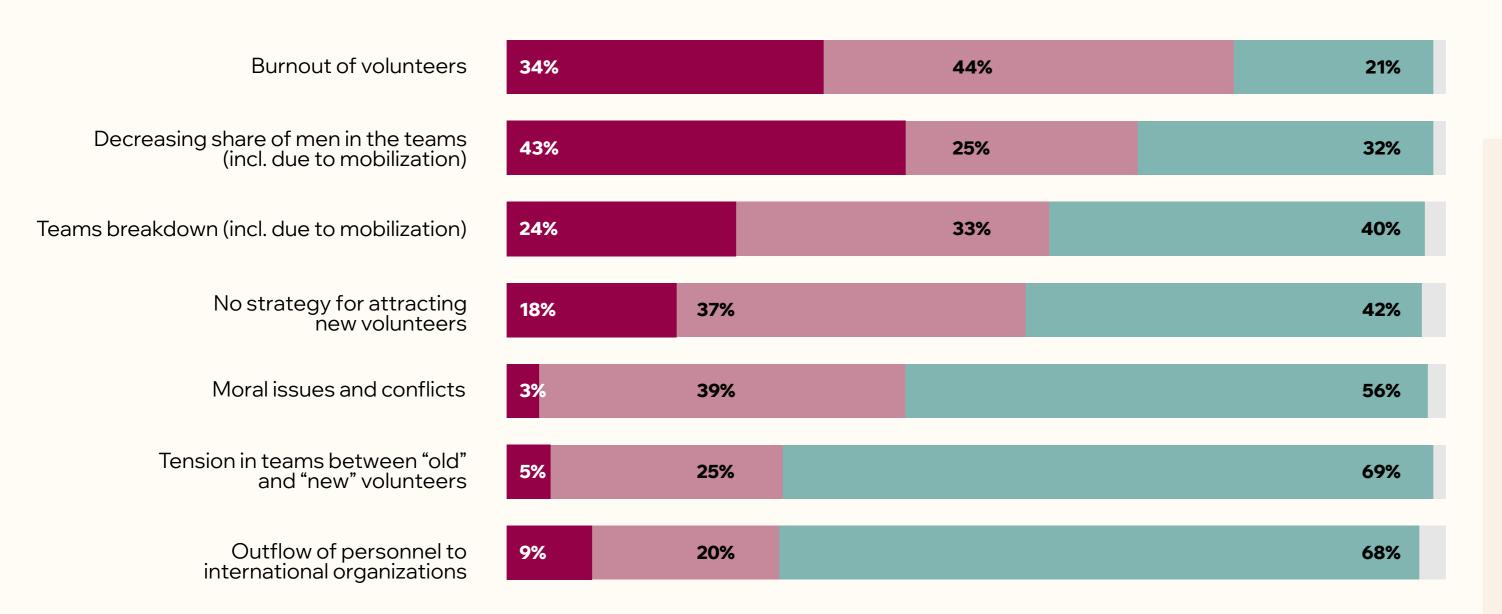
82% of the surveyed NGOs and charitable foundations involved volunteers in their projects. Since these NGOs mostly have small staff, their needs for volunteer assistance are also limited to a small number of volunteers: almost 60% of those who cooperated with volunteers involved up to 10 volunteers in 2024.

BARRIERS TO ENGAGEMENT WITH VOLUNTEERS



WITH BUSINESS ENVIRONMENT

Q45. What barriers or obstacles do you face when engaging with volunteers?



Regularly
Occasionally
(Almost) never
Hard/Refuse to say

N = 320

It should be reminded that 80% of the NGOs engage with volunteers. Among the biggest problems, the respondents mentioned burnout of volunteers (almost 80% face this problem occasionally, and 34% face it regularly). Another significant problem is the decreasing share of men in teams and the breakdown of teams (including due to mobilization). This is regularly experienced by 43% and 24% of the surveyed, respectively, and 68% and 57% face it occasionally. Moral and ethical issues in teams are not a significant problem, nor is the outflow of volunteer staff to international organizations.

INVOLVING VOLUNTEERS





Most NGOs involve volunteers in their activities regularly or situationally:

- Around half of the NGOs work with volunteers regularly and continuously, mainly with the youth and students.
- Volunteers are mainly involved in unprofessional work: in warehouses, unloading cargo, weaving nets, distributing aid, etc.
- Specialists, including international ones, and sometimes students-trainees of a particular specialization, are less frequently involved as volunteers.
- Some NGOs voluntarily join projects of other NGOs.
- Some NGOs only work on a volunteering basis and have (almost) no employees.
- Few NGOs have no experience of involving volunteers and do not plan to do so.
- For some NGOs, volunteers are vital in their activities, while for others, they are just important.
- In some NGOs, volunteers do not play an important role.
- The NGOs mostly do not plan to change their practices of involving volunteers.
- One NGO has mentioned that it plans to teach volunteers systemically.

Channels and ways of attracting volunteers:

- · Social media
- Pages of hromadas
- Word-of-mouth: Potential volunteers contact the organization on their own using available contacts
- NGOs' ambassadors actively work on attracting volunteers

Volunteer motivation:

- Desire to help, altruism
- Communication
- · New experience, development, travelling
- Affiliation with the target group or the close circle of an NGO
- Professional practice
- Feeling guilt (due to not being at the front line)
- Volunteer certificate and certain benefits
- A volunteer can become an ambassador of an NGO and/or start working for it



What NGOs offer to volunteers:

- Training and learning
- Interesting events
- Small gifts
- Awards
- · Joint recreation
- Trips, including international ones
- Volunteer contributions being appreciated and recognized
- Possibility to use the organization's space for volunteer activities



Problems and challenges:

- Inconsistent participation, unsystemic involvement
- The need to motivate, unite, and communicate with volunteers as an extra work area
- Volunteers' work is not always of high quality and responsible
- Conflicts and misunderstandings happen
- Dishonesty, there may be scammers
- Currently, it is harder to attract volunteers (mobilization, economic challenges, etc.)



"You know, you have to grow volunteers, like a good harvest. You have to teach them and inform them to make them understand the strategy of their work. They may not understand certain things: Why do I have to do that? I want to do another thing but you don't let me to. It's about awareness, about going through a school of volunteering."

(Pivden, a military foundation)

