



THE IMPACT OF COVID-19 OUTBREAK ON CIVIL SOCIETY ORGANIZATIONS OPERATING IN TURKEY

SURVEY REPORT
APRIL 2020

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April 2020



ABOUT TUSEV

Third Sector Foundation of Turkey (TUSEV) was established in 1993 with the objective of strengthening the legal, fiscal and operational infrastructure of civil society organizations. For over two decades, TUSEV has been working to create a more enabling environment for civil society and providing solutions to common and emerging problems of CSOs with the support of its members.

With the vision of a stronger, participatory and credible civil society in Turkey, TUSEV works under four main program areas and undertakes activities that aim to;

- Establish an enabling and supportive legal and fiscal framework for CSOs,
 - Encourage strategic and effective philanthropy and giving,
 - Facilitate dialogue and cooperation between the public sector, private sector, and civil society,
 - Promote the credibility of Turkish civil society,
 - Encourage collaborations at the international level,
 - Create resources and raise awareness through research on civil society.
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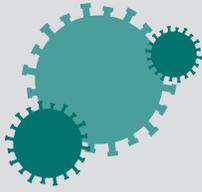
ABOUT THE SURVEY

Measures taken to prevent the spread of COVID-19 (Coronavirus), which was classified as a pandemic on March 11th, 2020 by WHO (the World Health Organization), have an adverse impact on the activities of civil society organizations like many other sectors. TUSEV came together with stakeholders from civil society at certain stages of the process; created platforms for sharing knowledge and experience related to the ongoing situation. As an output of these discussions - and with the objective of using the results in the planning of advocacy activities to be tailored for different stakeholders; TUSEV created the **Survey on The Impact of COVID-19 Outbreak on Civil Society Organizations Operating in Turkey**, to determine the common problems experienced by CSOs during this period in a more participatory manner. The survey included 34 questions in total with the following titles: General Questions, Current Resources, the Impact of COVID-19 on Your Organization, Grants and Funds, Aids and Donations and Employment and Sustainability. The survey was conducted online, remained available on 10-15th April 2020 and, in total, 170 CSO representatives responded.



TABLE OF CONTENTS

1. GENERAL QUESTIONS	6
2. CURRENT RESOURCES	9
3. THE IMPACT OF COVID-19 ON YOUR ORGANIZATION	13
4. GRANTS AND FUNDS	17
5. AIDS AND DONATIONS	24
6. EMPLOYMENT AND SUSTAINABILITY	27



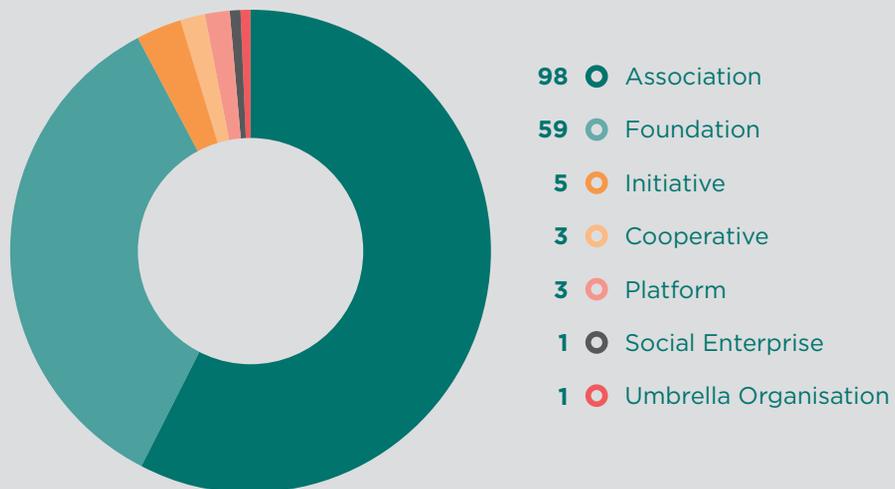
1. GENERAL QUESTIONS

In the General Questions section of the report, data regarding the types of CSOs, their fields of activity, and the regions where their HQs are located is presented.

TYPES OF CSOs

Within 170 CSOs that responded to the survey, there were 98 associations, 59 foundations, 5 initiatives, 3 cooperatives, 3 platforms, 1 social enterprise and 1 umbrella organization.

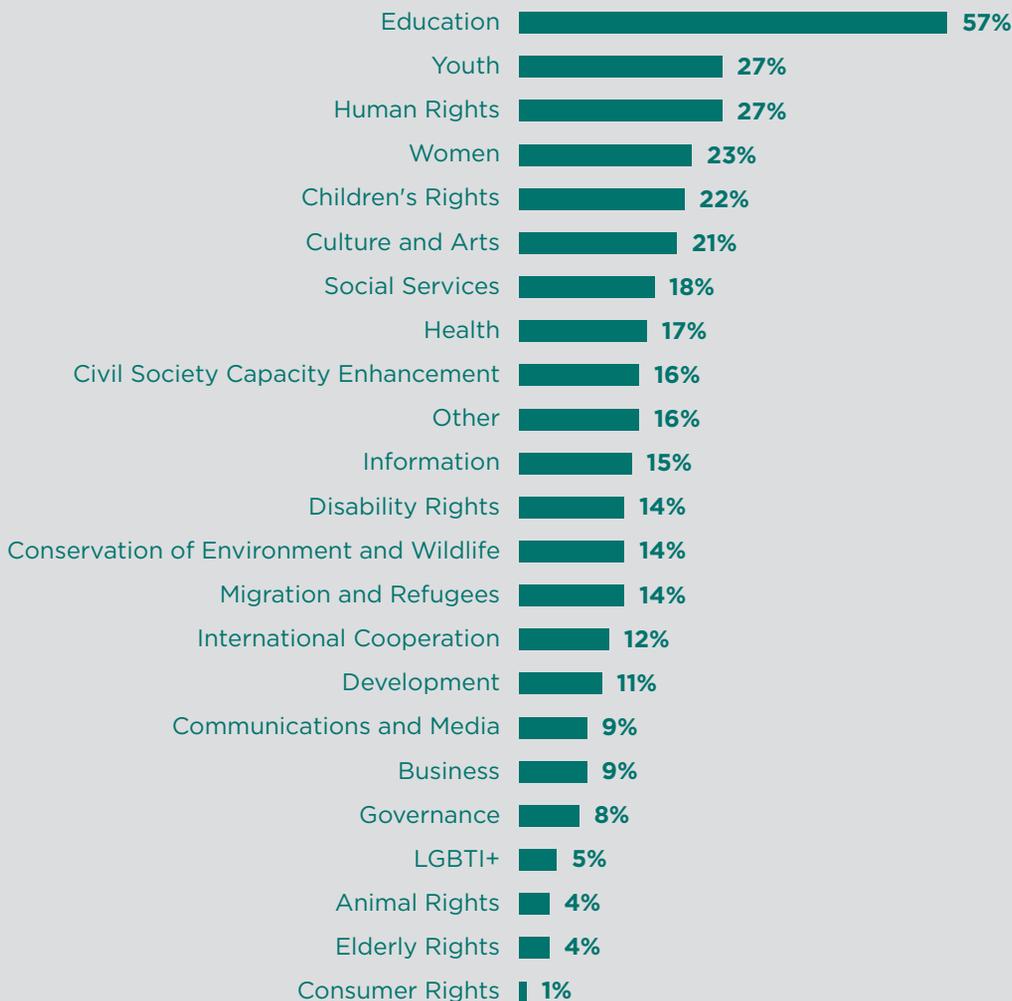
FIGURE 1. TYPES OF CSOs

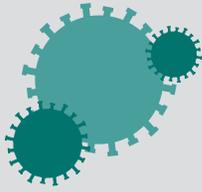


FIELDS OF ACTIVITY OF CSOs

When the primary fields of activity of the respondent CSOs were evaluated; number one was education with 57%, followed by human rights (27%), youth (27%), women (23%), children's rights (22%) and culture and arts (21%).

