



2020

China Environmental Grantmakers Alliance (CEGA) Report



大中华 大环境 大联合



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1 CHAIRPERSONS' MESSAGE



The annual CEGA report is an important channel for us to share grant lists with CEGA members and other grantmakers, so as to promote the development of environmental protection public welfare industry together. It has been warmly welcomed in not only the industry but also society in general.

While releasing the 2020 CEGA Report, we'd like to look back at the extraordinary 2020. The sudden outbreak of COVID-19 and frequent extreme climate events have compelled us to think about our responsibilities and to collaborate with every environmental grant maker in China to support environmental non-profits, optimize our grant strategies, and facilitate the development of a low-carbon society and the construction of ecological civilization.

In this report, we analyze the grantmaking practices of key domestic environmental foundations in face of the epidemic, as well as the development of environmental non-profits that had received the grants. We also focus on two specific topics: COVID-19 and climate change. Through this report, readers could gain an overview of the size, pattern and trend of domestic environmental grantmaking, and learn from cases of successful collaboration between grantmakers and environmental non-profits.

We would like to thank all environmental foundations and non-profits that participated in drafting this report. The information you shared on major grantmaking events and industry development has enriched this report. It is our sincere hope that more and more environmental grantmakers and non-profits would work together and build a better tomorrow. We would appreciate your feedback and suggestions so that we can improve our work and deliver a better analysis of annual environmental grantmaking and the development of environment protection charity industry in China.

We'd like to express our thanks to Corporate Citizenship in Action for compiling this report, to CEGA members for their contribution, and to China Foundation Center for supporting CEGA's operation.

2 PROFILE OF CEGA

Founded on 29 January, 2018, China Environmental Grantmakers Alliance (CEGA) is a platform for the communications and collaborations among Chinese environmental grantmakers. Its purposes are to employ strategic philanthropy, to promote the collaboration and development of environmental grantmakers, to guide the direction of environmental charity grantmaking and to maximize the social benefits of environmental charitable funds. We believe in integration, joint contribution, shared benefits, and joint creation of a beautiful future.

CEGA isn't an independently registered legal person. Its operation relies on China Foundation Center, and it is guided by the Decision-making Committee. Currently, the Decision-making Committee is composed of SEE Foundation, Alibaba Foundation, Beijing Qiaonyu Foundation, Shenzhen Mangrove Wetlands Conservation Foundation (MCF), Lao Niu Foundation, Guangdong Harmony Community Foundation, The Paradise International Foundation, Vanke Foundation, China Green Carbon Foundation, China Environmental Protection Foundation, Friends of Nature Foundation and China Foundation Center. The committee members serve a third-year term and elect the Chairpersons. Lei Yongsheng, Director of Lao Niu Foundation, and Zhang Li, Secretary General of SEE Foundation, are the first co-chairs of CEGA. The current co-chairs are Chen Yimei, Secretary General of Vanke Foundation, and An Yaqiang, Secretary General of Lao Niu Foundation.

Major areas of work of CEGA

- Establishing the Data Center for Environmental Charity Organizations, comprehensively analyzing environmental charity projects and providing support for the work of members.
- Issuing annual report and guiding future direction of the work of environmental charity.
- Organizing and convening annual CEGA forum and conference, promoting communications among members and expanding influence.
- Promoting international communication and collaboration in the field of environmental philanthropy and organizing members to attend important international conferences in relevant fields.
- Putting in place the classification standards for environmental charity projects and the influence assessment indicator system, thus evaluating social influence of environmental charities in a systematic and correct way.

CEGA Members

SEE Foundation
Alibaba Foundation
Beijing Qiaonyu Foundation
Shenzhen Mangrove Wetlands Conservation Foundation (MCF)
Lao Niu Foundation
Guangdong Harmony Community Foundation
The Paradise International Foundation
Vanke Foundation
China Green Carbon Foundation
China Environmental Protection Foundation
Friends of Nature Foundation
Beijing Afforestation Fund
All-China Environment Federation (ACEF)

3 2020 CEGA HIGHLIGHTS: AN OVERVIEW

➤ CEGA annual forum. On 30 December, 2020, CEGA held the third annual forum, with a theme “Focus on Industry Development, Create a Future with Beautiful Environment.” It was a great event where environmental foundations, NGOs and people who care about environment gathered.



➤ Successful release of 2019 CEGA Report. In the report, we have added the analyses of 8 non-CEGA members and 156 environmental non-profits, which greatly enriched our content and promoted our influence.