BENEFICIARIES

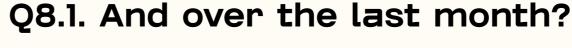


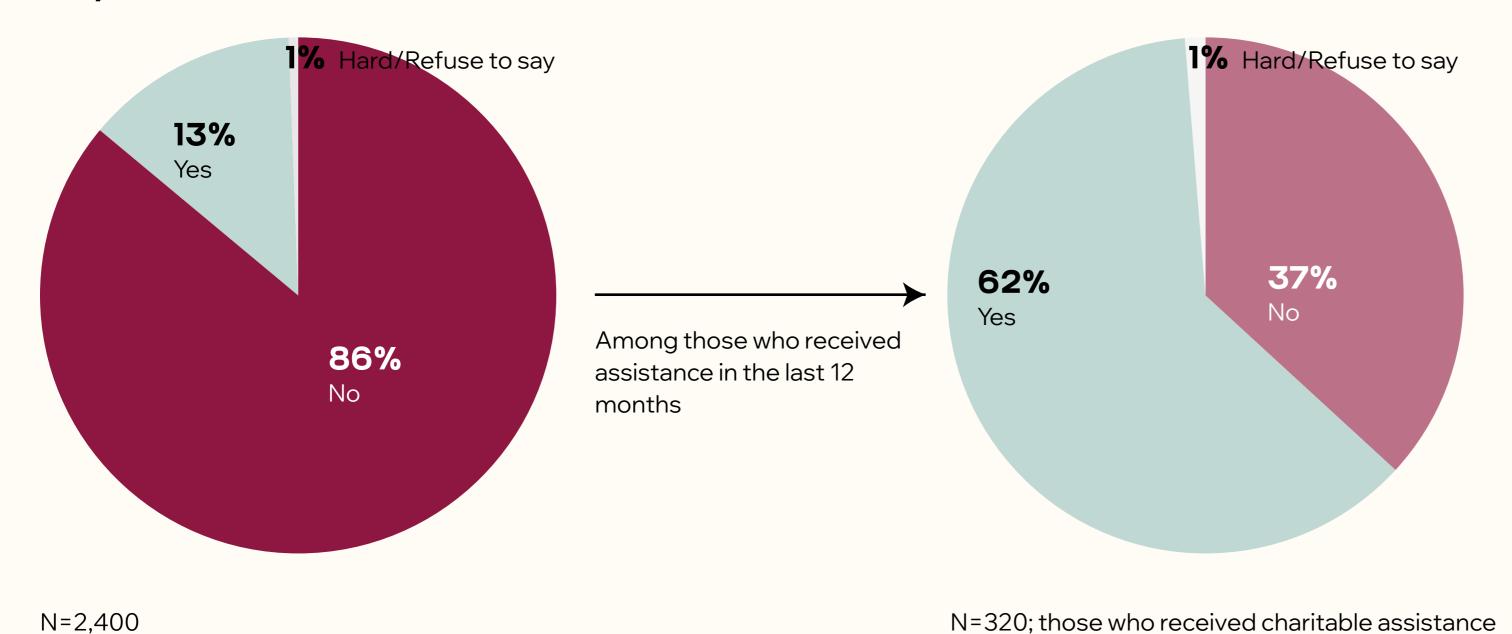


BENEFICIARIES



Q8. Did you personally receive charitable assistance in the last 12 months from charitable foundations or organizations? (Excluding state aíd).





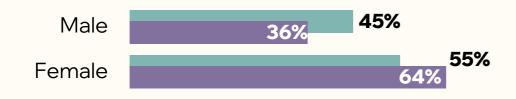
The share of beneficiaries among the respondents is 13%. 62% of them (8% of the total sample) received charitable assistance over the last month.

BENEFICIARIES

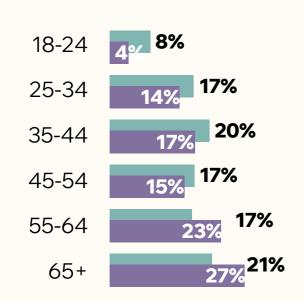


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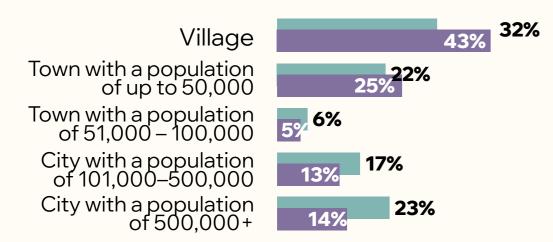




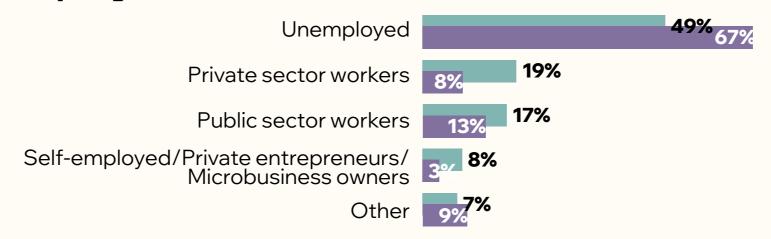
Age



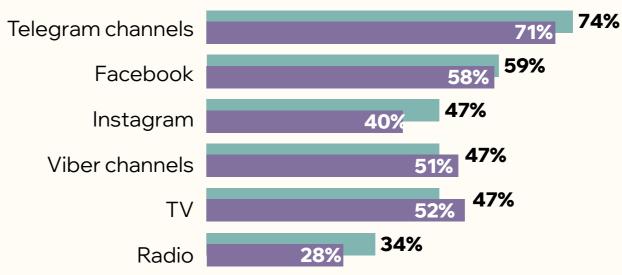
Place of residence



Employment status



Media use (weekly)



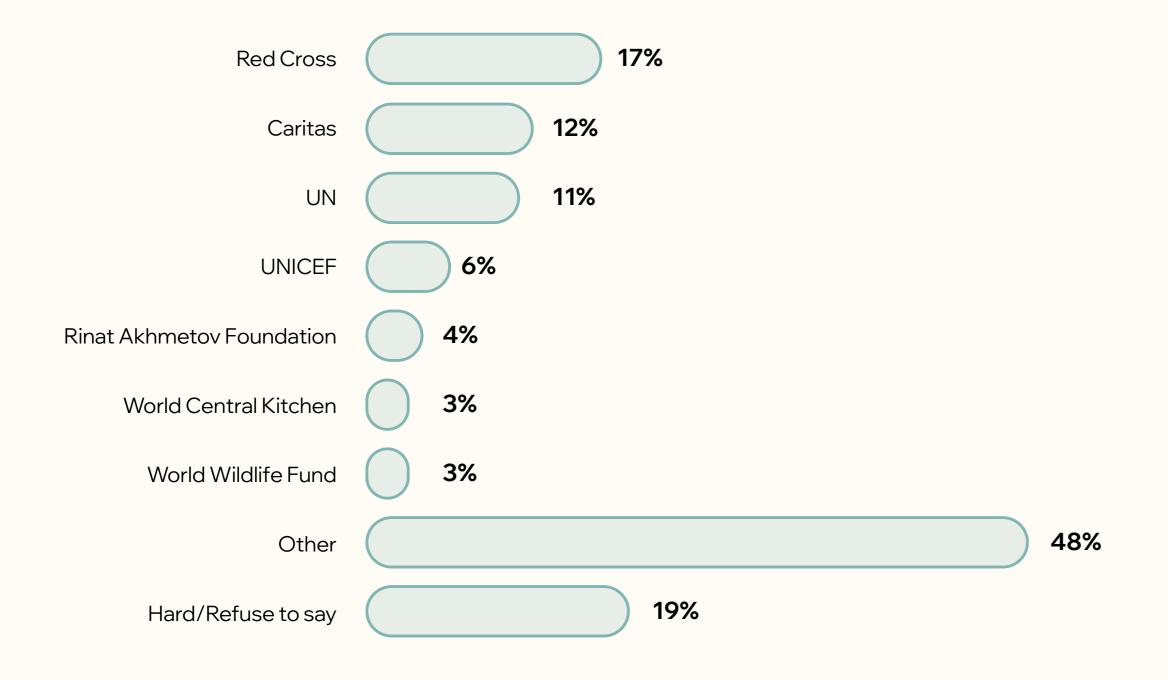
Society in general
Donors

N=320; those who received charitable assistance from charitable foundations/organizations over the last year

ASSISTANCE PROVIDERS



Q43. You have mentioned that you had received assistance from charitable foundations/organizations over the last 12 months. From which foundation did you receive assistance? (top answers, >1%)



N=320; those who received charitable assistance from charitable foundations/organizations over the last year

