

2023

Report on Environmental NGOs in China



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Survey Methodology

The survey was divided into two parts: the directory improvement of nonprofit environmental organizations and a questionnaire survey. Under the principle of Collaboration, Co-creation and Sharing, a total of 27 pivotal organizations, each playing a leading role in a specific field or region of environmental protection and having numerous partners among environmental organizations, were recruited to participate extensively in the survey. The criteria for “nonprofit environmental organizations” covered in this survey remain the same as last year, namely:

- **No restrictions on organizational form:** In order to comprehensively showcase the current status of China's environmental protection actions, this survey does not limit the forms of environmental organizations. They can be civil society organizations registered with the Civil Affairs Bureau, commercial entities engaged in nonprofit environmental activities, student societies, or organizations that are to be registered.
- **Business scope includes environmental protection:** Given the diversity of grassroots environmental organizations, this survey encompasses not only organizations primarily focused on environmental protection but also other types of nonprofit organizations such as social work and rural revitalisation that are involved in environmental protection.
- **Continuous operations:** That is, having conducted at least one environmental business or activity in the past year (from July 1, 2022, to the present).

1) Directory Improvement

In the 2022 survey, the initiator, in collaboration with hub organizations, collected information on a total of 2,482 nonprofit environmental organizations. In this

¹ The directories collected in 2023 primarily encompasses SEE Foundation's Green Innovators and Jincao Peer Partners directories; Guangdong Environmental Protection Social Organizations Development Report (2018); 2023 declaration list of Tricking Stream Action; Guangdong University Student Association Directory by

year's survey, the directory was improved in the following three ways: 1) Inviting hub organizations to verify and validate portions of the directory pertaining to their respective regions or fields, excluding organizations that did not meet the defined criteria, while rectifying any omissions or deficiencies; 2) Launching the Error Correction feature for the Directory of Chinese Nonprofit Environmental Organizations on the initiator's WeChat official account, inviting industry practitioners to provide suggestions for improvements. The directory will be updated quarterly; 3) Continuing extensive collection efforts by the initiators to gather additional entries¹. Consequently, the directory now comprises 5,209 organizations, known as the 2023 Directory of Chinese Nonprofit Environmental Organizations.

2) Questionnaire Survey

The current survey conducted an online questionnaire from July to September 2023 to gather information on the working fields, financial status, human resources, and related aspects of nonprofit environmental organizations in China. The questionnaire was disseminated industry-wide, with a specific focus on sending invitations to the 5,209 nonprofit environmental organizations listed in the Directory of Chinese Nonprofit environmental Organizations. Ultimately, 670 responses were collected, resulting in an approximate response rate of 12.8%. Among these, 614 responses were deemed valid, yielding a valid response rate of 92%. Out of the 614 environmental organizations that provided valid responses, 114 submitted their annual inspection reports for 2022. The survey team entered the financial and human resource information for the previous year based on these reports, while the remaining organizations opted to independently furnish their financial and human resource-related data.

3) Case Studies

With the development of China's nonprofit sector,

Green Point Public Welfare; List of Environmental Social Organizations in Haikou City; List of Provincial-level Environmental Social Organizations in Hainan Province; Information Registration Form of Zhejiang Province Environmental Social Organization.

county-level nonprofits, as an emerging grassroots model, is receiving increasing attention. Recognizing the significance of county-level nonprofits in the development of China's public welfare, this year's survey collaborated with a hub organization Beijing River Watcher Environmental Protection Foundation (hereinafter referred to as “**River Watcher**”) to showcase the development status of county-level nonprofit environmental organizations using River Watcher' River Patrol platform as an example. The report-writing team analyzed data from the River Watcher' River Patrol platform from the launch of the new version in March 2023 until approximately mid-September 2023, covering about six months. This analysis included non-governmental teams (comprising registered organizations, unregistered grassroots organizations, and school teams) that joined the River Patrol platform during this period. It also examined their activities such as beach cleanups, river assessments, and river patrols. Furthermore, the report-writing team conducted an interview with Ms. Zhou Shufen (known as “Xiaochuan”), the Executive Secretary of River Watcher, inviting her to interpret the data and share her observations on the development status and trends of grassroots environmental actions at the county level.

Key findings, Conclusions and Recommendations

1) Forms of organization

Among the 614 organizations participating in the questionnaire survey, approximately 71% were registered social organizations with the Civil Affairs Bureau. Among these, the number of social groups and privately-run non-enterprise units accounted for an equal share, each comprising 34% of the total. Business-registered entities and nonprofit environmental organizations awaiting registration represented 13% and 12% of the total, respectively. The remaining 1% consisted of nonprofit environmental organizations with other registration forms.

