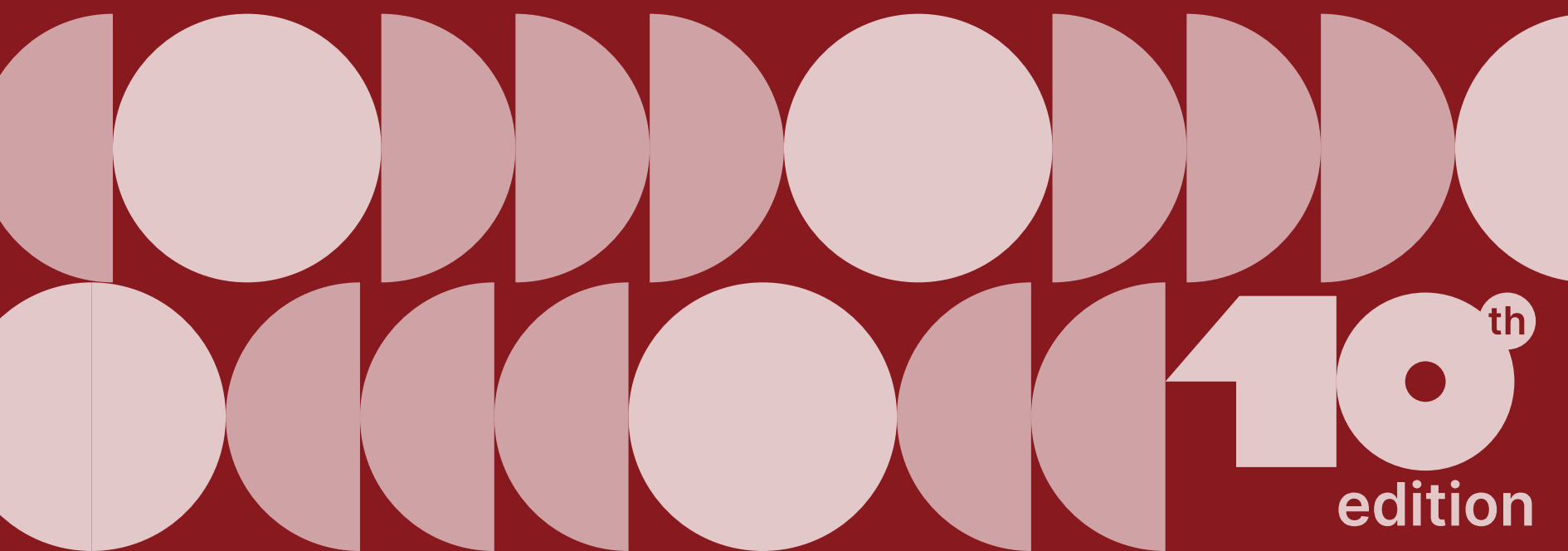




Key Facts

The Capacity of NGOs in Poland

2024



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This report is based on the findings of the *Capacity of NGOs 2024* survey conducted by the Klon/Jawor Association on a national sample of 1012 foundations and associations. The survey used the CAWI (Computer-Assisted Web Interview) technique and was completed between September and November 2024. The Capacity of NGOs is a regular survey conducted since 2002 and it is the largest independent survey of foundations and associations in Poland.

The Capacity of NGOs 2024 survey has been funded by the Polish American Freedom Foundation, the Stefan Batory Foundation, the National Freedom Institute – Centre for Civil Society Development, and the Save the Children Poland Foundation.



2000-20**25 YEARS**
POLISH-AMERICAN
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BATORY
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PUBLIC
BENEFIT
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National Freedom Institute
Centre for Civil Society Development



Government Programme
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CENTER FOR CIVIL SOCIETY DEVELOPMENT AS PART OF THE GOVERNMENT PROGRAMME
FOR CIVIL SOCIETY ORGANISATIONS DEVELOPMENT FOR 2018-2030 CSODev



About the report: *The Capacity of NGOs 2024*

The Capacity of NGOs 2024 report marks the tenth edition of a recurring study by the Klon/Jawor Association, which aims to provide a comprehensive analysis of the non-governmental sector in Poland. It is the largest independent research project in the country focusing on associations and foundations, which has been carried out since 2002. Thanks to this long-term perspective, we can track trends and describe the direction in which the Polish non-governmental sector is developing.