FIGURE 2. FIELDS OF ACTIVITY OF CSOs

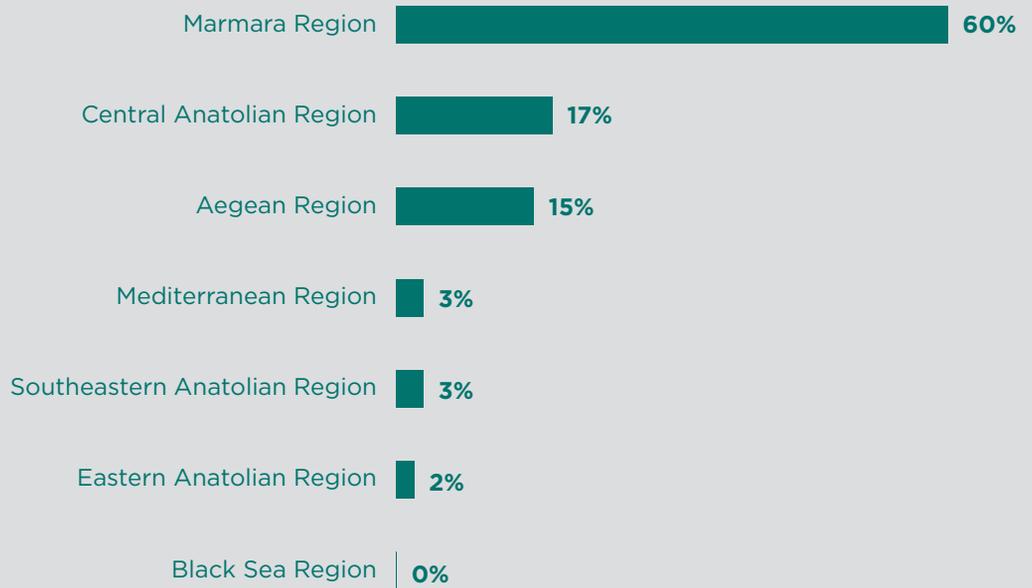




LOCATION OF CSOs' HEADQUARTERS

In terms of geographical distribution, majority of the CSO HQs are located primarily in 3 regions. More than half (60%) are located in Marmara Region, 17% in Central Anatolia, 15% in Aegean Region. No CSOs from the Black Sea Region responded to the survey.

FIGURE 3. LOCATION OF CSOs' HEADQUARTERS

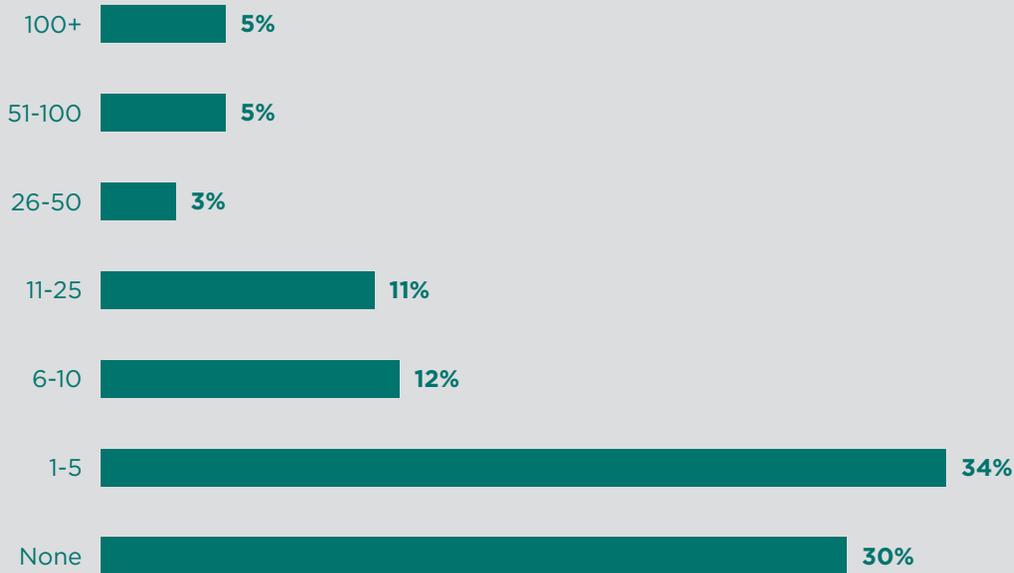


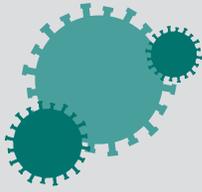
2. CURRENT RESOURCES

NUMBER OF FULL-TIME PAID EMPLOYEES IN CSOs

The CSOs were asked about the number of their paid employees. The results show that 34% of the CSOs have 1-5 full-time paid employees. 30% indicated that they have no paid employees, 23% stated that they have 6-10 & 11-25 paid employees. 10% of the CSOs have 51-100 and >100 paid employees.

