

Still going strong?

The impact of COVID-19 on Dutch Civil Society

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Highlights

- More than half of all CSOs in the survey have experienced an income loss over the period January-April 2020 and even more expect a (further) decrease over May-September 2020.
- Overall, losses relative to annual incomes amount to a modest -7% over January-April and an anticipated -9% over May-September. Together, the CSOs in our sample thus expect to lose one-sixth of their annual income over the first eight months of 2020.
- However, COVID-19 does not hurt all CSOs equally. While a few even show an increase in income, it are the smaller ones that are hit more severely as a share of the organisation's total budget, compared to their medium-sized and large counterparts. Organisations active in the Global South, regardless of their size, proved more resilient in this respect than organisations operating exclusively in the Netherlands.
- The income loss is mainly explained by decreased income from commercial activities, fewer donations from private companies, and a reduction in gifts from the general public. The latter is mainly due to a halt to all kinds of sponsor events due to the prevailing COVID-19 measures taken in the Netherlands. Income from national lotteries and governments, on the other hand, are a stabilising force.
- Notwithstanding the reported income losses, CSOs overall experienced a minor net increase in paid staff, although changes in staff composition favoured temporary staff and freelancers rather than permanent staff.
- Whereas small CSOs more often continue their regular programme as planned, larger organisations are more likely to have stopped (part of) their programme temporarily. Restrictions imposed by Dutch, European and (for development organisations) Southern governments are principally to blame. Large CSOs seem more keen to exploit opportunities for innovation.
- The possibilities for continuation and/or adaptation of regular programmes seems to depend partly on the extent to which CSOs can fall back on their reserves. Depletion of these reserves in the longer run is a worry shared by three out of four organisations across the income groups. Four out of ten CSOs worry (also) about their own survival, although most are only 'somewhat worried'.
- Overall, and despite strong variations across individual cases, CSOs are still going strong but are also bracing for a possible delayed impact of the COVID-19 pandemic.

Foreword

In the final open question of the survey many CSOs expressed their frustration about the COVID-19 pandemic, for instance because they have no means available to meet a growing demand for their services. More often, however, respondents expressed the need to look at the longer run in understanding the impact of COVID-19. One of the CSOs stated that ‘at this short notice we have not experienced major problems [but] there is a chance such problems will arise in the longer run’. Another concurred and argued that ‘[m]any organisations will survive the first period of set-backs because of their reserve funds and goodwill’ and then wondered what will happen after the ‘reserves are depleted, budgets are no longer reached, government support has come to a stop [and/or] contract partners or major donors have not survived the pandemic themselves’? Yet another simply stated that ‘the virus [will have] an impact mainly on the 2021 budget’ while a fourth reasoned that the ‘effects of the corona crisis will only be felt in the years to come with the need for economising also in subsidies’.

The fact that many Dutch CSOs are more worried about the longer than the short run is also clear when comparing the actual and projected impact of the pandemic, as we do in this report. While acknowledging (and evidencing) that the extent to which COVID-19 impacts organisations differs significantly, the overall findings show a sector that is still going strong but also one that wonders how strong it will still go in a few months’ time – let alone in a year’s time. In anticipation of capturing this longer-term perspective, we planned at least two follow-up surveys from the outset. In September 2020 and March 2021 we will once again request the *Erkende Goede Doelen* to participate in this joint study. We sincerely hope that at least as many will contribute as in the present study. And while gratefully acknowledging the support already received, we also hope that we can simply entitle our next two reports ‘Still going strong, part 2’ and ‘still going strong, part 3’.

The research team

Lau Schulpen, Luuk van Kempen and Sara Kinsbergen

Introduction

Over the last few months, the Dutch public has been bombarded with bad and sometimes hopeful news about the consequences of COVID-19. Chief among the bad was and is news about the economic consequences with hairdressers and pubs becoming symbolic for the downturn. How different the world of Dutch civil society organisations (CSOs). CSOs have hardly hit the news and as such the impact of the COVID-19 pandemic on them and their work remains largely obscure. Based on a survey among 604 *Erkende Goede Doelen* (literally Recognised Good Causes) in which a representative sample of 401 (66.4%) participated, this report sets out to remedy this. In this study, we shed light on the actual (period 1 from January to April 2020) and projected (period 2 from May to September 2020) impact of the COVID-19 pandemic on the income, staff/volunteers and activities of CSOs. In the first part we provide an overview of these changes, with specific attention for variation in impact for organisations that differ in size. The second part explains differences in terms of experienced and expected impact and questions what features render organisations more or less resilient for a unique crisis such as COVID-19. We do so by looking for risk and immunity factors, respectively.

Sample

The 401 *Erkende Goede Doelen* that participated in this study represent a cross-section of Dutch CSOs that together form a sector of economic and societal significance. They provide services in the Netherlands and/or abroad in fields as health care, education, animal care, arts and culture, human rights, poverty reduction and general wellbeing. In 2018, the 401 CSOs in our study together had an annual budget of €3.1 billion of which nearly €2.8 billion was spent on goal-related interventions. Whereas the 401 respondents cover a relatively large number of volunteer-led organisations, those that have paid staff in 2018 employed nearly 19,000 people (a close equivalent to all employees of the Dutch railways (NS)).