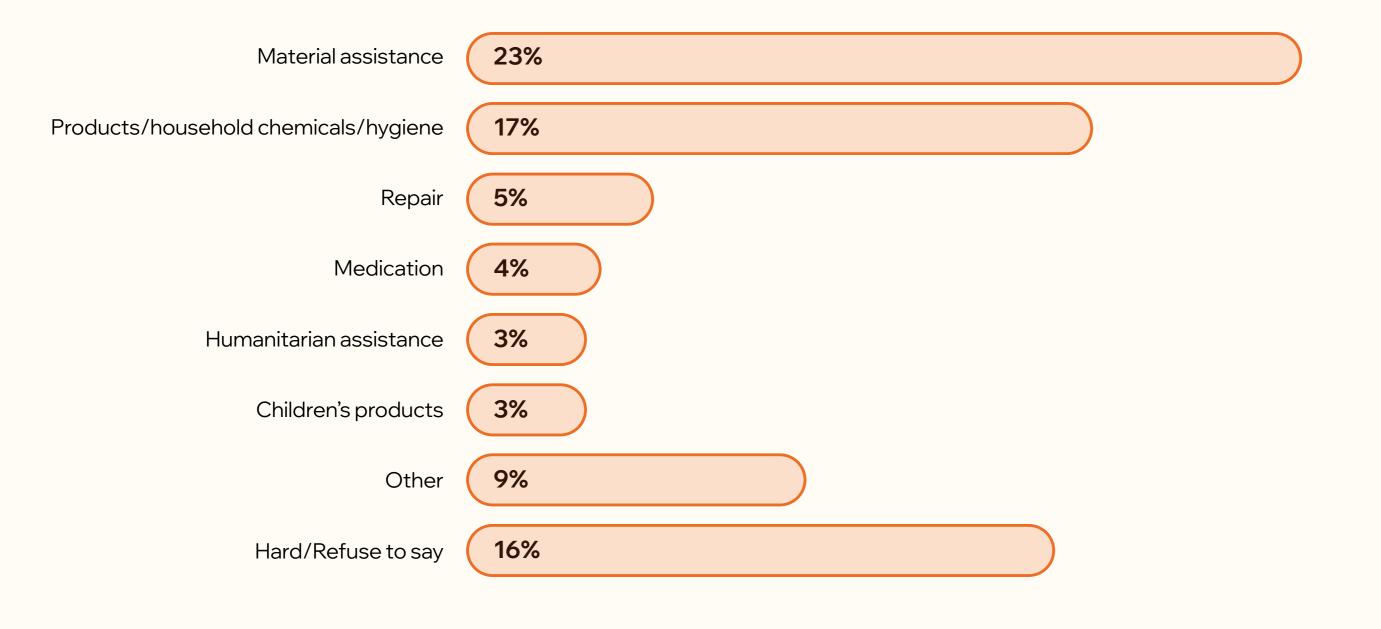
Among the aid providers, Red Cross is the leader (17%). The second place is shared by Caritas and the UN (12% and 11%, respectively), and UNICEF ranks third (6%).

Almost half of the respondents received assistance from smaller charitable foundations and organizations, whose share is less than 1% each.

ASSISTANCE TYPES



Q45. What kind of assistance did you seek?



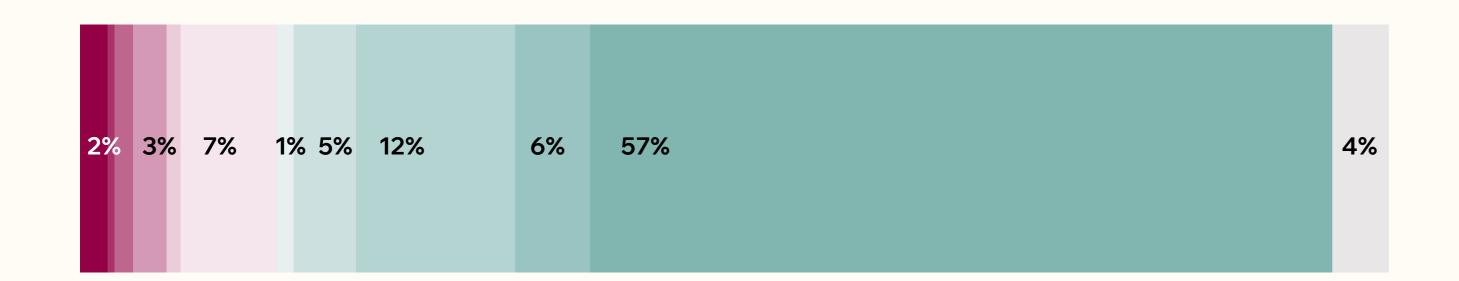
N=320; those who received charitable assistance

Material assistance (in monetary form) is the most common request — 23% of the respondents who received charitable assistance applied for it. In-kind assistance (food, household chemicals, hygiene) ranks second — 17% of the surveyed respondents applied for it.

ASSISTANCE QUALITY



Q46. How do you assess the quality of the assistance you have received? Answer on the scale from 0 to 10, where 0 is no assistance and 10 is comprehensive assistance:



N=320; those who received charitable assistance

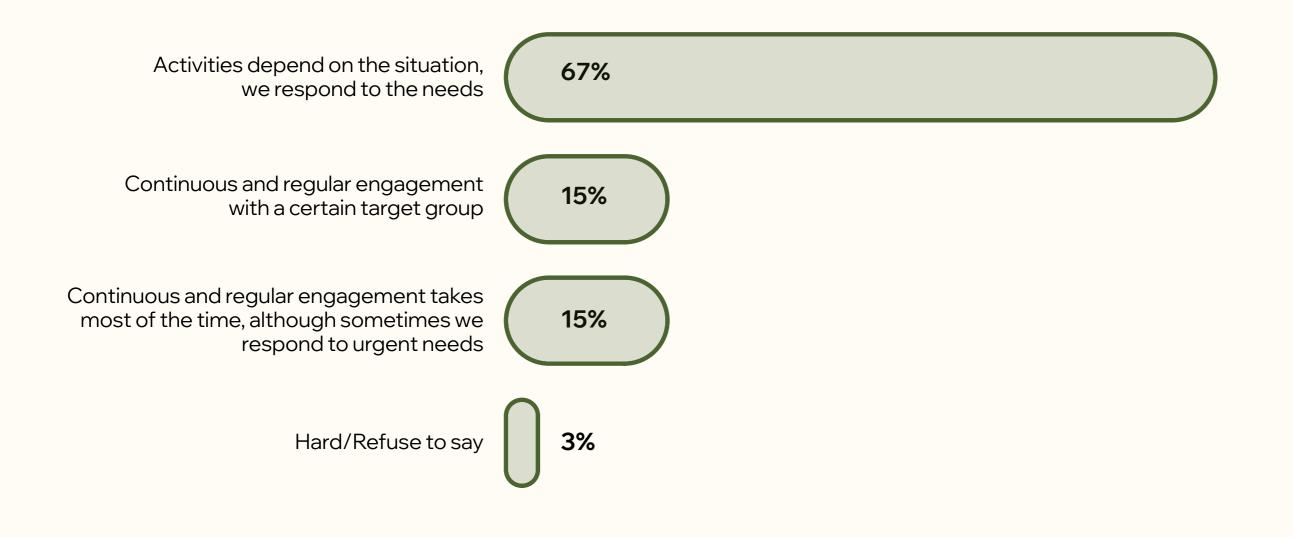


More than half of the respondents (57%) reported that they had received comprehensive assistance (giving a score of 10 on a scale from 0 to 10). All in all, 75% of the respondents rated aid at 8 to 10 on this scale. The share of scores from 0 to 3 comprises 7%, of which 2% reported that they had received no assistance.

CONSIDERING THE BENEFICIARIES' NEEDS



Q35. Is your work or engagement with beneficiaries rather regular, or do you respond based on their needs?



N=400

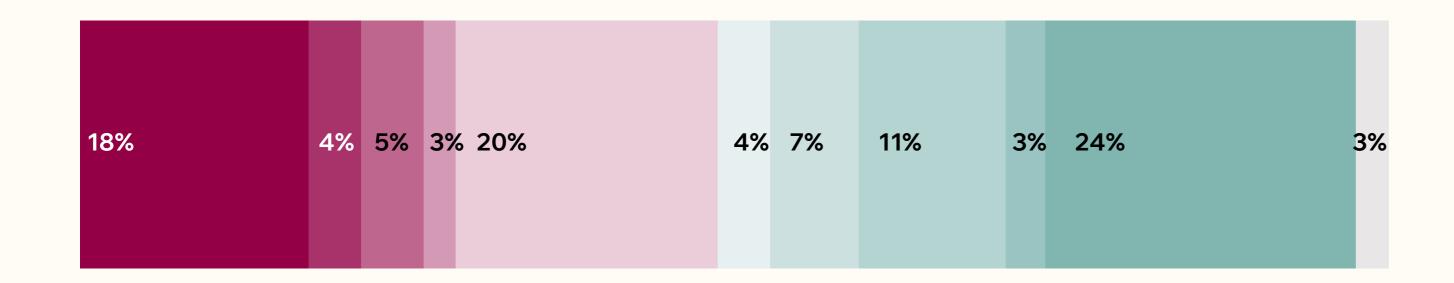
2/3 of the NGOs are guided by the beneficiaries' current needs in their work and lack continuous and regular engagement with the target audience of beneficiaries.
30% of the NGOs engage with their target audiences on a continuous and regular basis, but half of them also respond to urgent needs from time to time.