➤ Post-pandemic analysis report. The outbreak of COVID-19 has greatly challenged the foundations. We promptly conducted an analysis of the post-pandemic fundraising of environmental foundations, and compiled a report to shed light on opportunities and challenges.

➤ Successful CEGA salon sessions. We held seven salon sessions, and invited CEGA members and experts to discuss key topics, hot issues, and forward-looking topics. The salons were influential, attracting an online audience of around 30,000.



➤ With the support of the Beijing Representative Office of Partnerships for Community Development (Hong Kong), CEGA conducted a climate adaptation grantmaking strategy study in September 2020. This forward-looking study aimed to help grantmakers think systematically about how to facilitate climate adaptation while working on climate change mitigation.

➤ Internationally, CEGA was invited to become a partner of Climate Philanthropy 2030 initiated by Alliance Magazine, the world-famous charity media.



➤ New CEGA member. In December 2020, the All-China Environment Federation (ACF) was invited to join CEGA.

4 ANNUAL ANALYSIS OF ENVIRONMENTAL GRANTMAKERS IN CHINA

This annual analysis of environmental grantmakers, which includes 11¹ CEGA members and 7² non-CEGA members, hopes to reflect on the status quo of environmental grantmaking comprehensively.

4.1 Environmental Grantmakers 2020 Analysis: CEGA Members

➤ **Total grants:** Slightly lower. In 2020, CEGA members contributed about 296 million yuan of environmental grants, down by 4% from last year's 308 million yuan. Excluding the new member Beijing Afforestation Fund and Alibaba Foundation that did not disclose its 2020 grantmaking information, the rest 10 members made about 291 million yuan of environmental grants, up by about 9% from last year's 267 million yuan.

➤ **Grants made by each member:** Two foundations made more than 50 million yuan of grants in 2020: SEE Foundation contributed about 115 million yuan in 2020, slightly up from last year's 104 million yuan; China Environmental Protection Foundation contributed about 95.73 million yuan, up from 2019's 73.5 million yuan. Two foundations made 10 to 50 million yuan of grants – China Green Carbon Foundation and Vanke Foundation, while in 2019 there were five. The other seven foundations each made less than 10 million yuan of grants. Among the 10 CEGA members that provided grantmaking information in both 2019 and 2020, four increased their grants, among which China Green Carbon Foundation registered the largest increase (47.02%).

➤ **Changes in major grant fields:** SEE Foundation is the only CEGA member focused on six major grant fields (25 sub-fields). Guangdong Harmony Community Foundation newly focused on "Environmental Law" in 2020. China Green Carbon Foundation newly focused on "Climate Change." Several CEGA members' funding areas changed. For example, Friends of Nature Foundation focused on 3-4 sub-fields in the last two years, while it only funded on "pollution control-solid waste management" in 2020.

➤ **Regrants:** In accordance with international practice, we listed grants made between members and categorized them as regrants. Of the 296-million-yuan total grants made by CEGA members in 2020, 2.49 million were regrant, most of which came from Lao Niu Foundation's 1.74-million-yuan³ donation to China Green Carbon Foundation.

Please note that the 2020 operating costs listed below are based on 2020 annual audit reports, and the amounts of total grants are based on actual allocation, not agreement. (Numbers are shown rounded.)

Name	Funding Area	2020 Operating Costs Amount (10,000 yuan)	2020 Environment Grants Amount (10,000 yuan)	Environment Grants to Operating Costs Ratio
1 SEE Foundation	- Ecological protection: species and habitat, forest protection and restoration, wetland protection and restoration, grassland protection and restoration, sea protection, desertification control, natural reserve management;	15495.28	11520.75	74.35%

¹ Compared with 2019, CEGA welcomed new members Beijing Afforestation Fund and All-China Environment Federation (ACF). All-China Environment Federation (ACF) is not included in this chapter because it does not carry out grantmaking. Alibaba Foundation did not share its project grantmaking information due to its operational changes from project grantmaking to platform support.

² Compared with 2019, Shenzhen HUA Foundation did not join this report due to limited grantmaking.

³ The data is derived from China Green Carbon Foundation. Other regrants include The Paradise International Foundation's 470,000-yuan donation to China Green Carbon Foundation, SEE Foundation's 255,000-yuan donation to Shenzhen Mangrove Wetlands Conservation Foundation (MCF), and 23,300-yuan donation to Friends of Nature Foundation.