◆ Purpose and scope of the study

The study aims to capture an accurate picture of the current landscape and recent shifts in the non-governmental sector. It examines the condition of organizations in 2024, except for financial data, which pertains to 2023 (the most recent closed fiscal year). The report also assesses sectoral changes over the past decade.

The report addresses organizational activities and audiences, human capital (including boards, volunteers, employees, and members), employment, finances, partnerships, communication and digital tools, challenges, crisis response, and leaders' perspectives on social issues and the sector's future. This 10th edition considers the lasting impact of COVID-19 and the war in Ukraine.

The report targets professionals in institutions and organizations that foster the development of the non-governmental sector in Poland, as well as anyone with an interest in social change.

◆ Methodology

The survey used a nationwide random sample of 1,012 associations and foundations. The results represent the active part of the Polish non-governmental sector, comprising approximately 75,000 entities.

Data was collected through the CAWI (Computer-Assisted Web Interview) method, with organizations completing online questionnaires between September and November 2024.

We analyzed the data using analytical weights. This adjusted the proportions of different entities in the sample to reflect the sector. We took into account the legal form, size of the locality, and sample segment (local sports organizations and other organizations).

The SPSS statistical analysis tool was used for the calculations. A confidence level of 95% was adopted (maximum statistical error +/- 3%, significance $p < 0.05$).

What distinguishes
The Capacity of NGOs survey?

**Regular, recurring
measurement**

**Trend
monitoring**

**Unique
methodology**

**Credibility and
reliability**

**Multifaceted
subject matter**

**Expert
commentary**

Useful reports

At Badania Klon/Jawor, we are committed to providing reliable and accessible data to help understand the Polish non-governmental sector. We are excited to share the English-language summary of the tenth anniversary edition of the report, "The Capacity of Non-Governmental Organizations 2024." We warmly encourage you to read and join us in reflecting on the condition of the sector.



**Julia
Bednarek**



**Aleksandra
Belina**



**Beata
Charycka**



**Marta
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◆ Terms used in the report

Organization budget

Annual revenue of the organization; in this report, it refers to 2023, i.e., the last closed fiscal year at the time of the survey.

Location

Category of the size of the town where the organization is registered and has its headquarters. We distinguish the following categories of town size: rural area, small town with up to 50,000 inhabitants, medium-sized town with 50,000–200,000 inhabitants, and large town with over 200,000 inhabitants.

Area of activity

The main thematic area in which the organization operates, e.g., culture and art, ecology, health care.

Beneficiaries

A group of people or entities to whom the organization directs its activities, e.g., women, refugees, non-governmental organizations.

Average, median

A statistical measure that represents the middle value of a set ordered in ascending order according to a given characteristic. The median divides the set into two equal groups. For example, if the average (median) annual revenue of an organization is PLN 50,000, this means that half of the organizations have revenues lower than PLN 50,000, and half have revenues higher than this amount. The median is not sensitive to extreme values.

Scale of operations

The area covered by the organization's activities. Local scale means that the organization's activities cover only a municipality or county; regional scale – a province; national scale – the whole of Poland or several provinces; international scale – the organization's activities extend beyond the borders of Poland.

Organization team

Persons who work for the organization on a permanent and regular basis and receive remuneration for this work, regardless of the number of hours worked and the form of the contract. This means that the organization team may consist of individuals employed under both employment and civil law contracts, as well as those conducting business activities.

Volunteers

People who are not members of the organization or its governing bodies and who are involved in its activities on a voluntary basis, without remuneration, regardless of whether they have signed a volunteer agreement or not.