GRATITUDE FROM BENEFICIERIES

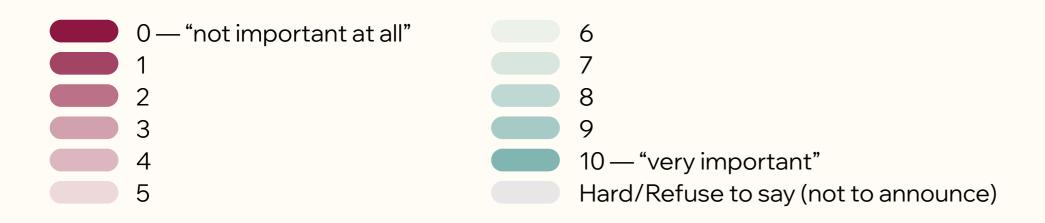


102

Q36. How important is the expression of gratitude from beneficiaries to you?



N=400



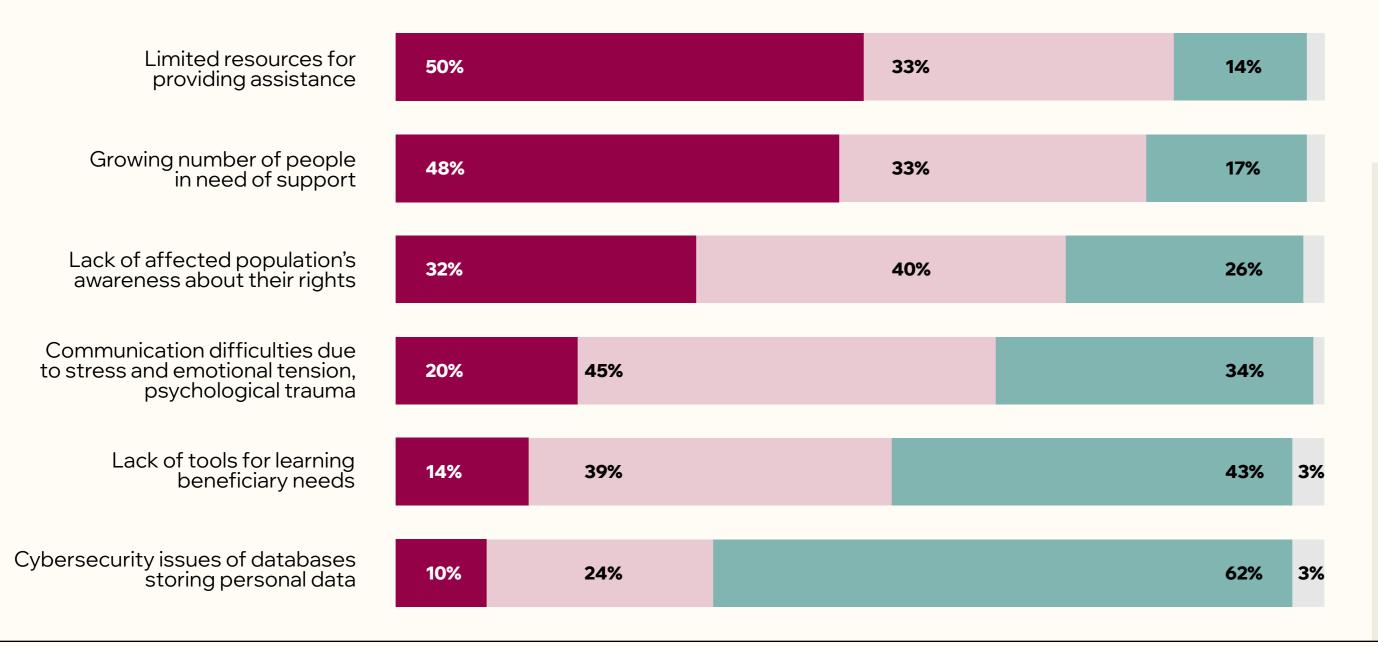
Expressions of gratitude from beneficiaries are quite important for the NGOs: 38% of the respondents rated them at 8 to 10 on a 10-point scale, where 0 stands for "not important at all" and 10 for "very important." However, the share of those for whom gratitude is not important is also quite significant — 26% of the respondents gave a score of 1–3.

BARRIERS TO ENGAGEMENT WITH BENEFICIARIES



103

Q33. What kind of barriers/obstacles do you face when engaging with the affected population/beneficiaries?



Regularly
Occasionally
(Almost) never
Hard/Refuse to say

N = 266

The main barrier to the NGOs' engagement with the affected population as beneficiaries is the limited resources for providing support. This applies both to the organizations' limited resources and to the constantly growing demand for such support. Half of the respondents report regular occurrence of such obstacles, and more than 80% of the NGOs mention that they occur at least occasionally. It is also worth noting that there are such communication obstacles as emotional overload and stress: 2/3 of the surveyed NGOs mentioned it.

ENGAGEMENT WITH BENEFICIARIES





Main trends:

- The number of beneficiaries has multiplied in some places, mainly due to IDPs, but not only them.
- Currently, people are actively leaving Pokrovsk, and they need basic humanitarian aid and information about IDP rights.
- New target audiences: people affected by the war, such as the families of prisoners of war, the dead, and the missing ones.
- The situation and the needs of the target audience, including IDPs, change rapidly during the war shelters may be unnecessary for some time, and then the need for them arises again.
- There are target audiences with stable numbers of people, such as children or adults with disabilities in certain hromadas, but their needs grow due to material difficulties.
- The need to protect cultural heritage and the environment in hromadas has increased due to military actions and, in some cases, corruption.

Beneficiaries' needs and problems:

Target audiences affected by the war:

- Loss of health, loss of limbs, need for rehabilitation and medical care.
- Deteriorating financial conditions, loss of housing, need for financial assistance, housing, and employment.
- Poor psychological condition, growing need for psychological assistance.
- In the beginning, IDPs needed basic necessities such as tableware and warm clothes, and now these needs are relevant for newly arrived IDPs.
- Frontline hromadas: Clothes, personal hygiene items, food, water, and medication are always needed.
- The military constantly need cars and drones; earlier, they needed everything food, clothing, etc.
- Ecological problems and problems of hromadas have not changed.
- Funds are lacking, and people ask for help more often anaesthetics, medications, diapers.
- Bomb shelters in frontline hromadas.

Vulnerability policy and criteria determine resource allocation and conflict of interest resolution: Since resources are limited, assistance is given **primarly to more vulnerable** target groups/families.



Difficulties and problems:

- Lack of resources to meet the requests of the target audience, finishing projects, and funding.
- People get used to receiving assistance and take even what is unneeded.
- Conflicts and claims, devaluation of work by beneficiaries.
- A more profound work with the target audience is needed to assess the real needs and explain the limitations of providing aid.
- Employee burnout.
- Difficult psychological conditions facing the target audience, lack of help.
- Beneficiaries do not receive feedback from NGOs despite applying with requests and filling out forms, which makes them lose trust.



Ways of overcoming problems, efficiency:

- Employee competences, such as stress resistance and communicativeness, are essential when working with the target audience.
- Feedback and respect toward the target audience, individual approach.
- Channels of information, Telegram, personal calls.
- When helping the military fulfil their needs, deliver the aid, and return safely.
- Conduct monitoring, focus groups, and surveys.
- · Cooperation with hromadas and other stakeholders to assess the target group's needs.
- Searching for resources and accepting the impossibility of fulfilling all the needs.

