Data Book on NGOs in Japan 2021
NGOs in Figures

Ministry of Foreign Affairs of Japan
Japan NGO Center for International Cooperation (JANIC), an NPO Corporation

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Opening Remarks

The COVID-19 pandemic is having a serious impact on the lives and livelihoods of all people on the planet, and the global outbreak still shows no signs of abating. In the midst of this COVID-19 pandemic, conflicts and natural disasters are occurring frequently, and the environment surrounding developing countries is becoming increasingly severe. Japanese NGOs are working closely with the people in developing countries who are most vulnerable to these new crises and are providing support to respond quickly and conscientiously to the diverse and ever-changing needs of the local people.

The Ministry of Foreign Affairs of Japan (MOFA) considers NGOs to be important partners in international cooperation and is actively engaged in various efforts to strengthen cooperation with NGOs, including financial cooperation for projects implemented by NGOs, support for capacity building of NGOs, and promotion of dialogue with NGOs.

From the perspective of strengthening cooperation with NGOs, MOFA has conducted surveys to ascertain the actual status of Japanese NGOs engaged in international cooperation and compiled the results in the Data Book on NGOs in Japan 2011 and the Data Book on NGOs in Japan 2016 as basic information for revising NGO support measures and considering cooperation with NGOs.

Since more than five years have passed since the last data book, and since NGOs have been greatly affected by the COVID-19 pandemic and their activities have also changed, we commissioned the Japan NGO Center for International Cooperation (JANIC), an NPO corporation, to conduct an up-to-date survey on Japanese NGOs to help us consider how to collaborate with NGOs in the future.

This publication has been completed with the cooperation of many people, including JANIC and the NGOs that responded to the survey questionnaire. I would like to take this opportunity to express my sincere gratitude to all of you.

We believe this publication will be useful not only to MOFA, but also to NGO personnel, people in private corporations and local governments who wish to engage in international cooperation in collaboration with NGOs, and people who wish to engage in international cooperation working for NGOs in the future.

We hope that many people will make use of this publication and that it will help to further expand the activities of NGOs and further activate the NGO sector.

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Introduction

<Background and Objectives of the Survey>

NGOs in Japan engaged in international cooperation (hereinafter referred to as "NGOs") have been playing a remarkable role.   The scale of these organizations based in various parts of Japan and of their activities is increasing, and the fields in which they operate are becoming increasingly diverse. On the other hand, Japan does not have a registration system or legal personality type specifically for NGOs engaged in international cooperation, so it is not possible to fully grasp their actual situation, such as where they are based throughout the country, the scale of organizations, and the contents of their activities. Therefore, there has been a strong demand from ODA and NGO personnel for a survey of the actual status of each organization, and for documentation of the survey results.

The "Data Book on NGOs in Japan 2011" was produced as part of the "Thematic Capacity Building Program by NGOs" sponsored by MOFA in 2010, and the "Data Book on NGOs in Japan 2016" was produced again in 2016 as part of the Ministry's "Development Assistance Research."   The Data Book is used as a helpful document not only by MOFA and NGO personnel, but also by government agencies, local governments, foundations, private corporations, and academic and research institutions that are interested in NGOs as well as people who are thinking of working for NGOs in the future.

Five years have now passed since the creation of the above Data Book.   During this period, the environment surrounding NGOs has changed significantly, as apparent from the growing recognition of the SDGs in Japan, the increased interest and expanded initiatives of corporations in the area of sustainability such as ESG, the spread of technologies such as IoT, ICT, and block chain, and the COVID-19 pandemic.   In response to these changes in the external environment, NGOs, which conduct activities while responding to these changes in the external environment, have been found to have undergone further changes and transformations in the form of their organizations, the content of their activities, and their partnerships and collaborations with other organizations.   This time, we have surveyed the current organizational status and activities, both domestic and international, NGOs and compiled the findings into the "Data Book on NGOs in Japan 2021," with the objective of grasping the overall situation of NGOs in Japan.   This publication is intended not only to provide information to those who wish to work in the NGO sector, but also to help the Government of Japan, MOFA and other relevant ministries, local governments, foundations, corporations, and academic and research institutions, etc., to understand the latest status of NGOs and consider how they should collaborate with NGOs in the future.

<Survey Methodology>

The survey for the preparation of this publication was conducted as follows, based on a careful examination and determination of target organizations, provision of data, questionnaire and interview surveys, and advice and guidance by the Supervisory Committee.

1. Careful examination and determination of target organizations

For these Data Books in the past, the survey was conducted based on the "NGO Directory" (hereinafter referred to as "Directory"), which contains basic information on 491 Japanese NGOs. However, the information in the Directory can be updated by the organizations themselves at any time, and there are some organizations that have not updated their information for a while or have already stopped their activities. Furthermore, various foundations, units of related ministries and agencies, and international exchange foundations of various prefectures are also registered, whereas there are also many organizations engaged in international cooperation that are not listed in the directory. Therefore, based on the definition of NGOs described in the introductory chapter, the following three steps were taken to finalize the list of target organizations: (1) a careful examination of the organizations registered in the NGO Directory, (2) addition of organizations that are not listed in the Directory but are members of regional network organizations, and (3) confirmation and addition to the list of target organizations by the Supervisory Committee.

First, (1) in the careful examination of the registered organizations in the NGO Directory, we selected 364 out of 491 registered organizations based on the definition in the introductory chapter and the confirmation of Supervisory Committee members. Next, we added to the list NGOs that are not listed in the Directory but are members of nine regional networks in Hokkaido, Saitama, Yokohama, Nagoya, Osaka, Kobe, Ehime, Fukuoka, and Okinawa. Finally, the Supervisory Committee confirmed and added to the list of target organizations created as above to finalize the list of target organizations.

In order to understand the actual activities of organizations targeted as a result of the deliberations of the Supervisory Committee, we checked the "NPO portal sites" of the Cabinet Office and each prefecture, the corporate number search site of the National Tax Agency, and the websites of each organization and their update status. Through these processes, the number of NGOs covered by this publication was reduced to 424 organizations.

2. Provision of basic information and financial data of the target organizations

In order to understand the latest financial status of NGOs, we received data from EMA Co., Ltd., a company with which the author is affiliated, which continuously collects financial data on the non-profit sector and builds its own database. The data provided includes basic information on the organizations, such as their name, year of establishment, location, and legal personality, which is provided in the Directory, as well as financial data for the latest fiscal year, and project details and implementation sites extracted from their activity reports, etc.

3. Questionnaire survey and interview survey

In addition to the basic information on 424 organizations and data on their finances and project sites, etc., obtained in 2 above, data was also collected on the basis of a questionnaire survey. The questionnaire survey items were based on the Data Book on NGOs in Japan 2016. In particular, we added three survey items regarding factors that have changed significantly over the past five

years: (1) the expansion of cooperation between NGOs and various domestic and overseas organizations due to the dissemination of the SDGs, (2) changes in connections with citizens and the current status of security due to the spread of technologies such as IoT, and (3) the impact of the COVID-19 pandemic on projects and organizations.

These survey items were converted into a web-based questionnaire using the web-based questionnaire creation system "Survey Monkey" (see the appendix for details of the survey items). The total number of survey items was 96, which was about twice as many as the 55 items in 2016, and the questionnaire required about one hour to complete.

Requests for the cooperation of each organization were made mainly using the e-mail addresses of NGOs that JANIC has maintained and managed, the e-mail addresses of the organizations provided in 2 above, and the online inquiry forms of organizations that only have such forms. The survey schedule was as follows.

Oct. 7-12, 2021	Sent questionnaire URL to 424 target organizations
Oct. 25	Sent reminder email to organizations that had not responded
Oct. 29	Regional network organizations were asked to send reminder emails to their affiliated organizations. Reminder emails were sent via email lists of JANIC and related organizations.
Nov. 5	Reminder emails were sent to organizations that had not responded.
Nov. 8-10	Reminder emails were sent to organizations that had not responded, also informing them that the deadline had been postponed.
Nov. 12	Questionnaire survey completed

Despite the large number of survey items and the long time required for responses, we received responses from 236 organizations, or about 56% of the 424 organizations. However, after a careful review of responses that could not be analyzed, such as multiple responses by a single organization, or responses that were blank except for the name of the organization and respondent, the responses of 216 organizations, or approximately 51%, were used as valid responses in this publication. The number of valid responses was about double that of 124 organizations in 2016.

Finally, in addition to collecting data through the above questionnaire, an interview survey was conducted to gain a detailed understanding of the current situation of some organizations. The organizations that cooperated with the interview survey are as follows.

- PHD Association (a public interest incorporated foundation)
- Nagoya NGO Center (an NPO corporation)
- Save the Children Japan (a public interest incorporated association)
- Cross Fields (an NPO corporation)

4. Advice and Guidance from the Supervisory Committee

A Supervisory Committee was established to provide advice and guidance on the survey design, screening of the target organizations, data collection and analysis methods, and the content, structure, and notation of this report, etc. The three Supervisory Committee members are as follows:

- Masaaki Ohashi, Professor, University of the Sacred Heart, Tokyo
- Yasuhiro Shigeta, Professor, Utsunomiya University
- Masako Hasegawa, Executive Director, CSO Network Japan

＜Notes, etc.＞

* In the text, the largest items are referred to as "chapters" under which there are "sections." Furthermore, the first section of each chapter is a "general introduction" that summarizes the chapter. The numbers of figures and tables are given as "chapter number / section number / order of figures and tables in the section," and a list of data on which the figures and tables are based is given in the Appendix.

* It has not been possible to collect information of all organizations for each of the data items of organizational information, etc., that was provided. This is because the information disclosed by each organization varies. Particularly in the case of voluntary organizations that do not have a website, it is difficult to collect information other than the name of the organization. Even for organizations that have a legal personality, the documents and contents of the activity reports submitted to the competent authorities after the end of the fiscal year, as well as the information disclosed on the website, are different for each legal personality and organization. Therefore, when conducting analyses based on the data items provided, the number of data points used has been clearly indicated in the text as follows. For example, if 350 organizations have filled out the "year of establishment" field, it would be indicated, for instance, as follows: "The years of establishment of the 350 organizations which provided this information are so and so." Also, if multiple country names are entered in the "country/region of activity" field in responses from 350 organizations, it would be indicated, for instance, as follows: "There are 800 valid data points regarding the countries/regions where the 350 organizations that provided this data are conducting activities."

In addition to the data provided in the above manner, we have also used the valid response data of 216 organizations obtained from the questionnaire survey, some of which may have unanswered items. In such cases, the "number of responding organizations" is indicated in the text as above, and if there are multiple responses, the number of valid responses along with the number of responding organizations is indicated in the text or in the figures and tables (e.g., "Number of organizations: 350; Number of data points: 800").

* For the survey items that were set in accordance with past data books, changes over time have

been shown using figures and tables. For historical data, figures are taken from the Data Book on NGOs in Japan 2016 and other sources. However, data up to 2011 was collected through questionnaires, and for 2016 data, data registered in the NGO Directory was also used in addition to that from questionnaires. This publication differs in its survey methods from previous data books; for instance, this publication is based on the questionnaire and the data provided, as described above. Therefore, changes over time are indicated just to help the reader to grasp the overall trends while being mindful of the differences in survey methods.

　* For the questionnaire survey, the survey items were set in such a way that the responses could be interpreted as uniformly as possible. However, some of the items were entered and answered with different interpretations by each organization. For example, some organizations answering the question on "the title of the representative of the organization" may have multiple corresponding titles such as "Chairman" or "President" etc., within the organization. There is no strict provision in the law as to which one is considered to be the "representative," and it is up to the interpretation of the organization. Therefore, if there are multiple organizations with coexisting positions as shown in this example, it is expected that the answers will differ from organization to organization. In this survey, the answers based on the interpretation of the organizations were adopted as is.

Outline of this Publication

This publication is comprised of a total of ten chapters.　In the following, bullets points "・" are used to indicate the contents of analysis and the main findings of each chapter.

Introductory Chapter "A Brief Overview of NGOs in Japan"
・ In this publication, NGOs are defined as "non-profit civil society organizations engaged in international cooperation."
・ NGOs in Japan can be divided into the "first generation" (1960s to early 1970s), "second generation" (around 1980), "third generation" (1980s), "fourth generation" (1990s), "fifth generation" (2000s) and "sixth generation" (2010s), and each generation has its own characteristic fields of activities and forms of projects.
・ Recent major trends include the "dissemination of the SDGs," "changes in connections with citizens and the current status of security due to the spread of technologies such as IoT," and "the COVID-19 pandemic."

Chapter 1 "The Current State of NGOs"
・ The number of NGOs newly established in Japan increased from the 1970s to the 1990s but has been declining in recent years.
・ The most common reason for the establishment of NGOs is "a meeting of minds for a common purpose."
・ NGOs most commonly acquire a legal personality as either "NPO corporations" or "certified NPO corporations (including specially certified NPO corporations."　Voluntary organizations without legal personality also exist and are expected to remain to a certain extent in the future.
・ As for the location of their offices in Japan, it is most common for NGOs to have "only a headquarters office in Tokyo." More than 60% of the organizations do not have an overseas office but carry out their activities in cooperation with local counterparts.

Chapter 2 "Forms and Contents of Projects Implemented in Japan and Abroad"
・ Overseas projects are primarily for "development and support" and consist of many different activities such as "project implementation" and "human resource development."
・ Domestic projects are primarily focused on information dissemination and awareness raising, mainly through "networking."
・ Both overseas and domestic projects are carried out in multiple forms with multiple contents by individual organizations.

Chapter 3 "Countries/Regions of Activities, Fields of Activities, and Target Groups"
・ Slightly less than 50% of activities of Japanese NGOs are conducted in Asia.
・ As for the fields of activities of overseas projects, the most frequent responses were "education

and vocational training," "development and poverty," "health and medical care," "environment," and "agriculture and fisheries," in that order, and the main target groups of these activities were "local residents and citizens in general," "children," "women," "youth (18 and older)," "the poor (landless farmers and day laborers)," and "refugees and internally displaced persons."

- The most common fields of activity for domestic projects are "networking," "education and vocational training," "advocacy and research," "human rights," and "starvation and disasters," in that order.   The main target groups for these activities are "local residents and citizens in general," "children," "others," "youth (18 and older)," and "foreign residents in Japan."

- NGOs in Japan are working to meet the diverse needs of the countries and regions in which they operate and are providing attentive support.

- Some of the projects implemented have increased relevance to the SDGs.

Chapter 4 "Collaboration with Other Organizations"

- More than 80% of the NGOs are collaborating with other organizations.

- Their main collaborators are domestic and overseas "governments and government-affiliated organizations," "local governments," "the United Nations and international organizations," "non-profit organizations such as labor unions, cooperatives, and religious groups," "universities and research institutions," "civil society organizations including foundations," and "corporations.

- NGOs most frequently collaborate with "corporations" and "social contribution type" collaboration tends to be most common.

- Strengthening of "CSV type" collaboration is expected in the future, for which some organizations are preparing "menus" to enhance collaboration with corporations.

- About 80% of NGOs are conducting activities as members of domestic or international network organizations.

Chapter 5 "Finances"

- NGO income has increased from 46.5 billion yen in FY2016, the time of the last survey, to 55.6 billion yen. In the breakdown of income, there was an increase in donations, grants and subsidies, and independent activity income in particular.

- The average income per organization was 196.56 million yen, a significant increase from 137.29 million yen at the time of the previous survey.   However, the average increased due to organizations with income of 100 million yen or more.

- Median income was 23 million yen, which is far from the average and closer to the reality of small and medium-sized NGOs.

- Income was observed to have a polarized structure. The five income categories of "membership fees," "donations," "independent activity income," "grants and subsidies," and "other income" all showed a polarized structure.

- The total expenditure (scale of operations) of NGOs has more than doubled compared to that at the time of the 2011 survey.

- As for the breakdown of total expenditures, "project expenses" accounted for 93.9% of the total at 51.17 billion yen, while "administrative expenses" accounted for 6.1% at 3.31 billion yen.
- Of the total expenditures, personnel expenses accounted for 25.1% at 13.7 billion yen.

Chapter 6 "Membership System"
- More than 90% of NGOs have membership systems.
- The most common membership system was "individual membership (with or without voting rights) + corporate membership (with or without voting rights).
- Individual members without voting rights were the most numerous, and corporate members were less numerous than individual members overall.
- There are other support systems such as "unsent postcard/used stamp systems" and "used book donation systems," etc.

Chapter 7 "Decision-Making Bodies"
- In most cases, the decision-making bodies of NGOs consist of two organs, the General Assembly and the Board of Directors.
- The frequency of holding the General Assembly is once a year at 94% of organizations whereas the frequency of meetings of the Board of Directors varies from one to six times a year.
- The highest decision-making body is the General Assembly for 78% and the Board of Directors for 14% of the organizations.   The Board of Directors is basically comprised of 10 members or less whereas the General Assembly is often comprised of more than 50 members, though it may be comprised of a smaller number for some organizations.
- As for the gender ratio of the members, the proportion of men is high.

Chapter 8 "Personnel Involved with NGOs and Their Remuneration and Benefits"
- The most common titles of NGO representatives are President, Representative Director, Representative, and Chairperson, and they are people from diverse social backgrounds.   As for the gender ratio of representatives, slightly more than 60% are men.
- The title of the person in charge of the secretariat is Secretary-General at more than half of the organizations, at some of which the representative also serves as the Secretary-General.   The gender ratio gap is less than in the case of the representative, with the proportion of women being slightly more than 40%.
- As for staff, female "domestic full-time paid staff" are most common, and the overall gender ratio is such that there are more females.
- Looking at the number of staff by income scale, it is noted that the number of "full-time paid staff" employed increases as the income scale increases.   Organizations with income of less than 20 million yen are supported by "unpaid staff."
- As for the working environment of NGOs, the rate of establishment of various regulations such as "work rules" and "salary regulations" is not very high. However, as the scale of income

increases, the rate of establishment of various regulations increases, as does the level of benefits.

- About 80% of the organizations accept "volunteers" and about 60% accept "interns. Of these, acceptance of "unpaid domestic volunteers" and "unpaid domestic interns" is most common.
- People from diverse social backgrounds participate in "volunteer" and "internship" activities. Among them, students account for a large percentage.

Chapter 9 "Connections with Citizens"

- NGOs conduct many programs for citizens to participate in, including for didactic learning (lectures, seminars, etc.), appreciation (screenings, concerts, etc.), experience (study tours, etc.), and exchange (bazaars, parties, etc.).
- In response to the COVID-19 pandemic in 2020, most of the programs that had been conducted face-to-face have been cancelled or replaced by programs held online.
- Information is disseminated to citizens not only by print media such as annual reports and newsletters, but also by digital media.
- The most common method of information dissemination was through websites, followed by social networking services such as Facebook, Instagram, and Twitter.
- Slightly less than 20% of NGOs have experienced some kind of cyber-attack in the past, but still about 30% of the organizations have not taken any specific countermeasures. Security measures are an issue for all NGOs.

Chapter 10 "Impacts of COVID-19 on Organization and Projects"

- Of the existing projects that NGOs have been conducting both domestically and internationally since before the outbreak of COVID-19, 96.3% of overseas projects and 96.9% of domestic projects have been negatively affected. Even today, more than half of the projects have not seen an improvement in their situation.
- As for impacts on collaboration with stakeholders, "no change" accounted for about 50% of the total, but there were some negative impacts such as "decreased collaboration and support" and some positive responses such as "increased collaboration." The predominant expectations toward stakeholders were for "financial support" and "project partnership."
- As for organizational and project operations under the pandemic, almost all organizations had responded by "introduction of telework," "changes in information dissemination methods" and "changes in how internal approvals and decisions and payments are made." Some organizations opted for "office relocation" or "review of personnel expenses."
- Currently, 95% of the organizations indicated that they plan to continue their activities, but the remaining 5% are considering suspending their activities or dissolution.

Introductory Chapter "A Brief Overview of NGOs in Japan"

Section 1 General Introduction

In this publication, NGOs are defined as "non-profit civil society organizations that engage in international cooperation."

NGOs in Japan can be divided into the "first generation" (1960s to early 1970s), "second generation" (around 1980), "third generation" (1980s), "fourth generation" (1990s), "fifth generation" (2000s) and "sixth generation" (2010 and later), and each generation has its own characteristic fields of activities and forms of projects.　Recent noteworthy trends include the "dissemination of the SDGs," "changes in the natural environment due to climate changes issues," "changes in connections with citizens and the current status of security due to the spread of technologies such as IoT," and "the COVID-19 pandemic."

NGOs in Japan need to constantly identify activities that are required in the context of global and domestic trends, and at the same time, to gain the understanding and support of citizens and be trusted by other sectors as important partners.

Section 2 Definition of NGOs

The origin of the term NGO (Non-Governmental Organization) dates back to 1946 when the Economic and Social Council (hereinafter, ECOSOC) of the United Nations (UN) referred to "non-governmental entities," especially private non-profit organizations that cooperate with the UN as NGOs.　At that time, however, NGOs registered with the UN were a diverse group of "non-governmental groups," including religious, political, labor, business, ethnic and regional groups, and professional associations, and it was difficult to say that they had anything in common other than being "non-governmental."

Since then, NGOs have expanded their activities in various ways around the world, though there is no globally agreed definition of what they are.　A magazine published by the World Bank, for example, defined NGOs as entities that " are entirely or largely independent of government, with humanitarian rather than commercial objectives.　They are private organizations that pursue activities to relieve suffering, promote the interests of the poor, protect the environment, and stimulate community development.[1]"

Based on an understanding of such definitions, JANIC defines NGOs as "organizations that address global issues such as poverty, hunger, and the environment from a private sector standpoint, as distinct from that of governments and international organizations, transcending national, ethnic, and religious barriers, without a profit motive."　Therefore, in this publication, NGOs are defined as "non-profit civil society organizations engaged in international cooperation" based on the following main points: "addressing international social issues = international cooperation," "not for

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[1] Christopher Gibbs, Claudia Fumo and Thomas Kuby "Nongovernmental Organizations in World Bank-Supported Projects: A Review," *Précis,* vol. 177, 1999, pp.1-2.

profit = non-profit," and "private sector standpoint = civil society organization."

