WORLD GIVING REPORT

BULGARIA — CHARITY INSIGHTS

2025





OVERVIEW

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Welcome.

BCause is proud to present part two of the World Giving Report 2025: Charity Insights. Since 2009, the World Giving Index presented an annual picture of generosity around the world and with the World Giving Report we go even further.

The <u>World Giving Report</u> 2025 (WGR) is the result of a global collaboration between the Charities Aid Foundation(CAF) in the UK, the BCause Foundation in Bulgaria, and dozens of other leading organisations around the world working for the public good. In July 2025 we presented the first part of the report, 'Donor Insights', based on survey data collected from 55,000 people in 101 countries.

This Charity Insights report focuses on charities' perceptions of their health and the challenges facing the sector. Through the BCause Foundation, Bulgaria is one of 27 countries worldwide to have conducted in-depth research on charitable attitudes and practices.

The survey, the results of which are presented here, explores how organisations — known in Bulgaria as civil society organisations, non-governmental organisations (NGOs), or non-profit entities — view their current situation and challenges, and how they interacted with key audiences and the Government throughout 2024.

The research reveals that Bulgaria's non-governmental sector maintains high motivation and a strong sense of mission. It takes pride in the public benefit it creates, and the professional standards it upholds. NGOs are clearly established as part of everyday life for thousands of citizens in need, connecting people who share common values and goals. These organisations remain determined to continue their work despite, and beyond, their limited resources.

The survey highlights the need for organisations to strengthen their strategic planning, adopt longer-term agendas that are proactive and responsive to society's needs, and engage more deeply both within the sector and across sectors to increase their impact.

We believe this report effectively captures the reflections and attitudes of the sector, while outlining key areas for improvement — many of which are already in progress.



Elitsa Barakova

Executive Director,

BCause Foundation

"The report lifts us above daily challenges, inspiring reflection on our context, relationships, culture, and the deeper forces shaping our growth — a true mirror of the sector's active core community!"

About us.

BCause Foundation

BCause Foundation is a leading Bulgarian organisation with nearly 30 years of experience in developing philanthropy and social investment.

We help people and companies support causes they care about through secure and easy ways to give — whether it's money, time, or skills. Our platforms for workplace giving, online donations, DMS campaigns, and volunteering connect donors with trusted and effective organisations.

Each year, we distribute around 4.5 million Bulgarian leva to support Bulgarian charities, civic organisations, and public institutions — including schools and libraries. We also provide high-value support to social entrepreneurs and social impact investors through our Rinker Centre's programmes.

BCause plays a key role in shaping Bulgaria's giving culture. We lead national campaigns such as Giving Tuesday, promote research, and work with media, celebrities, donors, and non-profits to raise awareness of the power of giving.

Through advocacy, consulting, and strategic communications, we influence policies that support a stronger, more generous Bulgaria.

CAF

The Charities Aid Foundation (CAF) exists to accelerate progress in society towards a fair and sustainable future for all. Over the last 100 years, we have led the way in developing innovative approaches to giving. Annually, we distribute over £1 billion to social purpose organisations around the globe.

As a leading charity operating in the UK, US and Canada, alongside an international network of partners, CAF works at the centre of the giving world. We collaborate with corporate and individual donors to enable them to give more effectively, strategically and impactfully. This includes connecting them to charities globally and providing access to our in-depth sector knowledge, governance expertise and innovative giving solutions.

We help social purpose organisations to strengthen their resilience and do more of their life changing work, through strategic advisory services from our Impact Accelerator, tools to support charities' fundraising activities, and charity financial services from CAF Bank Limited and CAF Financial Solutions Limited. Using our research, policy and campaigns work, we understand and influence the wider environment for charities and donors.

Together, we give more.

The World Giving Report captures the public's attitudes and behaviours around giving in 101 countries across the world and — working with local partners — the state of the charity landscape in 27 of these countries.

- This report is one of 16 country-specific Charity Insights reports and is produced by CAF in partnership with leading social purpose organisations around the world.
- You can access all our global and country-specific insights from both donors and charities at: www.worldgivingreport.org

Our methodology.

The results described in this report were collected as part of the Charity Landscape aspect of the World Giving Report between March and June 2025.

All fieldwork was conducted by CAF's co-author of this report. Partners reached out to charities in their countries with an online survey. Sometimes, the partners encouraged responses by conducting telephone or face-to-face interviews and simultaneously (or subsequently) completing an online response that accorded to the answers given in person. Surveys were available in the predominant local language or English.

The sample collected is an indicative snapshot of charity perspectives in this country as, in most cases, there is no data on the sample universe with which to guide any sampling or post-hoc weighting.

A note on 'Charity'

Across the report, we use the words 'charity' and 'charities' to represent any organisation that works to try and improve issues that are affecting individuals, communities, animals or the natural environment, and society as a whole.

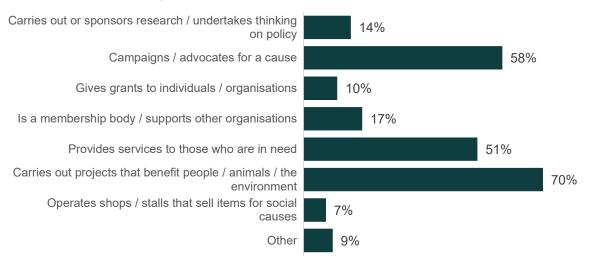
In doing so, we recognise that these terms and their definitions differ around the world, with this type of organisation also described as: non-governmental organisations (NGOs), non-profit organisations (NPOs), community organisations, social purpose organisations, associations and other names.

www.worldgivingreport.org

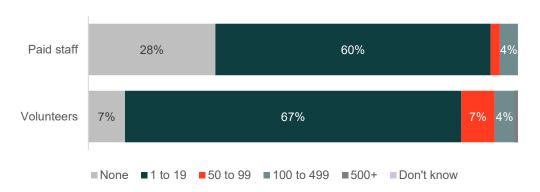


The organisations in the sample: 151 in total.

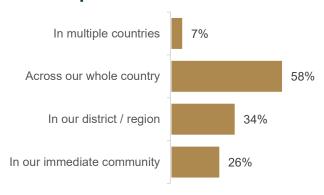
The role of the organisation:



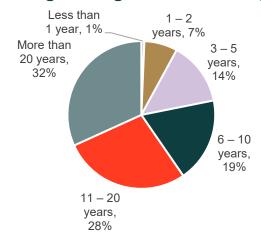
Size of organisation:



The scope of their work:



How long the organisation has operated:



The main cause area supported:

In total, 15 different main cause areas were represented within the sample, with the five most common being:

- 1. Children or young people (28%)
- 2. Animal welfare (12%)
- 3. Disabled people (11%)
- 4. Other (11%)
- 5. Human rights / equality / diversity (10%)





The biggest challenges for the sector.