What is necessary for long-term engagement with beneficiaries:

- Long-lasting projects
- Systemic communication social media, chats, etc.
- Communication with people
- Individual approach
- Safe spaces and events
- Assessing and understanding the needs
- Feedback mechanisms

NGOs do not always have the capacity to provide the above-mentioned aspects.

MEDIA AND THE STATE

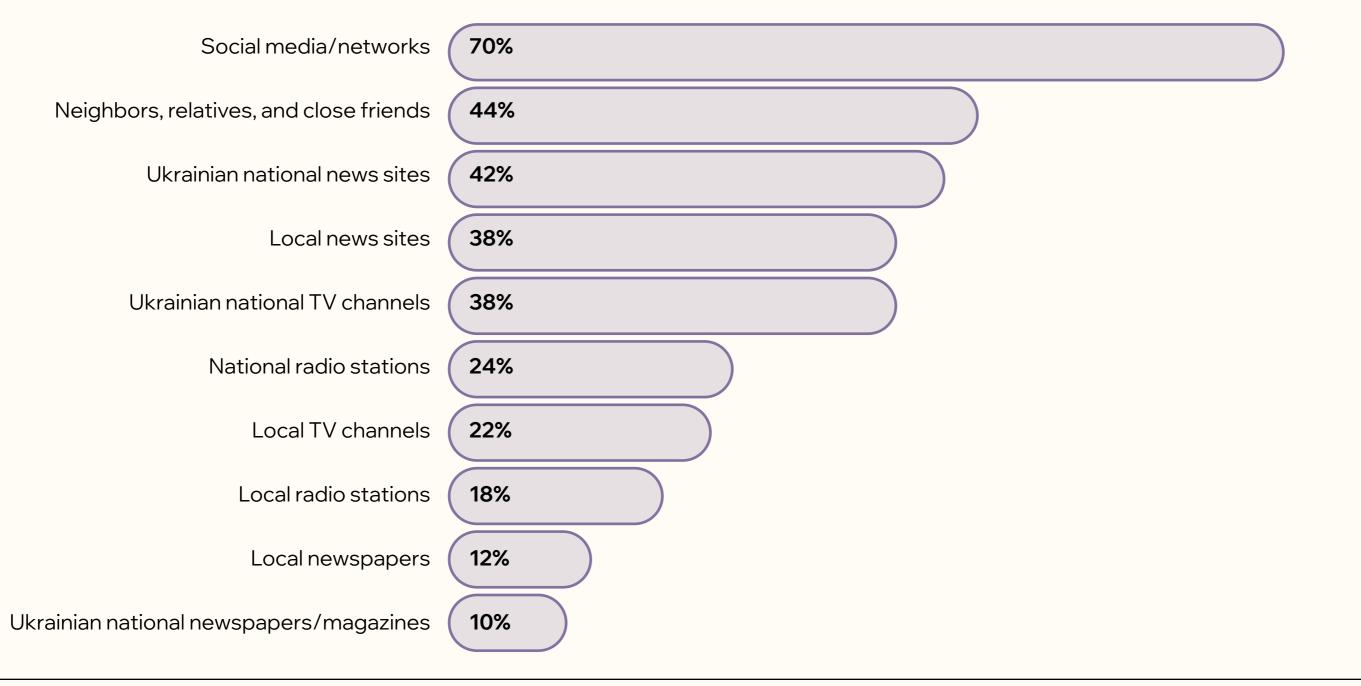




NEWS SOURCES



Q31. Where do you read and find out the news?



N=2,400

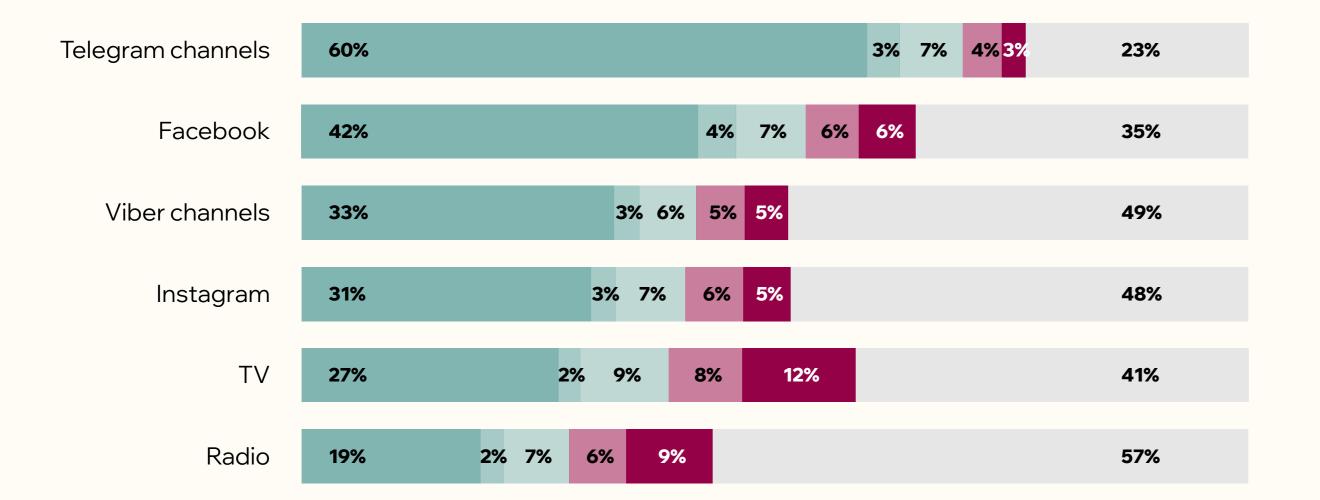
Considering the popularity of social media in general, it is not surprising that they are the main news source for the population: 70% of the respondents get their news from social networks. "Live social network" ranks second, with 44% getting news from relatives, friends, and neighbors. National news sites, with 42%, share the second place in the ranking of news sources with neighbors. The national television shares the third place in the ranking with local news sites: 38% of the respondents get news from each of these sources.

MEDIA USE



107

Q30. How often do you watch, listen, read...