The field of CSOs is not only diverse in terms of thematic orientation, but also in terms of size of the organisation. Here, we divide the sector into three broad income groups (also see Annex 1). The first group (labelled ‘small’) consists of 102 organisations with a 2018-budget of less than €100.000. On average, small CSOs depend for 55% of their income on gifts of the general public and for 25% on other non-profit organisations. The majority of these small CSOs is relatively young with 65% having been established after 2000. The majority of these (58%) is labelled as a development organisations (i.e. working only or also in developing countries) and is active on such themes as poverty reduction (29%), health (25%) and general welfare (24%). Not surprisingly, the vast majority of these small CSOs relies only on volunteers. Only 20% states to have paid staff members.

The second, ‘medium’-sized, group covers 150 organisations with a budget between €100.000 and €2 million. The general public accounts for on average 40% of their income with 24% coming from other non-profit organisations. Government subsidies (13%) and income from private companies (9%) are also important. Although a sizable part of them has been established after 2000 (39%), most saw the light of day in the 1970s to 1990s (53%). With 43%, development organisation form a minority here. The same three themes as with

small CSOs also top the list for this medium group, although in a different order: general welfare (25%), poverty reduction (25%) and health (16%). This group also hosts 55% of the organisations active on the theme religion, nearly half of the CSOs active in the field of animal care and one-third of the nature & environment organisations. Three-quarters of these medium CSOs employ staff and only seven medium organisations state not to have any volunteers.

In the final group of large organisations, which is made up of 149 CSOs, each has a budget of more than €2 million. Government subsidies are with nearly 37% of the income of the average large CSO the most important source followed by the general public (29%). Other non-profit organisations come in third with 13%, followed by income from lotteries (10%). This is the generally older group with 55% having been established before the 1980s and only 13% after 2000. Only one large CSO states not to employ any staff and thus to work entirely with volunteers, while only 13 state not to be working with volunteers at all. As with their medium-sized counterparts, the majority of large CSOs (55%) are primarily working in the Netherlands and/or other Northern countries. General welfare (21% of the large CSOs works in this field), health (20%) and poverty reduction (18%) remain the major themes but 60% of the nature & environment organisations is also in this group as is 75% of the arts & culture group.

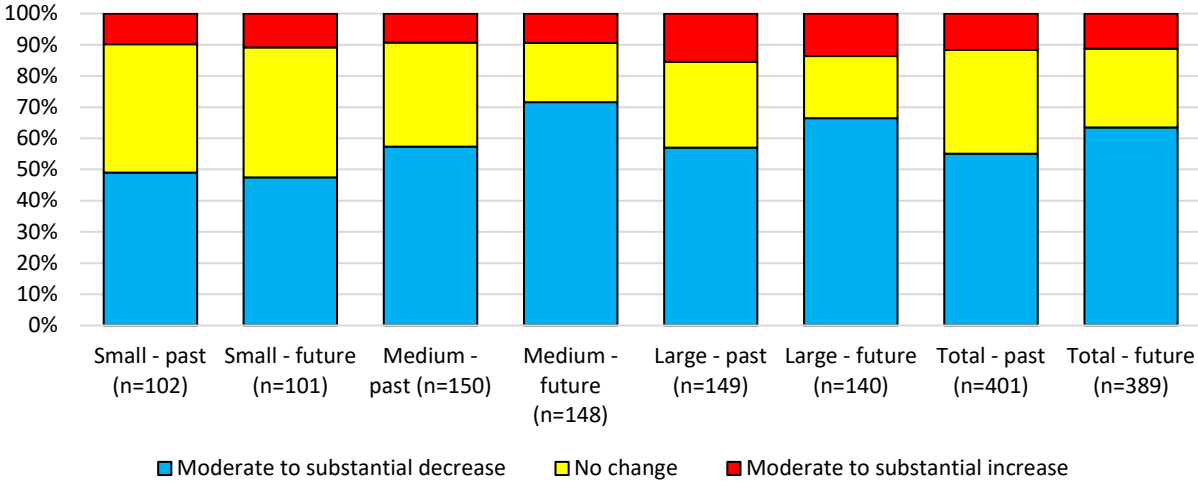
Actual and expected effects of COVID-19

Income

Economic sectors externally communicate the extent to which they are hit by COVID-19 principally in terms of loss of income. Considering this yardstick, 55% of the CSOs, i.e., 221 out of 401, state to have experienced an income loss over the period January-April 2020 (see Figure 1). With one-third seeing no change in income, that leaves nearly 12% for which income has moderately to substantially increased. The risk of income loss is lowest for small CSOs, however still nearly half of them already experienced a loss of income over January-April 2020 and 47.5% expect a (further) decrease between May and September 2020. A large part of the medium and big CSOs (57%) experienced a loss and an even larger part (72% and 66% respectively) expects the same for the future.