Name	Funding Area	2020 Operating Costs Amount (10,000 yuan)	2020 Environment Grants Amount (10,000 yuan)	Environment Grants to Operating Costs Ratio
1	SEE Foundation	15495.28	11520.75	74.35%
2	Beijing Qiaonyu Foundation	129.56	20.00	15.44%
3	Shenzhen Mangrove Wetlands Conservation Foundation (MCF)	2317.40	2634.00	11.37%
4	Lao Niu Foundation	5024.45	776.69	15.46%
5	Guangdong Harmony Community Foundation	1055.86 (266.48 ⁴ for Harmony Community Environmental Fund)	138.24	13.09%
6	Paradise International Foundation	2154.70	688.30	31.94%
7	Vanke Foundation	16111.12	2257.78	14.01%

⁴ The Harmony Community Environmental Fund focuses on environmental grantmaking, while the Harmony Community Foundation has other business areas. The Harmony Community Environmental Fund mainly deals with granting, which took up 51.88% of the expense.

Name	Funding Area	2020 Operating Costs Amount (10,000 yuan)	2020 Environment Grants Amount (10,000 yuan)	Environment Grants to Operating Costs Ratio
8	China Green Carbon Foundation	4026.72	3730.23	92.64%
9	China Environmental Protection Foundation	9573.10	9573.10	100%
10	Friends of Nature Foundation	389.38	95.13	24.43%
11	Beijing Afforestation Fund	769.69	574.91	74.69%
Total		57047.26	29638.53	51.95%

➤ **The number of grantmakers in each field:**

- Among the six major fields, the top three were the same as last year: “major special projects” (9 grantmakers), “ecological protection” (8 grantmakers) and “publicity and education” (7 grantmakers).

- “Climate change,” “pollution control,” and “environmental law” attracted five, four, and three grants respectively. Two more members made grants to “climate change” and three less members made grants to “pollution control.”

➤ **The amount of grants in each field and changes:**

● **Ecological protection:** This field had the greatest amount of grants and the greatest number of projects. In 2020, the amount was about 160 million yuan, accounting for 55.6% of total CEGA grants. Though the number of projects (211) was one third less than last year, the amount and its share in the total increased. From 2018 to 2020, “ecological protection” has remained the field that receives the most grants, with its amount and share increasing each year. Grants made to the field accounted for more than half of total grants this year, up from 41% in 2018 and 48% in 2019.

● **Pollution control:** Lower. 94 projects received about 14.29 million yuan of grants, accounting for about 4.8% of the total. Compared to 2019, the number of projects was down from 187 to 94 and the amount of grants was down from 40.03 million yuan to 14.30 million yuan, partly because Alibaba Foundation that focused on this field in 2019 did not disclose its grantmaking information in 2020.

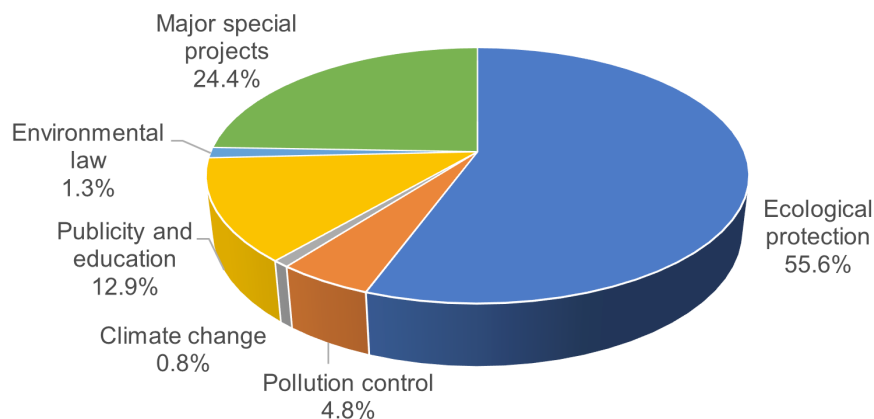
● **Climate change:** Receiving the least grants. Compared to 2019, the number of projects doubled from 6 to 12, while the amount received decreased from 3.03 million to 2.51 million yuan, accounting for less than 1% of the total.

● **Publicity and education:** The second largest field in terms of number of projects. 162 projects received about 38.37 million yuan, accounting for 12.9% of the total. The number of projects increased from 138 in 2019, partly because Vanke Foundation recategorized its projects related to solid waste management from “pollution control” to “publicity and education.” The amount of grants decreased from last year’s 45.37 million yuan, partly because Alibaba Foundation did not disclose its grantmaking information this year.