In Japan, non-profit organizations that address issues such as poverty and aging within the country are referred to as NPOs, while the term NGO is often used to refer to non-profit organizations working overseas on emergency humanitarian assistance, development, human rights, peacebuilding, etc.   This usage of the terms is unique to Japan. NGOs are civil society organizations (CSOs) and recently are often called more generally as civil society organizations (CSOs).   In recent years, especially, information from around the world is transmitted instantly via the Internet, and the travel of people across national borders has become commonplace.   Environmental issues such as climate change and refugee issues are a continuum transcending national borders, so it is becoming less meaningful to refer to civil society organizations differently based on national borders.

Section 3 The History of NGOs in Japan

At first glance, the fields of activities and forms of projects of NGOs in Japan are diverse.   However, it should not be overlooked that distinctive NGOs have been established in each period in response to the global situation and domestic trends.   In this section, we would like to provide an overview of the history of NGOs, dividing it into the "first generation" (1960s to early 1970s), the "second generation" (around 1980), the "third generation" (1980s), the "fourth generation" (1990s), the "fifth generation" (2000s), and the "sixth generation" (2010s).

The "First Generation" (1960s to Early 1970s)

NGOs were established for charitable activities by religious organizations, especially in the first half of this period.   The Japan Overseas Christian Medical Cooperative Service (JOCS) (established in 1960), the International Organization for Spiritual Culture (established in 1961, the forerunner of OISCA), the Southeast Asia Christian Rural Leaders' course (the forerunner of Asian Rural Institute) and the Family Planning International Cooperation Foundation (established in 1968, currently JOICFP), formed at the request of an international organization, are considered pioneering NGOs in Japan.   They were mainly engaged in direct support activities for the poor in developing countries mainly in Asia.

In the 1970s, with the end of the Vietnam War, the independence of Bangladesh (1971), the announcement of the "Limits to Growth" by the Club of Rome and the holding of the United Nations Conference on the Human Environment (1972), interest in international and environmental issues increased among citizens.   NGOs established during this period include SHAPLA NEER = Citizens' Committee in Japan for Overseas Support (established in 1972) and Asia Pacific Resource Center (PARC).   Japanese branches and partner organizations of NGOs headquartered overseas also began their activities in Japan during this period, including Amnesty International Japan (established in 1970), the World Wide Fund for Nature (WWF) Japan (established in 1971), and Christian Child Welfare Association (CCWA) (established in 1975, currently: Child Fund Japan), etc.

The "Second Generation" (Circa 1980)

Many NGOs were established to provide support to the large number of refugees that fled from Indo-China around 1980. These include the Association for Aid and Relief, Japan (AAR Japan) and Nippon International Cooperation for Community Development (NICCO) (established in 1979), the Japan International Volunteer Center (JVC) and Caring for Young Refugees (CYR) (established in 1980), and the Japan Sotoshu Relief Committee (JSRC) (established in 1981, predecessor of the Shanti Volunteer Association).   Many of the NGOs listed here began by providing emergency relief and supplies to local communities, and then shifted the focus of their activities to "development cooperation" to support local communities in response to changing local needs over the medium to long term.

Japanese branches and partner organizations of NGOs headquartered overseas, such as FoE Japan (established in 1980) and Foster Plan Japan Office (established in 1983, currently Plan International Japan), were also established during this period.

The "Third Generation" (1980s)

NGOs provided assistance to drought-stricken Africa.   It was roughly during this period that NGOs in Japan expanded the scope of their activities in Africa.   For example, "Association SAHEL" (established in 1987) shifted the focus of its activities from dealing with deforestation, which was considered to be an anthropogenic factor in the drought disaster, to environmental conservation and rural development.   During this period, the Development Education Council of Japan (established in 1982, predecessor to Development Education Association & Resource Center (DEAR)) was also established as a collaborative body on development education.   There were also notable movements to establish "network NGOs," such as the NGO Activity Promotion Center (established in 1987, the predecessor of JANIC), the Kansai International Cooperation Council (established in the same year, the predecessor of the Kansai NGO Council), and the "Nagoya Third World Exchange Center" (established in 1988, the predecessor of the Nagoya NGO Center).   The increase in the number of NGOs in Japan and the need for organizations that could form networks and provide intermediary support functions could be pointed out as a reason for this.

The number of Japanese branches and partner organizations of NGOs headquartered overseas continued to increase, with the establishment of Save the Children Japan(SCJ) (established in 1986) and World Vision Japan(WVJ) (established in 1987), etc.

The "Fourth Generation" (1990s)

The Gulf War, the conflict in Yugoslavia, and the Rwandan genocide led to the establishment of many NGOs for emergency humanitarian assistance, such as JEN (established in 1994) and Peace Winds Japan (PWJ) (established in 1996).   In addition to NGOs taking up activities related to global environmental issues in the wake of the United Nations Conference on Environment and Development (Earth Summit) (1992), NGOs focusing on discrimination against people with disabilities and women also emerged based on such events as the World Conference on Women held in Beijing (1995).   Furthermore, global social movement campaigns such as Jubilee 2000 (the Debt

Cancellation Campaign), which sought cancellation of debt of the poorest countries in the 1990's, and the International Campaign to Ban Landmines(JCBL) are developments emblematic of this generation.　These campaigns had an impact on the 'Stand UP' Against Poverty Campaign, etc., of the 5th generation.　With NGO relief activities after the Great Hanshin Awaji earthquake as an impetus, the Act on Promotion of Specified Non-profit Activities (NPO Law) came into effect in 1998, encouraging the establishment of new NGOs.

The "Fifth Generation" (2000s)

　This generation had two characteristics.　The first was the strengthening of partnerships with a variety of stakeholders, including citizens, government bodies, and corporations, rather than the establishment of NGOs focused on new fields of activity.　The Japan Platform, an emergency aid organization jointly organized by NGOs, the government, and the business community (established in 2000), as well as the 'Stand UP' Against Poverty Campaign including the White Band Project conducted by the Global Campaign to Eradicate Poverty (G-CAP), a movement to advocate and campaign on global issues (implemented in 2005), the 2008 Japan G8 Summit NGO Forum (held in 2008), and the NGO Network for Promoting CSR (established in 2008), etc., are emblematic of this trend.

　The second characteristic was the emergence of organizations working to address social issues using business methods, rather than relying on support from citizens like conventional NGOs.　In particular, the founders and representatives of the organizations are characterized by their social entrepreneurship, with Terra Renaissance (established in 2001), Kamonohashi Project (established in 2002), TABLE FOR TWO International (established in 2007), and ARUN (established in 2009) being typical examples.

The "Sixth Generation" (2010s)

　The characteristics of this generation are to go beyond the structure of supporters and beneficiaries, to provide resources to meet mutual needs, and to work for the creation of new social value (social innovation).　Kopernik (established in 2010), e-Education (established in 2010), CROSS FIELDS (established in 2011), and WELgee (established in 2018) are representative of this generation. Another characteristic of NGOs of this generation is that they are enthusiastic about support that actively incorporates technology, information dissemination using social networking services, and advocacy.

Section 4: The Environment Surrounding NGOs

　One of the most worrisome issues for NGOs in carrying out their work is the COVID-19 pandemic, which has been spreading globally since 2020 and is yet to be brought under control.　In the past two years, poverty and inequality have increased, especially affecting vulnerable populations, children, and women.　Economic recovery has also been slow due to loss of employment, etc.　In the most vulnerable countries, poverty is expected to increase further, especially in Africa, where the

absolute number of people living in poverty is expected to increase until 2023, and the achievement of the SDGs is beginning to be delayed or even set back due to the pandemic. NGOs in Japan are also facing restrictions on their staff's travel abroad and mobility in the field and are seeking new ways to provide support.　Under the concept of "localization," a new form of partnership is spreading in which local organizations are delegated leadership, authority, and resources to make the best use of local autonomy, while NGOs support them behind the scenes.

Other serious issues in the recent world situation include the growing need for humanitarian assistance due to the growing threat of armed conflict and terrorism, the impact of climate change on people's lives, and the narrowing of civic space.　First of all, armed conflicts and terrorism are becoming more frequent, and civil wars and coups d'états are causing the outflux of large numbers of refugees.　For example, it has been 10 years since the Syrian civil war began, but many Syrians are still displaced both inside and outside the country and need urgent humanitarian assistance. In addition, the expulsion of the Rohingya people from Myanmar to Bangladesh, the military coups d'état in Myanmar, and the Taliban's seizure of the entire country of Afghanistan have forced millions of people to flee both inside and outside their countries and to lead difficult lives.　The need for emergency humanitarian assistance, including to prevent famine, is expected to increase in the future.　Although NGOs in Japan have provided assistance in conflict zones around the world, they have not always been able to conduct activities that meet these needs, partly due to safety management issues.　In addition, even though the number of refugees seeking to travel to and stay in Japan is increasing, the number that are recognized as refugees is low, suggesting the need for measures to be taken, including improvements in the legal system and its implementation.

In the aftermath of the Great East Japan Earthquake and the Fukushima No. 1 Nuclear Power Plant accident in 2011, NGOs in Japan with no experience in disaster relief activities in Japan also provided support in the disaster-affected areas and areas where the victims had evacuated. NGOs in Japan have experience with relief activities after the Hanshin-Awaji earthquake and in areas affected by large-scale earthquakes and tsunamis that occurred in various parts of Japan and the world, such as off the coast of Sumatra, Haiti, and Turkey, and it can be said that their experience and know-how were put to good use after the Great East Japan Earthquake. The underwater volcano eruption that occurred recently in the Tonga islands had widespread impacts not only in Tonga but also far beyond. As large-scale earthquakes, windstorms, floods, and other disasters are expected to occur in Japan and abroad in the future, NGOs in Japan should consider further strengthening their ability to respond to natural disasters.

Climate change has a great impact not only on the environment but also on people's lives.　Global warming has brought about abnormal weather such as heavy rains, huge typhoons, extreme heat, and droughts, and the resulting damage is increasing year by year.　In addition, glaciers are melting, and sea levels are rising, and especially in island nations with low elevations, the areas where people can live are starting to be reduced due to the rise of the sea level.　These effects of climate change are causing damage to crops and famine and poverty and creating situations in which vulnerable populations will suffer even more severe impacts. The effects of climate change are expected to

continue for a long time to come, and new responses by NGOs will be required for the long term.

The problems facing "civic space" are worsening worldwide every year. Space for citizens to engage in activism freely is the foundation of a democratic and sustainable society. However, in recent years, it is noticed here and there that civic space has been further narrowed in the name of preventing the spread of COVID-19. According to the 2021 CIVICUS Monitor, only 41 of the world's 197 countries and territories, or just 3.1% of the world's population, live in countries or territories with "open civic space." In other words, 96.9% of the world's people are living under constraints of one type or another. How to deal with this narrowing of civic space is a very important issue for NGOs in their development activities.

In this way, the demands on NGOs are becoming increasingly diverse and sophisticated. It is difficult for NGOs of a limited scale to develop their activities and produce substantial outcomes on their own, so promotion of further collaboration with other sectors is crucial. NGO meetings with government agencies, such as the NGO-Ministry of Foreign Affairs Regular Consultation Meetings and the NGO-JICA Consultation Meetings are now held regularly, and public funding for NGO activities has reached about 10 billion yen per year. In 2015, the NGO-Ministry of Foreign Affairs Regular Consultation Meetings "Partnership Promotion Committee" compiled the "Medium-Term Plan with regard to collaboration between ODA and NGOs: Direction for Collaboration in the Next 5 Years," which sets "collaboration" as a new keyword and calls for future cooperation in 10 areas, including the expansion of the scope of international cooperation, NGO participation in ODA projects, and cooperation in policy advocacy.

Corporations are increasingly collaborating with NGOs as part of their Corporate Social Responsibility (CSR) and Business and Human Rights efforts, and the United Nations and international organizations, universities and research institutions, labor unions, local governments, and citizens' groups are also important partners for NGOs.

NGOs are working on many issues to achieve the SDGs. For example, while it is important to address the issue of poverty reduction, it is also important for NGOs to look at the social and economic conditions that create poverty, questioning how the human rights violation called poverty came about and why NGOs alone cannot solve it.

As the number of actors engaged in international cooperation is increasing, NGOs need to constantly identify activities that are required in the context of the global situation and domestic trends, and at the same time, to gain the understanding and support of citizens and be trusted by other sectors as important partners, while never losing sight of their essence as expressed in their definition as "non-profit civil society organizations engaged in international cooperation.

Chapter 1 " The Current State of NGOs "

General Introduction

As mentioned in the introductory chapter, the number of NGOs established in Japan has increased in response to events in society, especially since the 1970s, with the 1990s being the period when the largest number of NGOs were established.   In recent years, however, the number of new organizations established has been on the decline.   The results of the survey showed that, though in some cases the establishment of NGOs was a development or derivation from existing organizations or activities, the largest number of NGOs were not established based on a specific organization or activity, but rather were established as a result of "a meeting of minds for a common purpose."

   Next, the organizations most commonly acquired as "specified non-profit corporations" (NPO corporations) based on the Act on Promotion of Specified Non-profit Activities and "certified NPO corporations" (including "specially certified NPO corporations") certified by the competent authorities.   However, there were also a certain number of voluntary organizations without legal personality.   Various legal personalities exist, such as the general incorporated associations and general incorporated foundations established under the public-interest corporation reform system in 2008, but organizations that continue activities as voluntary organizations are expected to remain to a certain extent in the future as well.