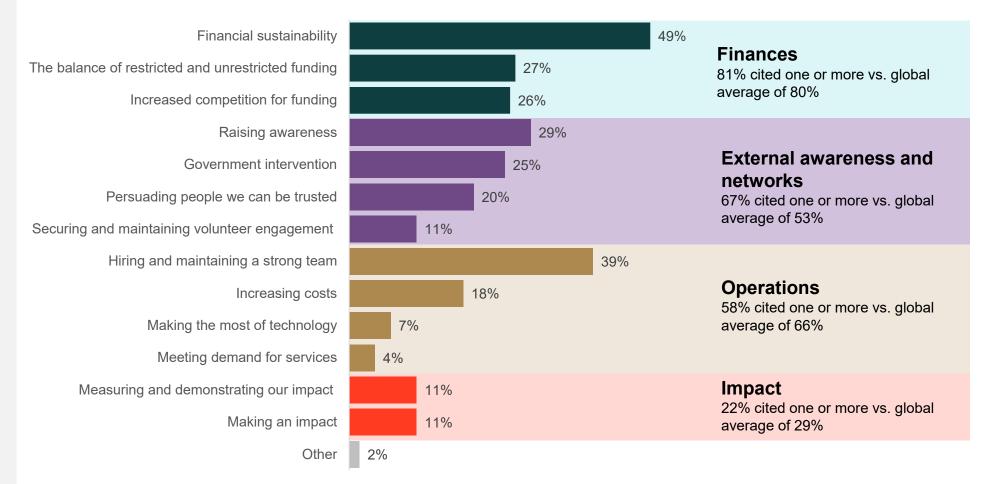
Every second organisation in Bulgaria (49%) faces the challenge of being financially sustainable. 81% of respondents cite some aspect of funding as a problematic issue, including 26% who report increasing competition for funding and 27% who find restrictive funding requirements a challenge.

Two out of three organisations (67%) identify partnerships, networking and public image as challenges, with raising awareness being a problem for 29% of organisations, and state intervention for one in four (25%).

Hiring and managing a strong team is a problem for 39% of organisations, with one in five (18%) struggling with rising operating costs.

Evaluating the impact of one's own work is a challenge for only 22% of organisations in Bulgaria (versus 29% worldwide), with measuring impact a problem for only 11%.

Q. Below is a list of challenges that charities might be facing. Please select the three that are most pressing for your organisation: (All charities answering, n = 119.)

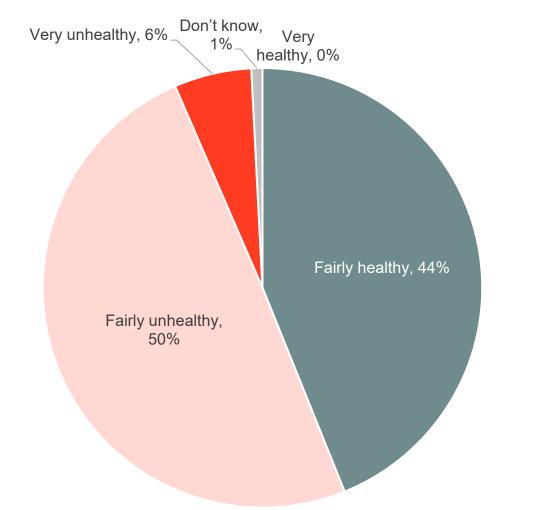


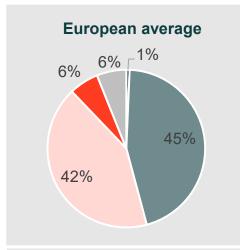
Perceptions on overall sector health.

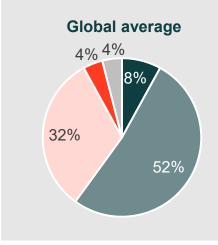
The majority of NGOs think the sector is unhealthy, including 6% who say it is 'very unhealthy'.

While 44% of the participants think the sector is 'fairly healthy', none believe it is 'very healthy'.

While this is broadly in line with the average for other European countries, the global average is significantly higher — 8% say'very healthy' and 52% 'fairly healthy'. Q. Overall, would you say the charity sector in your country is... (All charities answering, n = 123.)







The state of the sector, optimism and income.

The World Giving Report compares the state of the charitable sector in the countries studied, dividing them according to income into three categories*: high-income, upper-middle-income, and lower-income.

Since 2023, Bulgaria has been classified by the World Bank as a high-income country**. In some aspects, according to this study, our country is closer to upper-middle-income countries, for example, our perception of the state of the sector.

We are moderately optimistic about the future, like high-income countries and those with a well-developed civil society infrastructure. In Bulgaria, only 11%, and in Europe 15% of leaders of charitable organisations are very optimistic about the future of their own organisation — compared to 55% in Africa.

*The classification of economic types is based on the World Bank's income grouping. Only one low-income country, Uganda, is included in our study. Responses from charities in Uganda have been added to those from low-to-middle-income countries, in a group that we refer to throughout the report as "lower-income countries."

**Bulgaria was classified as a middle-to-upper-income country from 2006 to 2022, and as a low-to-middle-income country from 1989 to 2005.



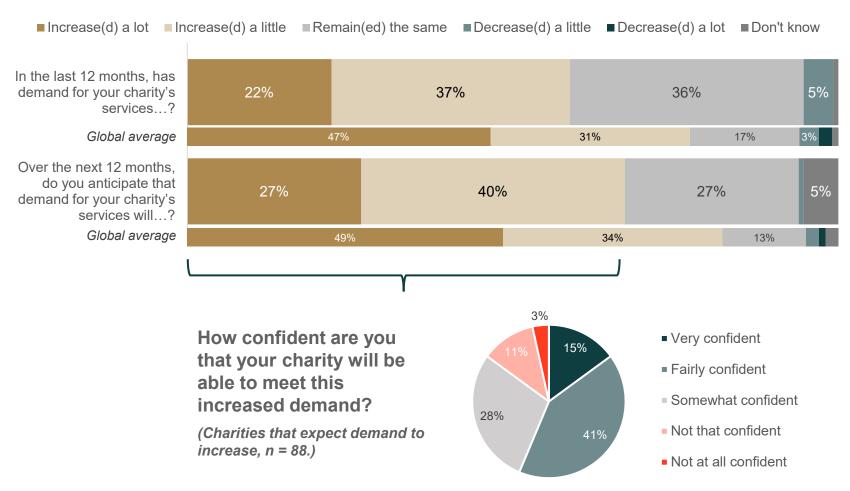
Children learn about the Solar System at "Summer for Joy" children's educational and entertainment academy in tobacco growing regions, organised by BCause Foundation.