2) Date of Establishment

In terms of the starting year (the registration year for registered organizations and the establishment year for

unregistered organizations), the vast majority (83%) of the participating nonprofit environmental organizations were established in 2010 or later, consistent with the previous year's findings. Sixteen organizations participating in this year's questionnaire survey were newly established in 2023. In terms of the registration types, among the surveyed organizations established before 2020, social organizations (foundations, social groups, privately-run non-enterprise units) constituted a significant proportion, while among those established in 2020 and later, there was a notable increase in the proportion of business-registered entities and unregistered organizations.

3) Geographical Distribution

The 614 nonprofit environmental organizations that participated in the survey covered all provincial-level administrative regions except for Tibet. At the regional level, the largest number of organizations were situated in the East China region, accounting for over a quarter (28%) of the total. The numbers of environmental organizations in South China, Central China, North China, and Southwest China were relatively similar, constituting 17%, 16%, 12%, and 13% of the total, respectively. Organizations in the Northwest and Northeast regions were relatively fewer, comprising less than 10% of the total.

- **County-level Environmental Organizations:** Among the 614 surveyed organizations, a total of 111 were county-level nonprofit environmental organizations located in counties or county-level cities, accounting for 18%. Among them, there were 20 surveyed county-level organizations located in Hunan, the highest among provinces, municipalities, and autonomous regions. Following were Jiangxi Province (16 organizations) and Guizhou Province (11 organizations).

4) Working Fields

This survey utilized the 2022 categories of environmental funding projects from China Environment Grantmakers Alliance (CEGA), comprising nine Level 1 working fields and 50 Level 2 working fields. The Level 1 fields encompass three major environmental issues:

Ecological Conservation and Restoration, Pollution Control and Climate Change, along with six working methods: Public Communication and Advocacy, Environmental Rule of Law, Green and Low-Carbon Business, International Cooperation, Industry Building and Development, and Other Methods. These categories cover nonprofit environmental organizations based on both issues and working methods. Each participating organization is required to select a unique primary field (specific to Level 2) and could select an unspecified number of secondary working fields.

- 47% of the surveyed organizations had their primary field categorized as the working method of Public Communication and Advocacy. Specifically at the Level 2, the main fields were Nature and Environmental Education and Public Advocacy, Mobilization and Participation, making it the most prevalent organizational focus among the surveyed organizations. 23% of the surveyed organizations identified Ecological Conservation and Restoration as their primary field, while 7% identified Pollution Control as their primary field. Fewer than 10% of organizations had other issues or working methods as their primary field.

5) Working Methods

Cross-analysis reveals the following trends:

- Among organizations where the three major environmental issues are the primary working fields, over 80% listed Public Communication and Advocacy as their secondary field, indicating it as the most commonly used working method among the surveyed nonprofit environmental organizations.
- Among organizations where Pollution Control is the primary field, half of them listed Environmental Rule of Law as their secondary field. For organizations focusing on Ecological Conservation and Restoration and Climate Change as their primary fields, nearly half (47%) selected Other Methods as their secondary field. These mainly included Community Work, Rural Revitalization and Sustainable Livelihood, and Authorized Conservation and Trust.

6) Fundraising Status

Among the 614 surveyed organizations, 94% provided information about their income in 2022, with a median annual income of 100,000 RMB. The majority of organizations (38%) reported an annual income ranging from 0 to 50,000 RMB (excluding 50,000 RMB), while 17% of the surveyed organizations reported an income of 1 million RMB or more in 2022. In terms of income sources, the primary sources for surveyed organizations are domestic foundation funding and government service procurement. 47% and 44% of surveyed organizations listed domestic foundation funding and government service procurement, respectively, among their top three main sources of income.

7) Human resources situation

Among the formally registered organizations that provided information about the number of full-time staff members, the median size of full-time staff members was three. Nearly half (48%) of the organizations had a staff size of 1 to 5, with as many as 70% having a staff size of 10 or fewer. Organizations with a staff size exceeding 10 accounted for only about 8%.