FIGURE 4. NUMBER OF FULL-TIME PAID EMPLOYEES IN CSOs

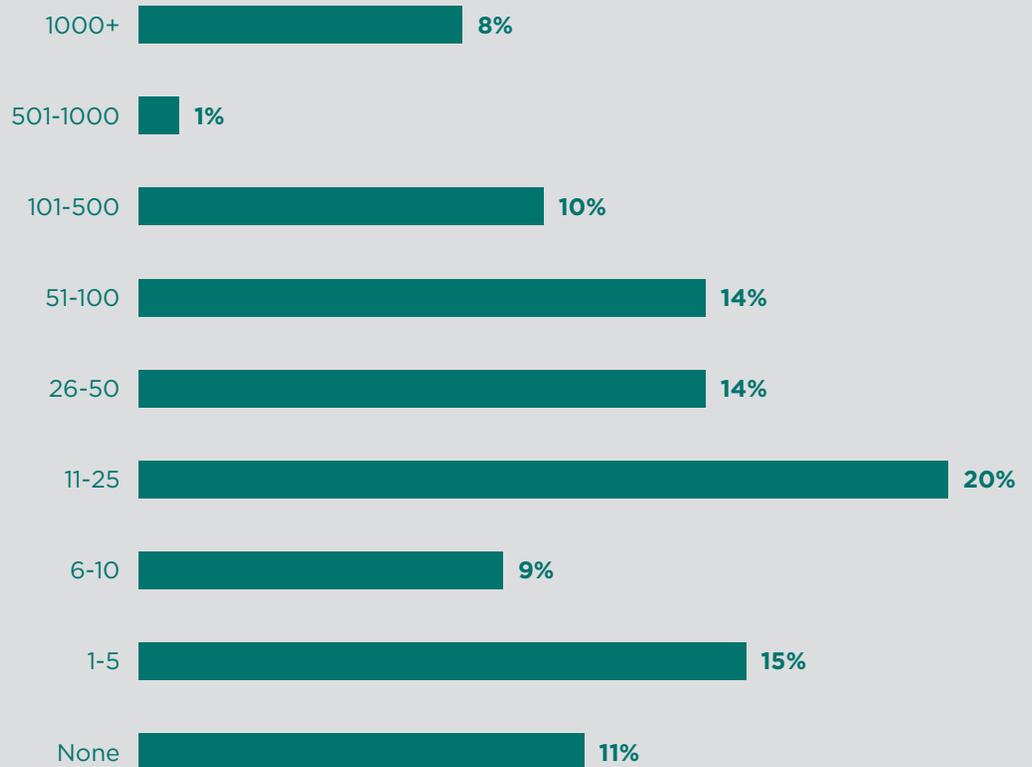




NUMBER OF ACTIVE VOLUNTEERS IN CSOs

The CSOs were asked about the number of their active volunteers. The results indicated that 20% of the organizations have 11-25, 15% have 1-5, 14% have 26-50 and 51-100 active volunteers. In addition, 10% of CSOs stated that they have 101-500 volunteers and 8% have more than 1000 volunteers, while 11% noted that they have no active volunteers.

FIGURE 5. NUMBER OF ACTIVE VOLUNTEERS IN CSOs

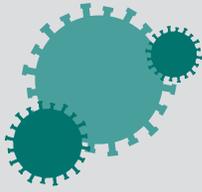


TOTAL INCOME IN 2019

When the responses of 170 CSOs who took the survey were evaluated, it was determined that 11% of the organizations had less than 10.000 TL of annual income in 2019. 9% had an annual income of 10.001-30.000 TL, 19% had 30.001-150.000 TL and 9% had 150.001- 300.000 TL. 24% of the CSOs stated they had an annual income of 300.001-1.500.000TL. 10% of the respondents indicated they had an annual income of 1.500.001-3.000.000TL and 19% reported to have an annual income of >3.000.000TL.

FIGURE 6. TOTAL INCOME IN 2019

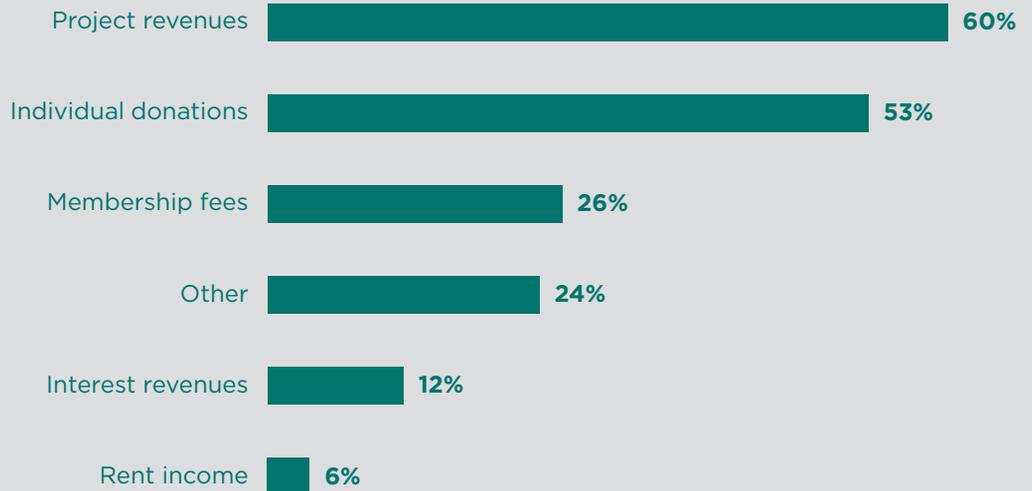




CSOs' MAIN SOURCES OF INCOME

According to the responses of the CSOs in the survey project revenues, (60%), individual donations (53%) and membership fees (26%) are among the top three sources. 12% stated that income from interest is among their main source of income while 6% indicated that rent income is among their main sources of income. 24% of the respondents indicated that their main sources of income include commercial enterprise revenues, corporate donations and public donations.

FIGURE 7. CSOs' MAIN SOURCES OF INCOME



3. IMPACT OF COVID-19 ON YOUR ORGANIZATION

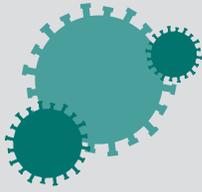
IMPACT OF COVID-19 ON ACTIVITIES

CSO representatives were asked questions regarding the impact of the pandemic on the activities of their organization. 75% of the respondents stated that, the direct impact of the pandemic on their activities happened through cancellations of seminars, conferences and performances. 59% of the organizations indicated that their training activities were affected. 43% reported that provision of services was affected due to cessation of field work and service centers being closed down. 43% of the organizations stated that the pandemic had an impact on their fundraising activities, and about one-third (29%) reported that they had to stop all activities.

FIGURE 8. IMPACT OF COVID-19 ON ACTIVITIES



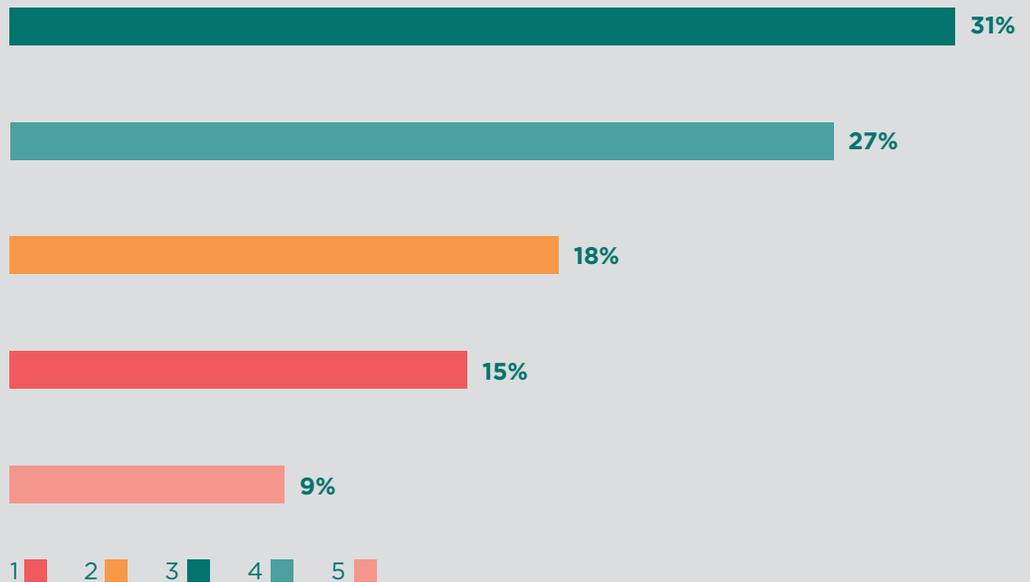
"How did the measures taken against COVID-19 pandemic affect the activities of your organization?"



ADAPTATION OF ACTIVITIES TO NEW WAYS OF WORKING

Within the scope of the questionnaire, CSOs were asked to rank how easily they could adapt their activities to the new ways of working, on a scale of 1 (we had great difficulty) to 5 (we had no difficulty at all). 15% of 170 respondents had great difficulty, 18% had some difficulty, 31% found it neither difficult nor not difficult, 27% had no difficulty and 9% had no difficulty at all.