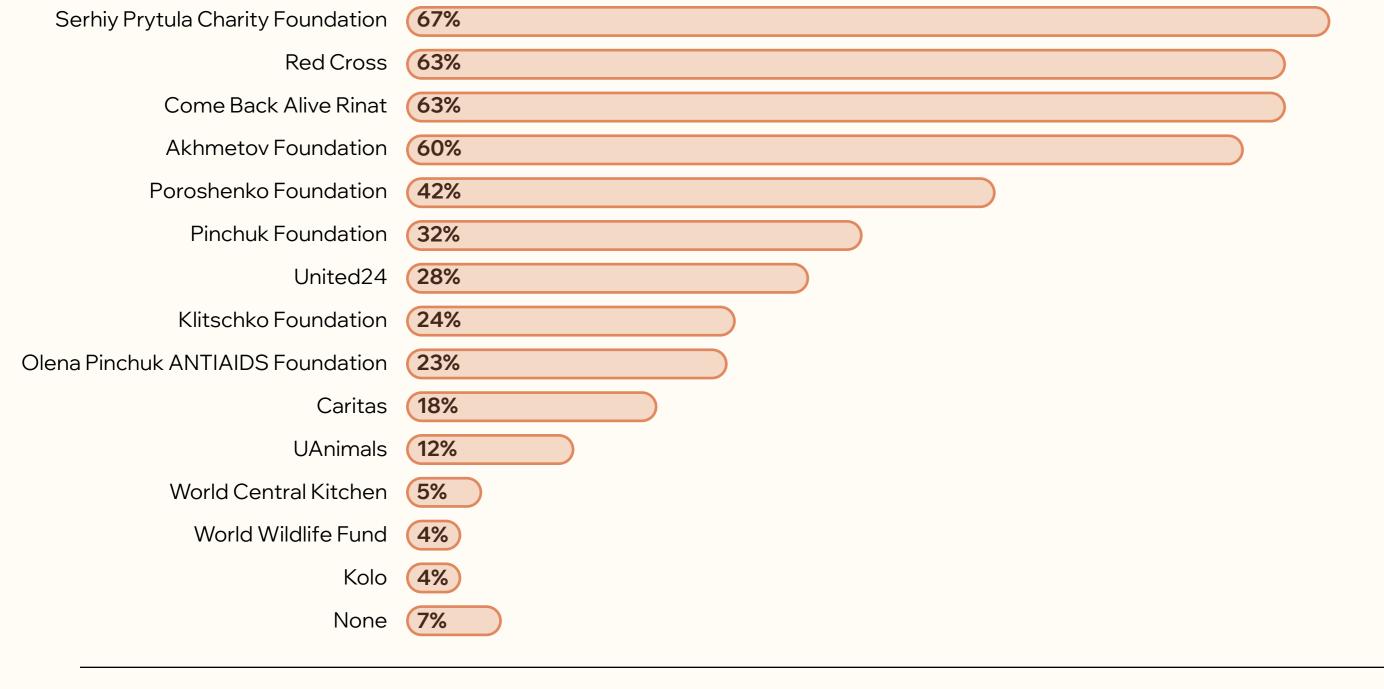


The primary media source for the population is Telegram: 60% read Telegram channels every day, and 74% at least once a week. Facebook ranks second with a 59% share of "weekly" users, while Viber and Instagram share the third place with a 47% share of "weekly" users. 47% report that they watch TV at least once a week, although television lags behind digital channels in terms of "daily users." Radio closes the "weekly users" ranking with 34%.

MEDIA PRESENCE OF CHARITABLE FOUNDATIONS



Q29. What charitable foundations have you heard of in the media? (TOP 15)



N = 2,400

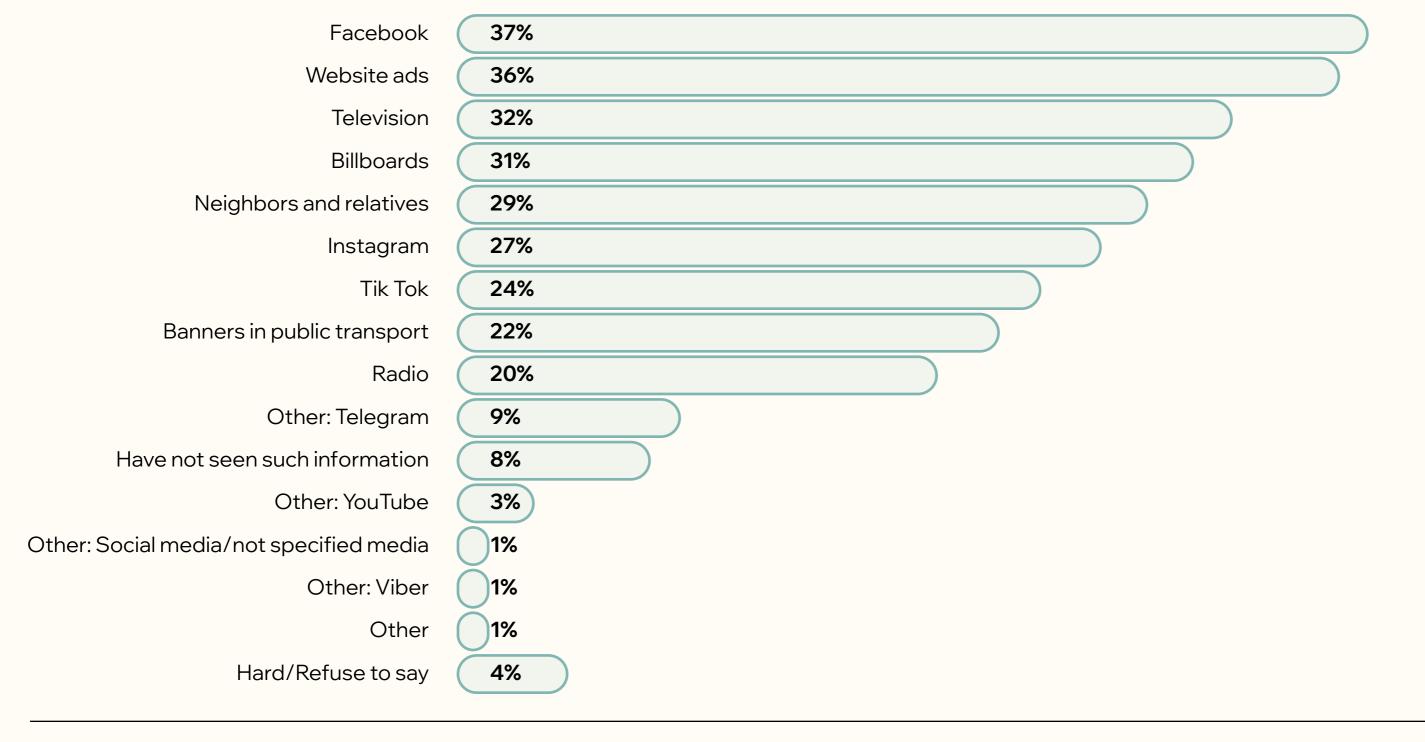
108

The media presence of charitable foundations correlates with the level of these foundations' recognizability. The leaders are the same: Serhiy Prytula Charity Foundation, Red Cross, Come Back Alive, and Rinat Akhmetov Foundation — 60% of the surveyed reported that they have seen or heard about these foundations in the media.

INFORMATION SOURCES ABOUT CHARITABLE FOUNDATIONS



Q32. Information about charitable foundations/organizations appears in the public space. Have you seen any such information in the last six months, and if yes — where exactly?



N=2,400

Information sources about charitable foundations differ from news sources: Facebook and website ads rank first (they were mentioned by 37% and 36%, respectively). Television and neighbors with relatives rank second, with 32% and 31% of the surveyed, respectively, learning about charitable foundations from these sources.

REASONS FOR CHARITABLE FOUNDATIONS' MEDIA PRESENCE



Q33. In your opinion, what is the reason foundations publish information about their activities?

N=2,400

110

Reporting to sponsors

FR

47%

Other: Attracting more people/
donations to fundraising

Other: Informing the society/
Desire to gain trust

Other: Desire to help

2%

Other: Advertising

2%

Other

Hard/Refuse to say

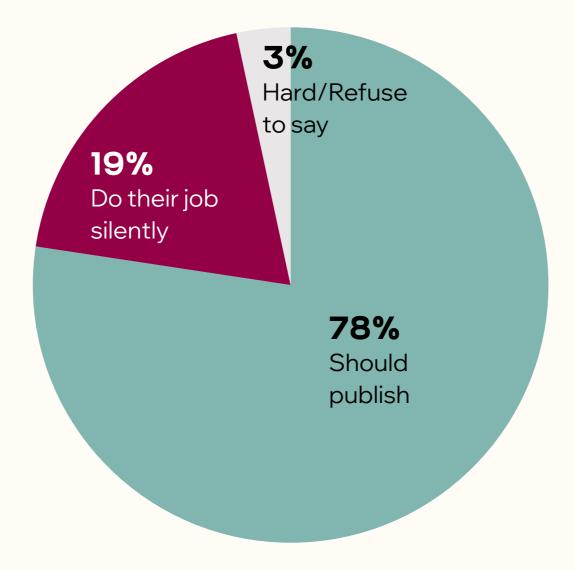
11%

The respondents were suggested to choose one of the two reasons for the presence of charitable foundations in the media (reporting to sponsors or PR). The respondents' opinions were divided almost equally (51% and 47%, respectively). However, a certain share of the respondents also mentioned other reasons: attracting people to participate in fundraising campaigns, informing the public about their activities, etc. Notably, the option "reporting to sponsors" is more often chosen by people involved in charity themselves (56%).