Sources of income

Categories of funding sources used by organizations, e.g., local government funds (funds from municipal, city, county, and marshal's offices), EU funds, donations.



The non-governmental sector in Poland

The non-governmental sector comprises organizations that operate differently from businesses and public administrations. They do not operate for profit, but are also not part of state structures, and their goal is to carry out a social mission. That is why we refer to them as non-profit, non-governmental (NGOs), or civic organizations.

The Polish non-governmental sector is a diverse mosaic of entities, with the most common being associations and foundations. They form its core. Their number, scope of activity, and diversity

of issues they deal with make them the foundation of the entire non-governmental organization community. These are the entities covered by our survey, *The Capacity of Non-Governmental Organizations*. The broadly understood sector includes, among others, informal groups, church organizations, economic, professional, employee, and political organizations, as well as social economy organizations.

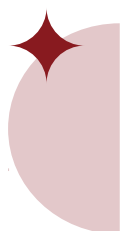
In this report, when we refer to non-governmental organizations (NGOs), we mean associations and foundations exclusively.

◆ Map of the non-governmental sector in Poland

Foundations ◆	Chambers and craft guilds ◆	Professional associations ◆
Associations ◆ ◆ Registered associations ◆ Ordinary associations ◆ Sports clubs, student sports clubs	Rural housewives' clubs, farmers' unions, and agricultural clubs ◆	Social cooperatives ◆
Employers' federations and confederations ◆	Volunteer fire departments ◆	Non-profit companies ◆
Chambers of commerce ◆	Organizations operating under separate regulations, e.g., the Polish Red Cross, hunting clubs, and social committees ◆	Associations of local government units ◆
Informal groups, urban movements ◆	Church organizations ◆	Unions of associations ◆
	Political parties ◆	Trade unions ◆



How many non-governmental organizations are there in Poland?



75 000

active non-governmental organizations



161 000

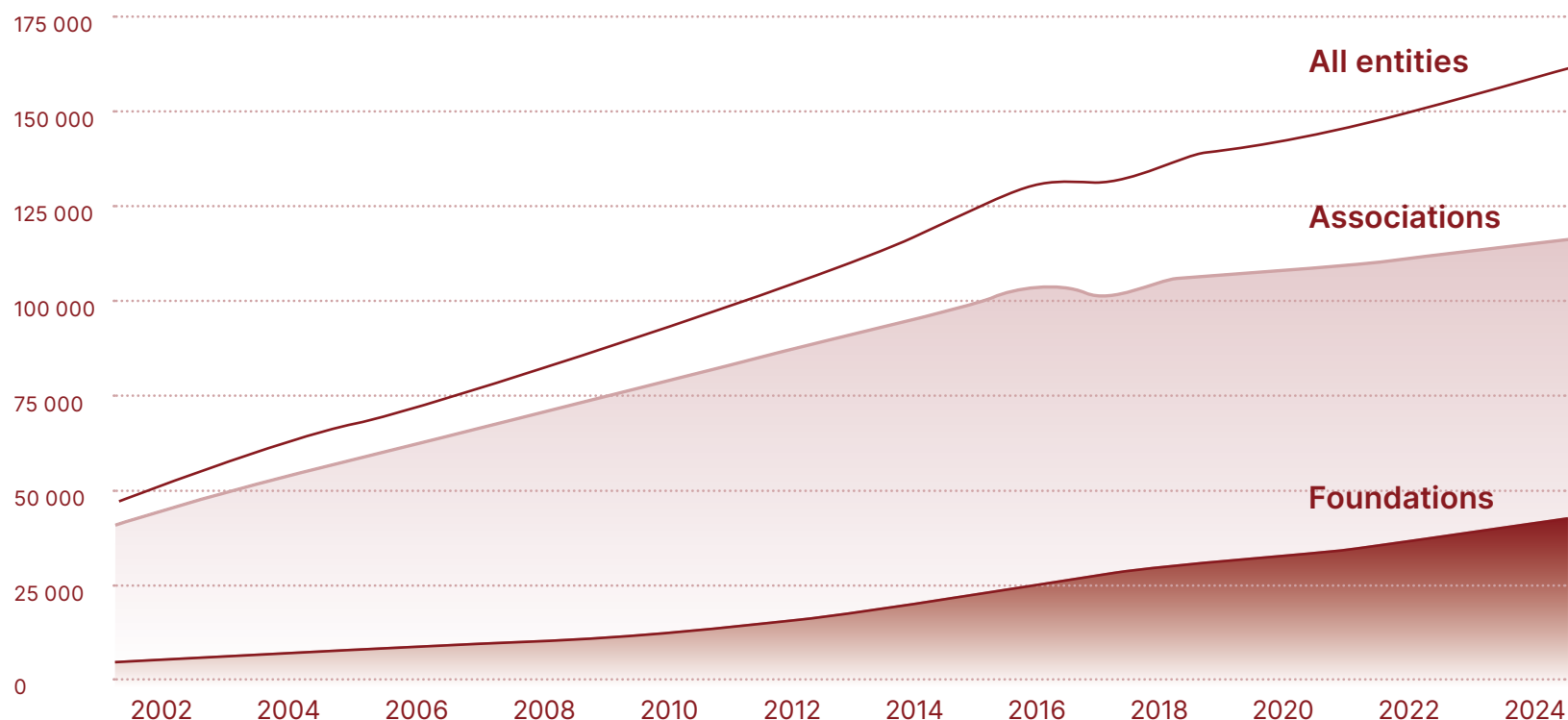
registered non-governmental organizations