FIGURE 9. ADAPTATION OF ACTIVITIES TO NEW WAYS OF WORKING

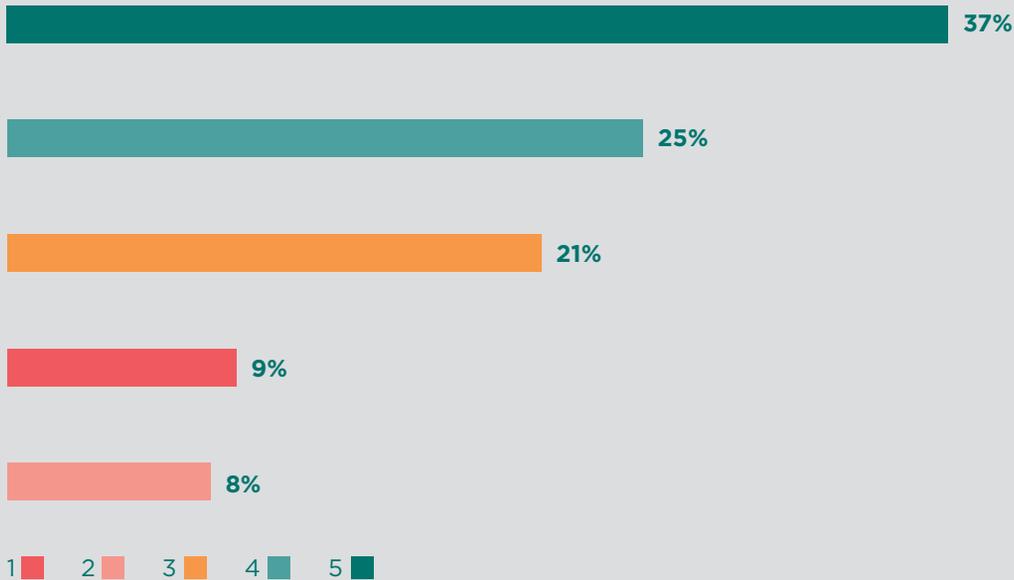


"How easily could you adapt your activities to new ways of working within the measures taken against the COVID-19 pandemic?"

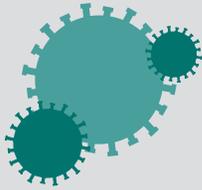
INCREASE IN DEMAND

Within the scope of the questionnaire, CSOs were asked to rank how the pandemic affected the demand for their activities, on a scale of 1 (not increased at all) to 5 (increased dramatically). 63/170 respondents reported a dramatic increase, 43 stated some increase and 36 said there was no change in demand. 13 stated the demand for their activities did not increase while 15 CSOs reported the demand "did not increase at all".

FIGURE 10. INCREASE IN DEMAND



"How has the demand for your activities increased during COVID-19 pandemic?"



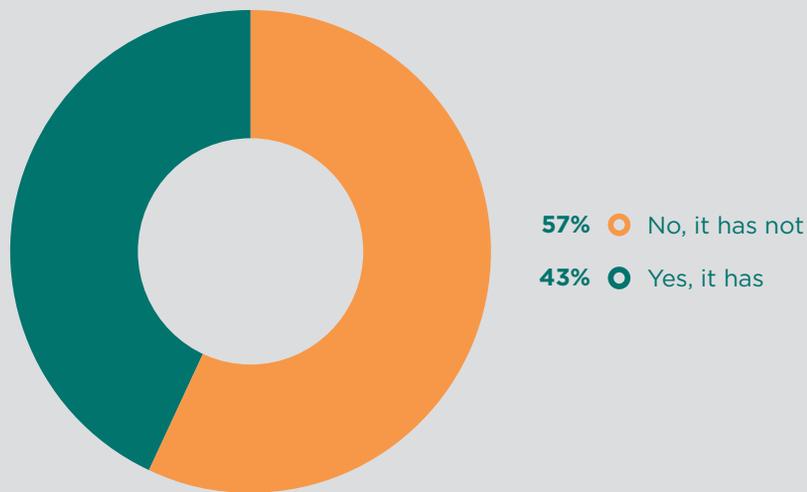
INCREASE IN DEMAND WITHIN A DIFFERENT AREA OF ACTIVITY

CSO representatives were asked whether the pandemic created an additional demand for activities/advocacy in other areas. 57% of the respondents stated that they are not planning to perform activities in other areas, 43% reported that pursuing activities in other areas came to their agenda.

The organizations who discussed pursuing activities in other areas, have summarized these areas as follows:

Online Training ● Online Volunteering ● Healthcare Needs ● Healthcare Rights ● Online Working Systems ● Training with Digital Tools ● Women's Poverty and Violence Against Women ● Parental Support ● Human Rights ● Remote Working ● Poverty

FIGURE 11. INCREASE IN DEMAND WITHIN A DIFFERENT AREA OF ACTIVITY



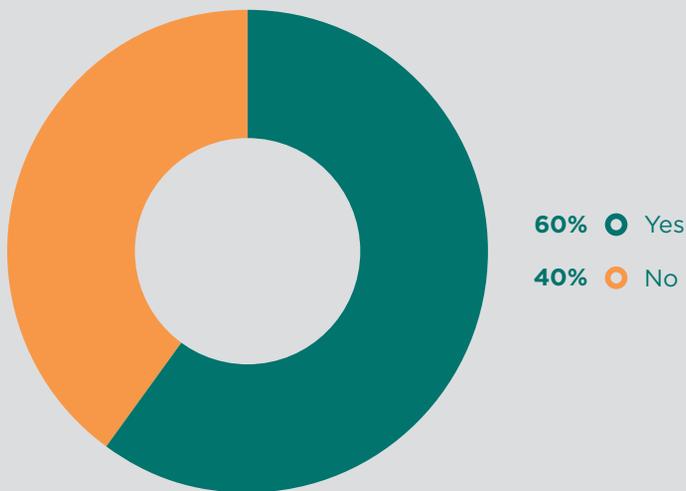
"In addition to your current areas of activity, has COVID-19 pandemic created an additional demand for activities/advocacy in other areas?"

4 GRANTS AND FUNDS

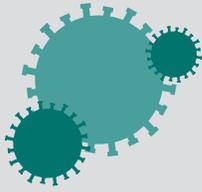
RECEIVING GRANTS/FUNDS

60% of CSOs stated they received grants/funds while 40% reported they did not.

FIGURE 12. RECEIVING GRANTS/FUNDS



"Does your organization receive grants/funds?"



SOURCES OF GRANTS/FUNDS

For the CSOs that receive grant/funds, international organizations are the primary sources for such grants/funds with 31%. 30% stated they receive grants/funds from supranational organizations, 21% from private sector. Those who receive grants/funds from a foundation that operate in Turkey make up 18% of the respondents.