The organisations in the sample that provided details on the magnitude of income changes together netted a loss of €32.2 million during the first four months of 2020 due to COVID-19 (n=375) and another €38.7 million net loss is expected to be in the pipeline for the next four months (n=361). In order to appreciate the impact of these income changes, it is informative to express an organisation's loss (or gain) as a percentage of its overall annual income for 2018 (latest year available). For the entire group of CSOs, this reveals an average loss of 7.2% and (an estimated) 9.3% for the first and second period, respectively (also see Figure 2).

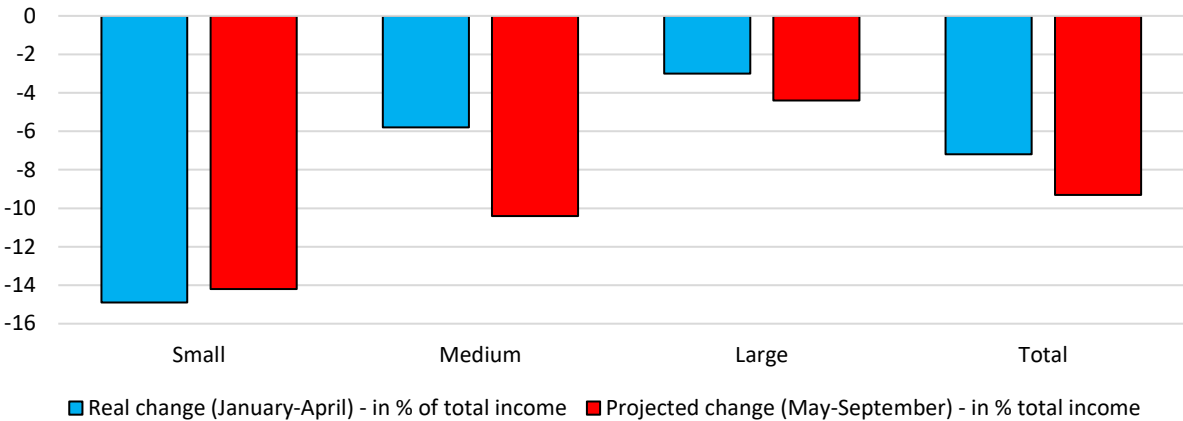
Figure 1. Distribution (in %) of respondents on direction and magnitude of actual and projected income effects over January-April 2020 (past) and May-September 2020 (future), in %, total and per income group



Source: own calculations

Broken down by income size, Figure 2 shows impacts to diverge markedly. The larger the organisation, the smaller the income loss relative to total income. Large organisations reported a net loss of a modest 3% from January to April, while this is 15% for the category of small CSOs. A similar scenario is anticipated for the second period, featuring percentage losses of the same magnitudes for small and large organisations. The medium-sized group stands out for its performance gap between the first and second period. While the average net loss in this group equalled 5.8% from January to April, the outlook is markedly gloomier for May-August: -10.4%.

Figure 2. Average net financial impact over January-April 2020 and May-September 2020, in % of total income (2018), total and per income group

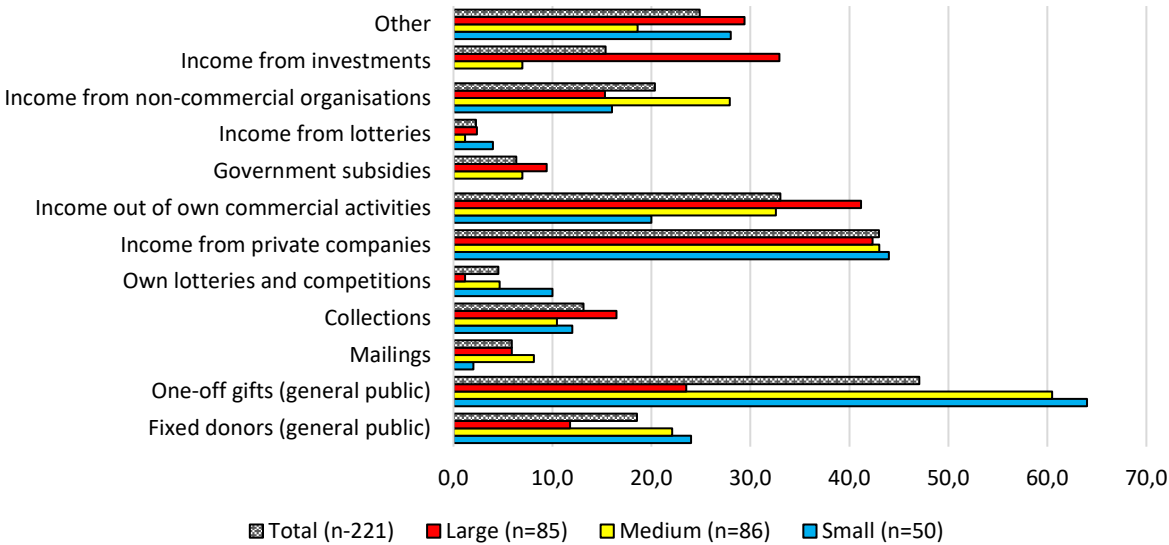


Source: own calculations

Overall, it are mainly income from one-off gifts of the general public (e.g. own fundraising events), from private companies and from own commercial activities (e.g. running a charity gift shop) that negatively affect CSOs’ income (see Figure 3). Large CSOs are especially hit by