   The results regarding locations of offices in Japan and overseas do not vary much from previous surveys.   In Japan, NGOs that have "only a headquarters office in Tokyo" are most common and more than 60% do not have an office overseas.   It is observed that projects implemented overseas are implemented in cooperation with local counterpart organizations.
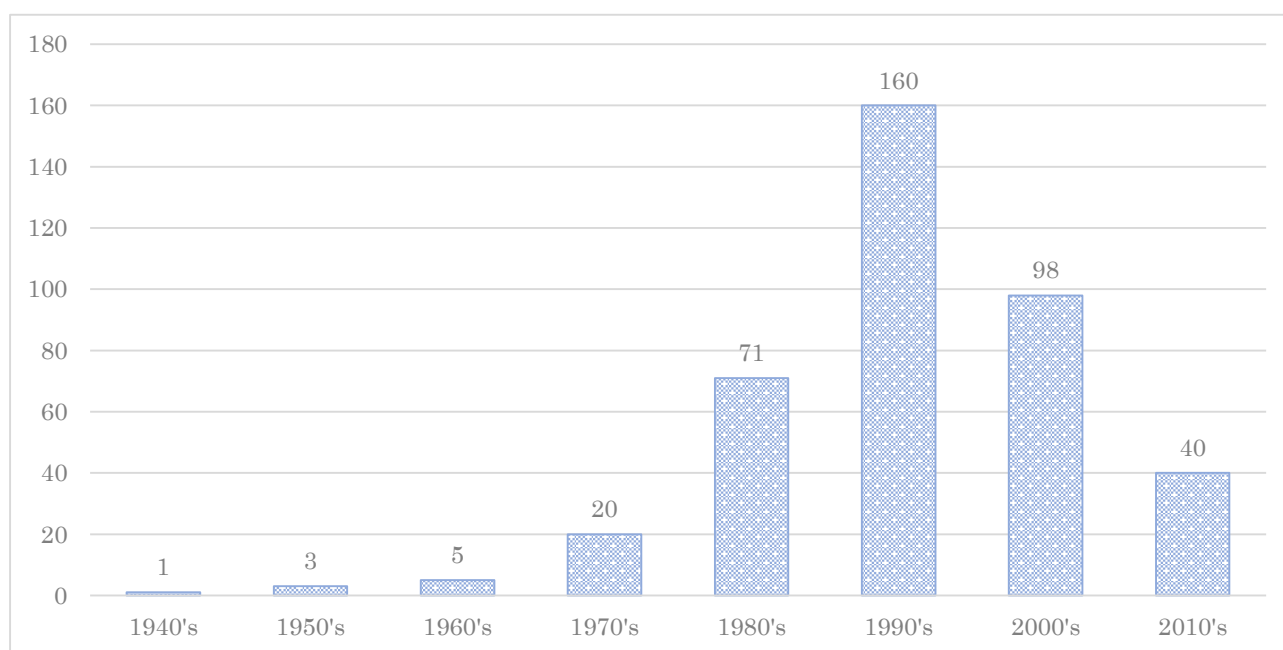
Figure 1.2.1 Decade of Establishment
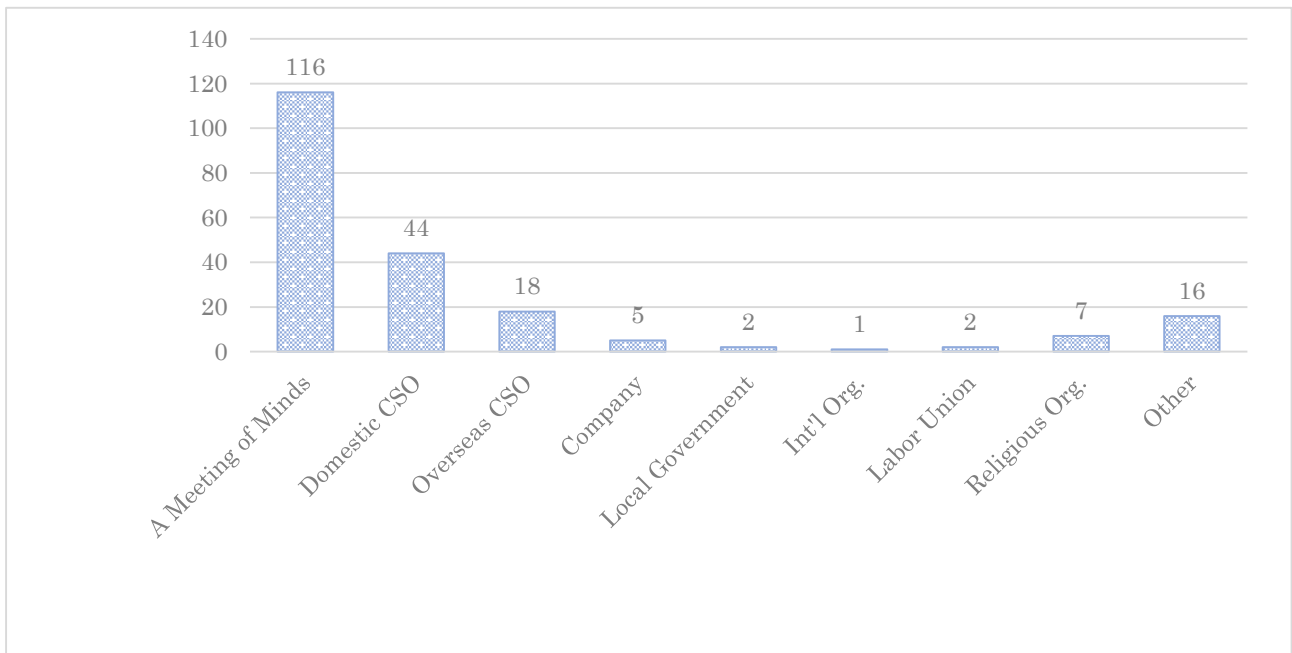
Figure 1.3.1 Founding Parent Organization
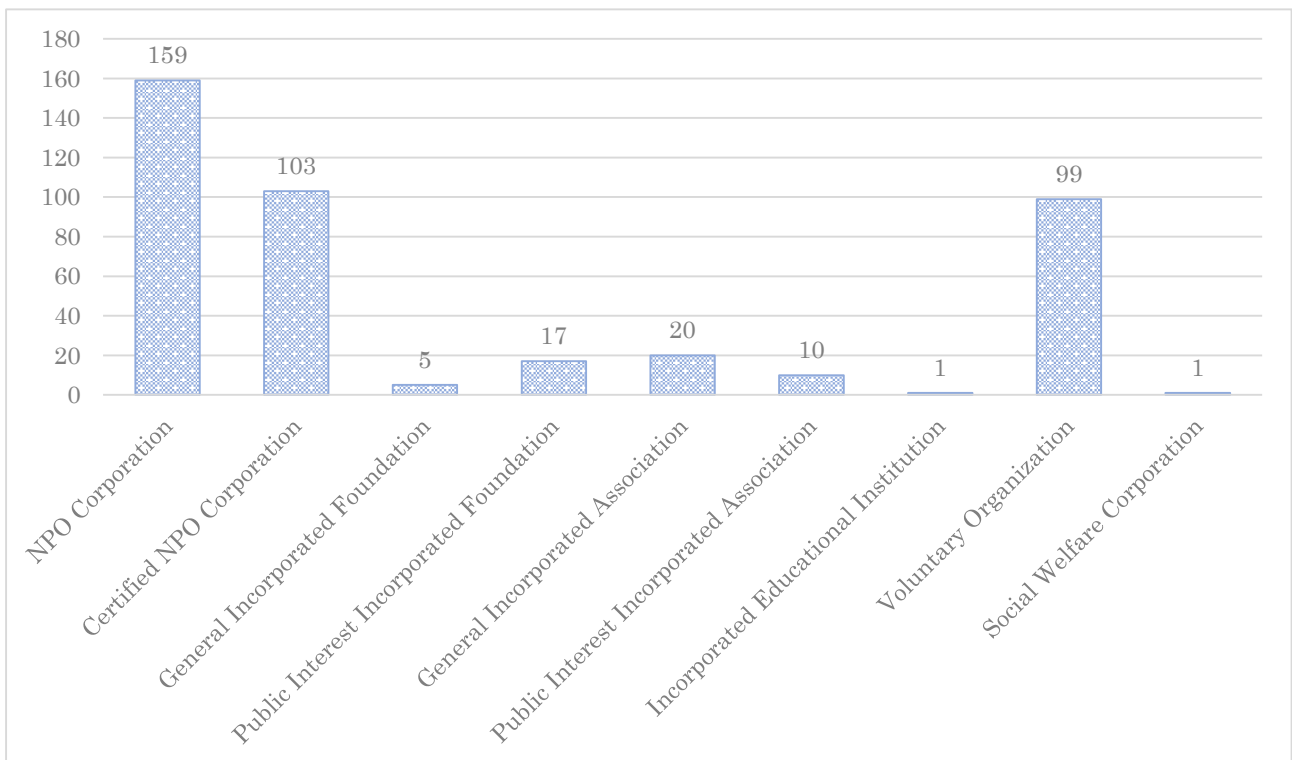
Figure 1.4.1 Legal Personality
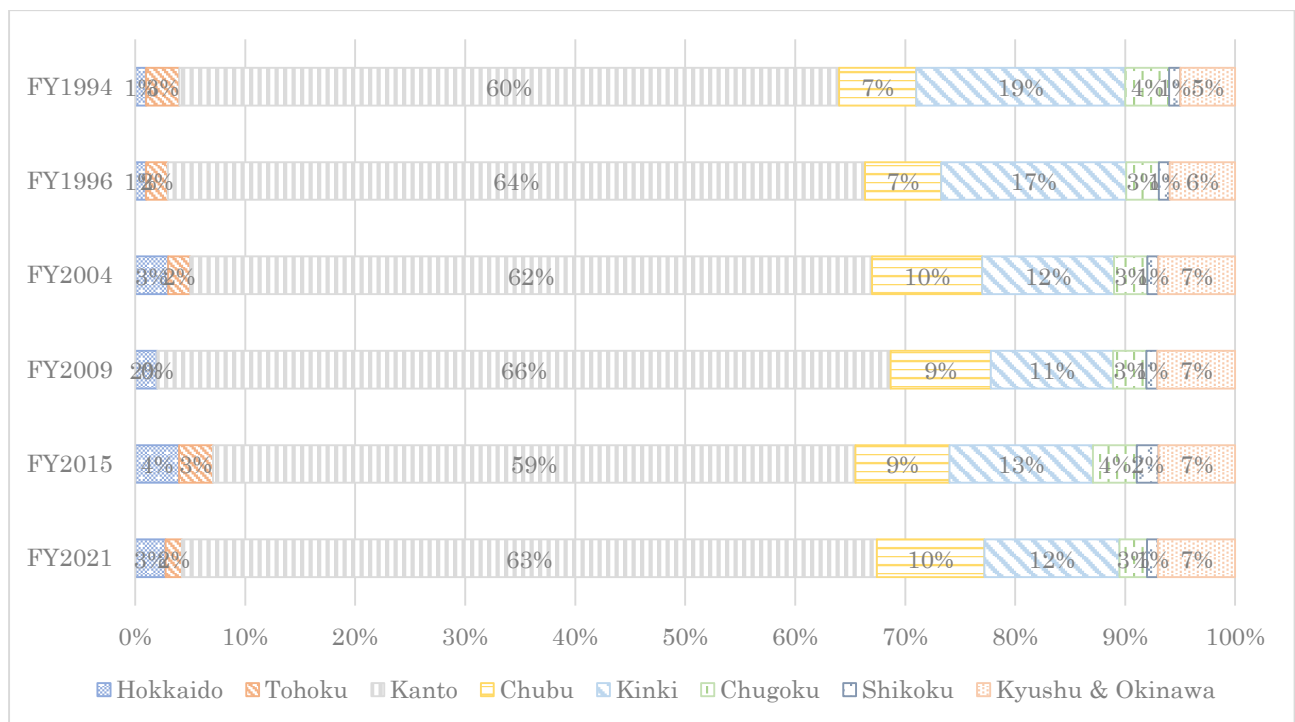
Figure 1.5.1 Trends in Location of Head Office by Region
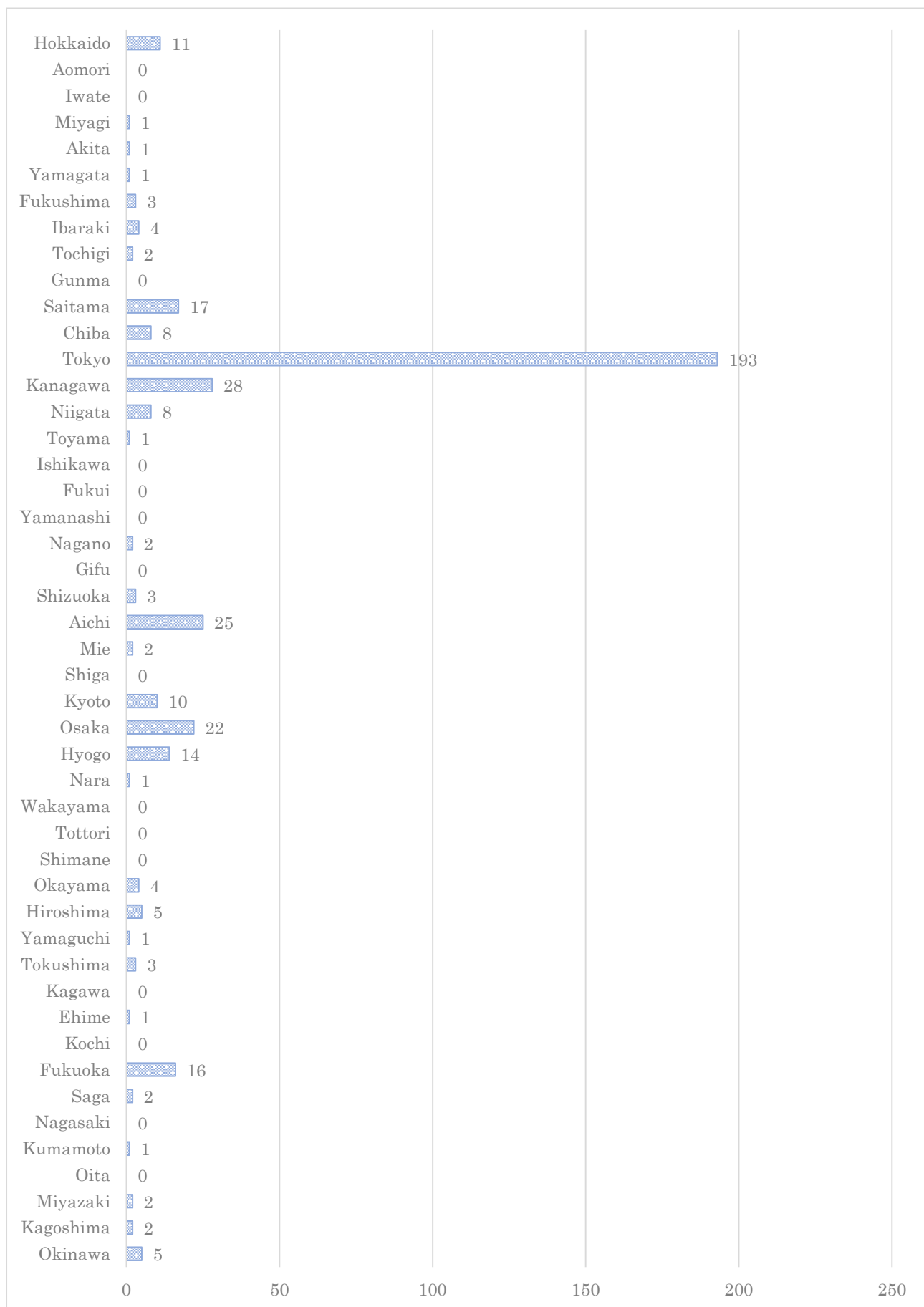
Figure 1.5.2 Location of Head Office by Prefecture
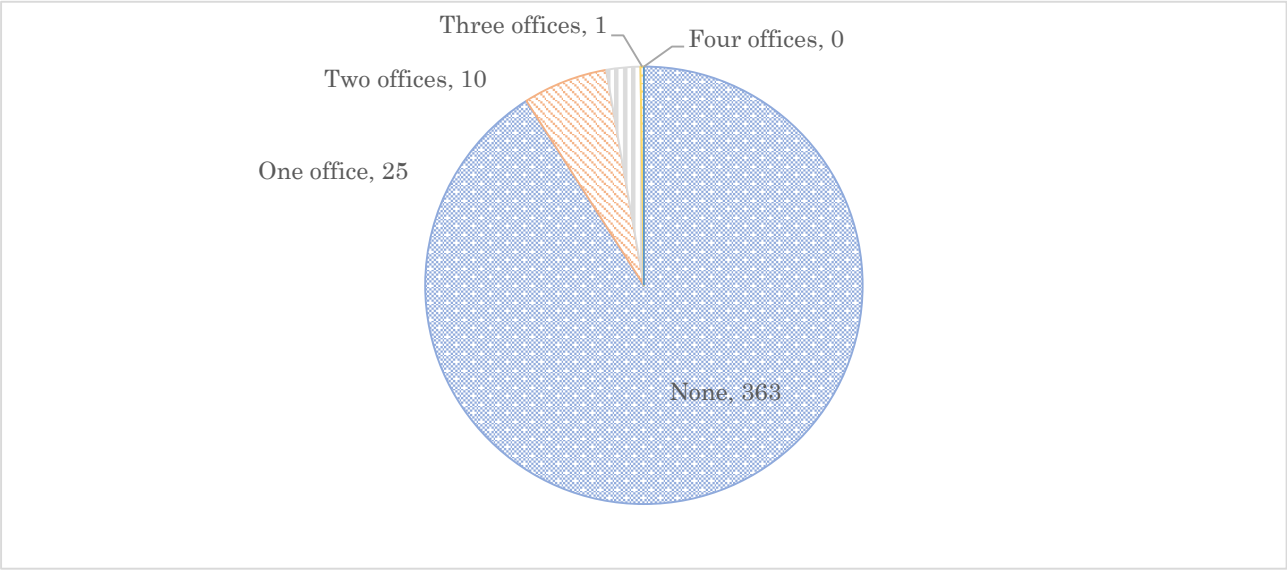
Figure 1.5.3 Number of Domestic Branches / Offices
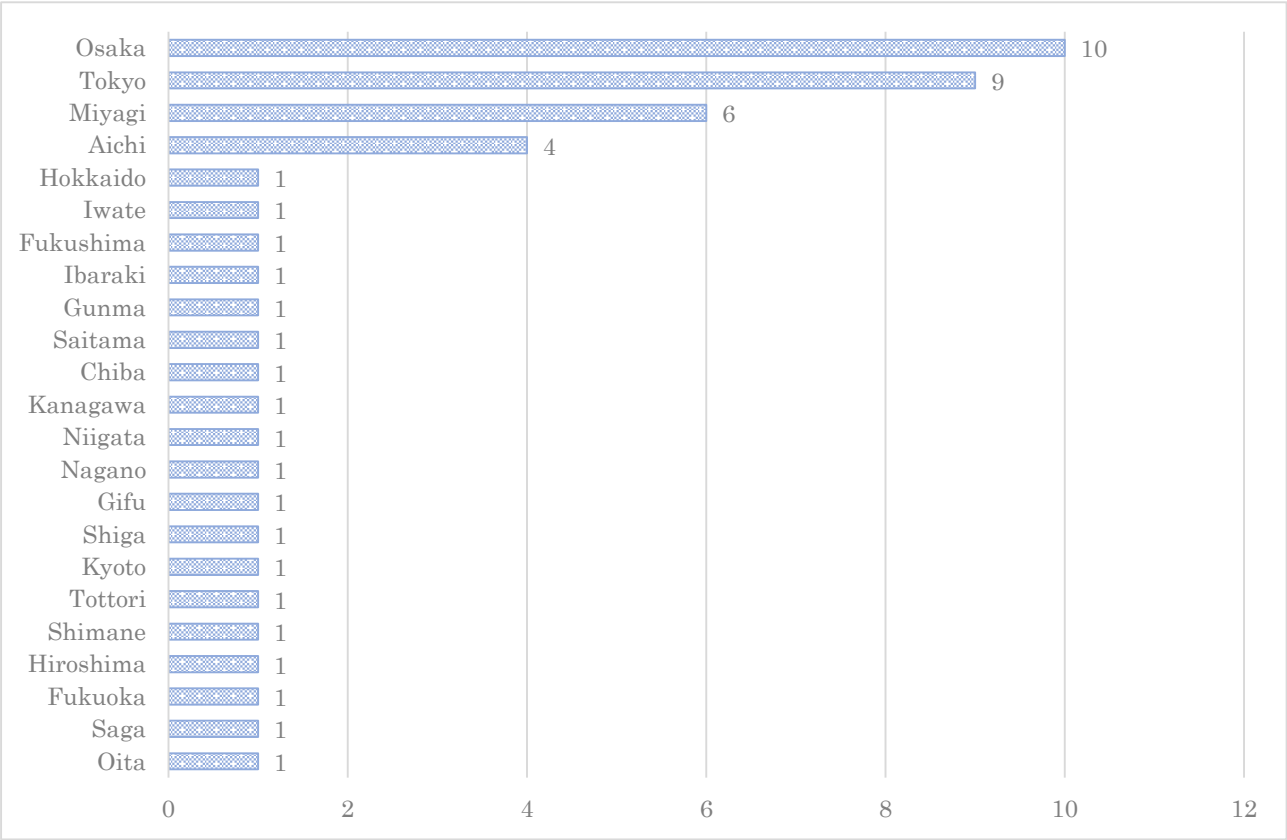
Figure 1.5.4 Number of Domestic Branches / Offices by Prefecture
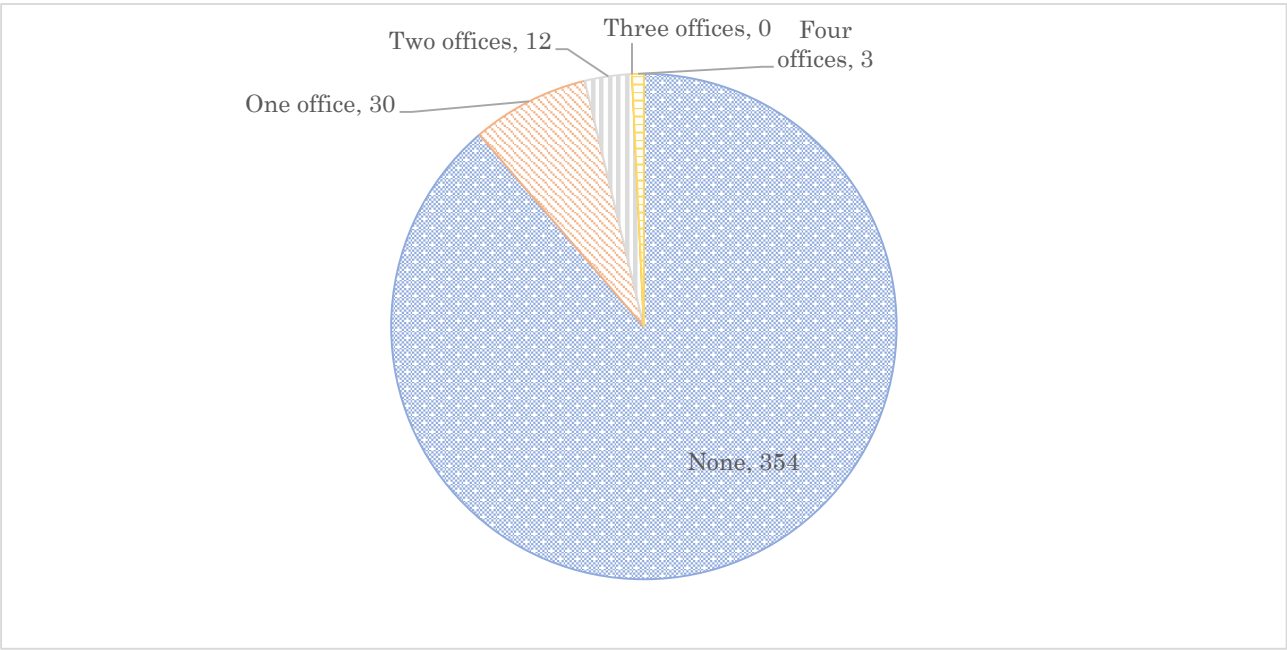
Figure 1.5.5 Number of Overseas Offices
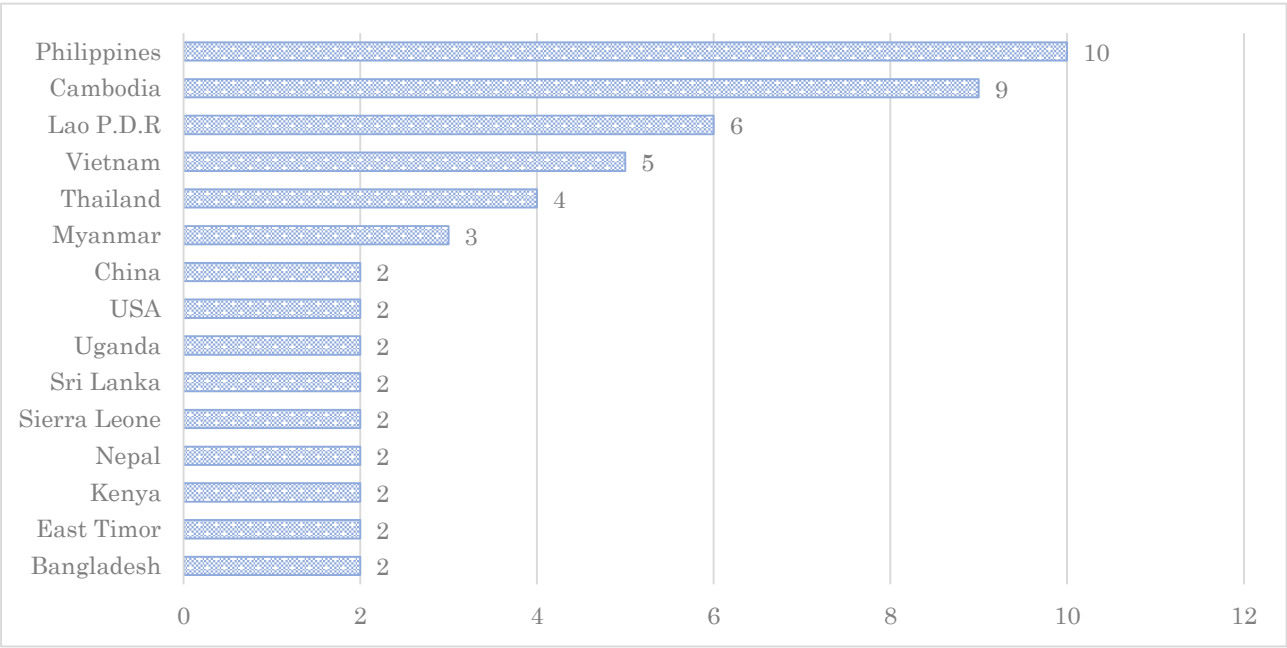
Figure 1.5.6 Main Countries where Overseas Offices are Located

Chapter 2 Forms and Contents of Projects Implemented in Japan and Abroad

General Introduction

In order to gather information on the forms of projects conducted by NGOs in Japan and the contents of their projects, a survey was conducted by dividing the forms of projects into the major categories of "development and support," "advocacy," "grants," and "networking," as shown in Figure 2.1.1, and then linking the contents of their projects in Japan and abroad.

First of all, it was found that overseas projects mainly take the form of "development and support" projects, and that many projects are conducted in parallel, with specific project contents such as "project implementation," "human resource development," "project support (partnership)," "financial support," and "emergency support." In the domestic projects, "networking" was the predominant form of activity, followed by "advocacy" and "development and support. Specifically, projects related to awareness raising, such as "provision of information," "human resource development," "project implementation," and "global citizenship education" were most commonly implemented. In both domestic and international projects, it could be seen that individual organizations are engaged in multiple forms of projects with different project contents in an integrated manner.