Demand for services.

More than half (59%) of organisations in Bulgaria report an increase in demand for their services over the past 12 months, with 22% reporting that it has increased 'a lot', (significantly less than the global average of 47%).

In Bulgaria, many organisations are confident — albeit to varying degrees — that they will be able to meet the increased demand for their services. Only 3% are 'not at all confident' that they will succeed, while 11% are unsure.





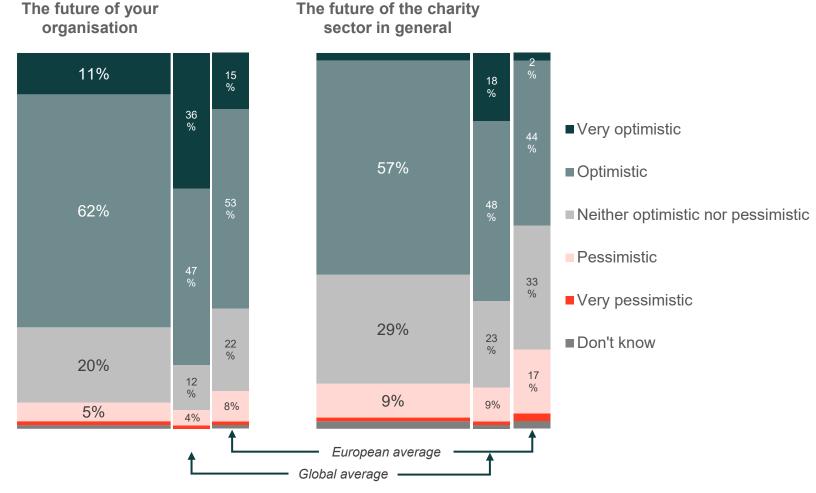
Optimism for the future.

Bulgarian charity leaders are less optimistic about the future compared to the global average.

Overall, charities are more optimistic about the future of their own organisation (73%) than they about the future of the charitable sector (59%).

However, pessimism is low — only 6% are pessimistic for their own organisation, and 10% for the sector. The global indicators are also similar.

Q. How optimistic or pessimistic are you about...? (All charities answering, n = 119.)



CAF's six characteristics of a resilient charity.

Through our extensive research and advisory work with charities, we have identified six characteristics that show an organisation has the potential to be resilient.



Purpose

Understanding what the organisational purpose is, and just as importantly, what it is not.

Evidencing impact

The ability to identify and communicate the needs being met, and the impact that is having.

Well networked

Being well connected and able to get support from working in partnership with others.

Financially & operationally fit ()

Being financially and operationally fit with sufficient income from a diverse range of sources.

People & culture

Having the right staff and prioritising their development and wellbeing with effective leadership.

External awareness

Awareness of the political, economic, local and national context. Horizon scanning for threats and opportunities.

The questionnaire included a number of questions that, when taken together, give each organisation a score for each of the six characteristics. Please see page 16 for the scores for this country.





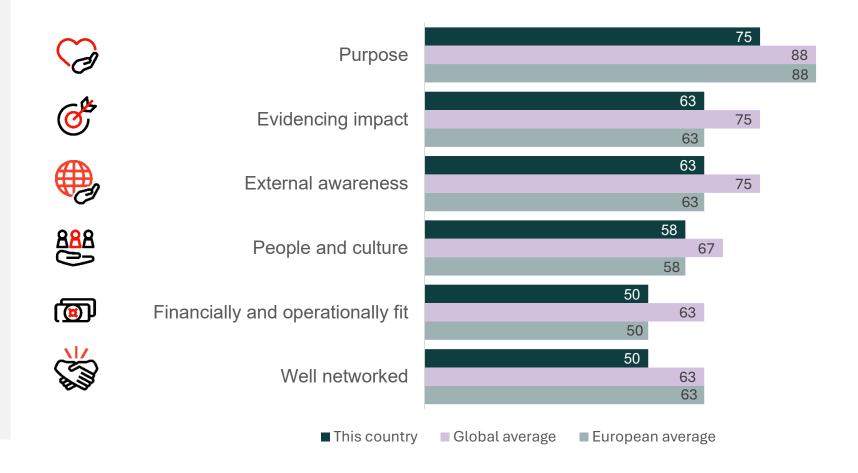
Levels of resilience.

In all six aspects of resilience, organisations in Bulgaria have lower scores than the global average. In Bulgaria, as elsewhere, most charities feel they are clear about their mission, but find it more difficult to create networks and secure the finances they need.

"Evidencing impact" is one of the areas in which charities feel most confident and this raises the prospect that there is a disconnect between the perceptions of NGOs and donors.

In the first part of the World Giving Report: Donor Insights, we recorded a desire among 34% of respondents to receive more information about the results of the work of NGOs, and 47% want to know more about how their money will be spent.

Resilience scores showing the median score for each aspect: (All charities answering, n = 130.)





Diversity of income streams.

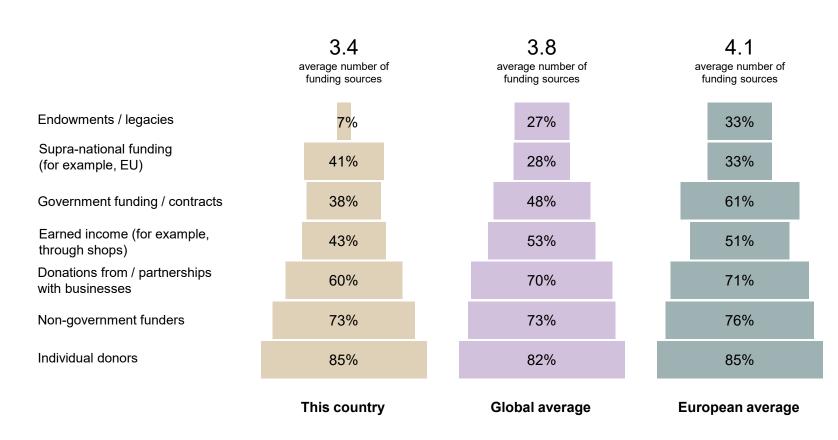
The proportion of charities that receive each type of funding: (All charities answering, n = 144-146.)