a backlash in terms of income from private companies, own commercial activities and investments. For medium sized and small CSOs the downfall of one-off gifts from the general public has the largest negative impact on their income, with private companies coming in second. For one of the small CSOs, for instance, the fact that sponsor events at schools and workshops were no longer possible was a the heart of their declining income while it was the sale of products at fancy fairs for another. Interestingly, the relatively small group of 47 CSOs that experienced a moderate to substantial hike in income also attributes this principally to one-off gifts (e.g. via crowdfunding or legacies).

Figure 3. Which income source has mainly contributed to the decrease in income over January-April 2020?, in %, total and per income group



Source: own calculations

Staff and volunteers

Overall, nearly 30% of the CSOs do not have paid employees and thus also did not experience any changes in staff because of the COVID-19 pandemic. This holds for 78% of the small, 25% of the medium sized and 0.7% of the large CSOs. Of those with paid staff, the vast majority (>75%) in all three income groups indicates no change for the period January-April nor expects any from May onwards. That leaves a relatively small part of medium and (particularly) large CSOs that already laid off staff and/or hired new staff or that expects to do so over the coming months.

Contrary to expectations, the CSOs show a net *increase* in staff over period 1. Whereas a total number of 150 new staff were hired, a total of 136 staff were discharged (also see Figure 4). An important qualifier should be added here: out of the 150 newly appointed staff members only 12% were permanent staff, whereas the corresponding share was 26% out of the 136 employees that were laid off. Hence, permanent staff laid off have oftentimes been replaced by temporary staff or freelancers. Not surprisingly, differences between income groups are telling. Small CSOs, as a group, report the loss of just one temporary staff member. In contrast, large organisations show a net increase with 15 staff members. For

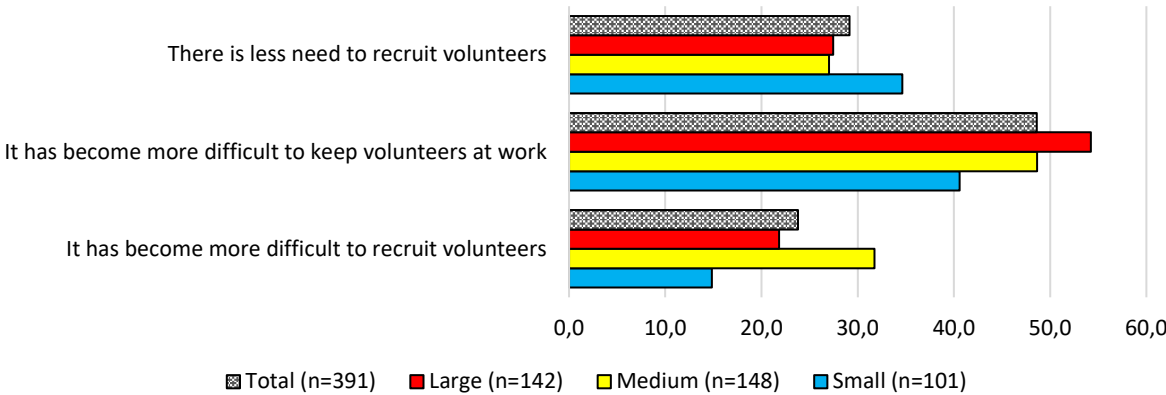
medium-sized CSOs staff acquisitions and divestments balance out. More generally, it should be noted, however, that staff changes are fairly marginal when considering the total body of staff hosted by the organisations consulted.

Figure 4. Changes in staff (composition) following COVID-19, in absolute numbers of staff members hired or laid off over January-April 2020, total and per income group



Source: own calculations

Figure 5. To what extent do the following statements hold for your organisation in light of the COVID-19 pandemic?, only (strongly) agree, in % (n=394)