Figure 2.1.1 Form & Content of Projects

Development and Support	Advocacy	Grants	Networking
・Project Implementation ・Project Implementation (Partnership) ・Assistance in Kind ・Emergency Relief ・Capacity Building ・Personnel Dispatch ・Acceptance of Trainees	・Molding Public Opinion ・Research ・Global Citizenship Education	・Financial Support	・Information Dissemination
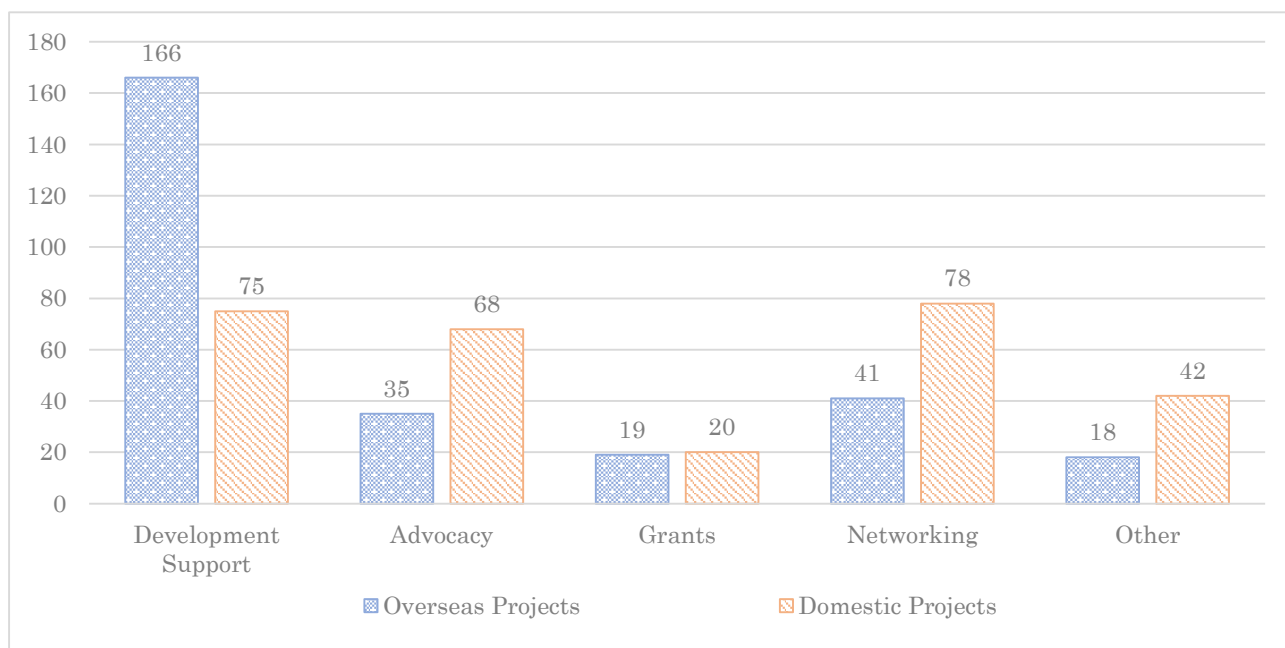
Figure 2.2.1 Form of Projects
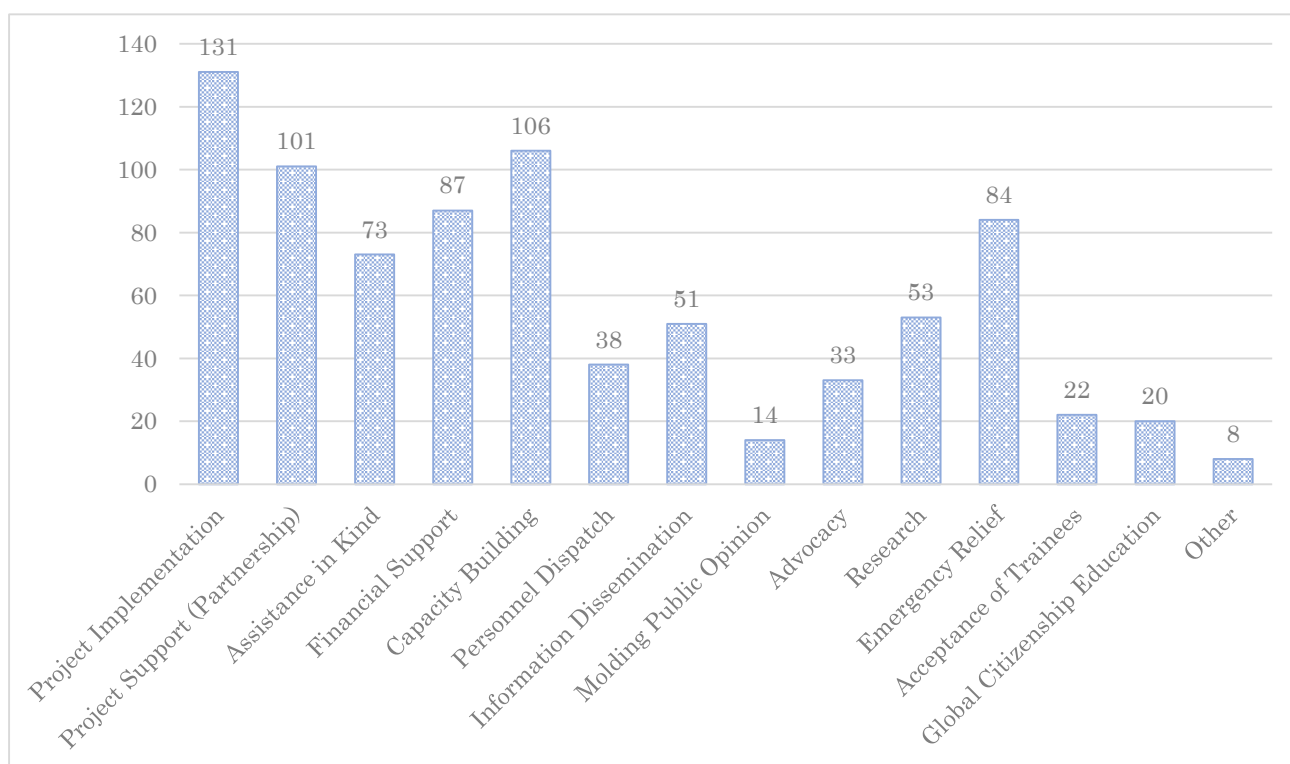
Figure 2.2.2 Contents of Overseas Projects
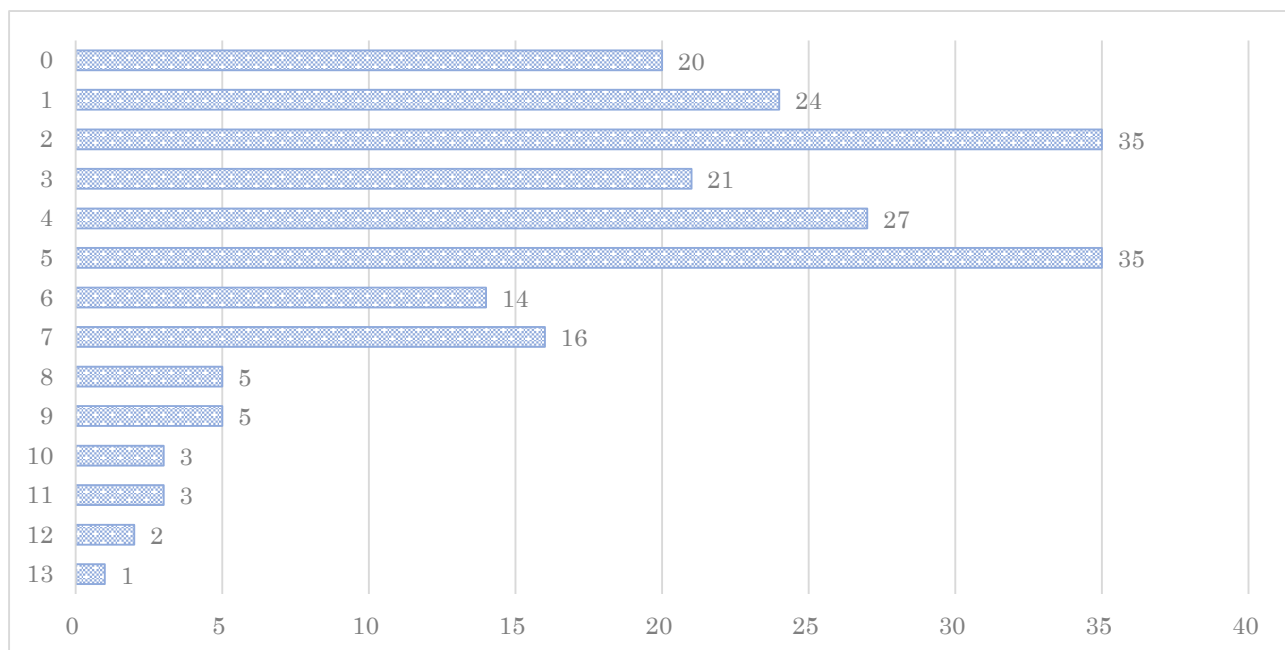
Figure 2.2.3 Number of Projects Implemented in Parallel (Overseas)
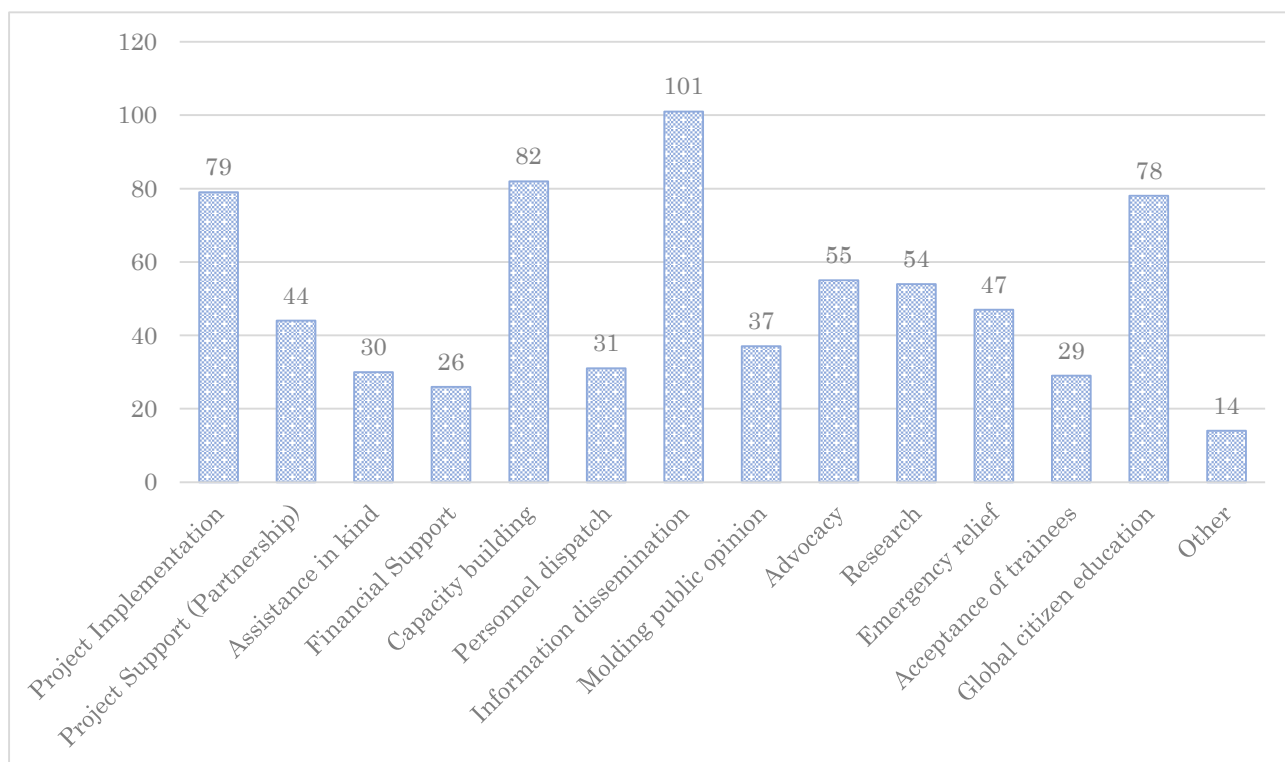
Figure 2.2.4 Contents of Domestic Projects
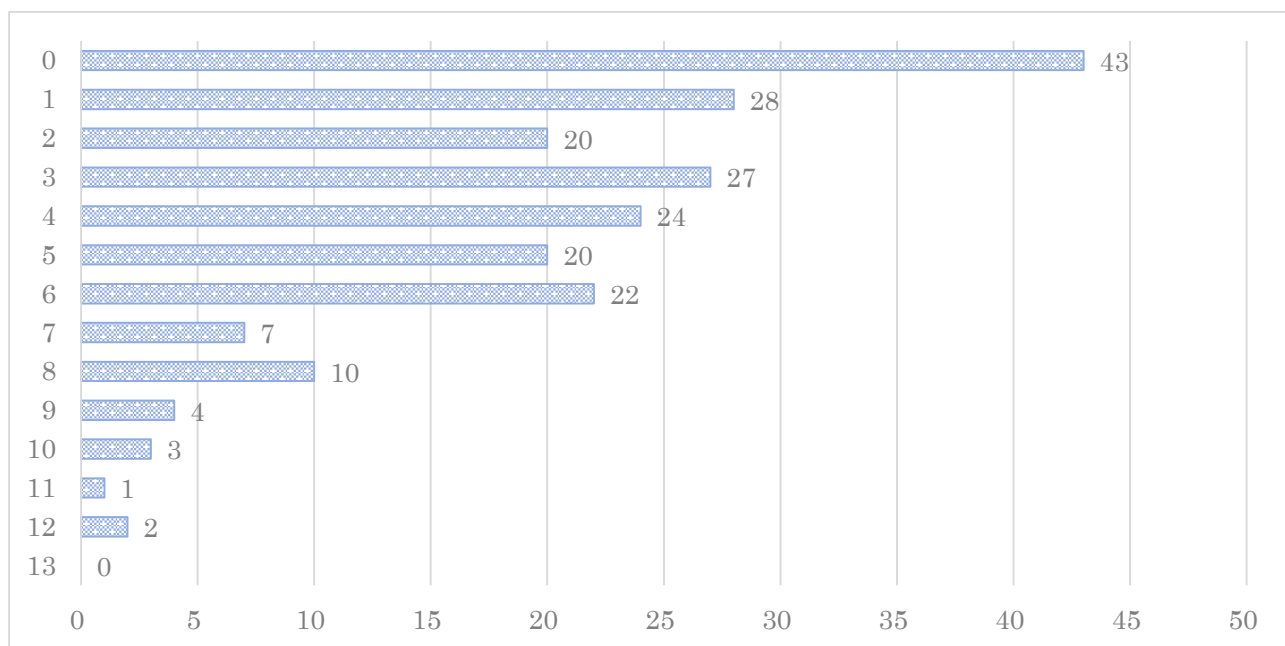
Figure 2.2.5 Number of Projects Implemented in Parallel (Domestic)
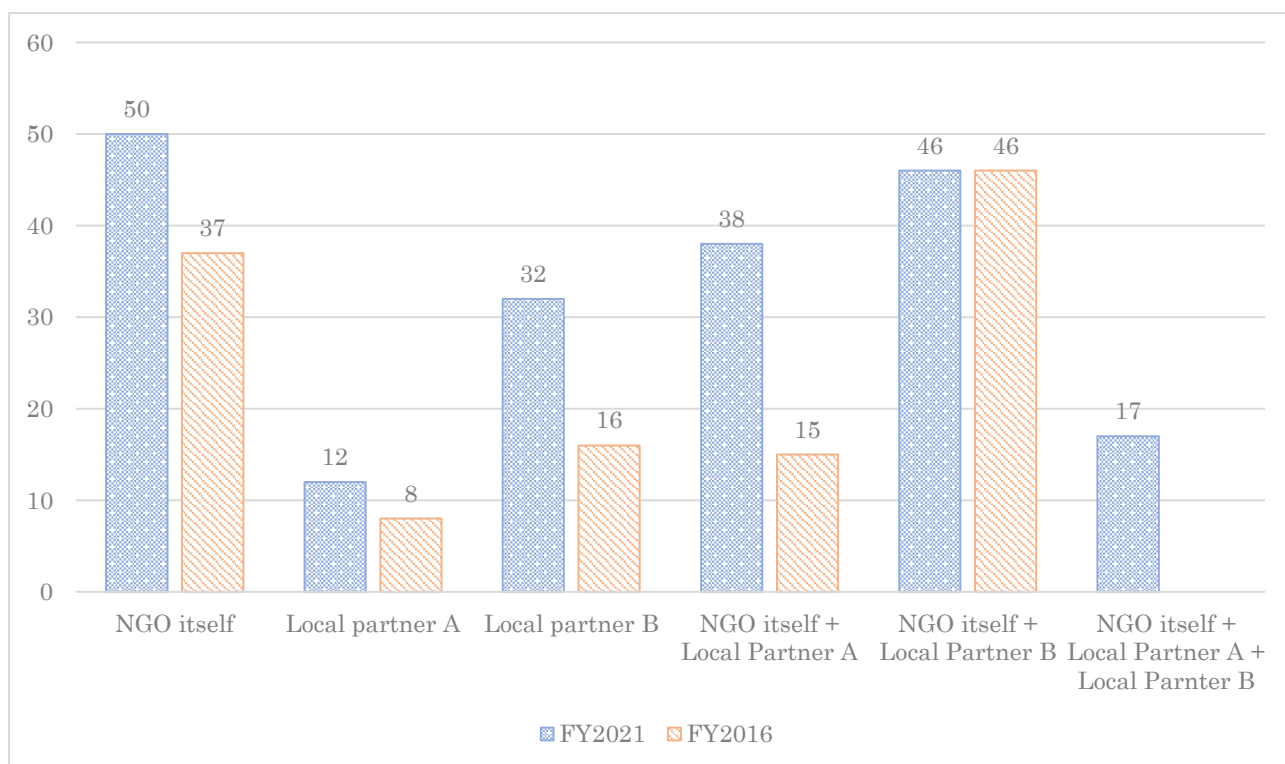
Figure 2.3.1 Project Implementer Breakdown
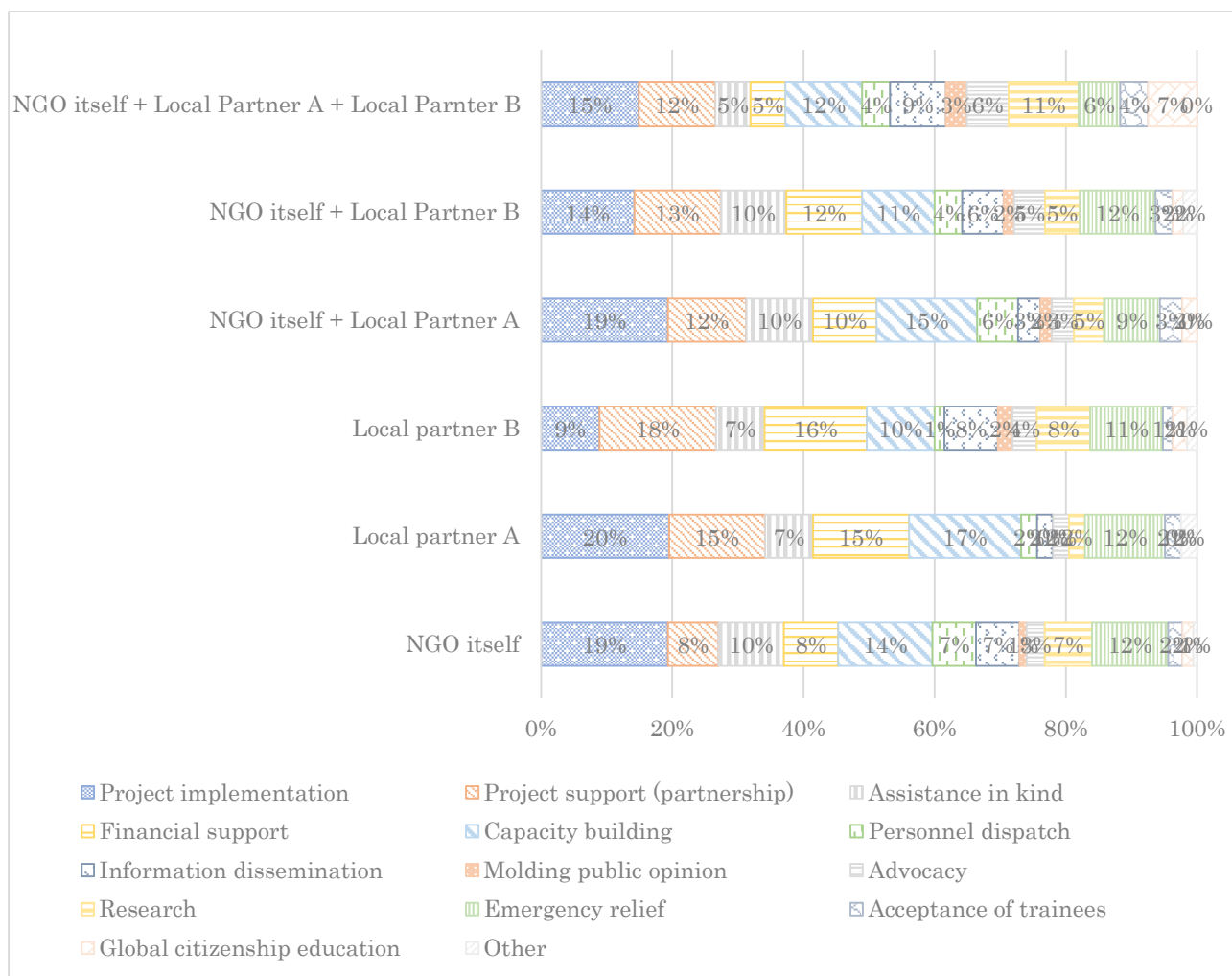
Figure 2.3.2 Overseas Project Contents by Project Implementer

Chapter 3 Countries/Regions of Activities, Fields of Activities, and Target Groups

Section 1 General Introduction

In this chapter, after confirming the countries and regions in which NGOs operate, we summarize the fields of activities and the main target groups of their projects in Japan and abroad, respectively.

First of all, Asia accounts for the largest share of the countries and regions where NGOs in Japan operate overseas, at slightly less than 50%. Specifically, the Philippines, Cambodia, India, etc., are the most common target countries. This is not surprising, given the historical and geographical ties between Japan and Asia. However, projects are being conducted in 65 countries around the world, including the Middle East, Africa, North America Central and South America, Oceania, and Europe, in addition to Asia. Furthermore, the number of organizations conducting projects in Japan has nearly doubled since the time of the previous survey, with an increasing trend in the number of organizations working on domestic social issues.

The fields of activity for implemented projects with the largest number of responses, in descending order, were "education and vocational training," "development and poverty," "health and medical care," "environment," and "agriculture and fisheries." The main target groups were "local residents/citizens in general," "children," "women," "youth (18 years and older)," "the poor (landless farmers and daily wage laborers)," and "refugees and internally displaced persons." In terms of fields of activities of projects in Japan, "networking" was the most common, followed by "education and vocational training," "policy advocacy and research," "human rights," and "starvation and disasters." The main target groups for these activities were "local residents/citizens in general," "children," "others," "youth (18 and older)," and "foreign residents in Japan."

In general, the domestic and international projects conducted by NGOs in Japan are not specialized in a few fields of activities but are carried out in a variety of fields to meet the diverse needs of the countries and regions where they are carried out. It seems that they conduct activities in close contact with the target groups to achieve the ideal of the SDGs to "leave no one behind."