Funding streams for charities in Bulgaria are less diverse than elsewhere. The NGOs receive funds from an average of 3.4 sources, below the global average and well below the European average.

In Bulgaria, as elsewhere, the most common sources of funding are from private individuals (85% receive this type of funding), non-government funders (73%), and corporate donations and partnerships (60%).

However, elsewhere in Europe, Government funding contracts are much more common than in Bulgaria (61% European average versus 38% in Bulgaria), as are endowments and legacies (33% European average versus 7% in Bulgaria). On the other hand, Bulgarian charities are more likely to receive funding from inter-governmental organisations like the European Union (41% versus 33% in Europe).

Please note, these numbers show the diversity of funding sources, but not the share of funds that organisations receive from them.



Where funding comes from geographically.

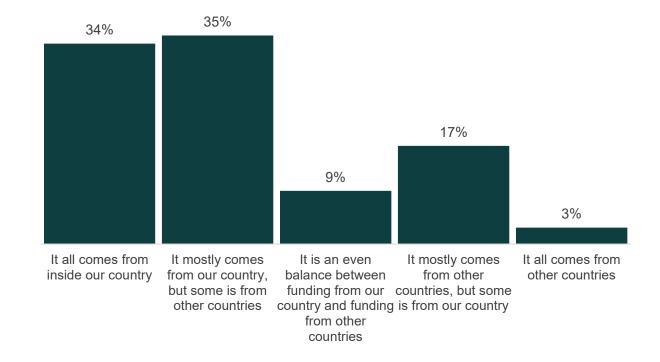
Bulgarian charities are much more likely to be domestically funded than to receive income from other countries.

Around seven in ten (69%) of charities are funded mainly or only from Bulgarian sources, while two in ten (20%) are funded mainly or only from sources in other countries.

The remaining one in ten (9%) say that they have an even balance between funding from Bulgaria and income from elsewhere.

We assume that the European Union (EU) funds that are distributed by Bulgarian ministries are defined by the participants in the survey as domestic, since 41% receive EU or other supranational funding.

Q. Geographically, where does your funding come from? (All charities answering, n = 144.)

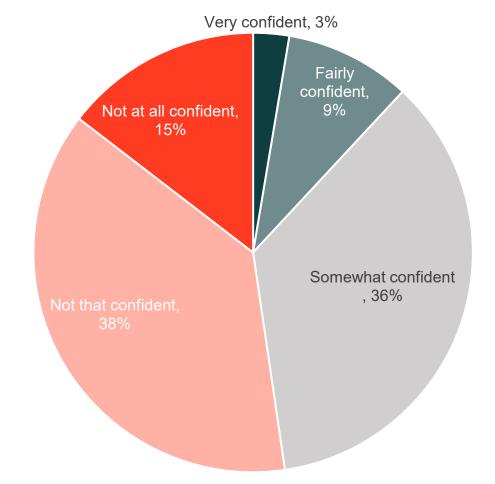


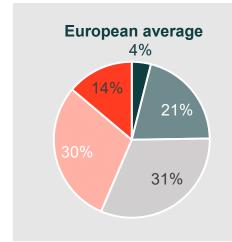
Confidence in the diversity of income streams.

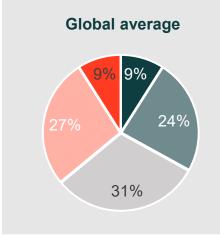
The organisations that participated in the survey have relatively low confidence that their funding sources are sufficiently diverse to provide security.

There are significantly fewer 'very' or 'fairly' confident charities compared to the global average, and significantly more who are unconfident: 38% are not that confident and 15% are not at all confident (compared to 27% and 9% global average, respectively).

This lack of confidence likely plays a role in financial sustainability being a challenge for 49% of organisations. Q. How confident are you that your income streams are diverse enough to cope easily with sudden decreases from any one of them? (All charities answering, n = 151.)



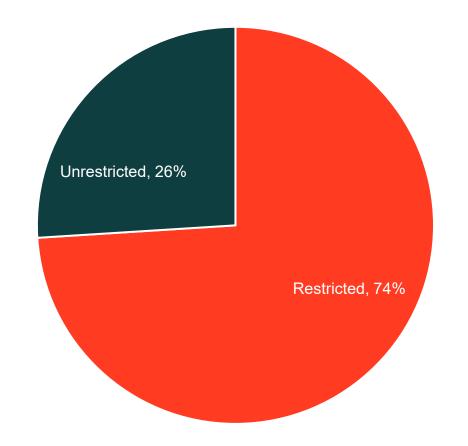


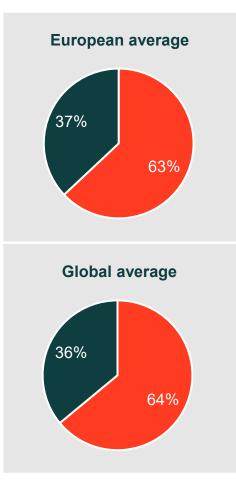


Restricted vs. unrestricted funding.

Bulgarian NGOs reported that three-quarters of the funds they operate with are restricted by conditions set by donors or funders, and only 26% of the funding gives them the freedom to decide how to invest it.

By comparison, this is close to the ratio seen in low-income countries (72% to 28%). In upper-middle-income countries the ratio is 65% to 35%, and in high-income countries it is 60% to 40%. Q. How much of your funding is given as 'restricted' funds (for example, only able to be spent on a specific project / purpose)? (Charities that were able to provide an answer, n = 119.)



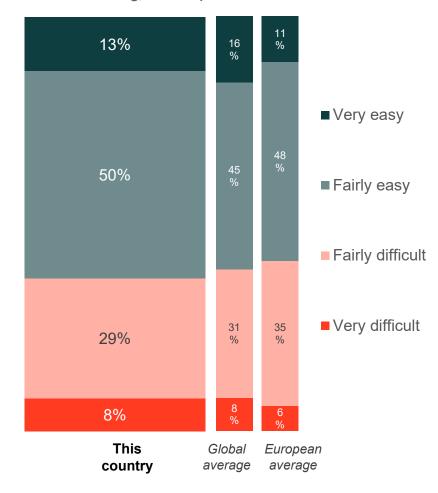


Satisfaction with their funding mix.

While Bulgarian NGOs are broadly satisfied with their mix of restricted and unrestricted funding, more than one in three finds it challenging.

These results are comparable to elsewhere, and highlight the universal need for many charitable organisations to source funding that will support capacity-building.