8) Data Comparison of Two-Year Survey

Over the two years from 2022 to 2023, the Status Survey of Chinese Nonprofit Environmental Organizations collected information from a total of 801 nonprofit environmental organizations through questionnaire surveys. These organizations were distributed across all 30 provinces, municipalities, and autonomous regions in China (refer to Chart 17), covering all nine environmental working fields. Among them, 313 organizations participated in both last year's and this year's surveys. Looking at the data from two-year survey:

- In terms of **working fields**, within this year's survey, the proportions of organizations categorized under Public Communication and Advocacy and Ecological Conservation and Restoration remained relatively stable among the surveyed organizations. However, the proportion of organizations categorized under Pollution Control declined from 10% last year to 7% this year, while the proportion of organizations focused on Climate Change slightly

increased compared to the previous year. Among the 313 organizations that participated in the survey for two consecutive years, nearly 80% did not change their primary Level 1 working field. Among the remaining 20% of organizations with changes in their working fields, the number of organizations that identified Pollution Control as their primary field decreased from 38 to 30, while the number of organizations listed Climate Change as their primary field increased by 8.

- In terms of **fundraising**, the median income of nonprofit environmental organizations participating in this year's survey decreased by 10,000 RMB compared to last year's survey, reaching a median income of 100,000 RMB. Comparing the survey data from last year to this year, the distribution of the previous year's income among the surveyed organizations remained largely consistent. The main changes observed include a nearly 5% increase in the proportion of organizations with incomes ranging from 50,000 to 500,000 RMB (excluding 500,000 RMB), while the proportion of higher-income organizations with incomes of 500,000 RMB or more decreased by 3% compared to last year. Among the 313 organizations that participated in the survey for two consecutive years, 48% reported an increase in their 2022 income compared to 2021, 8% remained unchanged, and 38% experienced a decrease. Organizations concentrating on fields such as Climate Change, Ecological Conservation and Restoration and International Cooperation exhibited a significant increase in income. In contrast, organizations focusing on fields such as Green and Low-Carbon Business and Other Methods experienced a notable decrease in income.
- In terms of **human resources**, the median number of full-time staff members in nonprofit environmental organizations participating in this year's survey remained consistent with last year, both averaging at 3 individuals. The size of full-time staff members among surveyed organizations largely remained unchanged. Among the 313 organizations that participated in the survey for two consecutive years, 32% reported an increase in the number of full-time staff members, 28% remained unchanged, and only 20% experienced a decrease. Among

organizations focused on fields such as Green and Low-Carbon Business and Other Methods, there was a higher proportion reporting an increase in full-time staff members. Conversely, among organizations focused on fields including Environmental Rule of Law, Green and Low-Carbon Business and Industry Building and Development, there was a relatively higher proportion reporting a decrease in the number of full-time staff members.

9) Observations on County-Level Nonprofit Environmental Organizations

This survey obtained data from the River Patrol platform from the launch of version 2.0 in March 2023 to September 20, spanning about six months. This included non-governmental teams (comprising registered organizations, unregistered grassroots organizations, and school teams) that joined during this period and engaged in common environmental activities within the county-level setting, such as beach cleanups, river assessments, and river patrols, characterized by low organizational thresholds. From March to September 2023, a total of 2,665 teams joined the River Patrol platform, covering all 31 provinces, municipalities, and autonomous regions in China. Among these, 1,199 teams were county-level teams, located in counties or county-level cities, accounting for 45% of the total and covering 26 provinces, municipalities, and autonomous regions. This provides a glimpse into the current status of county-level environmental protection. Additionally, this survey conducted an interview with Zhou Shufen, the Executive Secretary of River Watcher, inviting her to interpret the data and share her insights into the industry.

- **Overview of County-Level Teams on the River Patrol Platform:** River Patrol mainly mobilizes grassroots organizations through local Youth League Committees to join the platform. Among the 1,199 county-level teams that joined, half were registered organizations (such as volunteer associations and volunteer service teams), approximately one-third were school teams, and nearly one-fifth were other unregistered grassroots organizations.
- **River Protection Activities by County-Level Teams:** Among the 1,199 county-level teams that

joined the River Patrol platform, 587 teams, accounting for 49%, conducted at least one activity between March and September 2023. They collectively carried out around 31,000 river patrols, 28,000 river assessments, and over 4,000 beach cleanups. In comparison to beach cleanups, river assessments and patrols had smaller scales and lower thresholds. Therefore, the number of times county-level teams engaged in these two activities was significantly higher than beach cleanups. In the meantime, the total number of participants in these two activities was far lower than the number of activities conducted, indicating that the same active participants were recurrently involved in these two activities. However, beach cleanups involved nearly 160,000 participants in total, reaching the largest number of the public, despite their lower frequency compared to the other two types of activities.