Lastly, as in the 2016 survey, many organizations answered that "SDG 1: End Poverty" and "SDG 4: Quality Education for All" were the SDGs most closely related to the projects they implement. "SDG 10: Reduce inequality within and among countries," "SDG 16: Peace and justice," and "SDG 17: Partnership" were the goals whose relevance increased since the last survey. In the column at the end of this chapter, it is mentioned that civic space is being threatened. As citizens as well as NGOs, we need to keep a close watch on this.
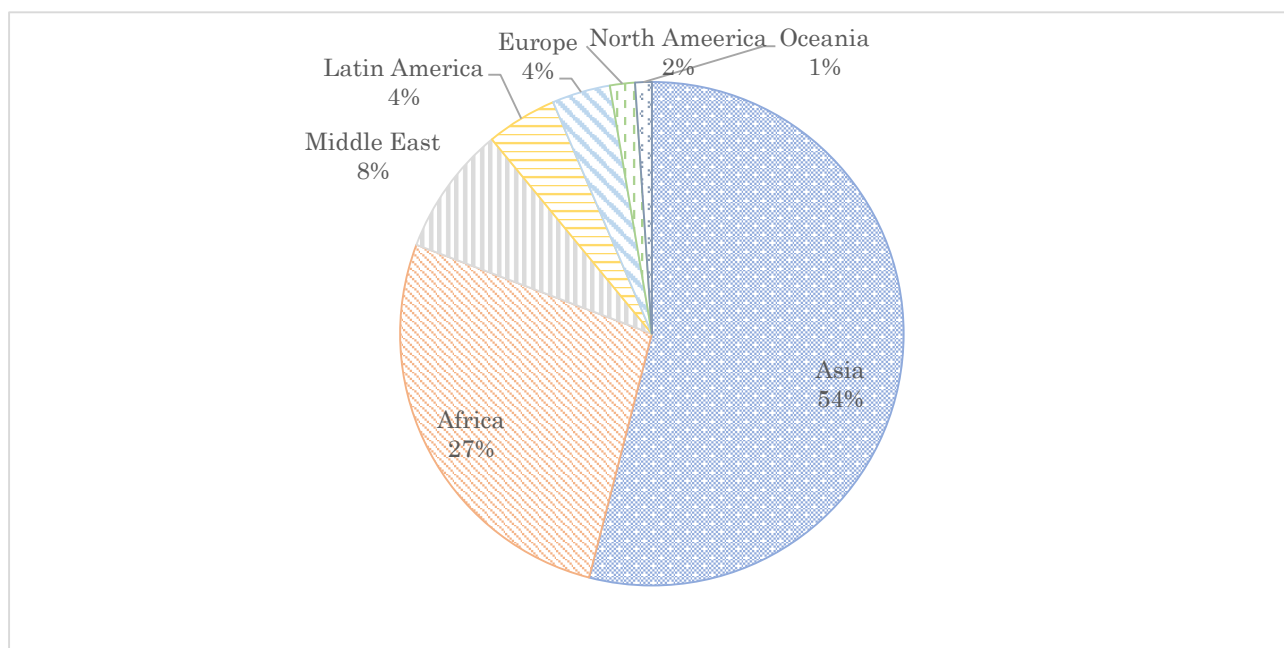
Figure 3.2.1 Regions with Activities
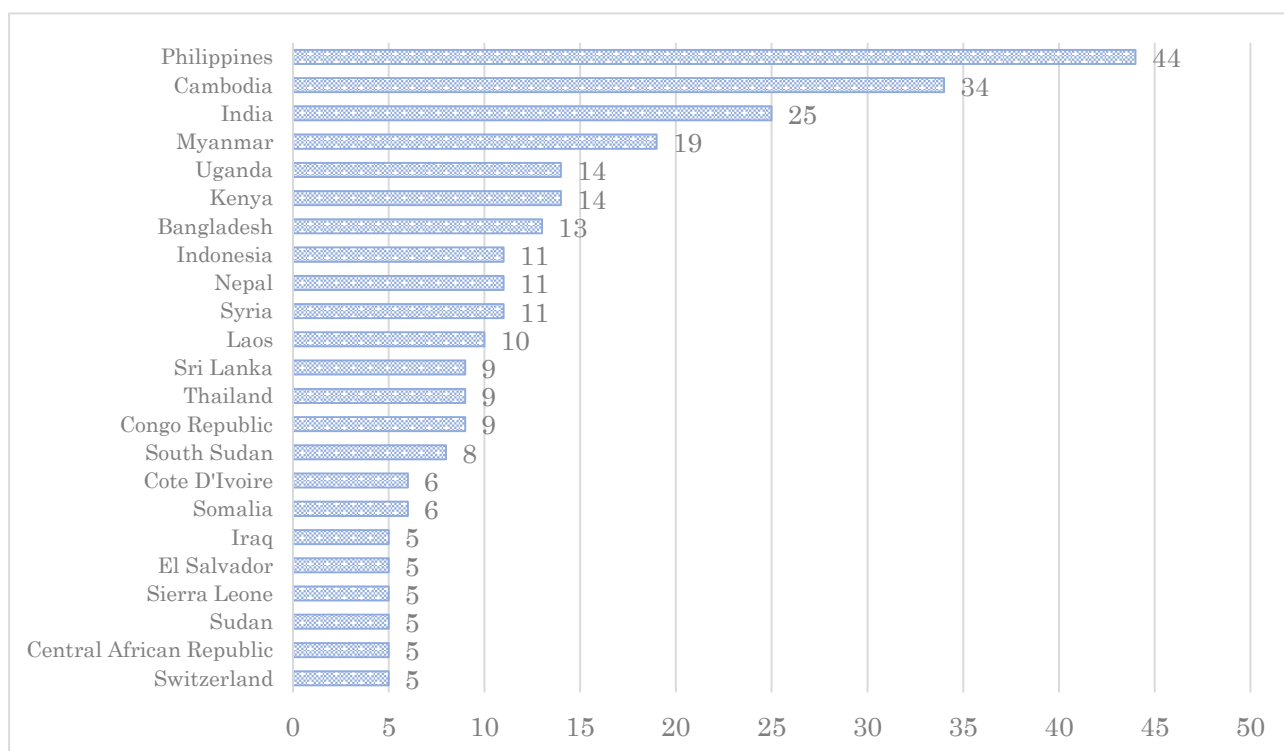
Figure 3.2.2 Main Countries where NGOs Work
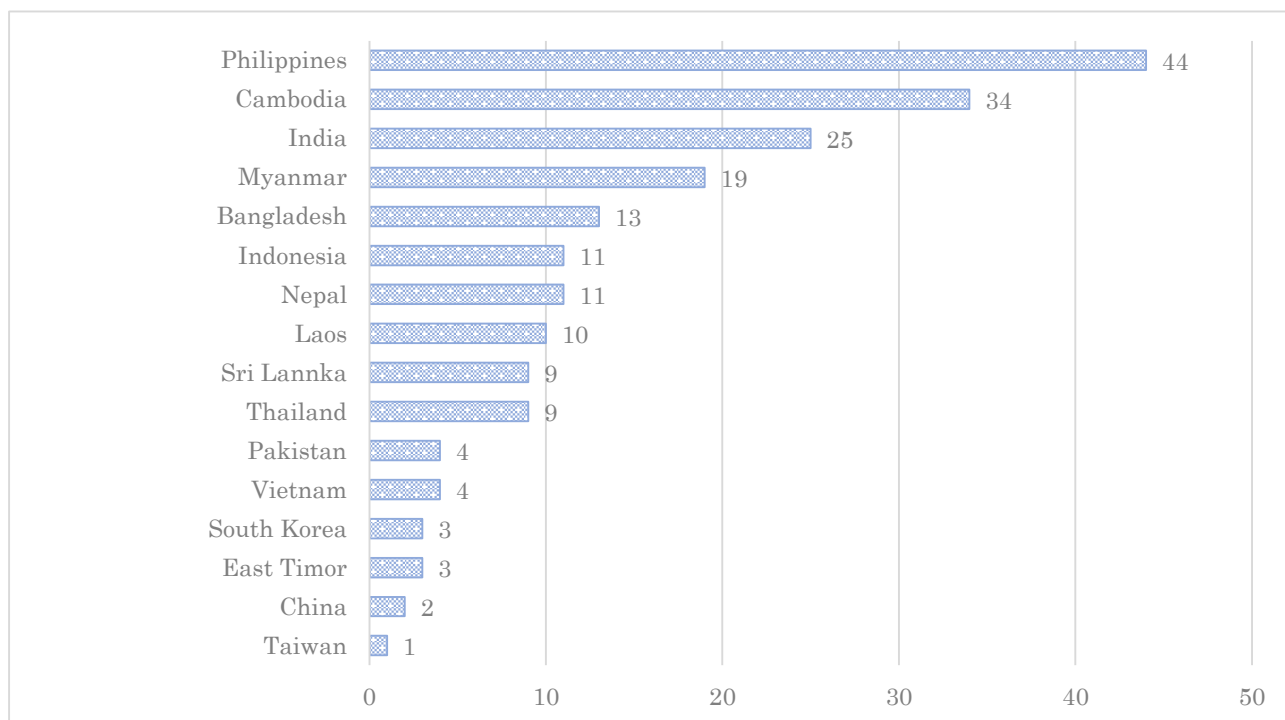
Figure 3.2.3 Asian Countries with Activities
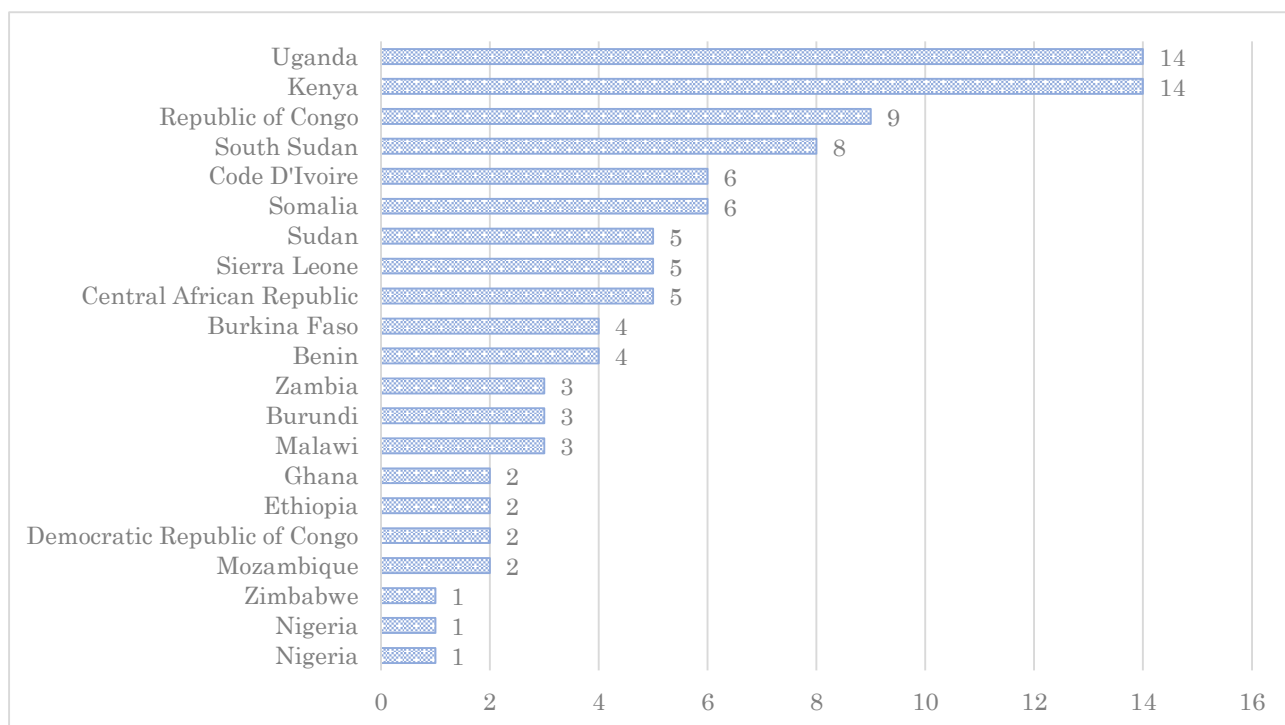
Figure 3.2.4 African Countries with Activities
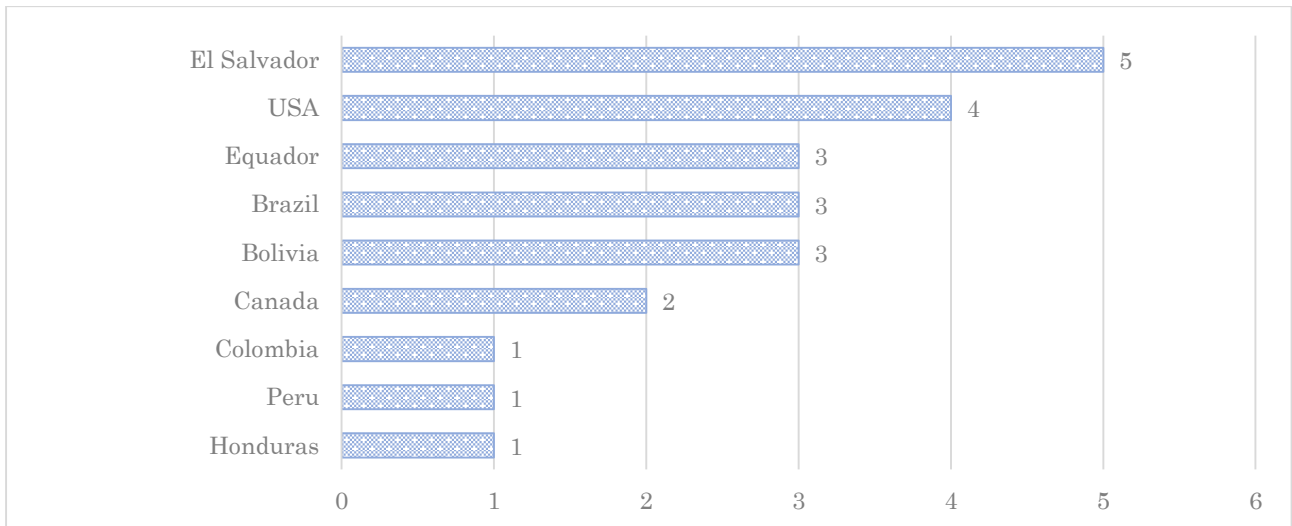
Figure 3.2.5 North & Latin American Countries with Activities
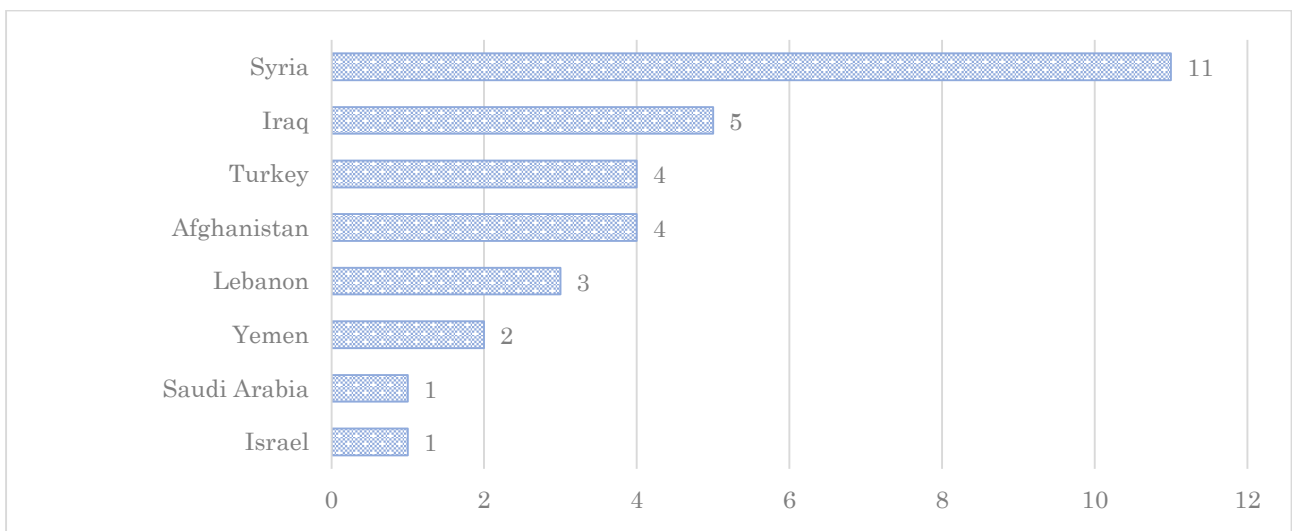
Figures 3.2.6 Middle East Countries with Activities
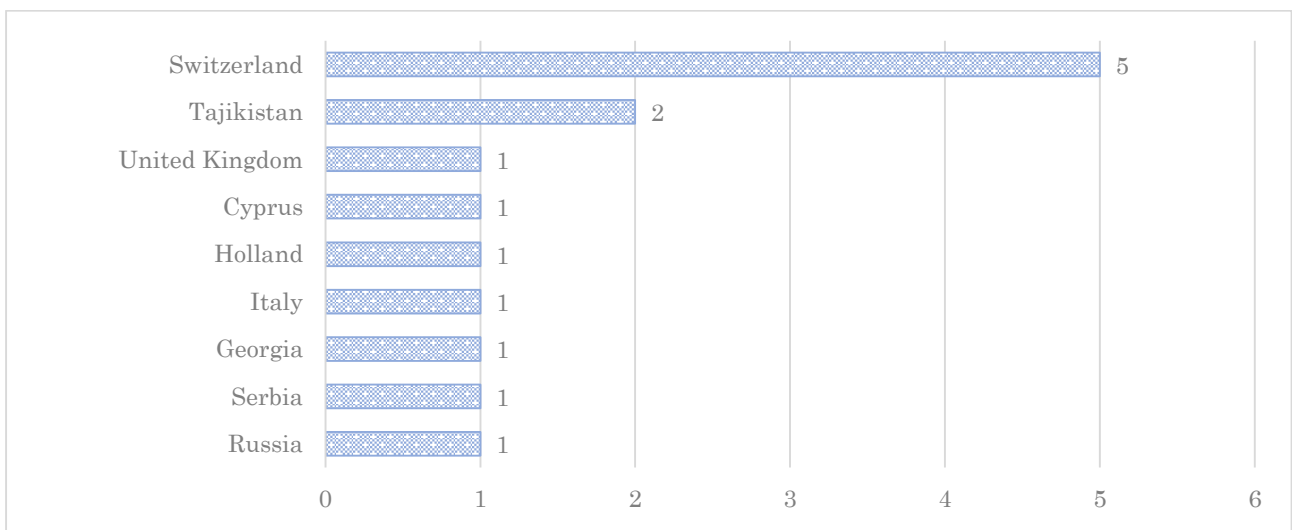
Figure 3.2.7 European Countries with Activities
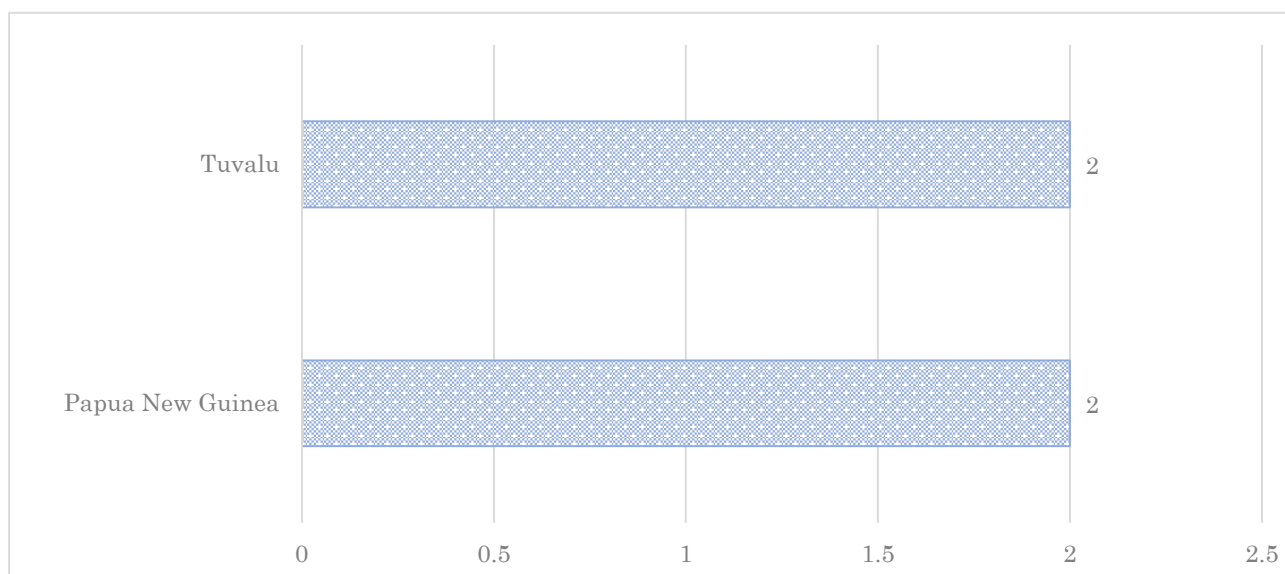
Figure 3.2.8 Oceanian Countries with Activities
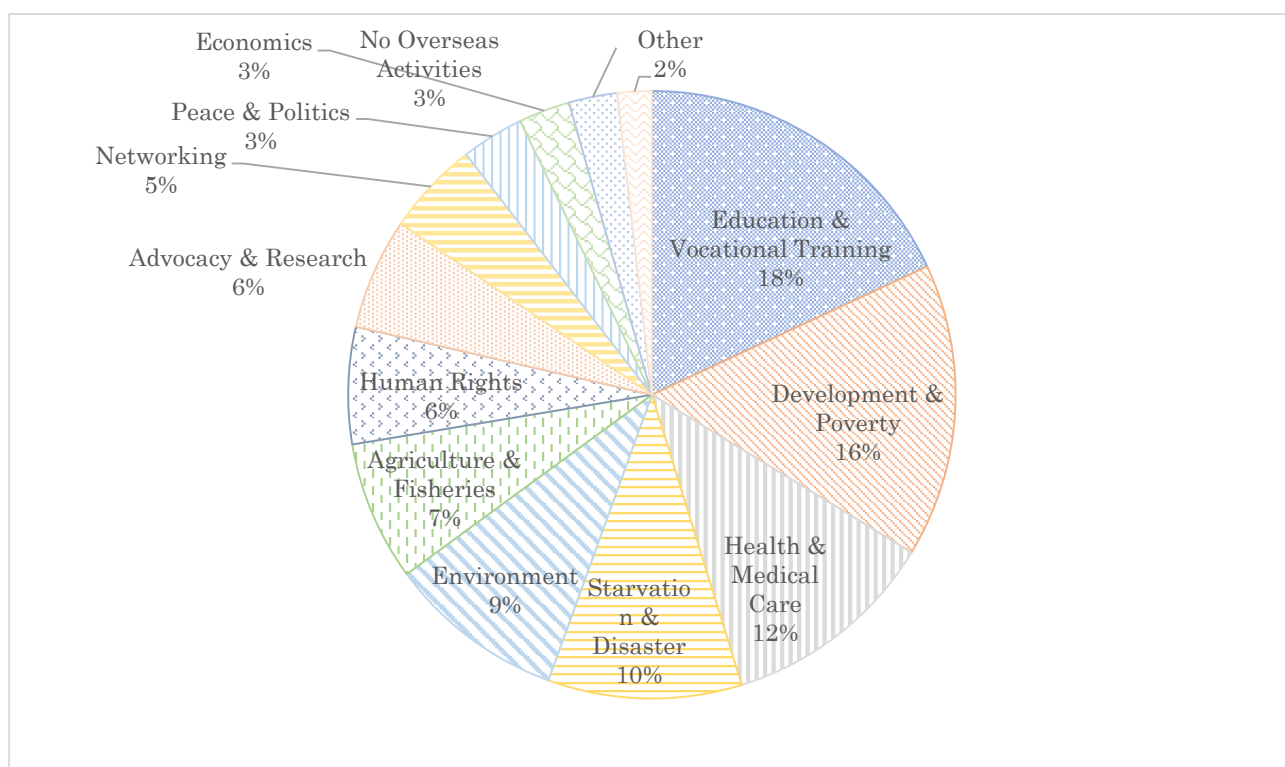
Figure 3.3.1 Overseas Projects - Areas of Activity