The number of non-governmental organizations in Poland changes each year as some register and others cease operations. At the end of 2024, there were 161,000 non-governmental organizations registered, including 117,000 associations (excluding volunteer fire departments) and 44,000 foundations (data according to the REGON register - National Official Business Register, as of December 31, 2024).

Not all registered organizations are actually active. It is estimated that around half—about 75,000 associations and foundations—are actively operating. The rest have suspended or terminated their activities without completing deregistration. This report covers associations and foundations that represent the active part of the non-governmental sector.

Chart: Number of registered non-governmental organizations.

 Data according to the REGON register - National Official Business Register, as of December 31, 2024.





Key statistics on non-governmental organizations in Poland

Number of organizations



~75 000

Active associations and foundations
(representing about half of all registered entities)

Legal forms

72%

associations



28%

foundations*

* Data based on the REGON register (National Official Business Register), as of December 31, 2024.

Location



49%

of organizations are based in villages and towns with up to 50,000 inhabitants

36%

organizations are located in cities with over 200,000 inhabitants

Main areas of activity

34%

sports

13%

culture and arts

12%

education



Main beneficiaries



70%

NGOs work for children and young people



65%

NGOs work for the local community

Scale of operations



34%

of organizations operate exclusively locally

40%

of organizations have a nationwide or international reach

Main methods of operation



69% NGOs organize events



65% NGOs are involved in the direct provision of services



45% NGOs conduct informational activities

Budget



50,000 PLN ~ 11750 EUR

the average (median) annual budget of an organization in 2023

25%

of NGOs have an annual budget of up to PLN 10,000

10%

of NGOs have an annual budget exceeding PLN 1 million

Main sources of income

(the largest share in the budget of the entire sector)



Public funds
(local government, federal, EU)



Donations
from individuals and institutions



Economic activity
of the organization

Financial stability



47%

NGOs ended 2023 with a profit
(revenues > costs)



35%

NGOs have financial reserves

Team



38%

NGOs have a permanent team of employees

4 people

the average (median) team size in an organization with a permanent team

Paid vs. volunteer work

66%

organizations pay for work done for the organization

34%

NGOs operate solely through voluntary work

Volunteering



62%

of organizations work with volunteers

8 volunteers

an average of 8 volunteers per year

Cooperation and partners



84% NGOs cooperate with other non-governmental organizations



80% NGOs cooperate with the local community



78% NGOs cooperate with local government

Main problems



72% NGOs have difficulty raising funds



61% NGOs lack people willing to get involved



58% NGOs struggle with a lack of successors for current leaders

Online communication and digital technologies



93%

NGOs have an online presence

44%

NGOs use online meeting tools

29%

NGOs use artificial intelligence-based tools (AI)