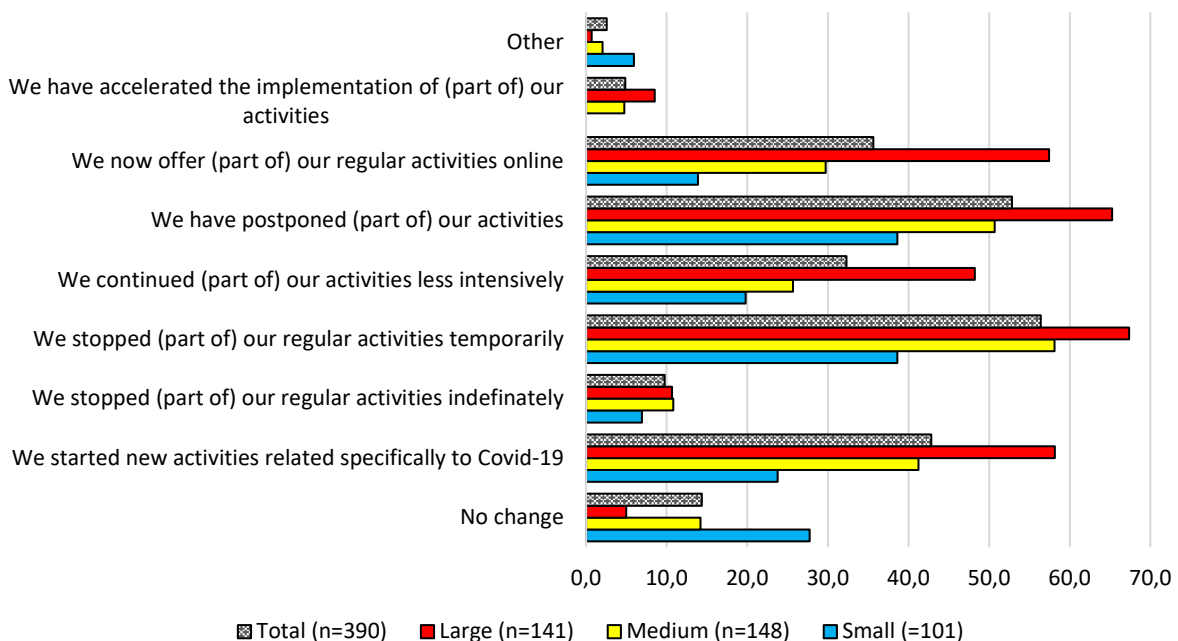
Source: own calculations

Most likely, all 305 organisations (partly) relying on volunteers are still doing so. Figure 5 shows, however, that five out of ten CSOs already experience difficulties in keeping their volunteers at work (for instance, as one of the medium CSOs stated, because they could not get a hold on protective gear for their volunteers). For small CSOs, with many of them exclusively relying on the efforts of volunteers, keeping volunteers at work is slightly less problematic than for large ones. Compared to medium and large CSOs, small organisations are more likely to agree that there is less need to recruit volunteers and fewer of them concur that it has become more difficult to recruit volunteers. The observation that small CSOs are generally less worried about volunteers is also indicated in Figure 7 below, which shows that 34% of them worry about a (possible) shortage of volunteers against around 40% of their medium and large colleagues.

Programme activities

Whereas it is relatively rare for CSOs to have stopped (part of) their regular programme indefinitely, a large part of them did stop (part of) of it temporarily (56%) and/or has postponed (part of) it (53%) (see Figure 6). This holds substantially more often for bigger organisations. Larger CSOs also are more pro-active and/or capable of offering (part of) their programme online (54% of the large ones did so against 14% in the small group) and they were also more likely to have started new activities specifically related to COVID-19 (58% against 24%). In contrast, small CSOs more often continued their regular programmes as planned. Most likely, this is related to fewer of them experiencing problems from restrictions imposed by Dutch and EU governments and from health risks for staff. That these restrictions not only come from European governments but also (or mainly) from governments elsewhere is pertinent for many development organisations. One of them simply states that ‘decisions by the Kenyan government prevent continuing our work’ while another expresses uncertainty because of the ‘total lock-down in India’. Differences between income groups almost disappear when zooming in on the future; 37% (small) to 41% (medium) consider it highly unlikely that they will manage to implement their regular programme between May and September 2020.

Figure 6. Effects on activities because of COVID-19, in % (n=390)