【Development & Poverty】
Regional Development (Infrastructure) — 38
Rural Development — 57
Urban (Slum) Development — 14
Other — 20
【Starvation & Disaster】
Emergency Relief — 50
Reconstruction — 30
Disaster Prevention & Mitigation — 14
Food Sovereignty — 12
Other — 2
【Education & Vocational Training】
School Attendance & Non-formal Education Support — 74
Vocational Training — 42
Appropriate Technology — 14
Facility Improvement & Construction — 36
Other — 12
【Environment】
Environmental Education — 32
Afforestation; Forest & Ocean Conservation — 39
Biodiversity — 0
Climate Change & Global Warming — 11
Alternative Energy — 3
Soil & Atmosphere — 1
Waste (incl. plastic) — 5
Other Global Environmental Issues — 2
【Agriculture & Fisheries】
Organic Farming (Alternative Farming, etc.) — 22
Conventional Agricultural (Modern Agriculture) — 12
Fisheries — 2
Other Primary Industries — 8
Other — 5
【Health & Medical Care】
Medical Assistance — 26
Health — 31
Nutrition Issues — 16
Public Sanitation — 21
Water Supply & Resources — 13
Population & Family Planning (RHRR) — 2
UHC — 4
Other — 6
【Peace & Politics】
Peace Building — 16
Democracy — 3
Disarmament — 1
Preventive Diplomacy — 0
Global Citizenship Education — 6
Other Peace Activities — 9
【Economics】
Microfinance — 5
Local Industry — 10
Small Businesses — 0
Consumer Education — 2
Social Business — 7
Economics — 0
Other — 4
【Human Rights】
Human Rights (General) — 15
Ending Discrimination & Inequality — 18
Social Participation — 13
Business & Human Rights — 5
Legal Aid — 4
Other — 4
【Networking】
Domestic Networking — 16
International Networking — 22
Overseas In-Country Networking — 12
Thematic Networking — 6
Other — 1
【Advocacy & Research】
Civil Space — 7
Multicultural Symbiosis — 6
Gender — 6
Debt — 0
Research — 23
Other — 15

Figure 3.3.2 Overseas Projects - Details of Activities

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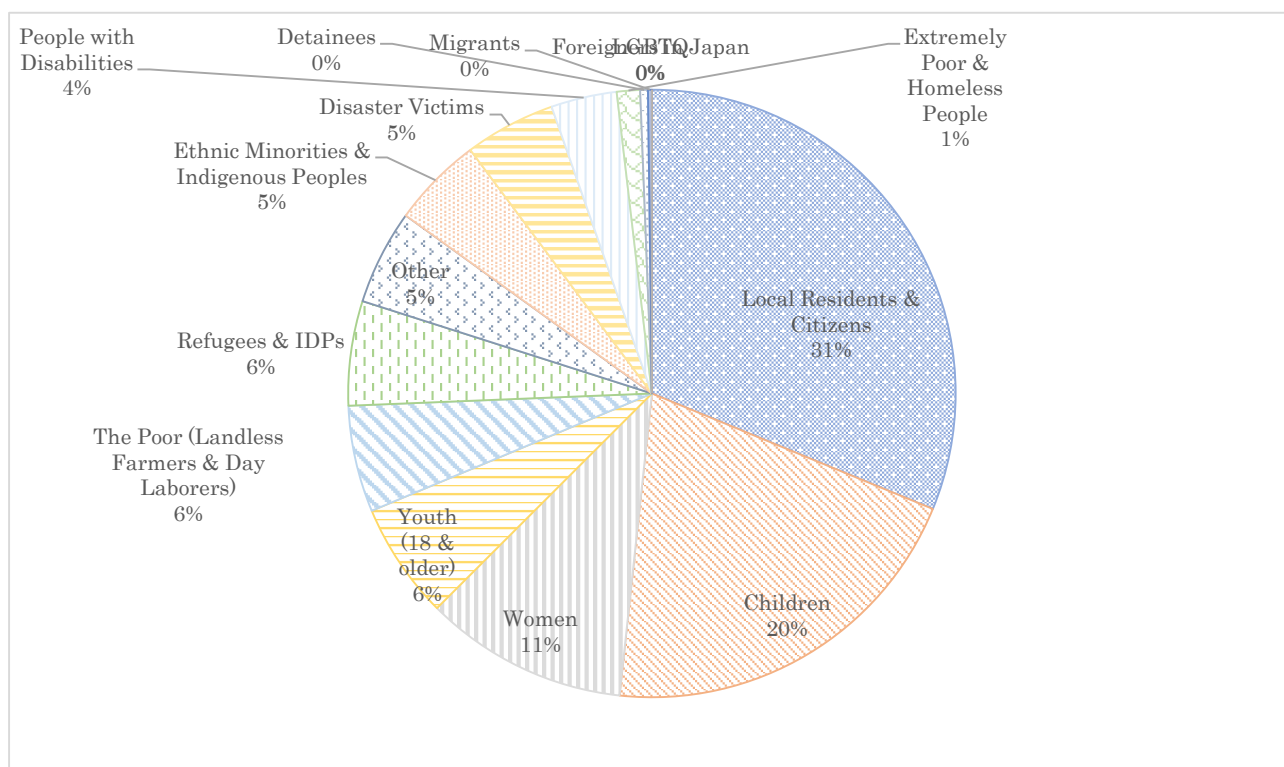
Figure 3.3.3 Overseas Project Target Groups

Figure 3.3.4 Target Groups of Overseas Projects by Field of Activity (Top 4)

Target Group	Education & Vocational Training	Development & Poverty	Health & Medical Care	Starvation & Disaster
Community Residents & Citizens	21	50	31	27
Children	69	37	32	17
Women	22	23	19	2
Youth (18 & older)	24	8	1	0
The Poor (Landless Farmers & Day Laborers)	5	18	5	6
Refugees & Internally Displaced People	8	11	8	13
Other	5	3	1	0
Ethnic Minorities & Indigenous Peoples	14	8	4	2
Disaster Victims	2	3	3	36
People with Disabilities	10	4	7	3
Extremely Poor & Homeless People	3	3	4	1
Detainees	1	0	0	0
Migrants	1	0	0	0
LGBTQ	0	0	0	0
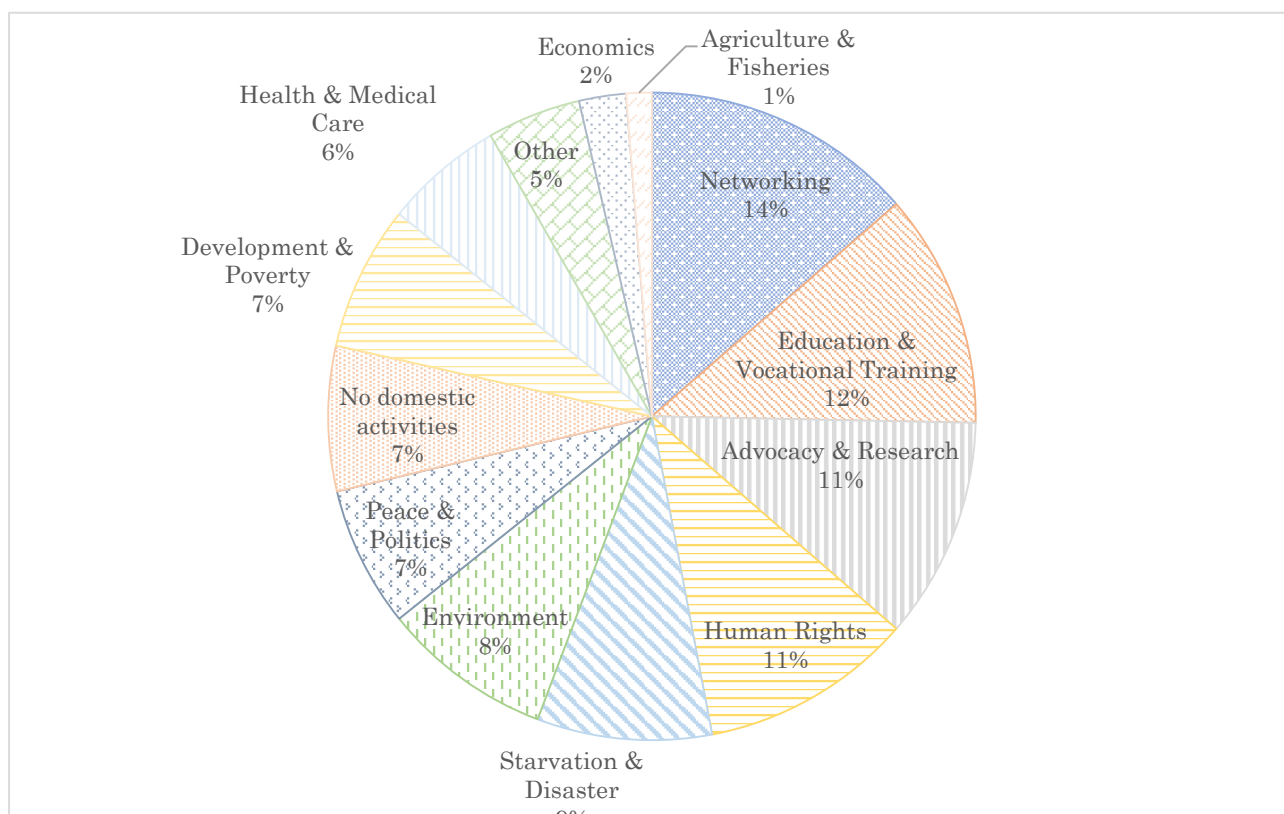
Figure 3.4.1 Domestic Projects - Fields of Activity
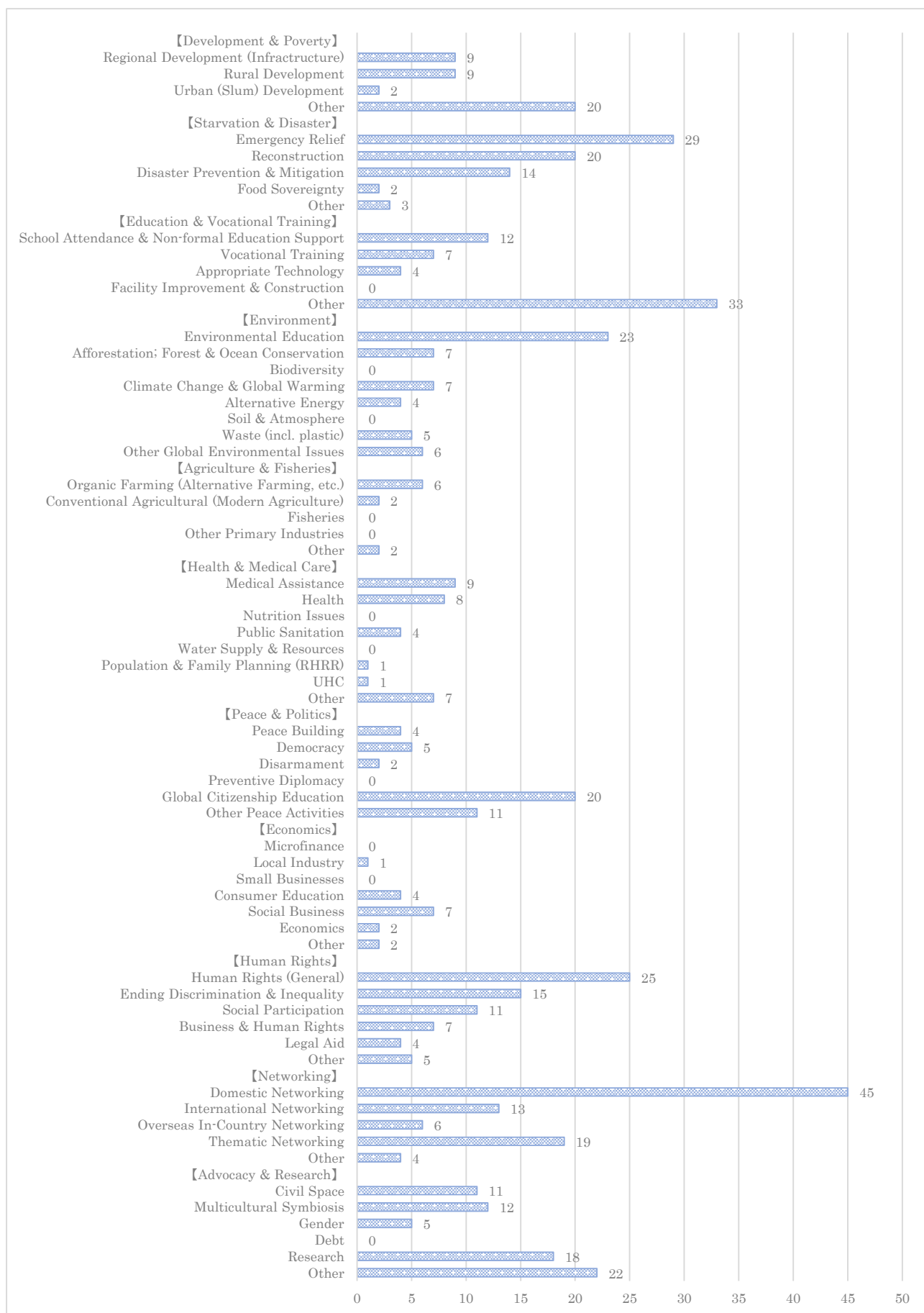
Figure 3.4.2 Domestic Projects - Details of Activities
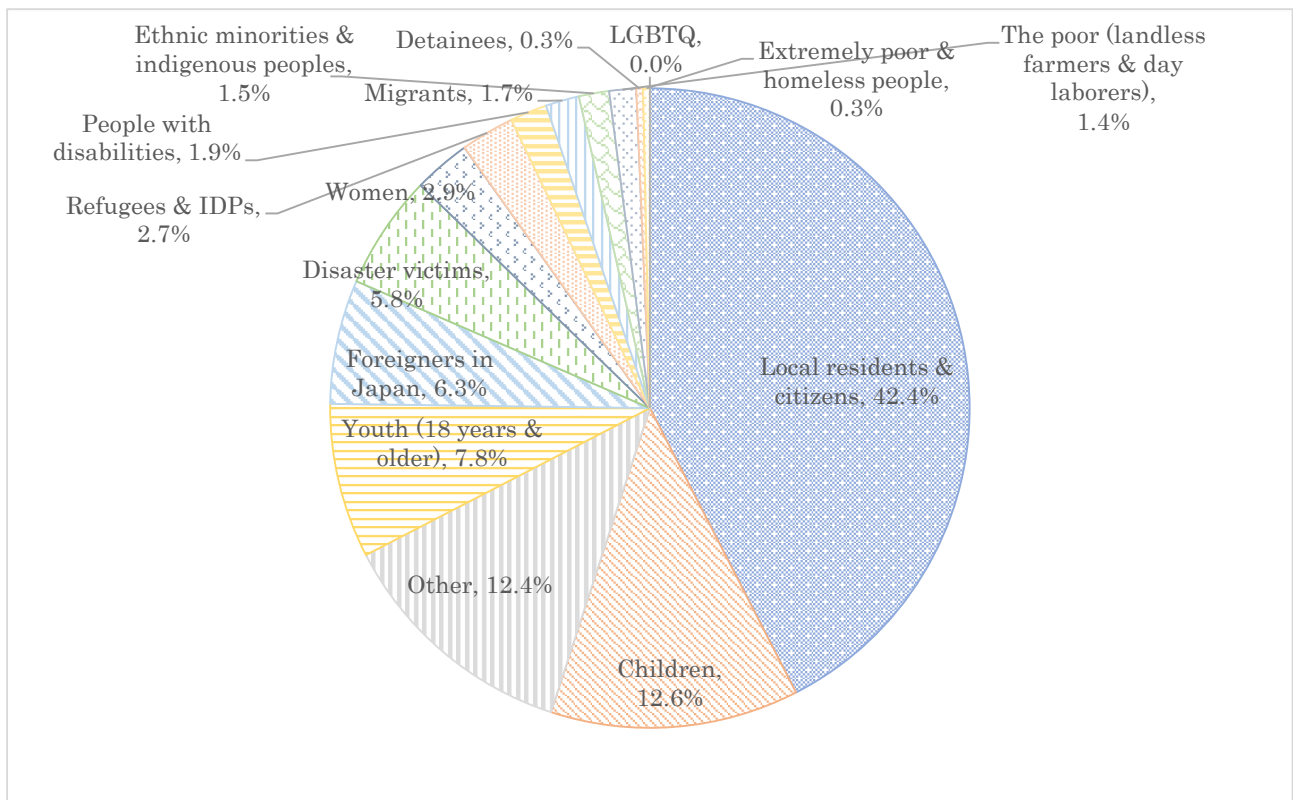
Figure 3.4.3 Domestic Project Target Groups
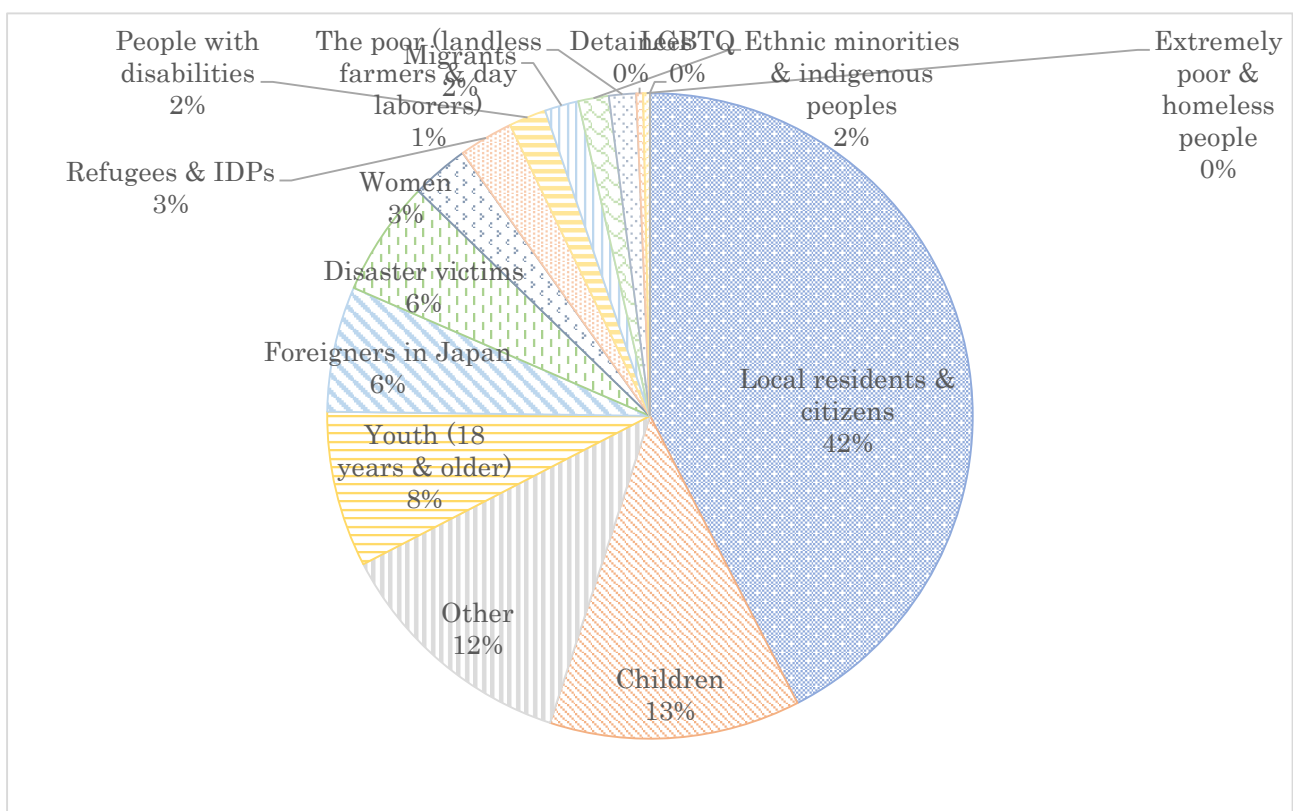
Figure 3.4.4 Domestic Project Target Groups

Figure 3.5.1 SDGs' Relevance to Projects & its Change over Time

Goal Name	2021	2016	Increase	2021	2016
No poverty	127	103	24	11.2%	15.5%
Zero hunger	67	39	28	5.9%	5.9%
Good health and well-being	103	71	32	9.1%	10.7%
Quality education	122	74	48	10.8%	11.1%
Gender equality	80	52	28	7.1%	7.8%
Clean water and sanitation	57	56	1	5.0%	8.4%
Affordable and clean energy	26	12	14	2.3%	1.8%
Decent work and economic growth	45	43	2	4.0%	6.5%
Industry, innovation, infrastructure	18	16	2	1.6%	2.4%
Reduced inequalities	97	36	61	8.6%	5.4%
Sustainable cities and communities	57	37	20	5.0%	5.6%
Responsible consumption, production	43	36	7	3.8%	5.4%
Climate action	44	22	22	3.9%	3.3%
Life below water	25	5	20	2.2%	0.8%
Life on land	40	11	29	3.5%	1.7%
Peace, justice and strong institutions	87	40	47	7.7%	6.0%
Partnerships for the goals	93	45	48	8.2%	6.8%
Total	1131	664	467		

Chapter 4 Collaboration with Other Organizations

General Introduction

It was found that although NGOs sometimes conduct projects on their own, they generally work in collaboration with other organizations. In fact, more than 80% of NGOs were found to collaborate with other organizations. The major types of collaborators include domestic and foreign governments and government-affiliated organizations, local governments, the United Nations and international organizations, non-profit organizations such as labor unions, cooperatives, and religious groups, universities and research institutions, civil society organizations including foundations, and corporations.