THE NEED FOR CHARITABLE FOUNDATIONS' MEDIA PRESENSE



Q34. In your opinion, should charitable foundations publish information about their activities or just "silently do their job"?



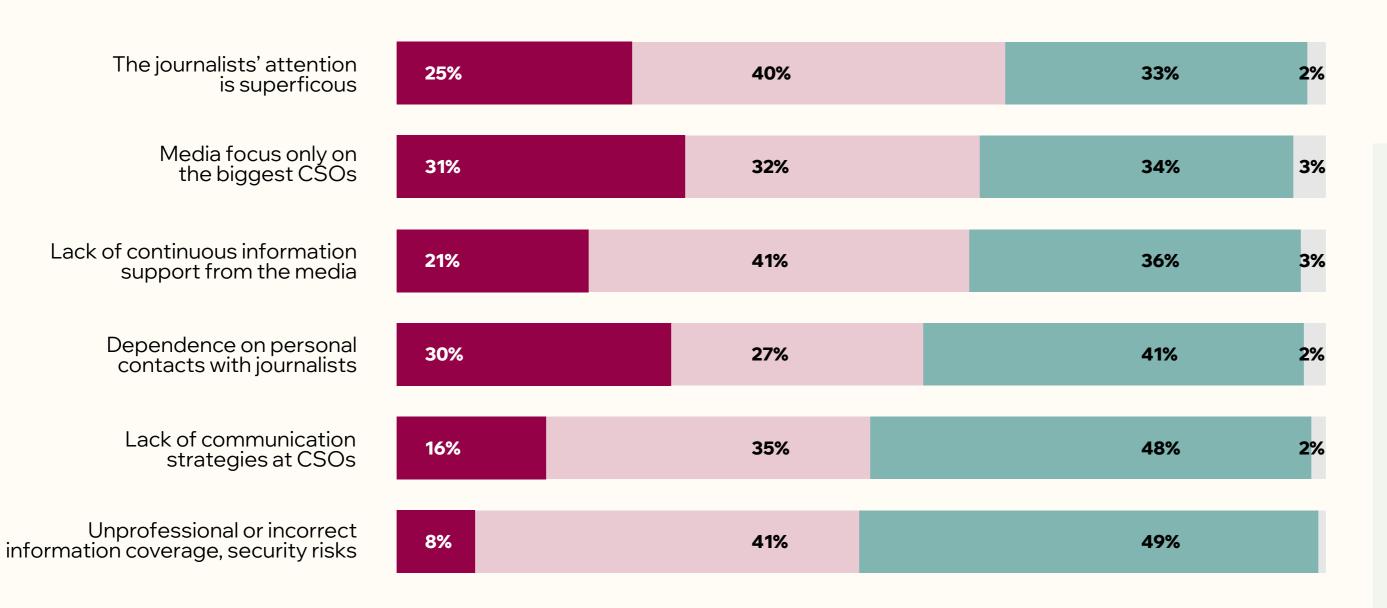
The majority of the respondents (78%) believe that charitable foundations should publish information about their activities.

BARRIERS TO ENGAGEMENT WITH THE MEDIA



112

Q43. What barriers/obstacles do you face when engaging with the media in Ukraine and/or abroad?



Regularly
Occasionally
(Almost) never
Hard/Refuse to say

N = 261

The NGOs face certain obstacles when interacting with the media. Most often, they relate to the lack of media attention to the activities of charitable foundations: The NGOs say that the attention of journalists is superficial and focused only on the largest CSOs and CFs. Therefore, NGOs do not feel information support from the media and cannot build their own communication strategies. A significant share of the NGOs believe that the quality of media support depends on personal contacts with journalists.

MEDIA COVERAGE OF NGO ACTIVITIES





Some NGOs mentioned that they actively cover their activities:

- Cooperation with journalists helps promoting organizations and activities and raising donations.
- The media are interested in NGOs' activities, and there is active cooperation.
- Part of NGOs communicate their activities mainly through social networks.
- It is important to have personal contacts with journalists.

Information channels:

- Cooperation with Ukrainian and international media, including TV
- Internet. NGO's website
- YouTube
- Telegram
- TikTok
- Instagram
- FacebookAdvertising
- Announcements in public institutions



Some NGOs struggle to cover their work:

- They lack the resources and specialists to actively communicate their activities, in particular, to work in the field.
- Hromadas and small towns may lack local media.
- Since the beginning of the full-scale war, the number of media outlets has decreased significantly even in large cities.
- Lack of personal contacts with journalists.
- The media publish materials about NGOs only on a paid basis.
- NGO activities/themes do not attract media attention.
- Distortion of information about NGOs by media representatives.
- Media violating security rules.



«... in the past, we used to get two or three interview inquiries from the media. Now, we give 15-20 interviews or comments a month. So, we have become more visible."

(East, CSO, social sector)



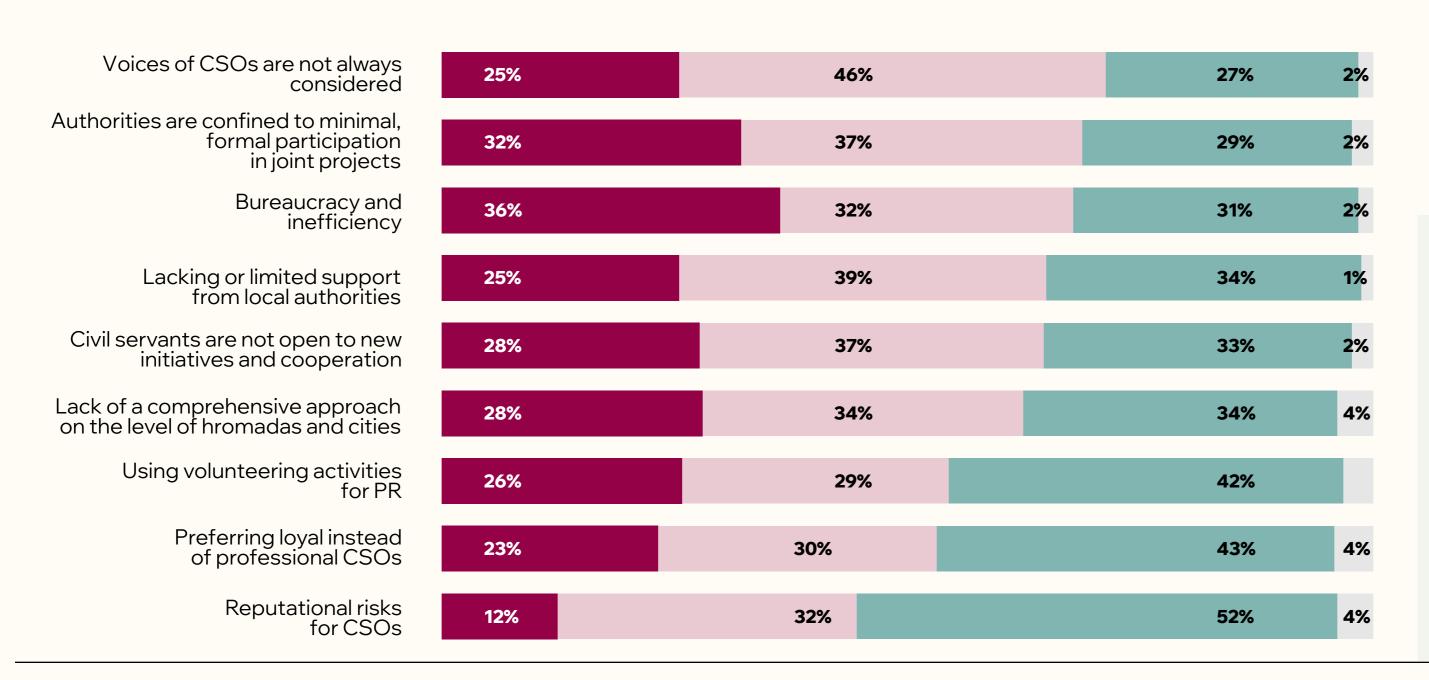
"...ICTV visited us, and we were featured in a report on the United News telethon. It was very important, very cool. I know that a lot of organizations include such promotion in their budgets. A certain share of organizations pay for it — it's like advertising, for highlighting their activities. But we just attract interest with our activities, our press releases, and we haven't done any paid things like that yet."