Q. Does this mix of funding make it easy or difficult for you to achieve your goals? (All charities answering, n = 127.)

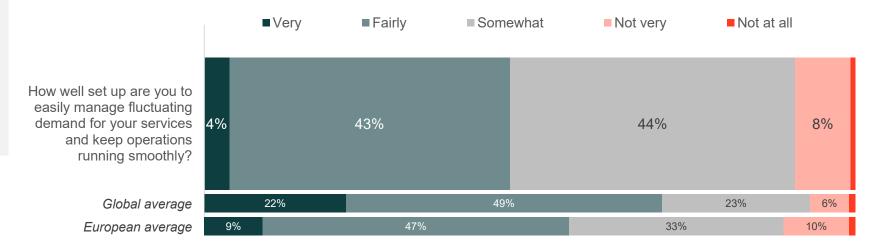


Operational fitness to meet demand.

When it comes to selfassessment of their operational adaptability, Bulgarian charities are less sure than organisations elsewhere.

Only 4% are very well prepared to respond to the growing demand for services, compared to 22% of organisations worldwide.

How they would rate their charity: (All charities answering, n = 130.)



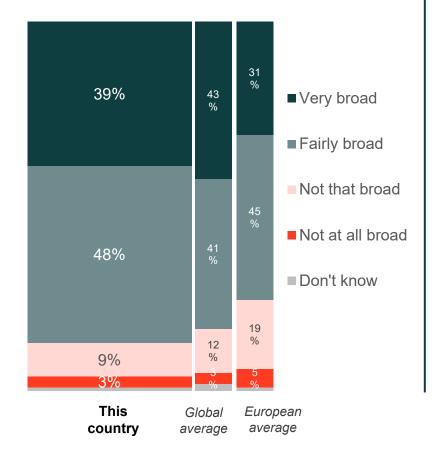


The senior team.

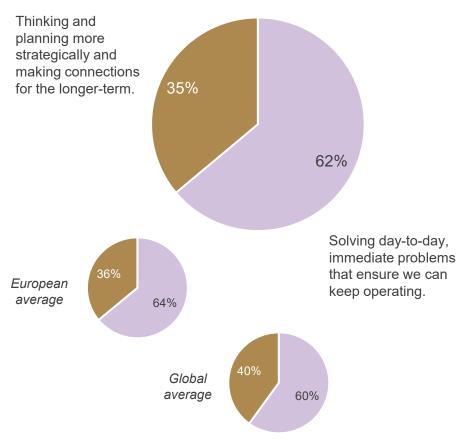
The study shows that leadership teams at Bulgarian NGOs are generally felt to have diverse experiences and competencies, which bodes well for providing the broadest possible support for their goals and operational activities.

It is important to note that in the Bulgarian context, in large organisations, the management functions of the top bodies are often divided between an external management board and an internal management team, while in smaller organisations these functions are usually performed by the same people.

In Bulgaria, senior leaders spend around the same amount of time on strategic activities as their counterparts elsewhere in the world. How broad are the skills and experience of the most senior leadership team in your organisation? In some cases, this might be your board, an external board of trustees or a C-suite team (e.g. CEO, CFO, etc.) (All charities answering, n = 130.)



Roughly speaking, what proportion of time does your senior team spend on each of the following? (All charities answering, n = 126.)



Recruitment and retention.

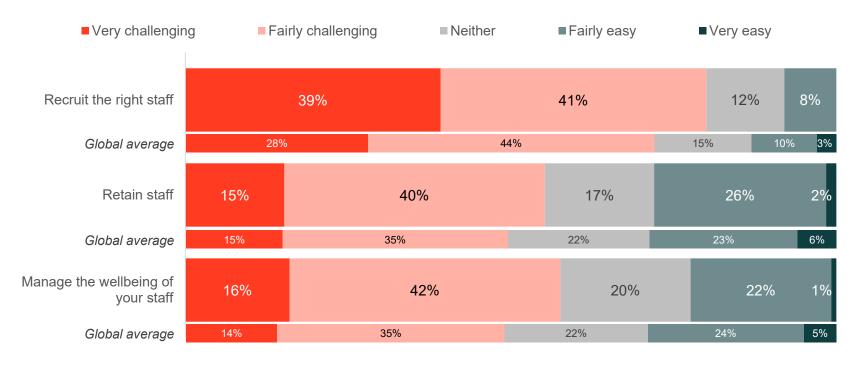
Hiring the right employees — motivated and with the necessary qualifications — is a big challenge for charities.

Out of all organisations in Bulgaria, 80% have a problem with securing a good team — for 39% it is 'very challenging' (with a global average of 28%), and for 41% it is 'fairly challenging'.

Employee retention is relatively less challenging, but still a difficulty for a total of 55% of charities in Bulgaria.

Managing employee wellbeing — which might include training, development, and work-life balance — is easy for less than a quarter (23%) of Bulgarian organisations — slightly below the global average (29%).

How challenging is it to do the following? (All charities answering, n = 125)

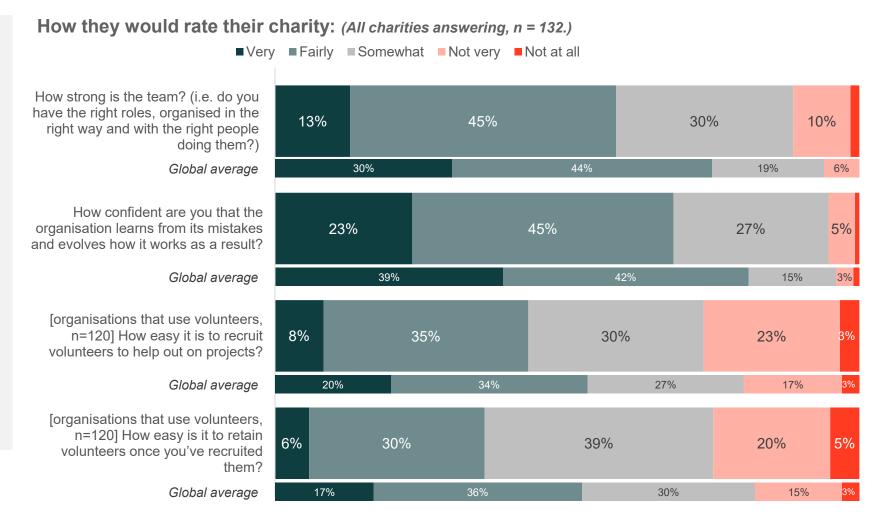


Strength and depth of the team.