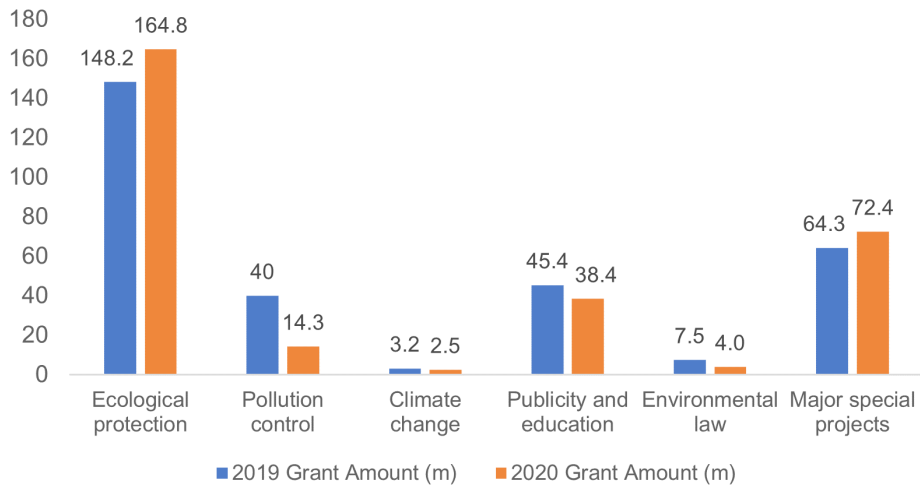
● **Environmental law:** 3.95 million yuan of grants accounted for about 1.3% of total grants, registering a slight decrease from last year in terms of both the amount and the share in the total.

● **Major special projects:** 54 projects received 72.45 million yuan of grants, namely 24.4% of the total. Compared to 2019, the number of projects was down from 186 to 54. This was because SEE Foundation recategorized its “Chuanguyujia” (Green Starters) projects from “major special projects” (“industry infrastructure construction”) to fields like “ecological protection,” “pollution control,” “climate change,” and “publicity and education.” But the amount of grants in this field grew by 13%, thanks to China Environmental Protection Foundation’s increased grants.

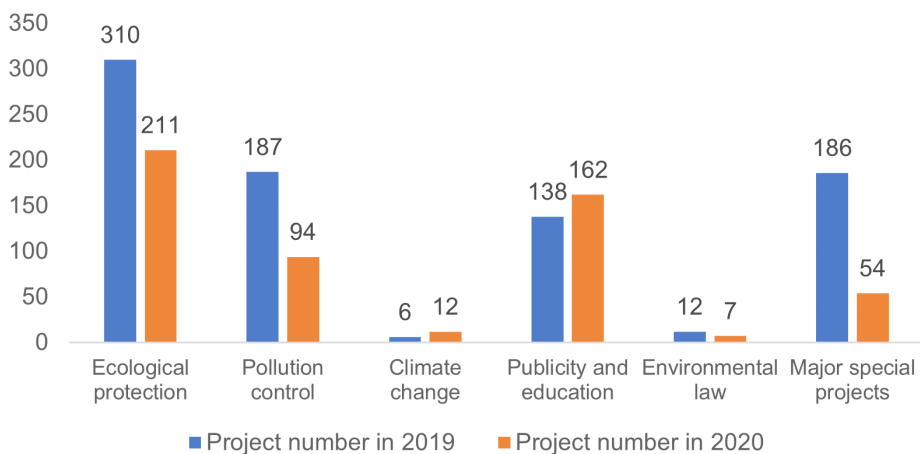
Grant Amount in Each Field by CEGA Members in 2020



Comparison of Grant in Each Field in 2019 and 2020



Comparison of Project Number in Each Field in 2019 and 2020



➤ **Average grant amount:** Lao Niu Foundation had a relatively higher average grant amount per project, reaching 1.55 million yuan. It was followed by China Environmental Protection Foundation's 1.52 million yuan. Beijing Afforestation Fund had an average grant amount of 1.15 million yuan. No other members had an average grant amount of more than one million yuan. This reflects the grantmaking preferences of members.

➤ **Project location:** Among the 540 projects, 104 of them were nationwide, which was the highest category. 96 were in South China, 80 in North China, 72 in East China, 68 in Southwest China, 63 in Northwest China, 45 in Central China, and 21 in Northeast China (the fewest). And there are four overseas projects, including 1 in Myanmar, 1 in Russia, and two projects that are co-organized by SEE Foundation and Michael Otto's Environmental Foundation in "climate adaptation" sub-field.