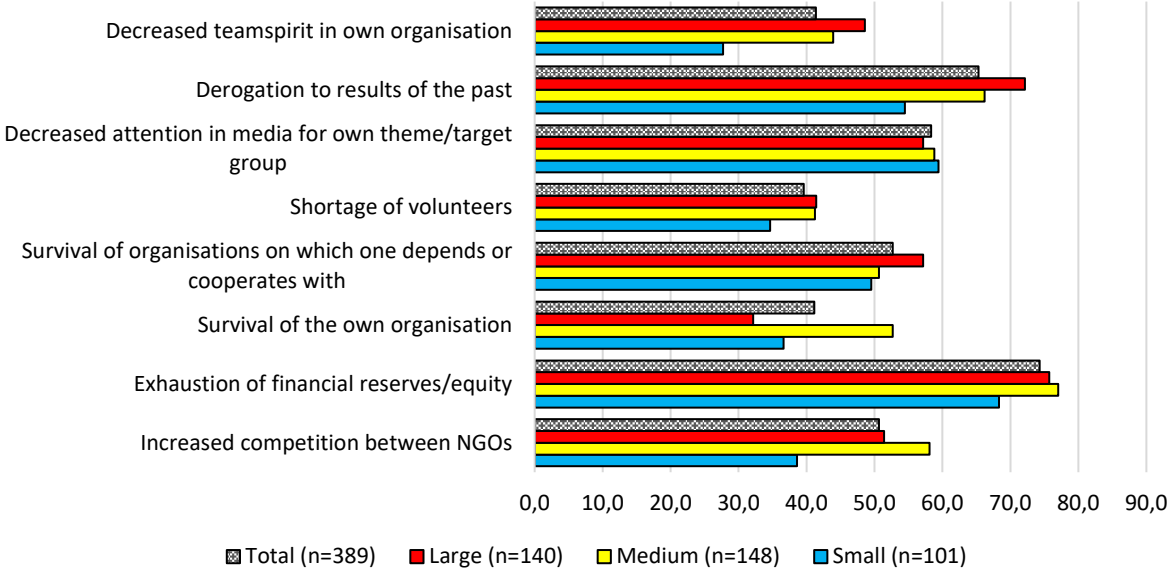
Source: own calculations

Additional worries ... and opportunities

In addition to the large number of CSOs expecting a (further) decrease in their income over the coming months, there are quite some other issues that worry these organisations. Part of these additional worries are directly related to their financial situation. As Figure 7 shows, three out of four organisations fear exhaustion of their financial reserves and four out of ten even worry about their own survival. A qualifier here is that the majority of respondents who

indicate concern about the organisation’s survival report to be ‘somewhat’ worried rather than ‘(very) worried’. This also holds for medium-sized CSOs, but stress levels seem to run higher in this particular group, as more than half signal to be worried about organisational survival. No outliers are recorded regarding the concern that the COVID-19 pandemic will lead to decreased attention for their own theme or target group; across the size groups there is a majority consensus of around 58% that feels this is a real issue. Other worries, such as increased competition between CSOs, a shortage of volunteers, and a decreased team spirit in the own organisation, are important overall, but the small organisations consistently show lower levels of concern. For example, where close to half of the large organisations are worried about a negative impact on team spirit, this only holds for roughly a quarter of the small ones.

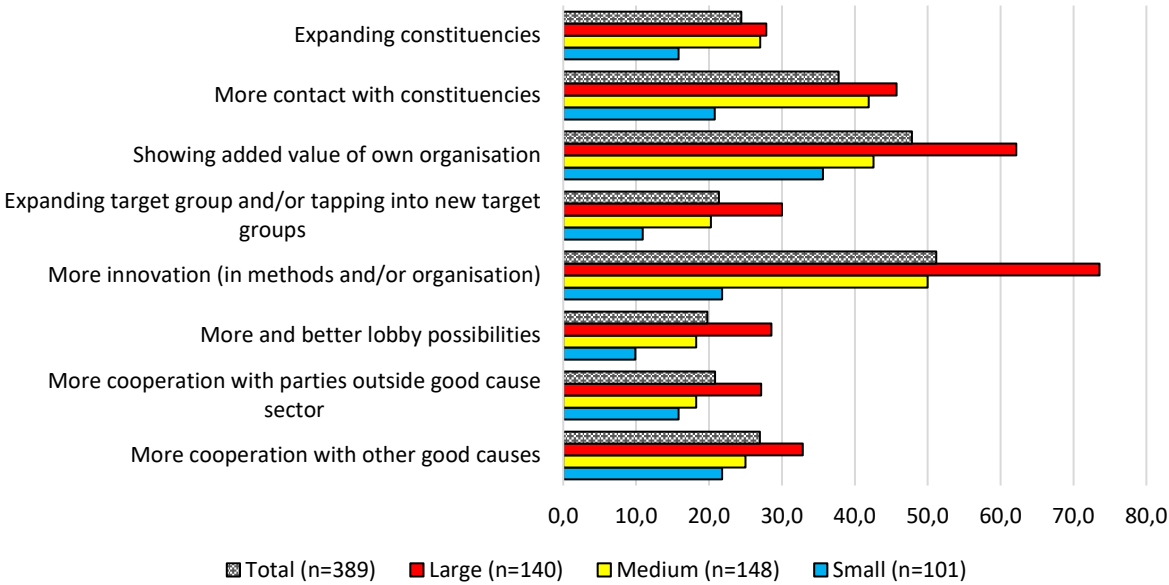
Figure 7. Worries for the future (slightly to very), in % (n=389)



Source: own calculations

While larger CSOs thus tend to have more and wider concerns than small ones, the former also see more opportunities arising from COVID-19. Figure 8 shows, in line with earlier findings about the online continuation of programmes, that nearly 74% of the large organisations see a chance for innovation. This is shared by only 22% of the small CSOs. But also with regard to more contacts with constituencies, showing the added value of the own organisation, expanding their target group, more and better lobby possibilities, and more cooperation with other organisations and actors, bigger CSOs spot more chances than their smaller counterparts.