Charity leaders' assessment of the quality of their own teams is less positive than elsewhere. Only 13% rate their team as 'very strong' (compared to a global average of 30%).

Volunteer recruitment and retention is a challenge for around a quarter of the organisations who have them. Only 8% of these organisations find it very easily to attract volunteers (compared to a global average of 20%).

The global Donor Insights and Charity Insights reports showed that Europe is the continent in which volunteering has the lowest levels — both in terms of participants, hours of volunteer work, and the share of organisations for which attracting them is easy.



05 EXTERNAL AWARENESS AND NETWORKS

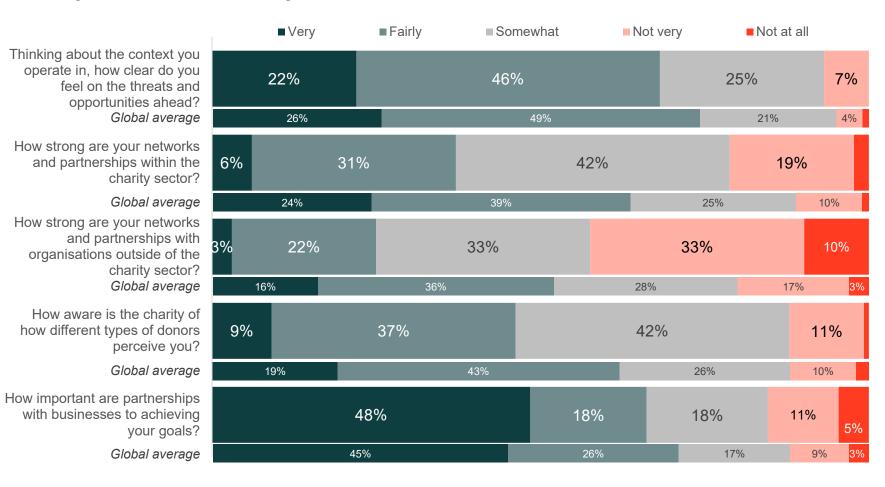


External awareness and partnerships.

Only around a third (37%) of Bulgarian organisations say they have strong networks within the sector, while even fewer (25%) say they have strong networks outside of the sector, despite business partnerships being an important support pillar for most charities. In general, Bulgarian organisations do less well on these measures than their equivalents elsewhere.

On the whole, Bulgarian charities tend to be clear about the threats and opportunities ahead. However, less than half (46%) say they are aware of how their donor base perceive them, highlighting their potential vulnerability.

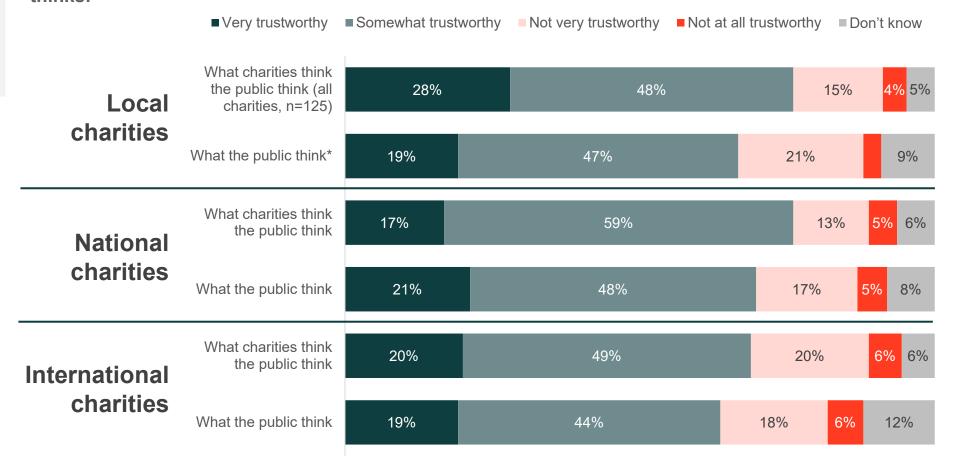
How they would rate their charity: (All charities answering, n = 130-132.)



Trust in charities.

The Bulgarian public has a similar level of trust in charities, whether they are local, national, or international in scope, while between a fifth and a quarter of people think that charities are untrustworthy.

Trustworthiness of charities — what charities think the public thinks, and what the public actually thinks:



^{*}Data from CAF World Giving Report – Donor Insights, 2025.

The Culture of Collaboration.

In recent years, we have observed worrying trends of societal division across almost all issues, self-isolation of individuals, and a lack of culture for constructive collaboration and coalition-building. Support from the state and institutions for the non-governmental sector has shown hesitation, and even regression; the role of the education system in providing initial knowledge and understanding of civic participation mechanisms is largely formal, while the media environment contributes to public division.

These deficits are reflected within the civil sector. Organisations find it difficult to unite and rarely maintain networks running on members' own resources. While rapid responses in emergencies and crises build trust in non-profits, their ongoing work and results remain insufficiently visible.

The main barriers to building networks are limited funding, which increases competition between organisations, and a shortage of human resources, which leads NGOs to prioritise immediate activities over collective initiatives. Coalitions also struggle to formulate causes which connect the protection of fundamental societal principles and values with citizens' everyday concerns.

On a positive note, the "aging" of the sector has brought accumulated skills, relations among leaders, and a clearer understanding of the importance of collaboration in today's national and global context. Building effective networks requires stable teams, clear communication, and a long-term vision. Donors should address these challenges and encourage not just formal partnerships, but genuine movements around shared causes that resonate with most Bulgarians.

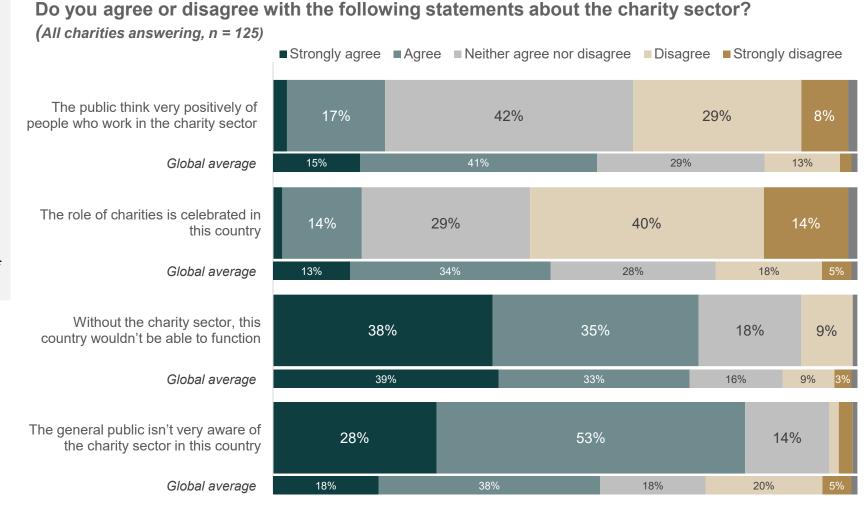


The "Achilles" equestrian centre of the We Can Do It Together Foundation is one of the few places in Bulgaria where hippotherapy (therapy with the help of horses for children with disabilities) is carried out.