➤ **Project and grant amount distribution:** about 42.8% of all projects received less than 100,000 yuan, while 37.8% of all projects received 100,000 to 500,000 (exclusive) yuan. In total more than 80% of all projects fell under these two categories. 43 (8%) projects received 500,000 to one million (exclusive) yuan and 54 (10%) projects received one to five million (exclusive) yuan. Fewer projects received more than 5 million yuan: five for 5-10 million yuan, and three for over 10 million yuan. Compared with 2019, the share of projects receiving more than 500,000 yuan grew from 16% to nearly 20%, reflecting the change in the grant distribution as more projects received larger amounts of grants.

➤ **Project evaluation:** Among the 540 projects, 459 (85%) were evaluated by the foundations, 43 (8%) were evaluated by third parties, and 38 (7%) were not evaluated. Compared with last year's statistics (59% foundation evaluation, 13% third-party evaluation, and 28% no evaluation), the percentage of foundation-evaluated projects increased greatly.

4.2 Environmental Grantmakers 2020 Analysis: Non-CEGA Members

Seven non-CEGA members provided their environmental grantmaking information:

➤ **Total amount of grants:** In 2020, the seven organizations made about 23.94 million yuan of grants, down by 21% from 30.17 million yuan in 2019⁵.

➤ **Grants made by each non-member:** Five organizations each made more than 1 million yuan of grants, including China Oceanic Development Foundation (16.04 million yuan), Cihai Environmental Foundation (2.06 million yuan), Zhilan Foundation (2.00 million yuan), K2 Foundation (1.85 million yuan) and Ming Foundation (1.08 million yuan). Compared with 2019, Zhilan Foundation, Ming Foundation and K2 Foundation increased their grant amounts by more than one-fold, namely 168.48%, 144.36% and 103.07% respectively. Moreover, Cihai Environmental Foundation's grant amount grew by 59.06%.

➤ **Changes in major grant fields:** Ming Foundation shifted their focus from "species and habitat" to "environment education" and "ecological poverty alleviation and sustainable livelihood". Beijing Wo Qi Foundation narrowed their focus to "action advocacy".

⁵ Shenzhen Hua Foundation did not disclose its granting information in 2020 like it did in 2019.

	Name	Funding Area	2020 Operating Costs Amount (10,000 yuan)	2020 Environment Grants Amount (10,000 yuan)	Environment Grants to Operating Costs Ratio
1	China Oceanic Development Foundation	Ecological protection: sea protection	3656.68	1604.12	43.87%
2	Zhenro Foundation	Major special projects: green finance	1623.18	9.50	0.59%
3	Cihai Environmental Foundation	Ecological protection: species and habitat; Pollution control: solid waste management; Publicity and education: environment education; Major special projects: ecological poverty alleviation and sustainable livelihood	213.08	206.28	96.81%
4	Beijing Wo Qi Foundation	Publicity and education: action advocacy	208.63	81.01	38.83%
5	K2 Foundation	Major special projects: industry infrastructure construction	819.02	185.00	22.59%
6	Zhilan Foundation	Ecological protection: species and habitat, forest protection and restoration, sea protection.	339.38	199.98	58.93%
7	Ming Foundation	Publicity and education: environment education Major special projects: ecological poverty alleviation and sustainable livelihood	112.64	108.49	96.31%
Total			6972.61	2394.37	34.34%

Please note that the 2020 operating costs listed below are based on 2020 annual audit reports, and the amounts of total grants are based on actual allocation, not agreement. (Numbers are shown rounded.)

➤ **The number of grantmakers in each field:** Four grantmakers in “major special projects”; Three grantmakers in “ecological protection” and “publicity and education” respectively; one grantmaker in “pollution control.”