- **Characteristics of Active County-Level Teams:** During the period between March and September 2023, among county-level teams that conducted at least one river conservation activity, registered organizations accounted for 58%. Among active organizations that conducted a minimum of ten activities, registered organizations constituted as high as 74%. This indicates that the majority of active nonprofit environmental organizations at the county level are registered social organizations. According to information provided by the River Watcher, many of these organizations are voluntary service-oriented organizations at the county level, such as volunteer associations. Regarding team size, the majority of active volunteers in most county-level environmental organizations engaging in regular activities numbered within 5 individuals. However, the most active county-level teams had over a hundred actively engaged volunteers. Concerning income, as mentioned by the person in charge of the River Watcher, the income of grassroots teams at the county level is generally modest. Yet, due to the relatively low cost of conducting environmental activities like river protection within the county and the generally lower personnel expenses of county-level teams, they can still carry out environmental activities at the grassroots level in a sustainable manner.

10) In summary, the report offers the following conclusions:

- **Amidst an overall tense situation in the nonprofit sector, nonprofit environmental organizations have exhibited resilience and adaptability, particularly within volunteer-based organizations.** In recent years, the nonprofit sector has faced a highly uncertain external environment, resulting in an overall contraction seen in a reduction in the number of philanthropic organizations and available resources. Despite this unfavorable backdrop, the surveyed frontline environmental nonprofits have displayed a certain resilience in fundraising and human resource management. The survey has been conducted continuously for 2 years and has covered a total of 801 nonprofit environmental organizations nationwide, demonstrating that the surveyed organizations have maintained a relatively consistent scale in both their annual income and the number of full-time employees over the two-year period. Among the 313 organizations that participated in the survey for two consecutive years, 48% reported an increase in their income for the year 2022. A significant portion of these organizations involved in fields such as Climate Change, Ecological Conservation and Restoration and International Cooperation, indicating that certain specialized types of organizations have been less affected by the economic headwinds. On one hand, small-scale organizations have consistently been the mainstream among frontline environmental nonprofits in China, forming the foundation of the total sector. On the other hand, county-level environmental nonprofits, represented by voluntary service-oriented organizations, have been thriving in recent years. Despite these organizations having modest incomes, due to low participation thresholds and minimal expenses, they are still able to sustain ongoing environmental activities. This trend reflects their ability to adapt to the longer-term constraints of limited resources. These factors collectively demonstrate the resilience of nonprofit environmental organizations in a backdrop where the overall nonprofit sector is experiencing contraction.

- **Advocates play a fundamental and crucial role within the environmental governance system, and it is imperative for nonprofit environmental organizations to strengthen their capacity for conducting Public Communication and Advocacy.** Public Communication and Advocacy stands out as both the primary field and the most commonly utilized working method among the surveyed organizations. Organizations that identified Public Communication and Advocacy as their primary field have consistently accounted for half of the surveyed organizations over the past two years. Furthermore, among organizations that listed environmental issues such as Ecological Conservation and Restoration, Pollution Control and Climate Change as their primary working fields, over 80% have utilized Public Communication and Advocacy as a method in their operations. Advocates engage in educational campaigns, promoting cutting-edge green and low-carbon concepts and models. This helps consolidate societal consensus and establishes a strong social foundation for environmental work, which is the cornerstone of the environmental protection cause. Given the overall tightening of resources within the nonprofit sector, nonprofit environmental organizations should persist in being effective advocates, further connecting with the public to highlight their advantages in being closely aligned with the public and local communities.
- Based on the findings and conclusions drawn from the survey, this report presents the following **recommendations** for stakeholders in the industry:

For competent authorities:

- Conduct industry exchanges and capacity-building initiatives focused on the unique role played by environmental organizations in the modern environmental governance system, thereby enhancing the resilience of nonprofit environmental organizations to navigate through challenging periods.

For environmental grantmakers:

- Tailor resource allocation based on industry positioning
- Focus on the development of county-level nonprofit environmental organizations and support more grassroots forces to participate in environmental protection on a sustainable basis.
- Invest resources continuously towards key issues like climate change
- Foster domestic and international industry exchanges

For nonprofit environmental organizations:

- Innovate the value of Public Communication and Advocacy based on emerging trends in environmental issues (such as climate change)
- Engage in and initiate joint actions within the industry for collective support
- Expand environmental scenarios, explore interdisciplinary collaborations and seek service-based income
- Emphasize the transparency of information disclosure, particularly regarding the publication of annual reports

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