Charities' perceived role and reputation.

Charitable organisations are of key importance for the functioning of the state, but the results indicate that society is not well acquainted with their work, does not value them, and does not value the people employed by them.

The results indicate that charities may be feeling underestimated and undervalued, with only 17% of charities agreeing that their role is celebrated in Bulgaria (compared to a global average of 47%).

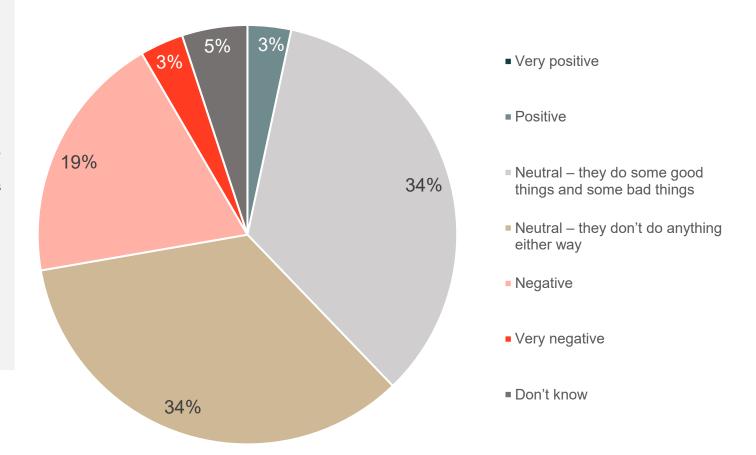


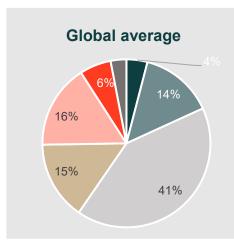
Overall influence of Government on charities.

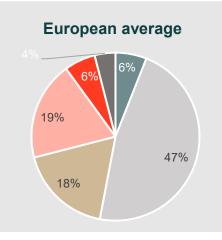
Only 6% of charities in Europe believe that their governments have a positive influence on the sector (compared to 23% in North America and 32% in Asia). Bulgaria is even more critical than elsewhere in Europe — here the influence of the state is assessed as positive by only 3%, and as very positive by no one.

The most widespread opinion is that the influence of the state is overall neutral — for 34% this is because the state is seen to do nothing, and for a further 34%, it is seen to do both good and bad things.

How charities perceive state funding, delegated services, the regulatory environment, and political priorities may all be influencing these results. Overall, do you think the Government is a positive or negative influence on the charity sector? (All charities answering, n = 119.)





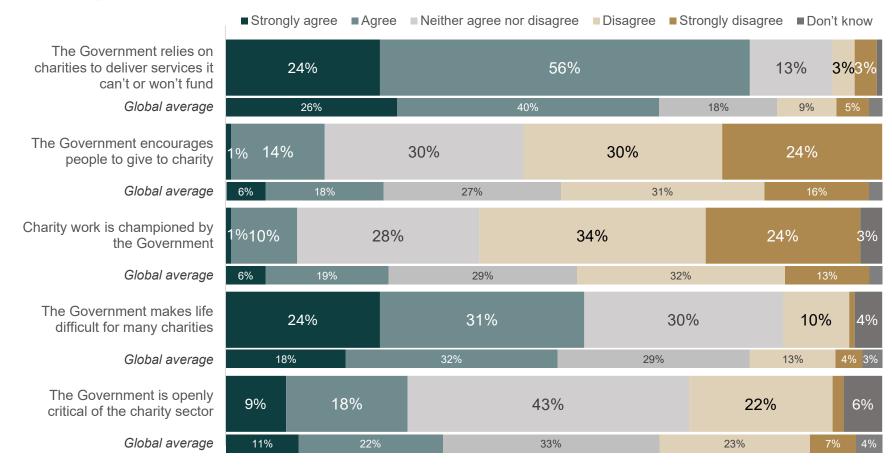


Specific opinions on the role of Government.

Out of the organisations participating in the survey in Bulgaria, 80% believe that the state relies on the NGO sector to provide services for which it does not have the resources – and this is above the world average (66%).

Moreover, 55% believe that the state makes things difficult for them and 27% agree that it openly criticizes them. Only 1% of charities in Bulgaria firmly believe that the state supports the sector, either by encouraging people to give, or by championing the work of the sector.

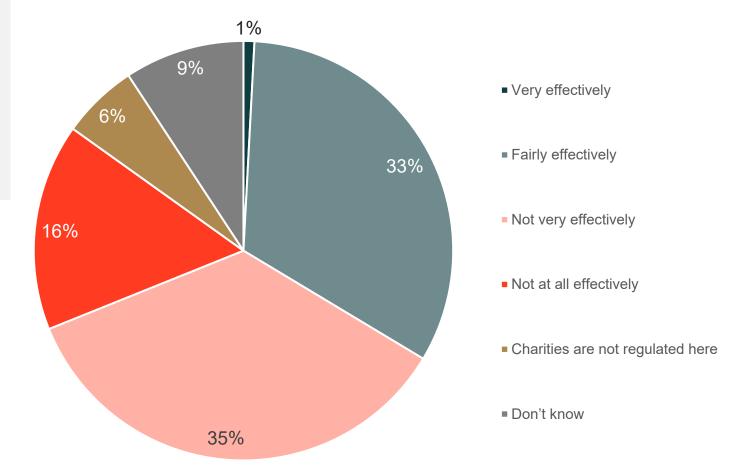
Do you agree or disagree with the following statements about the Government's involvement in the charity sector? (All charities answering, n = 119.)

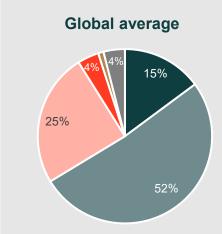


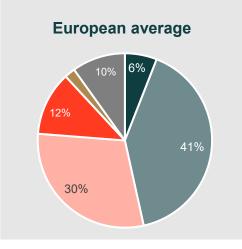
Effectiveness of regulation.