➤ **The amount of grants in each field and changes:**

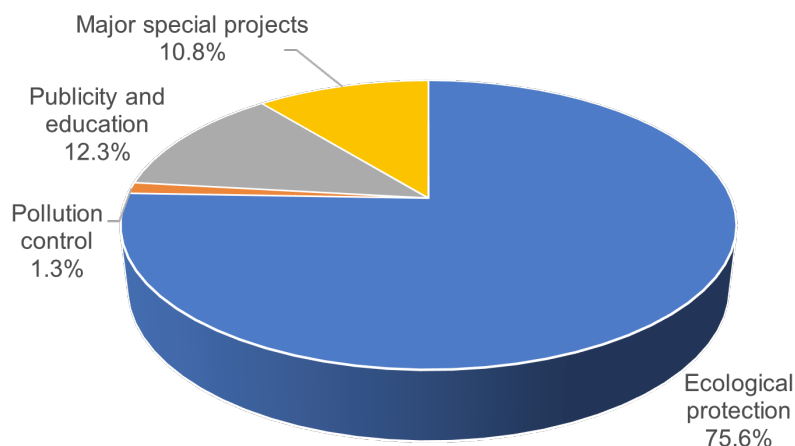
- **Ecological protection:** A total of 18.09 million yuan (75.6% of the total) of grants went to 45 projects, registering a decrease from last year (25.44 million yuan, 77% of the total). The major project of this field was the 14-million-yuan “Fujian Ningde Sanyu Ocean Ecology Restoration Project” supported by China Oceanic Development Foundation. The Foundation was also the main grantmaker in this field (its grants amounted to 94% of total grants of this field in 2019, and 89% in 2020).

- **Pollution control:** One project received 300,000 yuan (1% of the total), down from last year’s 848,000 yuan (2%).

- **Publicity and education:** A total of 2.96 million yuan (12% of the total) went to 16 projects, down from last year’s 4.18 million yuan (13%).

- **Major special projects:** A total of 2.60 million yuan (11% of the total) went to 14 projects, up from 2.54 million yuan last year.

Grant Amount in Each Field by Non-CEGA Members in 2020



➤ **Average grant amount:** The average grant amount of the seven non-CEGA members was 315,000 yuan. The average grant amount of China Oceanic Development Foundation reached 8.02 million yuan. Ming Foundation had an average grant amount of more than 500,000 yuan. Other foundations were below this threshold.

➤ **Project location:** Most of the 75 projects supported by non-CEGA members were located in South China (22) and across China (16), while only two projects were located in Northeast China. With an overall increase in the number of projects, projects in each region also increased compared to 2019.

➤ **Project and grant amount distribution:** 54 projects (72% of total) each received less than 100,000 yuan. 16 (21.3%) each received 100,000 to 500,000 (exclusive) yuan. Two projects in the sub-fields of “major special projects – ecological poverty alleviation and sustainable livelihood” and “major special projects – industry infrastructure construction” received 500,000 to one million (exclusive) yuan. Two projects in the sub-fields of “ecological protection – sea protection” and “publicity and education – environment education” received one million to five million (exclusive) yuan. One project in “ecological protection – sea protection” received more than 10 million yuan. The distribution of grant amounts did not change much compared to 2019.

➤ **Project evaluation:** Of the 75 projects, 17 were evaluated by the foundation, 13 by third parties, and 45 were not evaluated. All 12 projects of Beijing Wo Qi Foundation and one project of Cihai Environmental Foundation were evaluated by third parties. Most projects (39)⁶ of Zhilan Foundation, most projects (4) of Cihai Environmental Foundation, one project of Zhenro Foundation and one of Ming Foundation were not evaluated. The rest of the projects were evaluated by the foundations. These did not change much compared to 2019.

⁶ Zhilan Foundation has their projects evaluated at the end of projects. Due to the pandemic, most of the projects have been delayed, thus they were not evaluated when this report was compiled.

4.3 Grantmakers' Message

This year, this section includes information from CEGA new member Beijing Afforestation Fund, non-CEGA member China Oceanic Development Foundation, Cihai Environmental Foundation, Beijing Wo Qi Foundation, Zhilan Foundation and Ming Foundation.

This section mainly reflects on changes in grantmaking in 2020.

4.3.1 Evaluation of Current Status of Environmental Protection Fields and Challenges

In general, we are in good external environment. The concept of ecological civilization, the "14th Five-Year Plan", the potential land optimization brought by the "Long-Range Objectives Through the Year 2035," President Xi's commitment to carbon neutrality, the convening of CBD COP-15 in China, etc. have promoted the development of issues related to environmental protection charity. There is a strong momentum for non-profit environmental protection innovation.

We invited grantmakers to give feedback on the development and challenges faced by the environmental non-profits that they supported.

Mature organizations: Generally, these organizations are doing well but may think about optimization and sustainable development, such as team management and development, sustainable source of funds, future direction navigated through practicing environmental protection (Beijing Wo Qi Foundation), clearer strategic positioning, more stable team and more professional finance and project management (Zhilan Foundation).

Premature organizations: Their main challenge is fundraising, specifically personnel expenses (Cihai Foundation).

Grantmakers also offer suggestions on sustainable development.