Figure 8. Chances seen in COVID-19 (big to very big), in % (n=389)



Source: own calculations

Risks and immunity



The above overview of changes due to COVID-19 already shows that the extent to which CSOs are hit financially, in terms of staff and volunteers and with regard to activities differs per income group. But does that also mean that the size of the organisation in terms of budget is the (main) determining factor affecting the vulnerability or immunity of organisations in dealing with the COVID-19 crisis? In the following analysis, we test to what extent age of the organisation (year of establishment), thematic orientation, geographic focus, staff composition (paid staff or not) and sources of income (dependency rates calculated from 2018 data) affect the actual and projected impact of COVID-19 on CSOs.

In order to shed light on these questions, we ran a multivariate regression analysis on four outcomes: (1) the trend in income due to COVID-19 from January to May (realisation); (2) and from May to September (expectation); (3) the more precise income change expressed as percentage of annual income in period 1; (4) and (as anticipated) in period 2. Outcomes (1) and (2) thus correspond to the scenario in Figure 1 and (3) and (4) to that in Figure 2. We highlight only those factors that turn out to significantly ($p < 0.1$) affect at least one of the four outcomes. A distinction is made between factors that seem to render organisations more susceptible to (sizeable) income loss, i.e., *risk factors*, and those that appear to shield or cushion against such a negative impact, being *immunity factors*. Table 1 summarises these respective characteristics for each of the four outcomes.

Before highlighting selected results from Table 1, it should be noticed that two background characteristics of CSOs – interestingly enough – offer little help in explaining the impact CSOs experience or expect. First, the age of organisations does not influence the experienced or expected impact of COVID-19, at least when controlling for size of the organisation (note

that older organisations tend to be larger, see Annex 1). Second, staff composition crops up only once; an organisation which employs paid staff is significantly more likely to have incurred an income loss over the first months of 2020 than a similarly-sized organisation relying exclusively on unpaid volunteers. For the next period, however, this distinction no longer applies. Size of the organisation itself presents a paradox in the analysis, in the sense that being small proves a double-edged sword. Confirming our earlier (bivariate) observation, belonging to the category of small organisations features as an immunity factor regarding the probability of facing an income loss per se, but once it occurs, small organisations tend to take a relatively strong hit. The latter makes intuitive sense; the cancellation of, say, a donation from a single corporate donor that is struggling to weather the economic storm likely ‘bites’ more in CSOs that rely on fewer such donors than in organisations that enjoy a more diversified donor base.

Table 1. Risk and immunity factors for pandemic-related income loss among Dutch CSOs

		
1a) Probability of having experienced a positive/negative income change (period 1)*	<ul style="list-style-type: none"> ▪ Working in Arts & Culture theme ▪ Relying on corporate funding ▪ Relying on own commercial activities ▪ Employing paid staff 	<ul style="list-style-type: none"> ▪ Operating in the Global South
1b) Probability of anticipating a positive/negative income change (period 2)*	<ul style="list-style-type: none"> ▪ Reliance on own commercial activities 	<ul style="list-style-type: none"> ▪ Operating in the Global South ▪ Being small (budget-wise) ▪ Relying on lottery funds ▪ Relying on government funds
2a) Actual income change experienced as % of annual income (period 1)	<ul style="list-style-type: none"> ▪ Working in Arts & Culture, Health, or Education theme ▪ Being small (budget-wise) ▪ Relying on corporate funding 	<ul style="list-style-type: none"> ▪ Operating in the Global South ▪ Relying on lottery funds
2b) Anticipated income change experienced as % of annual income (period 2)	<ul style="list-style-type: none"> ▪ Working in Health or Education theme ▪ Reliance on own commercial activities 	<ul style="list-style-type: none"> ▪ Relying on lottery funds ▪ Relying on government funds

* Scaling: 2=strong increase; 1=modest increase; 0=no change; -1=modest decrease; -2=strong decrease

Notwithstanding the heterogeneous impact of the pandemic-induced economic crisis on the corporate sector, strong reliance on corporate funding as a whole presents a significant risk for CSOs on two out of the four outcomes in Table 1. It may therefore not surprise that organisations that largely live off their own commercial activities are also in for a rough ride. This is identified as a risk factor in three of the outcomes. Lock-down restrictions, in terms of outright prohibitions on economic activity or mobility limitations, are undoubtedly to blame for this observation. This also holds a connection to the thematic specialisation of CSOs. Social distancing is clearly a major impediment in the Arts & Culture sector, so that its appearance (twice) as a risky field of operation in times of a pandemic is in line with expectations. Education and health also stand out as sectors liable to income loss (both appear twice). While the closure of schools might offer a possible explanation for the first,

we have no ready explanation for those CSOs working on health. Tentatively, COVID-19 causes attention (and thereby funds) to divert away from other diseases. Returning to the impact of income sources, two of these emerge as offering significant immunity. Dependence on funds from national lotteries as well as on government funding makes CSOs more resilient to negative income fluctuations, as witnessed by their multiple appearances in Table 1. This financial stability seems inherent to the nature of these sources, which work on the basis of longer-term funding commitments.