FIGURE 13. SOURCES OF GRANTS/FUNDS

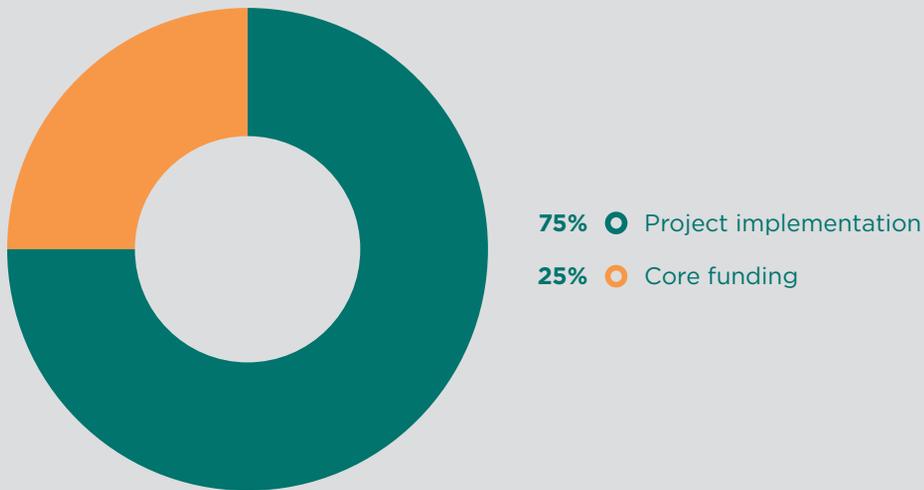


"If you receive grants and funds, can you state their source?"

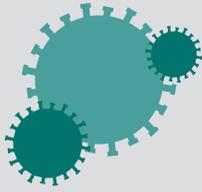
PURPOSE OF GRANT/FUND

75% of the CSOs stated that the grant/fund is for project implementation, 25% reported that they are core funding.

FIGURE 14. PURPOSE OF GRANT/FUND



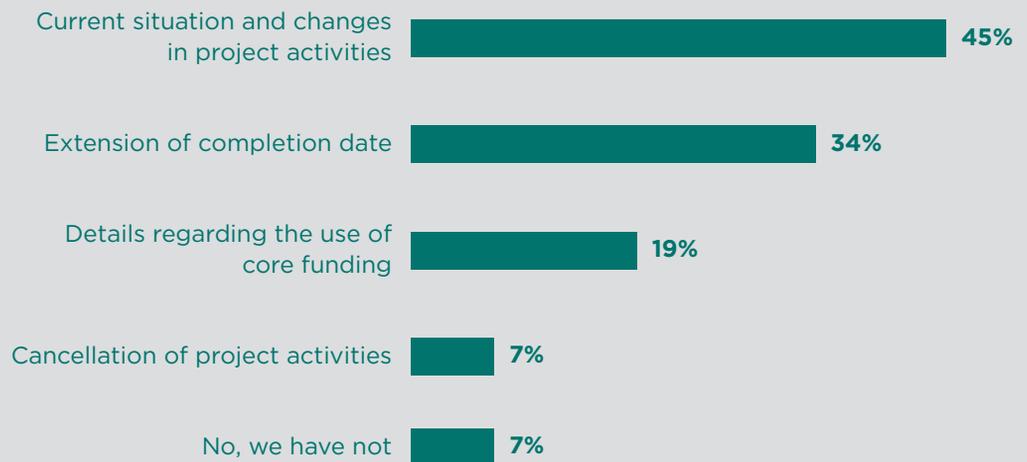
"If you receive grants/funds, can you state their purpose?"



RELATIONS WITH DONORS

CSOs were asked whether they discussed specific topics with their donors from the beginning of the pandemic until the period covered by the survey. 45% respondents stated that they discussed the current situation and changes in project activities with their donors and 34% reported having discussed an extension in completion date of the project. 19% of the CSOs stated that they discussed details regarding the use of the core funding they received from the donor. Also, 7% of the respondents reported that they discussed the cancellation of project activities with their donor. During this period, 7% did not discuss any topics with their donors.

FIGURE 15. RELATIONS WITH DONORS

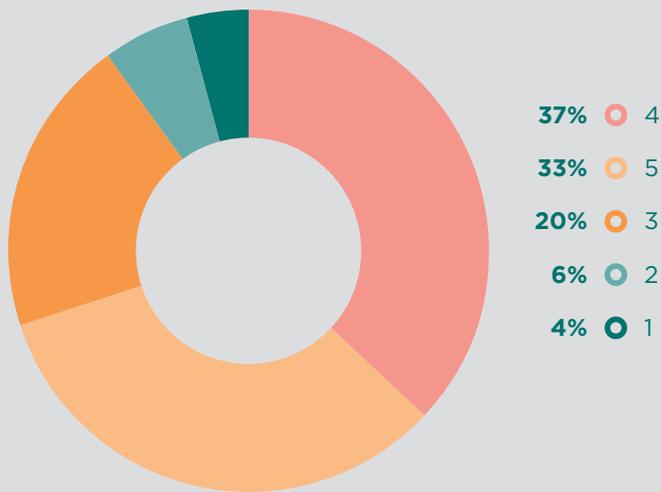


"If you receive grants/funds, have you discussed any of the following topics with your donor?"

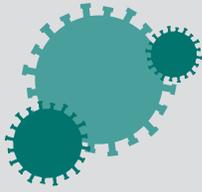
FLEXIBILITY OF DONORS ACCORDING TO REQUESTS

The CSO representatives were asked to rank the flexibility of their donors with regards to their needs on a scale of 1 (not flexible at all) to 5 (extremely flexible). 37% of 170 respondents chose "very flexible", 33% responded "extremely flexible". 20% of the representatives responded as neither flexible nor not flexible; another 10% in total chose the options of either "not flexible" or "not flexible at all".

FIGURE 16. FLEXIBILITY OF DONORS ACCORDING TO REQUESTS



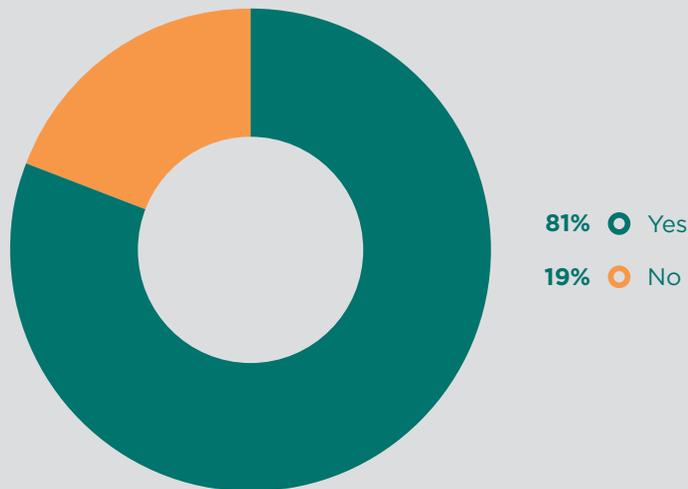
"If you receive grants/funds, can you rank the flexibility of your donor with regards to the needs of your organization in this period?"



OPINIONS REGARDING THE PRIORITIES OF DONORS

The CSOs were asked whether they think the donors would change their priorities after the pandemic. 81% of the respondents stated that they think there will be such a change while only 19% thought there will be no changes in the priorities of donors.