Professionalism:

- NGOs should work on developing professional and in-depth topics (Beijing Wo Qi Foundation). The key is to find the root cause for protection. Therefore, it is worthwhile spending more efforts on analyzing the problem (Zhilan Foundation). Continuous efforts are needed to become more professional and attain innovation and breakthrough in mode of operation. (Shenzhen Mangrove Wetlands Conservation Foundation)
- Environmental problems should be understood in a comprehensive way that engages law and policy, economy and finance, education, production and life, community building, etc. In this way, the root causes of environmental problems and cooperation opportunities may be found. Organizations should find support for their actions, and work on their core businesses to build an exemplar community or project. (Guangdong Harmony Community Foundation) Organizations should keep the bar high in terms of professional issues, project management and organizational building, and build a strong basis. (Vanke Foundation)

Joint-actions:

- Build connections and cooperate with grantmakers and other organizations and participate more in joint events, so as to build diverse and active channels of publicity. Leverage self-media and build a brand project. (Shenzhen Mangrove Wetlands Conservation Foundation)
- Actively introduce your work to organizations and individuals of various types and fields for wide recognition, support and cooperation. (Vanke Foundation)
- Keep a relatively stable team and build a culture that prioritizes learning. Encourage the organic combination of inheritance, integration and innovation. (Lao Niu Foundation)

Operations and personnel:

- Organizations can maintain their operation by providing professional services to governments, enterprises and institutions (like R&D and implementation courses, event planning and organization, and professional consulting). In this way, organizations can build more talents and have their ideas and values heard. (Guangdong Harmony Community Foundation)

- Don't expand blindly with an unclear environment and limited budget. Instead, organizations should build their core teams and discover the possibilities of developing volunteer communities, so as to enable more active cooperation. (Guangdong Harmony Community Foundation)

Grantmakers also commented on the development, challenges and future trends of different sub-fields.

Ecological protection: More and more attention from the whole society is paid to this field.

- **Sea protection:** In our 2019 report, Paradise International Foundation believed this field was still at an early stage and in need of funding. This year, the Foundation believed that sea protection organizations remained underdeveloped, and their management skills needed to be improved. Organizations at the frontline were still too few to meet the demand. The Foundation will strengthen its support for sea protection talents and organizations through the "Blue Pioneers" project.

- **Wetland protection and restoration:** According to Shenzhen Mangrove Wetlands Conservation Foundation (MCF), the East Asian-Australasian Flyway (EAAF) needs protection most. Through promoting systemic changes, the Foundation will improve the quality of three to five key habitats and stop the decline of global waterbird populations.

Pollution control: With a clear policy of green and low-carbon development, serious illegal pollution has been stopped.

- **New key points:** The severe pollution caused by high-polluting heavy industry and power industry will be significantly alleviated due to the adjustment of the industrial structure. After that, agricultural non-point source pollution, urban traffic and other pollutions will become key and difficult issues in environmental governance. (Harmony Community Foundation)

- **Solid waste management:** Community waste management has been greatly developed due to implementation of waste-free city and other policies. In food waste field, we also saw the enactment of the Anti-food Waste Law of the People's Republic of China. The macro-situation has changed. Currently, organizations focusing on this field are still limited, weak and focusing on environmental protection only. They haven't worked on community building and should improve their strategies. Few of them can participate in policy making. Organizations as a social force should have contributed much more to long-term mechanism building, green lifestyle advocacy, and primary-level governance. (Vanke Foundation)

Climate change: The field of climate adaptation has great potential, but has attracted limited attention and resource.

- **Individual carbon reduction:** The 2060 carbon neutral target will bring far-reaching impact, and individual behavior will become more and more important. We can calculate the potential of carbon reduction by the community through saving energy, promoting vegetarian food, recycling used items, reducing food waste, etc. (Guangdong Harmony Community Foundation)

- **Challenges brought by multiple factors together:** When climate change, biodiversity loss and pollution are brought together, it is essential for NGOs to attain long-term development through finding the root causes, adopting scientific and sustainable solutions to major problems, and promoting diversified collaboration among government agencies, enterprises and social organizations. (Lao Niu Foundation) The major challenge faced by social organizations lies in their weak basis in terms of size, capacity, and discourse power. (Vanke Foundation)

5 ENVIRONMENTAL NON-PROFITS IN CHINA: AN OVERVIEW

To get a comprehensive view of the environmental protection public welfare industry, we continue to research on environmental non-profits in China, hoping to provide references for professionals and grantmakers. We have invited the most representative environmental organizations to participate and collected 165 valid questionnaires.