Only 1% of respondents believe that charities are very effectively regulated, and 33% believe that they are 'fairly effectively' regulated. More than half are critical.

We know from our work with charities that compliance with anti-money-laundering legislation, data protection and donor reporting requirements remains a challenge for many smaller organisations. Overall, how effectively do you think charities are regulated in your country? (All charities answering, n = 119.)





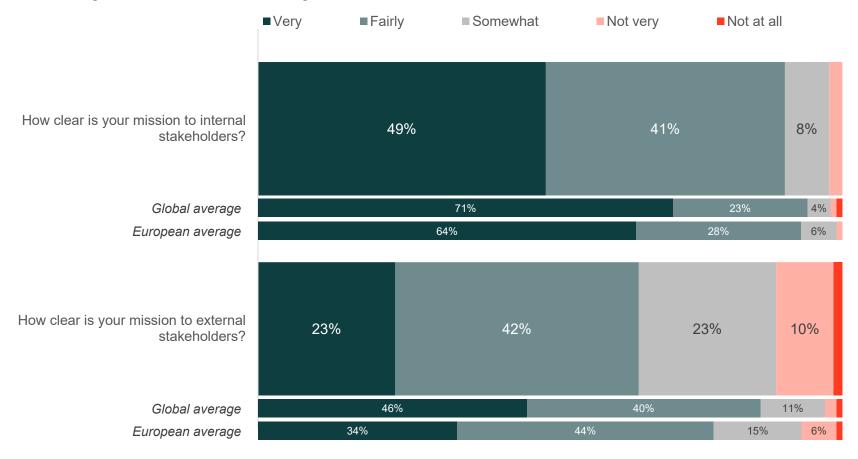




Clarity of purpose.

Although, overall, a large majority of Bulgarian charitable organisations think their mission is clear to internal stakeholders, they are less certain than their equivalents elsewhere (49% if Bulgaria versus 71% global average).

There is even less certainty around external stakeholders, with only 23% of respondents agreeing the mission is very clear to these audiences. How they would rate their charity: (All charities answering, n = 132.)

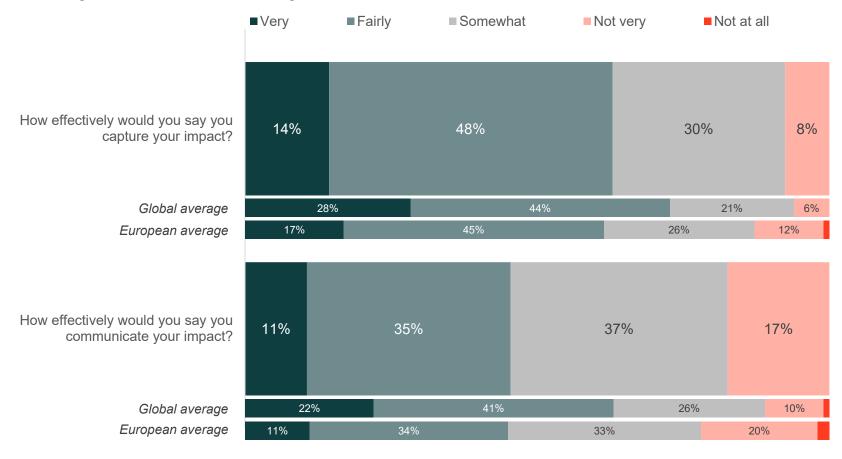


Translating purpose into impact.

In general, organisations are of the opinion that they do a slightly better job of registering the effect of their work, than they do of presenting it to the public or their funders.

Around six in ten (62%) are confident they effectively capture their impact, while only 46% say they communicate that impact well.

How they would rate their charity: (All charities answering, n = 132.)



Civil Society Organisations, the State, and Society.

While many charitable organisations say they effectively communicate their impact, other studies that the public is much less likely to agree. Society demands more information about the actual impact of CSOs' work.

Positive examples include organisations working for the welfare of children and families successfully receiving significant donor support, the examples of cross-sector partnerships between business and NGOs, and respect for NGOs among professionals in the health and education sectors.

However, signs of an unfriendly environment are also evident, such as increased inspections by institutions and municipalities, the creation of "fake replicas" of organisations that neutralise them and divert public support, and political attempts to imply that NGOs serve as conduits for malicious foreign influence through part of their funding. These pressures create a sense of vulnerability and insecurity within the sector.

Negative attitudes towards the NGO sector, however, are felt more strongly internally — among its leaders and activists — than among the general public.

Experts agree that the sector still enjoys a level of trust, but maintaining it requires more visible work, active communication, and demonstrable social impact.



The National Association of Volunteers in the Republic of Bulgaria (NAVB) plays a key role in supporting fire services by organising and involving volunteers in fire prevention and extinguishing.



Civil Society running on grit.

The civil sector in Bulgaria is dedicated but tired. It demonstrates high engagement and a strong sense of mission, yet it struggles to build strong resilience and lacks a supportive environment. Human capital remains a significant challenge, particularly as one-third of organisations operate without a permanent paid team (and experts suggest the actual number is even higher). The difficulty in measuring impact is not unique to Bulgaria, but here it is particularly evident and often underestimated as a problem.

Although most civil society organisations rate their own work highly, they describe the sector as unstable. This discrepancy highlights the need for deeper self-reflection and a more realistic assessment of its overall state. Many organisations continue to act reactively, working "project to project", without a long-term strategy. The lack of sustainable funding leads to exhaustion and constant pressure to seek new resources instead of focusing on strategic development.

Following the withdrawal of American donors from Bulgaria, organisations have

been seeking funding within the European market, where competition is extremely strong. There is a risk that Bulgarian organisations could be pushed out by more experienced EU-based actors and left without significant resources. The key issue remains organisational capacity and the ability to invest strategically — for instance, in social entrepreneurship, fundraising, and diversification of funding sources. Increasingly important will be collaboration around shared causes and advocacy, engagement with European and global networks, and stronger cross-sector partnerships domestically.

Experts consulted for the study remain optimistic about the future of Bulgaria's civil sector. The fact that 85% of organisations engage with individual donors, and more than half operate at the national level, indicates that society recognises their causes and values their work.

Despite the challenges, the sector shows potential for greater connectedness and the strengthening of local networks — essential steps towards a more mature and sustainable civil society.



For 'Our Children Foundation' with over 30 years of history in Bulgaria works to ensure a safe and supportive family environment and a happy childhood for children at an early age..

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