There are various cases of collaboration with governments and government-affiliated organizations, including financial cooperation, indicating their strong relationship with NGOs. In the case of cooperation with local governments, the main focus was on project implementation and associated financial cooperation, while cooperation with non-profit organizations such as labor unions, cooperatives, and religious organizations and civil society organizations including foundations mainly focused on financial cooperation. In addition, the most common type of collaboration with universities and research institutions was investigation and research, and collaboration methods were tailored to the characteristics of each institution, although the number of cases of collaboration was less than with other stakeholders. However, collaboration with the United Nations and international organizations was limited to a very small number of NGOs.

The NGOs most frequently collaborated with corporations. In particular, financial cooperation in the form of donations, grants, and subsidies stood out. When corporate partnerships were classified into the three types of social contribution, CSR, and CSV, there was found to be a tendency for most partnerships to be of the social contribution type, which mainly involves financial cooperation such as donations. However, the type of collaboration that the respondents would like to focus on in the future is the so-called CSV type, which is collaboration on activities that are positioned as a company's core business. In order to strengthen the cooperation with corporations, many organizations have taken measures such as preparing "menus" for cooperation with corporations and creating websites for cooperation with corporations, suggesting that they have high expectations for cooperation with corporations.

Lastly, since NGOs are often members of some kind of network organization, we surveyed their membership status. As a result, we found that about 80% of them are working as members of some kind of domestic or international network organization.
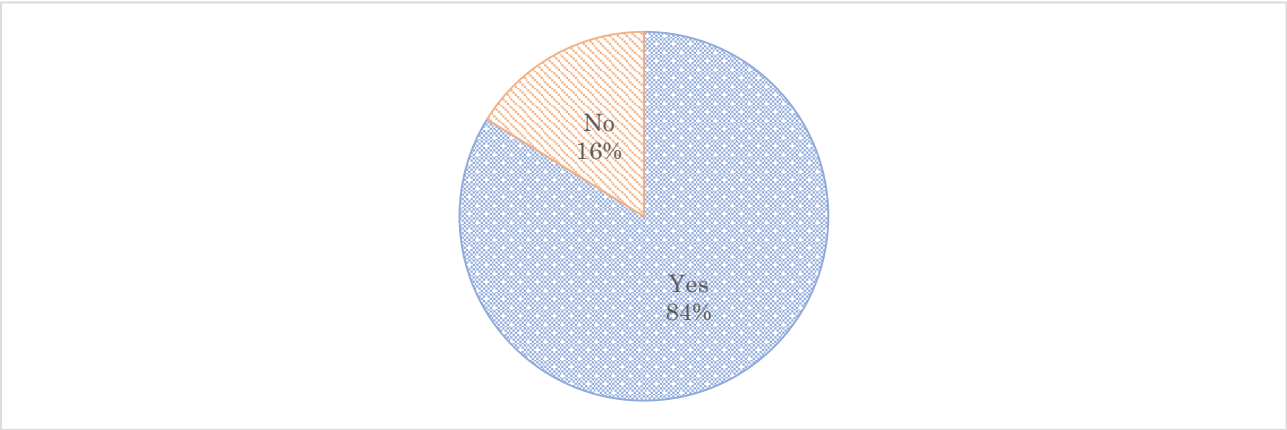
Figure 4.2.1 Presence of Partner Organization(s)
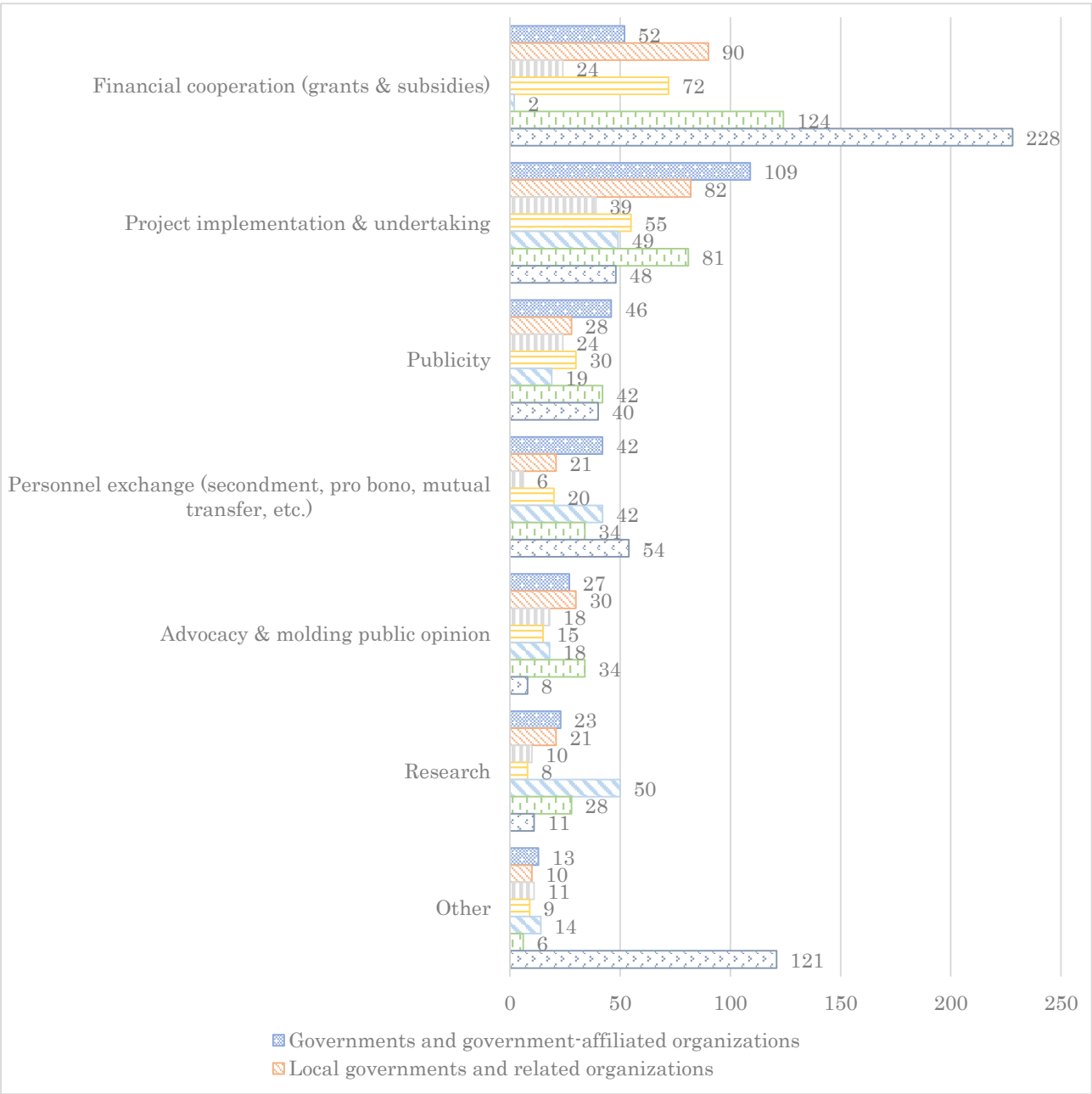
Figure 4.2.2 Collaboration with Other Organizations
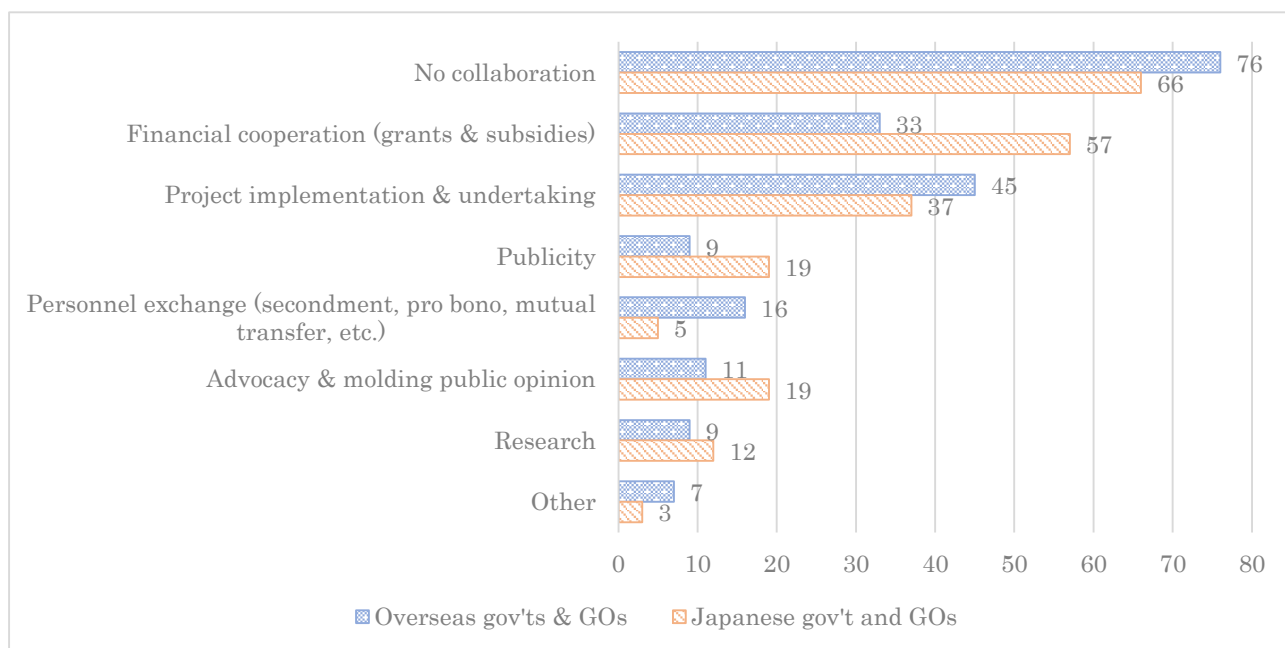
Figure 4.2.3 Collaboration with Japanese / Overseas Governments & Gov't Bodies
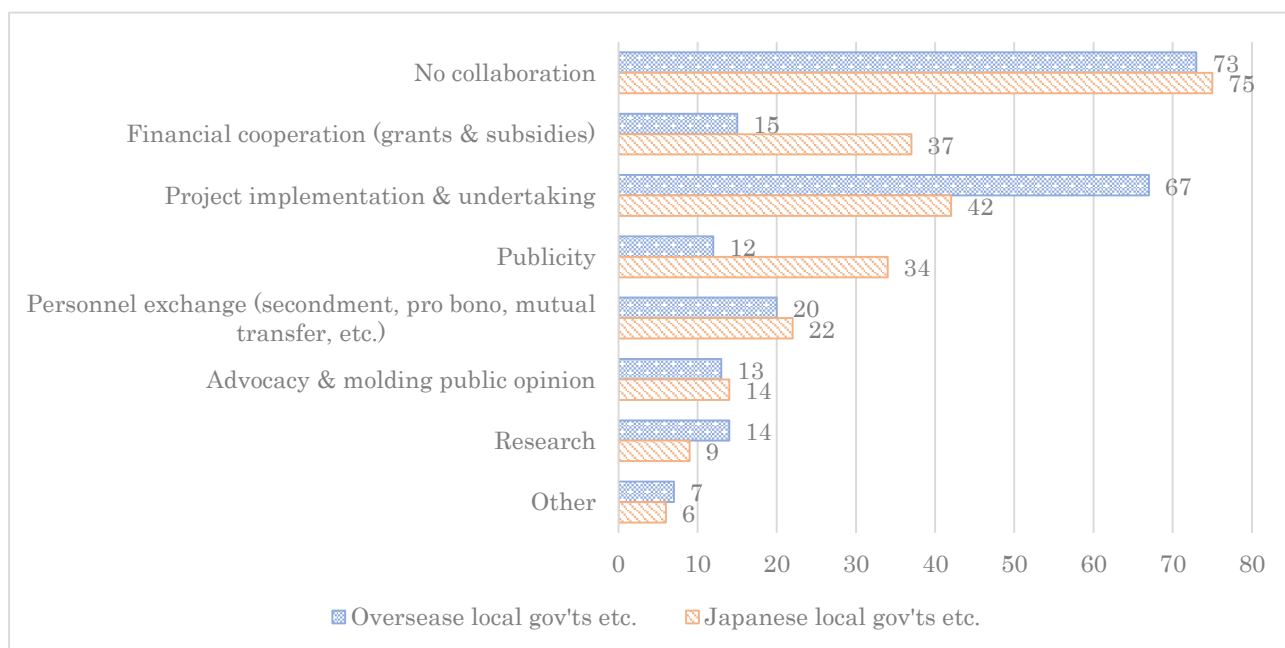
Figure 4.2.4 Collaboration with Japanese & Overseas Local Governments and Related Institutions
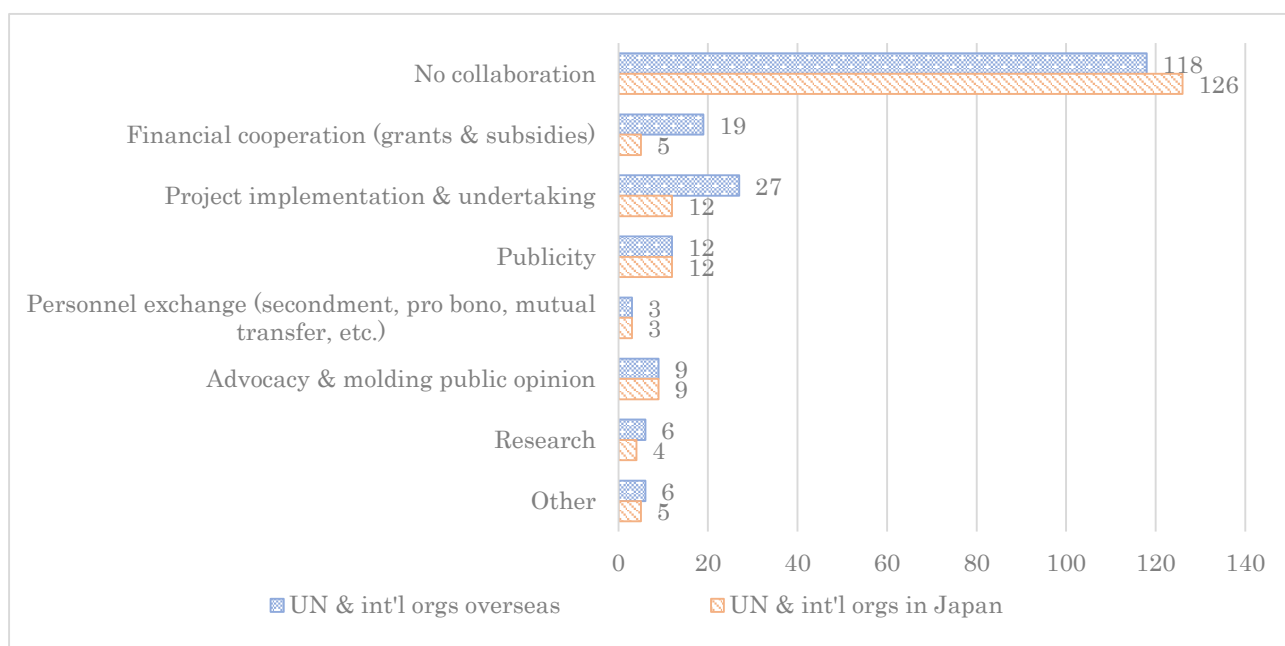
Figure 4.2.5 Domestic & Overseas Collaboration with UN & international organizations (incl. branches)
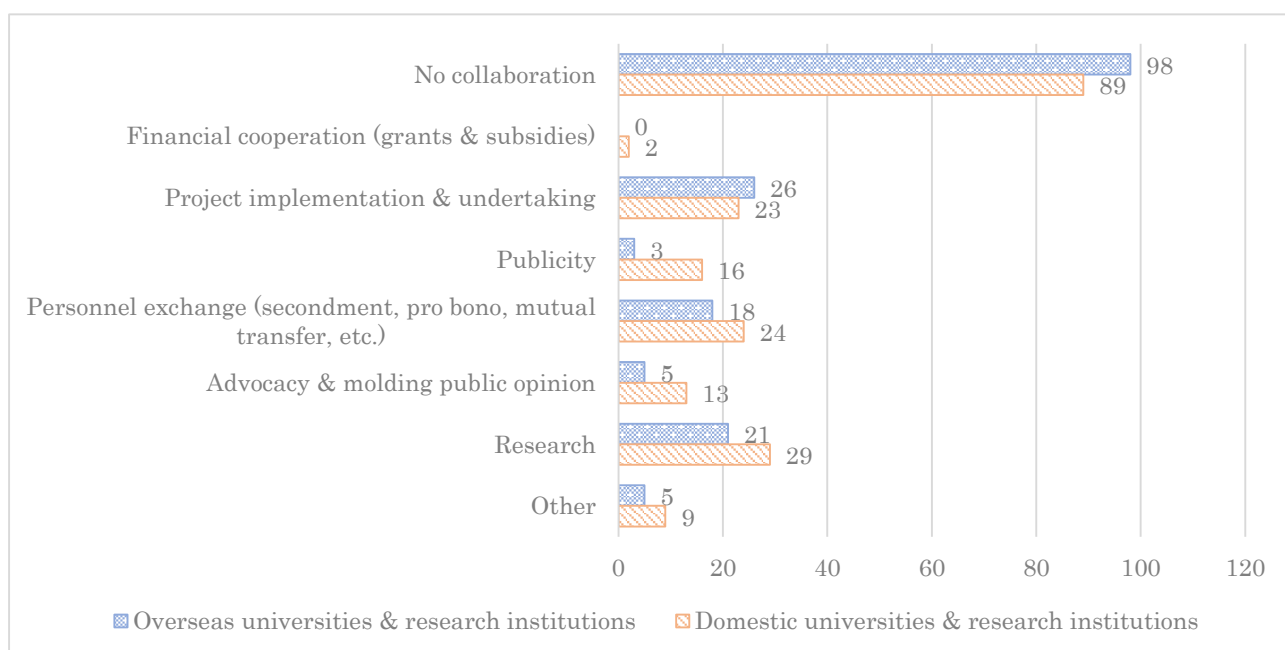
Figure 4.2.6 Collaboration with domestic / overseas universities & research institutions
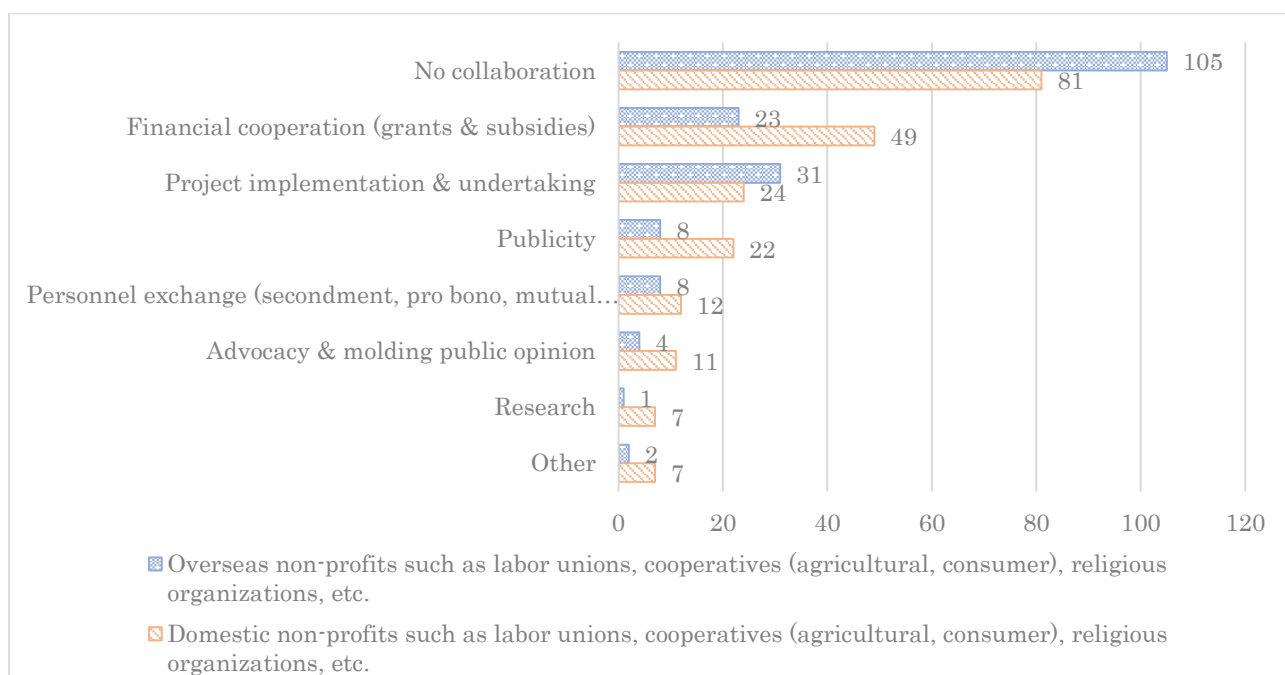
Figure 4.2.7 Collaboration with domestic / overseas non-profit organizations such as labor unions, cooperatives (agricultural, consumer), religious organizations, etc.
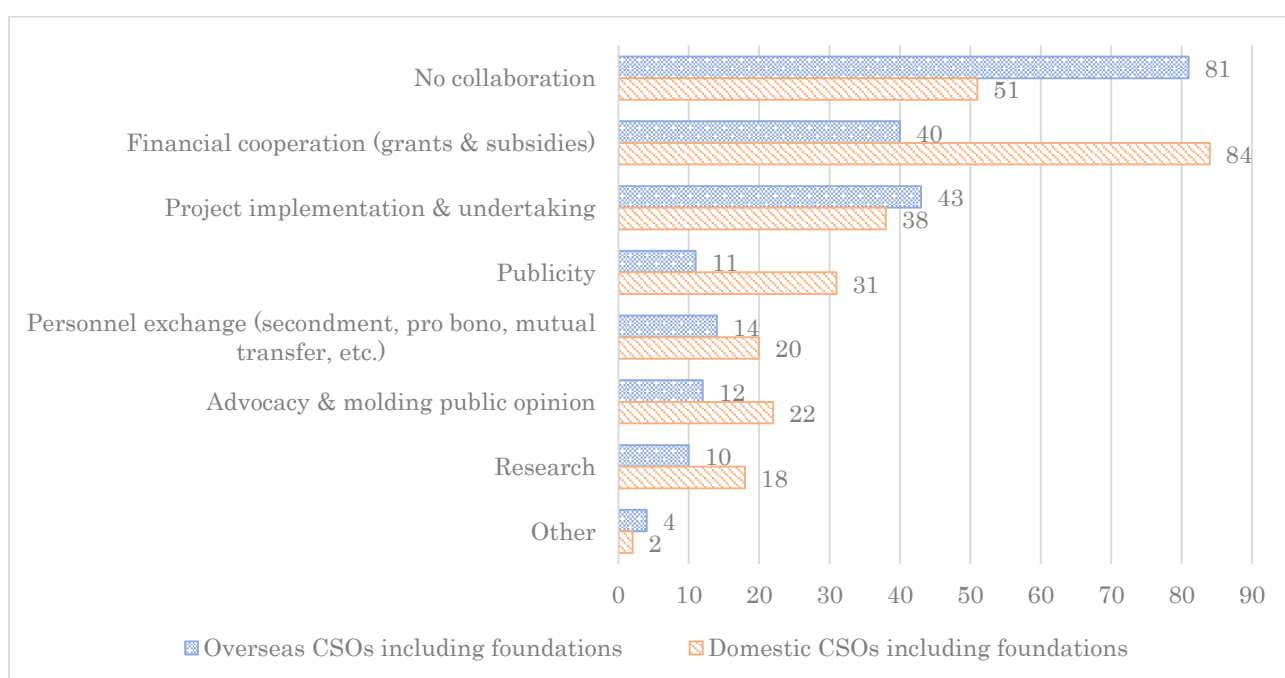
Figure 4.2.8 Contents of Collaboration with Domestic / Overseas Civil Society Organizations including Foundations
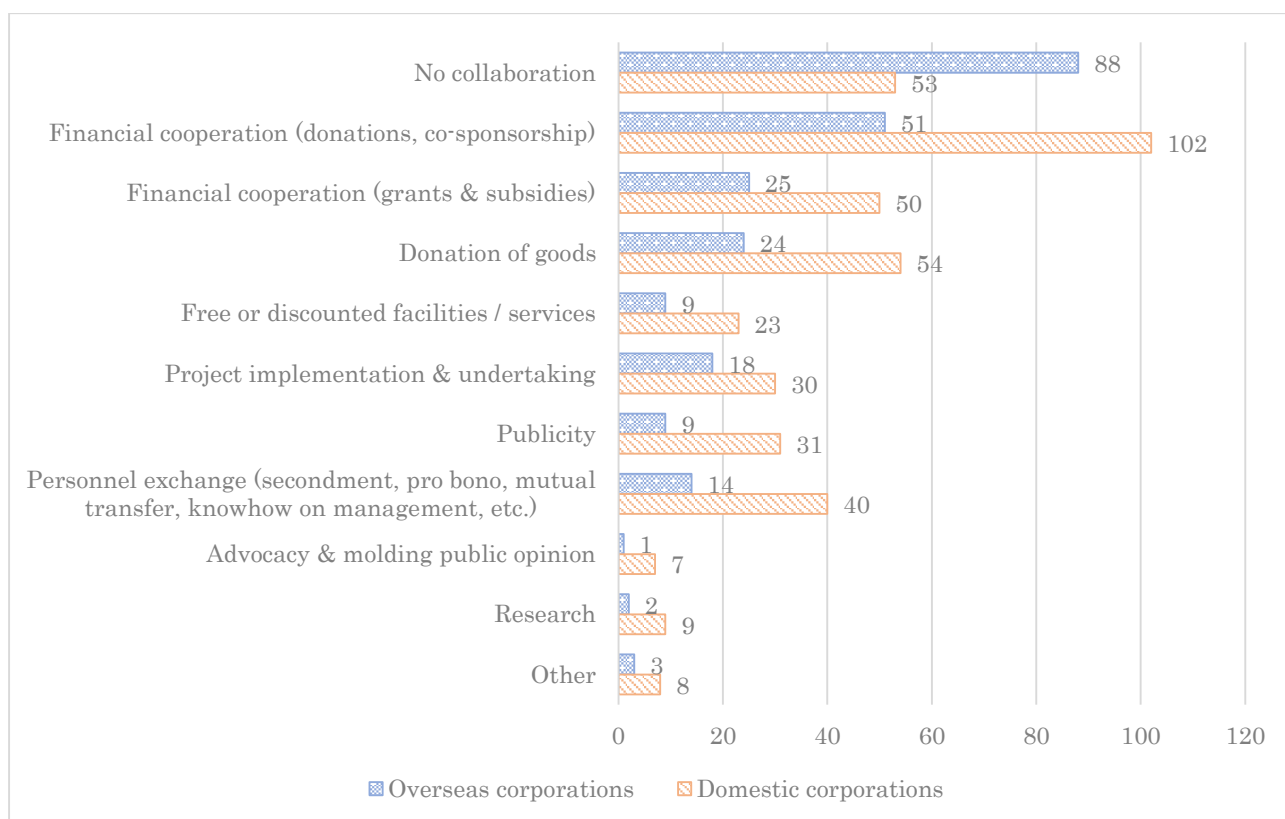
Figure 4.2.9 Contents of Collaboration with Domestic / Overseas Corporations
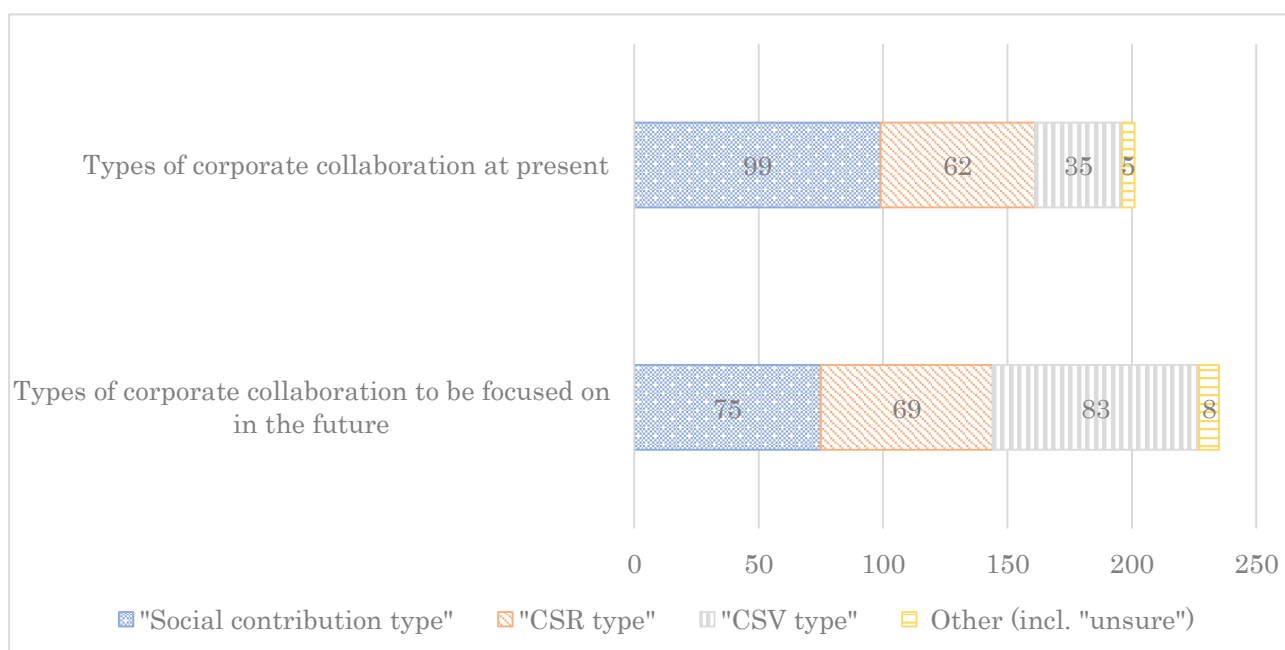
Figure 4.2.10 Types of Collaboration Carried Out Now and to be Focused on in the Future
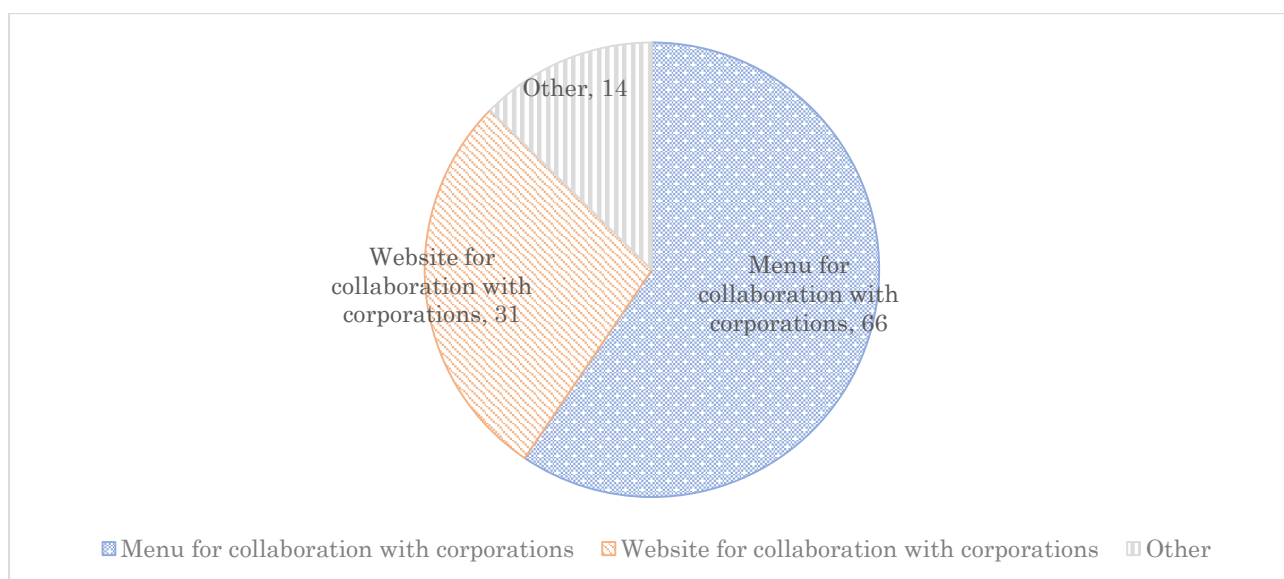
Figure 4.2.11 Preparations for Enhanced Collaboration
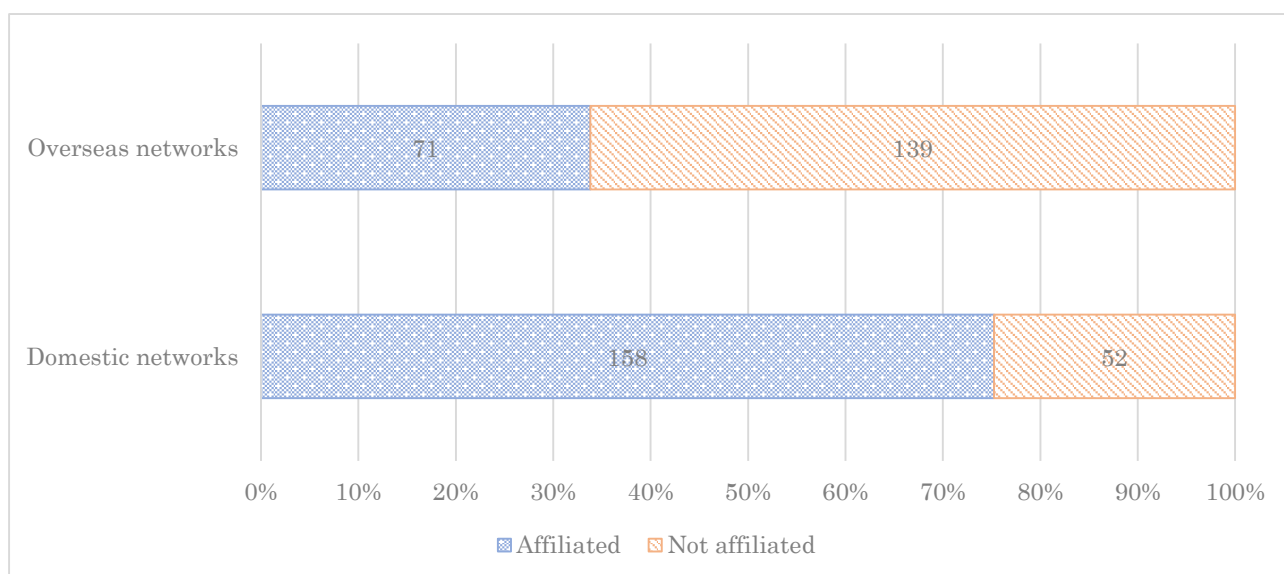
Figure 4.3.1 Affiliation with Domestic/ International Network Organizations