Here are what we found:

➤ **Registration and place of registration:** Among the 165 organizations surveyed, 153 are registered (41% of them are social service organizations, 30% are social associations and 17% are organizations registered as companies). About half of them are registered at the prefecture level, and about one third are registered at the county level – they are the primary-level organizations. East China (27% of the total) and South China (21%) have the most organizations. Guangdong province (18) and Fujian province (12) have the highest number of organizations at the provincial level.

➤ **Annual revenue:** Of the 165 organizations surveyed, about 60% had a revenue of less than 500,000 yuan in 2020. 27% had a revenue between 100,000 and 500,000 (exclusive) yuan (the largest share). Fewer organizations (11 organizations, 6% of the total) had a revenue of more than five million yuan. Seven had a revenue of more than 10 million yuan. All organizations that had a revenue of more than 5 million yuan in 2020 have been registered for more than 3 years, and more than half of them have been registered for more than 10 years. Affected by COVID-19, about 40% of all organizations reported lower revenue than that of last year, and about half of them had a revenue 20% to 50% lower. Meanwhile, 32% of all organizations reported higher revenue, and 30% of all organizations reported a revenue almost equal to that of last year.

➤ **Source of funds:** The main source of funds for the surveyed organizations is domestic foundations. It is followed by government purchases of services, personal donations, corporate donations, and corporations' purchases of services.

➤ **Team size:** 72% of the surveyed organizations have 5 or fewer full-time employees. 11% have more than 10 full-time employees. The size distribution of part-time employees is almost equal to that of full-time employees. The size distribution of core volunteers is relatively dispersed. The size is small in general.

➤ **Fields of work:** The organizations surveyed focus mainly on “ecological protection” and “publicity and education.” “Climate change” and “environmental law” received least attention. In terms of sub-fields, more projects are in “species and habitat,” “sea protection,” “water pollution control,” “solid waste management,” “environment education,” “nature education,” and “action advocacy.”

➤ **The status quo of survey organizations:**

Strategy and core business: about 3/4 of the organizations surveyed have clear strategic positioning.

Team: more than 80% of the organizations surveyed have a stable team that can support core business.

Fundraising: Most (64%) organizations surveyed cannot raise enough fund to support core business. Their sources of fund are not stable, and they do not have a fund management system.

Finance: About half of the organizations are relatively healthy financially.

➤ **Biggest challenge:** Fundraising is the biggest challenge for 3/4 of the organizations surveyed, echoing the analysis above. Moreover, about half of the organizations reported that “lack of effective publicity” and “unstable and unprofessional staff” are among their major challenges.

➤ **Support needed from grantmakers:** 68% of the organizations surveyed hope to get resource recommendations and networking from grantmakers. Besides, more than half of the organizations hope to get support in terms of “publicity support” and “capacity building.” About 40% hope to get consultation of future development. About 30% hope to learn “community network building.”

This English version is a simplified version of 2020 CEGA Report. Please read the Chinese version for details.

ACKNOWLEDGEMENT

Main participants in report preparation

Corporate Citizenship in Action (CCiA)	Hu Heng (Editor in Chief) Ding Siming, Zhang Wanxian, Zhao Kunning
SEE Foundation	Gong Yue
Beijing Qiaonyu Foundation	Ma Tengyu
Shenzhen Mangrove Wetlands Conservation Foundation (MCF)	Xu Yuman
Lao Niu Foundation	Lan Keqi
Guangdong Harmony Community Foundation	Huang Li
Paradise International Foundation	Ma Jian
Vanke Foundation	Wu Dan
China Green Carbon Foundation	Hou Yuanqing
China Environmental Protection Foundation	Yu Yinming
Friends of Nature Foundation	Zhang Boju
Beijing Afforestation Fund	Luo Huixin
All-China Environment Federation (ACEF)	Ni Yao
China Oceanic Development Foundation	Zhang Maodong
Zhenro Foundation	Lu Lichun
K2 Foundation	Liu Yiwei
Ming Foundation	Lu Zhongcheng
Cihai Environmental Foundation	Kang Hui
Beijing Wo Qi Foundation	Tang Ting
Zhilan Foundation	Chen Nan



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**China Environmental Grantmakers
Alliance (CEGA) Report**

CEGA - Building a New Environmental Future



Add: Room 205, Building B, Kelin Plaza, No 107 Dongsì North Avenue, Dongcheng District, Beijing

Tel: +86 (10) 65691826 / 18601195332

E-mail: zhangry@foundationcenter.org.cn



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