FIGURE 17. OPINIONS REGARDING THE PRIORITIES OF DONORS

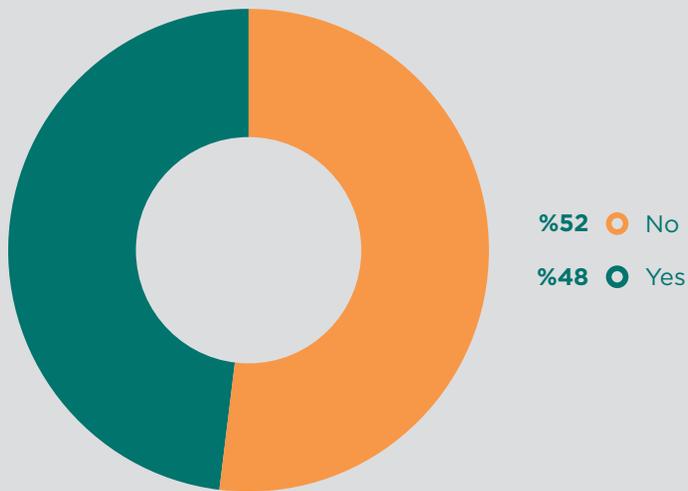


"If you receive grants/funds, do you think donors will change their priorities after COVID-19 pandemic?"

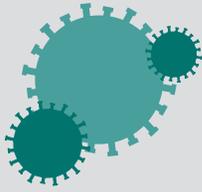
OPINIONS REGARDING THE ORGANIZATION'S OWN PRIORITIES

48% of the respondents replied "Yes" to the question of "Do you think there will be changes in your organization's priorities after COVID-19 pandemic?", while 52% responded "No".

FIGURE 18. OPINIONS REGARDING THE ORGANIZATION'S OWN PRIORITIES



"Do you think there will be changes in your organization's priorities after COVID-19 pandemic?"

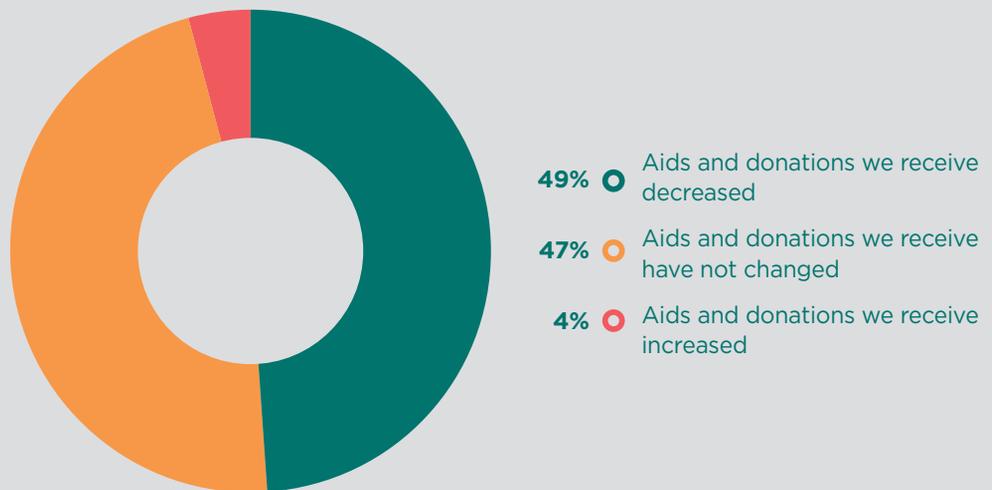


5 AIDS AND DONATIONS

IMPACT OF COVID-19 ON AIDS AND DONATIONS

The CSOs responded to a question on how COVID-19 pandemic affected the aids and donations their organizations receive. 49% of the respondents stated a decrease in the aids and donations they receive. 47% of the organizations reported no change in the aids and donations they receive while 4% reported an increase.

FIGURE 19. IMPACT OF COVID-19 ON AIDS AND DONATIONS

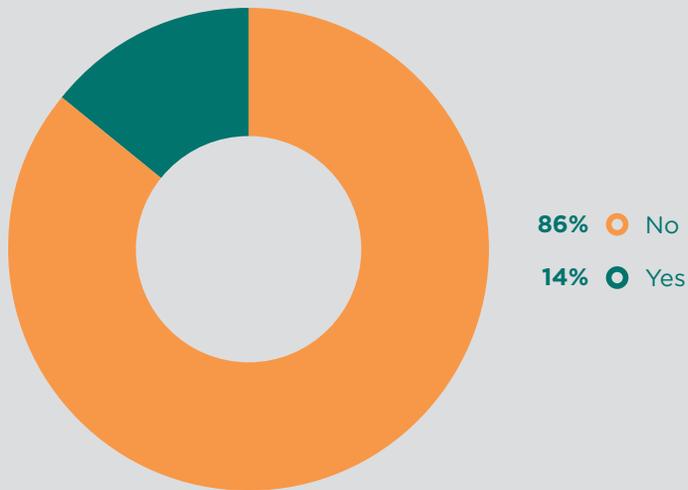


How has COVID-19 impacted the aids and donations you receive?"

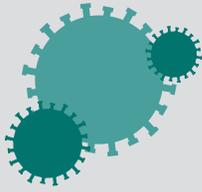
INFORMATION ON ACTIVE DONATION OR AID CAMPAIGNS

86% of the respondents stated they are not actively running a donation or aid campaign while 14% stated they are currently running a donation or aid campaign.

FIGURE 20. INFORMATION ON ACTIVE DONATION OR AID CAMPAIGNS



"Is your organization currently running a donation or aid campaign?"



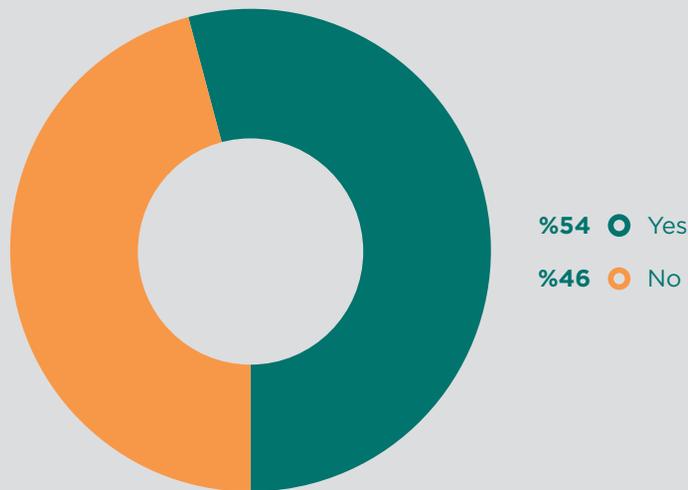
CHANGES IN FUNDRAISING STRATEGIES

Organizations were asked whether they plan to make any changes in their 2020 fundraising strategies. 54% of the CSOs stated they have changed/are changing their strategies while 46% indicated that they will not make any changes.

CSOs who responded "yes" to this question were asked to share information regarding such changes. The responses have been pooled and are outlined below:

Fundraising Strategies Focusing on Individual Giving ● Budget Planning ● Estimated Decrease in Donations ● Active Social Media Communication ● Digital Donation Campaigns ● New Grant/Fund Applications ● Need for New Volunteers ● Need for Core Funding

FIGURE 21. CHANGES IN FUNDRAISING STRATEGIES



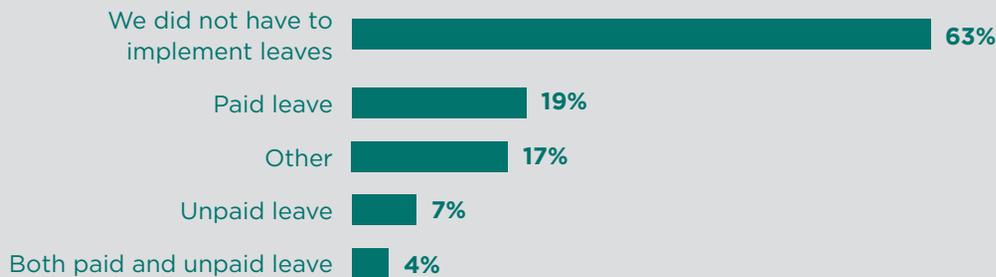
"Have you made/do you consider making any changes in your fundraising plans for 2020?"