Finally, a robust immunity factor is a CSO's area of operation. Organisations operating exclusively in the Netherlands report an average loss that is triple the loss experienced by those operating in the Global South (-10.5% versus -3.5%) during the first period. This tendency is replicated in the second period, although the gap narrows somewhat (-11.3% versus -7.1%). In terms of impact, therefore, small organisations whose operations are restricted to the Netherlands, are at a double disadvantage when negatively affected by COVID-19. On average, these organisations saw almost half their annual income evaporate in the span of only four months. This is not to say, however, that development organisations are out of the woods; we cannot rule out that the impact may simply be delayed as the virus ravages on across the world's poorer regions. The fact that the only outcome in Table 1 in which involvement with the Global South does not come out as a protective factor relates to the future, may be an ominous sign.

Epilogue

At the time of publication of this study, the COVID-19 crisis is in its fourth month in the Netherlands. Our study shows that, although many CSOs already experience a negative impact of the crisis in terms of their programmes and budget, many of them are still standing strong. However, a large number of them is also fearing the future impact of the crisis. The current negative impact is mainly the result of direct effects of the crisis on the Dutch society and economy: government restrictions limit organisations in continuing their regular programmes and companies hit by economic consequences of the crisis end or reduce their financial support to CSOs. The coming months will show if and how more indirect effects of the crisis will impact Dutch CSOs. For example, if companies will, as already announced by for example the national air carrier (KLM) and the national railways (NS), start retrenching employees, how then will this affect donations of private donors?

Whereas currently development organisations turn out to be more resilient, the coming months will show if they continue to stay more immune towards the impact of the crisis. On the longer run, these organisations might be hit more severely compared to their colleagues working in the Netherlands. Development organisations are namely not only affected by the impact of COVID-19 (regulations) in the global north, but also, even primarily when it comes to their programmes, by the impact of the crisis in the global south. The near future will show how the COVID-19 pandemic will progress in countries in the global south, both in terms of the spread of the virus as in the (continued) impact of the lock down. Compared to CSOs operating only in the Netherlands, development organisations might experience a

'double burden' because of their embeddedness both in the global north and in the global south. On the positive side, it also diversifies their risks.

A first follow-up survey to be conducted in September 2020 will shed light on these more longer term impacts of the crisis on Dutch CSOs and will allow to answer if they continue to stand strong.

Annex 1. Characteristics of the three income groups

	Small	Medium	Large	Total
N=	102	150	149	401
Income (n=401)	< €100.000	€100.000 – €2 million	€2 million	-
Year of establishment (n=401)				
<1950	1,0%	2,0%	19,5%	8,0%
1951-1960	0,0%	2,7%	6,7%	3,5%
1961-1970	1,0%	3,3%	10,7%	5,5%
1971-1980	2,9%	14,0%	18,1%	12,8%
1981-1990	5,9%	14,0%	15,4%	12,5%
1991-2000	24,5%	25,3%	16,8%	22,1%
2001-2010	34,3%	22,7%	11,4%	21,6%
>2010	30,4%	16,0%	1,3%	14,0%
Income sources (n=401)				
General public	55,4%	39,7%	28,7%	29,0%
Private companies	6,0%	9,0%	3,4%	3,5%
Other non-profits	25,2%	23,9%	13,1%	13,4%
Lotteries	0,1%	6,0%	9,6%	9,5%
Governments	4,6%	13,1%	37,6%	36,9%
Own commercial activities	6,4%	6,7%	6,9%	6,9%
Other sources	2,3%	1,6%	0,8%	0,8%
Age (n=401)				
0-10 years	33,3%	20,7%	2,7%	17,2%
11-20 years	35,3%	20,7%	10,7%	20,7%
20-40 years	26,5%	38,0%	34,9%	33,9%
>40 years	4,9%	20,7%	51,7%	28,2%
Theme (n=401)				
Poverty reduction	29,4%	24,7%	18,1%	23,4%
General welfare	23,5%	25,3%	20,8%	23,2%
Health	25,5%	16,0%	20,1%	20,0%
Nature & environment	2,0%	8,7%	15,4%	9,5%
Animals	3,9%	8,0%	6,0%	6,2%
Education & science	8,8%	4,7%	2,7%	5,0%
Religion	1,0%	7,3%	5,4%	5,0%
Human rights	4,9%	4,0%	5,4%	4,7%
Arts & culture	1,0%	1,3%	6,0%	3,0%
Development organisations (n=401)	57,8%	43,3%	45,0%	47,6%
No paid staff (n=401)	80,4%	26,0%	0,7%	30,4%
No more than 10 volunteers (n=401)	65,6%	42,7%	34,2%	45,4%