(West, a humanitarian CSO)

BARRIERS TO ENGAGING WITH LOCAL AUTHORITIES



Q38. What barriers/obstacles do you face when engaging with local authorities?



Regularly
Occasionally
(Almost) never

Hard/Refuse to say

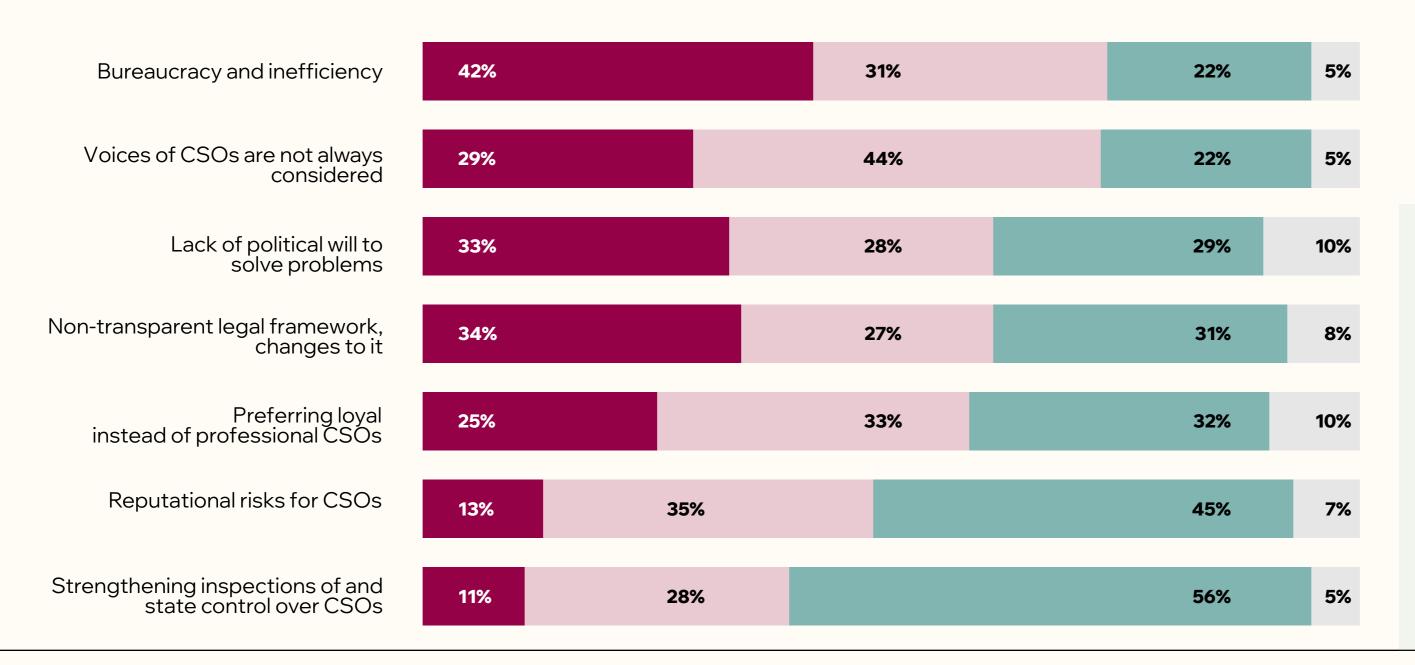
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BARRIERS TO ENGAGEMENT WITH NATIONAL AUTHORITIES



Q39. What barriers/obstacles do you face when engaging with national authorities?



Regularly Occasionally (Almost) never Hard/Refuse to say

N = 156

Bureaucracy and inefficiency in engaging with national authorities is an even bigger obstacle than in engaging with local authorities. This is a problem that 42% of the respondents face regularly, and 73% occasionally. The second place goes to the unwillingness of the national government to listen to the voice of CSOs and, accordingly, the lack of political will to solve problems. A positive factor is that the CSOs rarely see any reputational risks from their engagement with authorities, both national and local ones.

ENGAGEMENT WITH NATIONAL AND LOCAL AUTHORITIES





Factors contributing to obtaining grant funds:

- The legal framework regulating NGO activities and reporting requirements, as well as accounting and distribution of humanitarian aid, is changing;
- Numerous novelties regarding the import of humanitarian aid and its taxation;
- Accountants and lawyers monitor changes;
- Specialists attend training and consult with each other;
- NGOs get registered in the database of the Ministry of Social Policy as providers of humanitarian assistance;
- Local and Kyiv city authorities often lack a clear and unified vision about reporting and what kind of aid is taxed.

- Some NGOs fear inspections and fines, while other NGOs reported that they are adapting to the requirements
- Some NGOs comfort themselves with the fact that the law does not always work "as written";
- Some NGOs are involved in advocacy and communication of the needs of organizations to regulatory authorities;
- NGOs try to provide recommendations to national executive authorities on regulation improvement, but it is a long and difficult process;
- CSOs have more restrictions than CFs, in particular on humanitarian aid distribution.

Problems and challenges:

- Lack of authorities/individual institutions' openess;
- Lack/insufficient communication/dialogue and cooperation;
- Authorities' unwillingness to hear criticism from NGOs, desire to create only a positive media image;
- Uneven efficiency of cooperation with different authorities;
- Unprofessionalism of civil servants;
- Unimplemented projects despite promises;
- Lack of support, in particular financial, from local authorities;
- Centralized distribution of humanitarian aid and monopolization of the sector, including military assistance, by municipal governments.

- Non-partner cooperation on the terms of authorities' representatives, ignoring the needs of NGOs;
- Individual decision-making, in particular by heads of hromadas;
- Corruption in government bodies: NGOs that expose it are persecuted; corruption increases during the war;
- Persecution of NGOs not related to authorities: inspections, investigations, lawsuits;
- Destruction of the cultural and architectural heritage of cities by developers related to authorities;
- Corruption in the land sector, changes in the status of land plots especially the valuable ones, nature protection areas, reserves, etc.



- Some NGOs have experienced successful cooperation with authorities, while others reported challenges and problems;
- Most NGOs face some challenges, while few NGOs have no complaints at all;
- Some NGOs have conflicts with authorities, particularly due to their anti-corruption activities.

Successful engagement with authorities:

- Memorandums of cooperation with authorities;
- Systemic and long-term productive cooperation with local authorities:
- Providing consultations regarding the needs of the target groups and NGOs;
- Recommendations on regulation and legislation;
- Regular participation in boards/advisory bodies and working groups;
- Advocacy meetings and campaigns;

- Documentation and investigation of war crimes.
- Joint events and projects: cultural events, educational projects, social and psychological assistance;
- Cooperation with municipal educational, healthcare, and other institutions with the support of local authorities;
- Aid in the form of equipment and necessary materials.

Parties:

- Local authorities city and regional councils, heads of hromadas, regional military administrations;
- Relocated hromadas;
- Employment Centers and Social Service Centers;
- Municipal services (frontline cities);
- Parliament:
- President and Presidential Office;
- Ministries of social policy, reintegration, justice, culture, education, healthcare.
- Ukrainianian Embassies in different countries;
- Ombudsman's office;

- Law enforcement bodies police,
- Security Service of Ukraine, Office of the
- Prosecutor General;
- State Service of Ukraine for Ethno-Politics and
- Freedom of Conscience;
- National Academy of Sciences;
- State Tax Service of Ukraine;
- State Service of Ukraine on Food Safety and Consumer
- Protection.