6. EMPLOYMENT AND SUSTAINABILITY

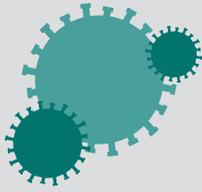
EMPLOYEE LEAVES

CSOs were asked about their practices regarding employee leaves during the pandemic. 63% stated they did not have to enforce employee leaves, 19% stated that they are enforcing paid leaves for employees while 7% reported enforcing unpaid leaves. CSOs that implement both paid and unpaid leaves make up 4% of the respondents. In addition, the CSOs shared information regarding employee leaves, stating that their organizations are bound by the HR policies of their umbrella organization and they have no specific practices since they do not have any paid employees.

FIGURE 22. EMPLOYEE LEAVES



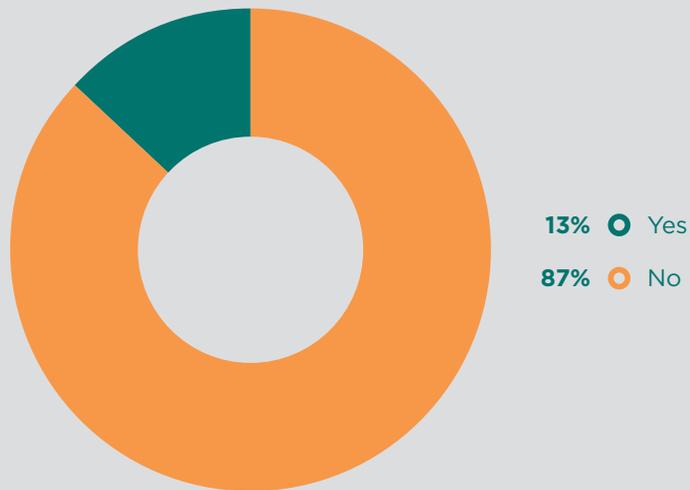
"What type of employee leaves are you implementing, if any, within the framework of measures against COVID-19?"



SHORT-TIME WORK ALLOWANCE APPLICATION

87% of the CSOs stated that they have not applied for short-time work allowance while 13% stated that they have applied for the allowance.

FIGURE 23. SHORT-TIME WORK ALLOWANCE APPLICATION

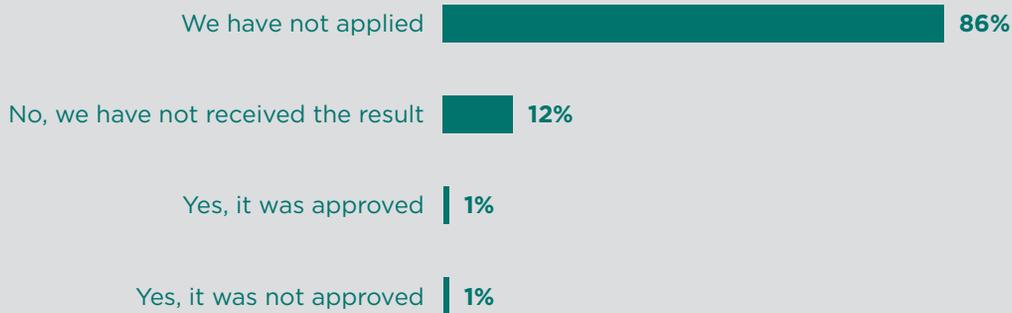


"Have you applied for short-time work allowance for your employees?"

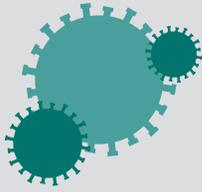
SHORT-TIME WORK ALLOWANCE APPLICATION RESULTS

86% of the respondents who replied to the question on short-time work allowance application stated that they have not applied. 12% of the CSOs who applied for the allowance reported not having received a response yet; 1% stated their applications were not approved and 1% stated that their applications were approved.

FIGURE 24. SHORT-TIME WORK ALLOWANCE APPLICATION RESULTS



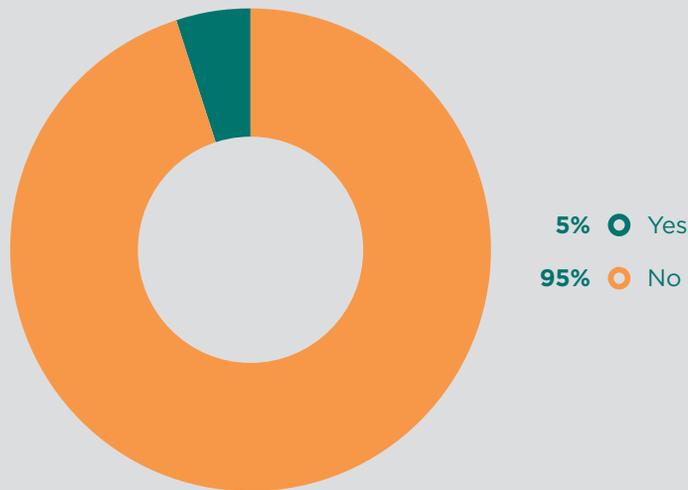
"Have you received the result of your short-time work allowance application?"



DISMISSALS

5% of the respondents stated that they had to dismiss employees due to the impact of the pandemic on their financial position while 95% reported they did not have to.

FIGURE 25. DISMISSALS

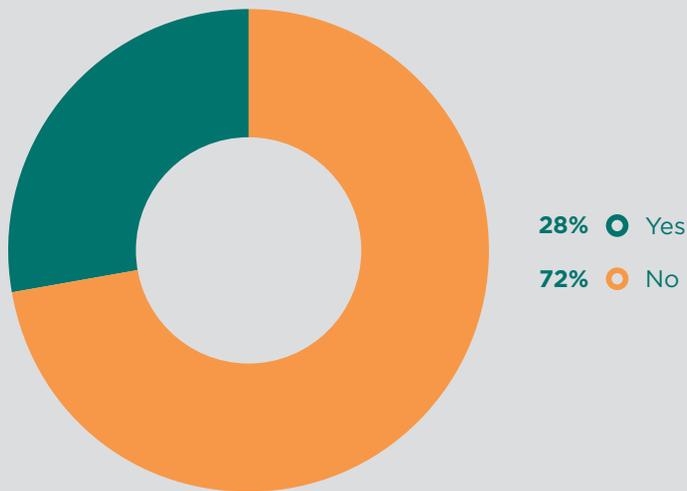


"Have you had to dismiss any employees from your organization until now, due to the impact of COVID-19 on your financial position?"

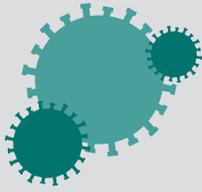
FORECASTS FOR DISMISSAL

28% of the CSOs said they might have to dismiss employees if the pandemic continues while 72% stated that they do not believe they will have to take a decision in this direction.