Mode of operation

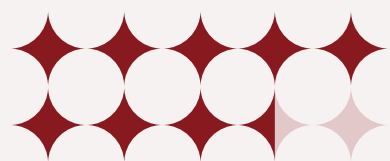


31%

NGOs operate on a daily basis

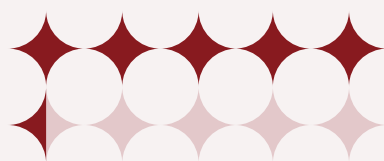
(they are available every working day during specified working hours)

Crises and current challenges



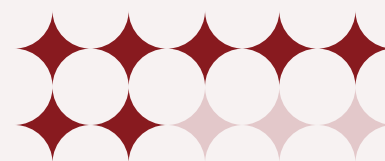
84%

NGOs have been involved in responding to crises since 2020, most often by organizing fundraisers or distributing donations



54%

NGOs feel the impact of the war in Ukraine on their current situation



70%

NGOs feel the long-term effects of the COVID-19 pandemic

◆ Key findings from the study

Maturation of the non-governmental sector

The sector is becoming more experienced, with organizations operating longer and building their capabilities. However, this growth mainly benefits organizations with larger resources, while many others see less progress.

Change in engagement model

The model of social engagement is shifting from long-term to ad hoc and temporary. Volunteers now participate more in single actions, the number of association members is dropping, and the younger generation favors flexible engagement.

Evolution of funding sources

The revenue map of the entire sector is changing, i.e., the share of individual types of sources in the budget of all organizations. Parallel to the growing importance of money from individual and institutional philanthropy, we are seeing a decline in the share of public funds (from local governments, national governments, and the EU) in the budget of the entire sector.

Professionalization of the largest organizations

Organizations with the largest budgets (over PLN 1 million) exhibit a higher level of professionalization compared to the rest of the sector; however, they still do not fully capitalize on their potential in terms of employment stability, strategic planning, and transparency.

The COVID-19 pandemic and the war in Ukraine

The pandemic and the war in Ukraine have had a profound impact on the sector, not only generating new challenges but also serving as a catalyst for change and adaptation.

Leadership crisis

A key challenge is the leadership crisis, seen in succession issues and a shortage of candidates for board positions. High burnout among current leaders and an aging management staff intensify this problem.

More money, but not necessarily more stability

Organizations' revenues are increasing, and 10% have budgets over PLN 1 million. However, only 35% hold financial reserves, and difficulties in obtaining funds remains the sector's biggest challenge.

Precarization of work

Employment under civil law contracts is growing at the expense of permanent staff, and the average salary remains at the minimum wage level. Low wages and unstable employment conditions make it difficult to retain staff.

Positively assessed cooperation with the local government, but tensions with the central government

Relations with the local government are assessed as positive and are even improving. At the same time, we observe some tensions and the influence of political divisions in the assessment of the central administration.

The sector's straddling identity

Most NGO leaders do not perceive the sector as a cohesive community, which may be due to the wide variety of missions and operational methods. Despite this lack of unity, more than half of the leaders recognize the need to develop a shared vision for the sector's growth.

Badania Klon/Jawor is a research team affiliated with the Klon/Jawor Association, an organization that supports the development of civil society in Poland and publishes the ngo.pl portal. Our team combines expert knowledge of the non-governmental sector with research and analytical experience.

We study non-governmental organizations, their image in society, and social activities such as volunteering and philanthropy. Feel free to contact us and collaborate with us: badania@klon.org.pl.

kondycja.ngo.pl – *The Capacity of NGOs* survey website

fakty.ngo.pl – civic participation statistics and analyses

ngo.pl – non-governmental organisations' portal