FIGURE 26. FORECASTS FOR DISMISSAL



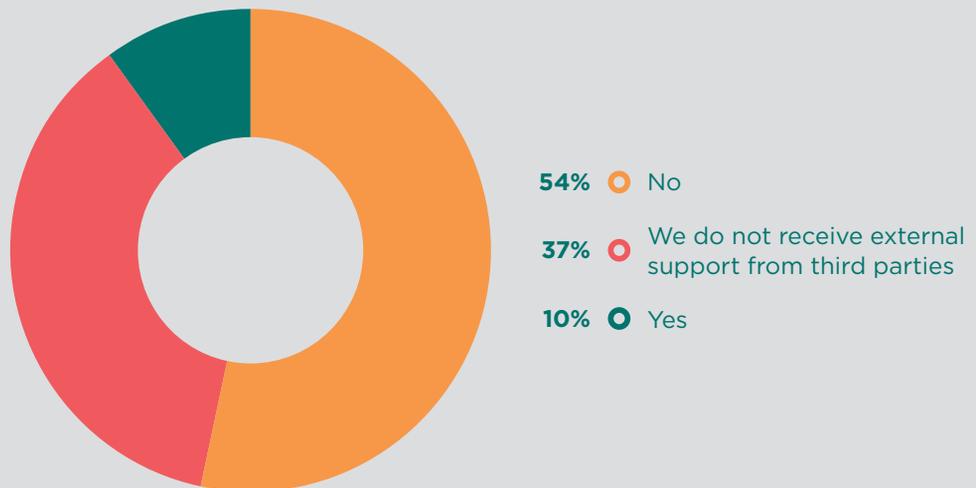
"Do you think that if the effect of COVID-19 continues, you will have to dismiss employees from your organization?"



RELATIONS WITH THIRD PARTIES

The organizations were asked a question regarding their relations and partnerships with the third parties within the scope of their activities. The responses showed that 54% did not have to end their partnerships while 37% stated they receive no external support. 10% of the respondents, however, stated that they had to terminate their partnerships with third parties.

FIGURE 27. RELATIONS WITH THIRD PARTIES

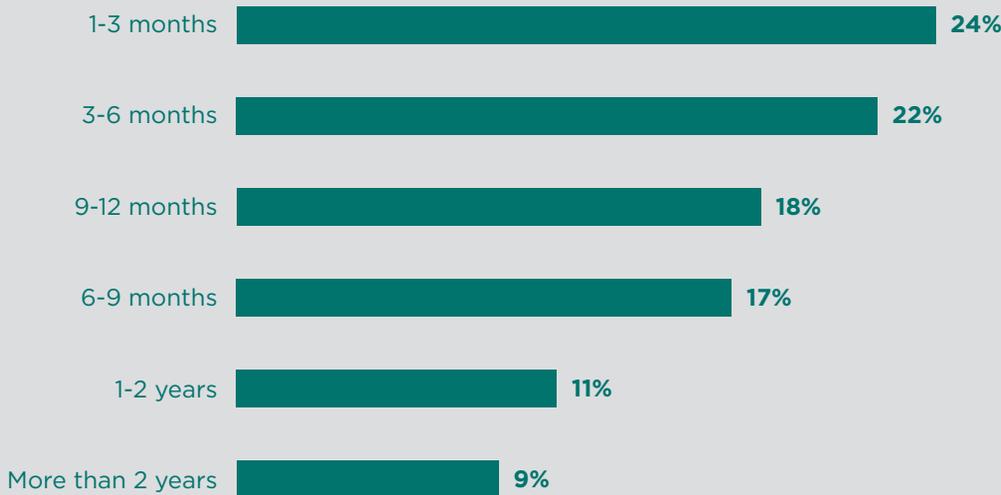


"Have you had to end your partnerships with third parties that provide external support for your organization, due to the impact of COVID-19 on your financial situation?"

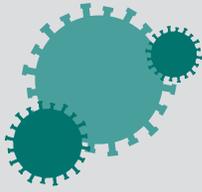
FORECASTS FOR SUSTAINABILITY

CSOs were asked about their forecasts regarding sustainability. 46% of the CSOs replied to the question of "how long do you foresee that you can sustain your current working structure and number of staff with your existing resources without carrying out new fundraising activities?" as 1-6 months. 17% stated that they can sustain their current working structure and number of staff with their existing resources for 6-9 months; 18% reported they can do so for 9-12 months. 11% of the CSOs stated they can keep their existing working structure and number of staff without any fundraising activities for up to 2 years while 9% stated they could sustain for more than 2 years.

FIGURE 28. FORECASTS FOR SUSTAINABILITY



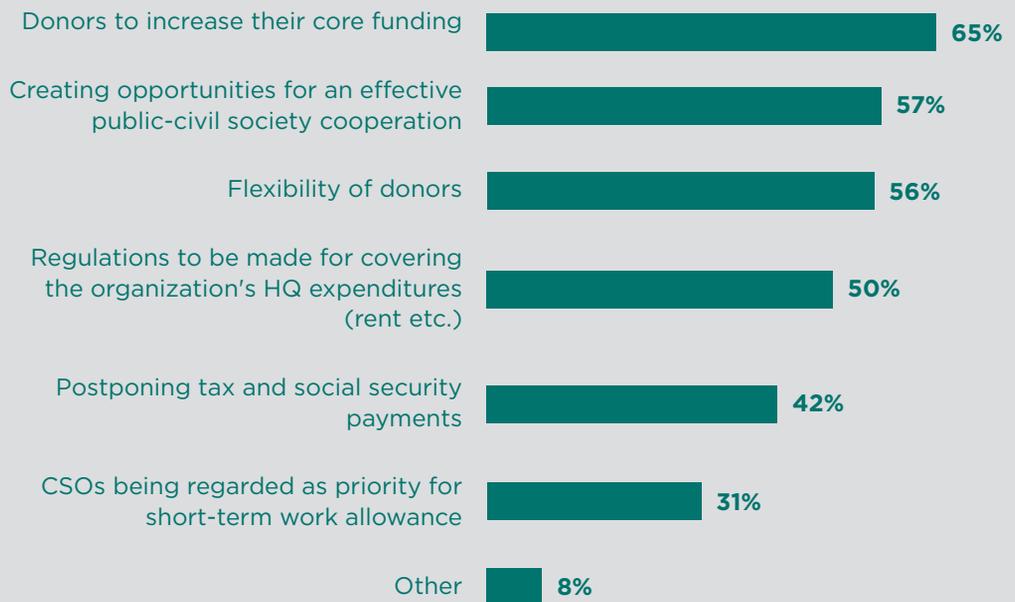
"How long do you foresee that you can sustain your current working structure and number of staff with your existing resources without carrying out new fundraising activities?"



ELEMENTS CONSIDERED TO FACILITATE AND CONTRIBUTE TO SUSTAINABILITY

CSOs were asked to evaluate a list of elements that would prevent their employment and activities from being affected. The elements selected by the CSOs are as follows: 65% of the responding CSOs stated that it would be "donors to increase their core funding"; for 57% it was creating opportunities for an effective public-civil society cooperation", 56% chose "flexibility of donors", 50% selected "regulations to be made for covering the organization's HQ expenditures (rent etc.)", 42% stated that it would be "postponing tax and social security payments", and 31% stated that it would be "CSOs being regarded as priority for short-term work allowance".

FIGURE 29. ELEMENTS CONSIDERED TO FACILITATE AND CONTRIBUTE TO SUSTAINABILITY



"Which of the following would make it easier for your organization to sustain its employment and activities?"