Figure 4.3.2 Breakdown of Domestic Network Organizations

Category	Examples of Organizations
Multi-disciplinary Comprehensive Networks (NPO/NGO)	Japan NPO Center, SDGs Civil Society Network
Multi-disciplinary Comprehensive Networks (Multi-stakeholder type)	Global Compact Network Japan
Thematic Network (NPO/NGO-led)	Climate Network, Japan NGO Network for Education, etc.
Thematic Network (Multi-stakeholder type)	Japan Platform (JPF), etc.
Domestic Regional Network (NPO/NGO-led)	NGO Fukuoka Network, Yokohama NGO Network, etc.
Domestic Regional Network （Multi-stakeholder type）	
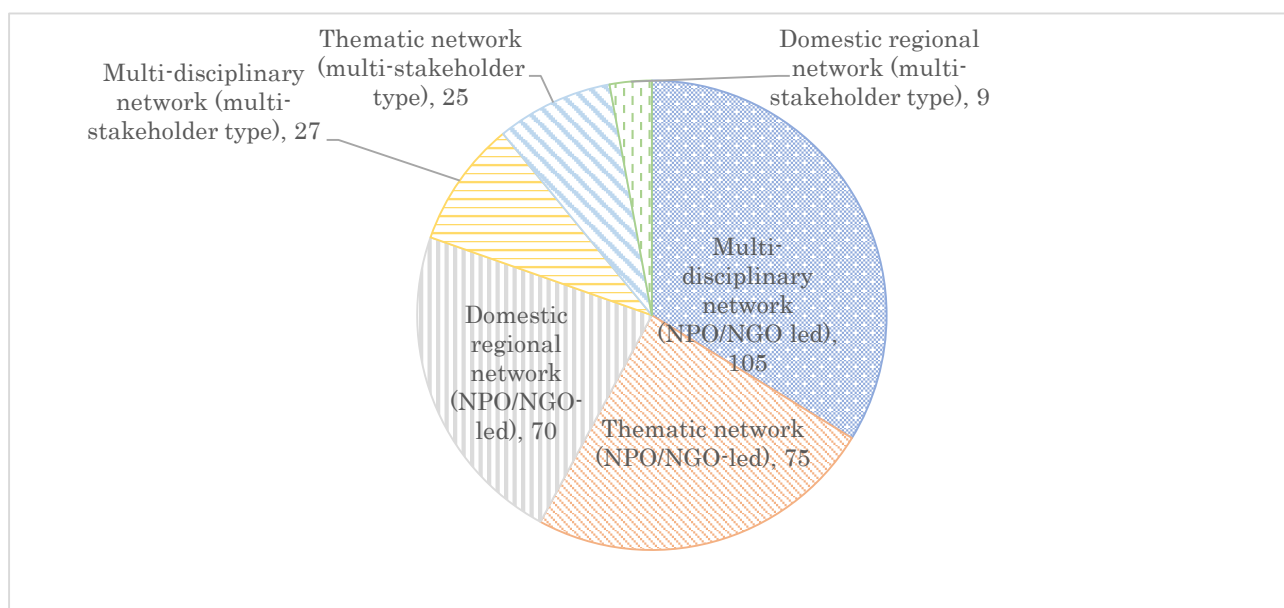
Figure 4.3.3 Proportion of Affiliated Domestic Network Organizations
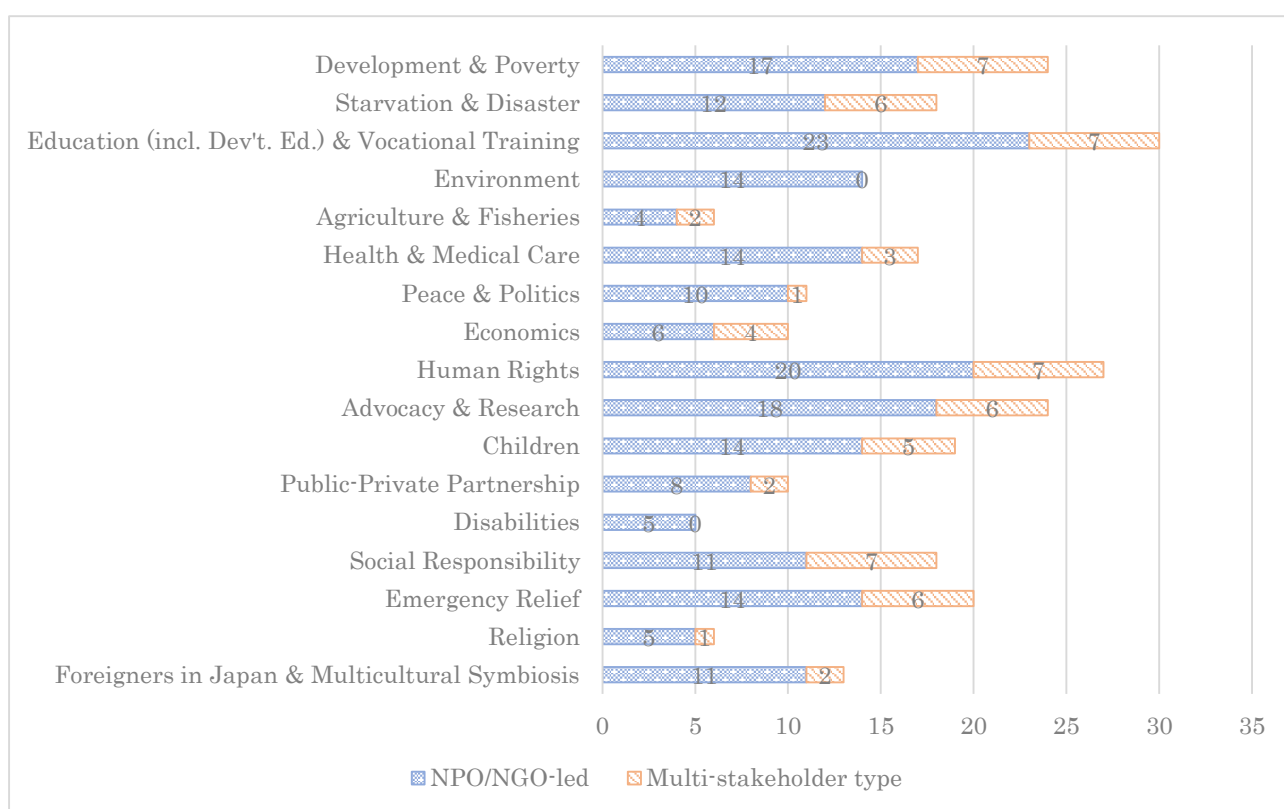
Figure 4.3.4 Breakdown of Affiliated Domestic Thematic Networks
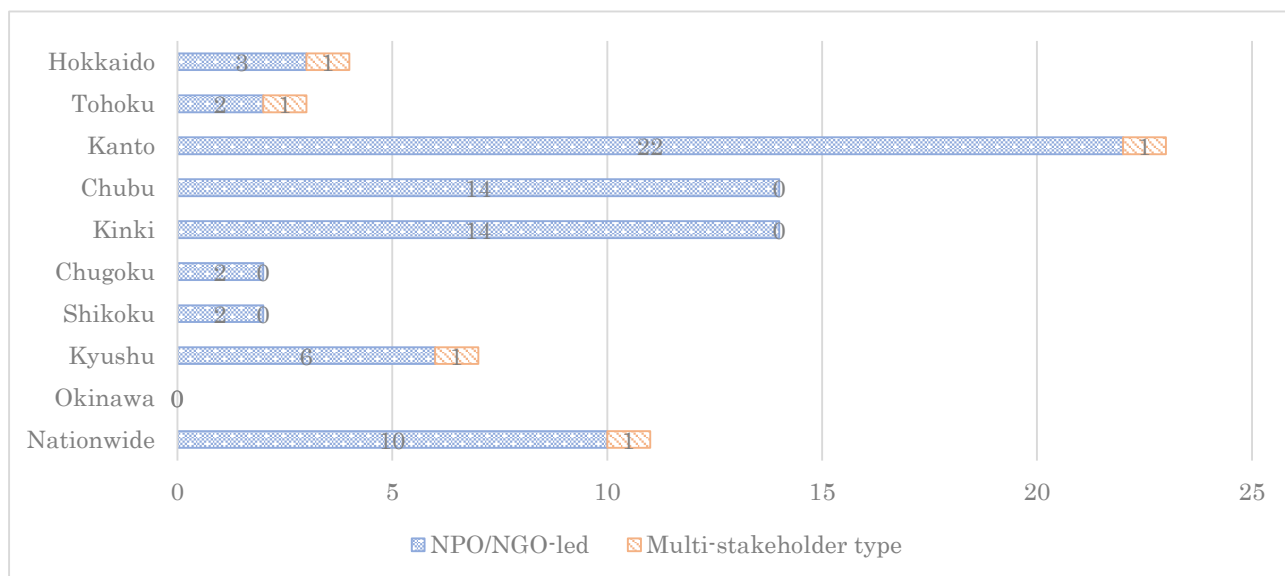
Figure 4.3.5 Breakdown of Affiliated Domestic Regional Networks

Figure 4.3.6 Breakdown of Overseas Network Organizations

Category	Examples of Networks
International Alliance Networks	Save the Children、World Vision, etc.
International Thematic Networks	People's Health Movement, etc.
Overseas Regional Networks	Bond, etc.
Regional Networks in Countries with Activities	CCC (Cooperation Committee for Cambodia) etc.
Thematic Networks in Countries with Activities	Bangladesh NGO's Network for Radio and Communication, etc.
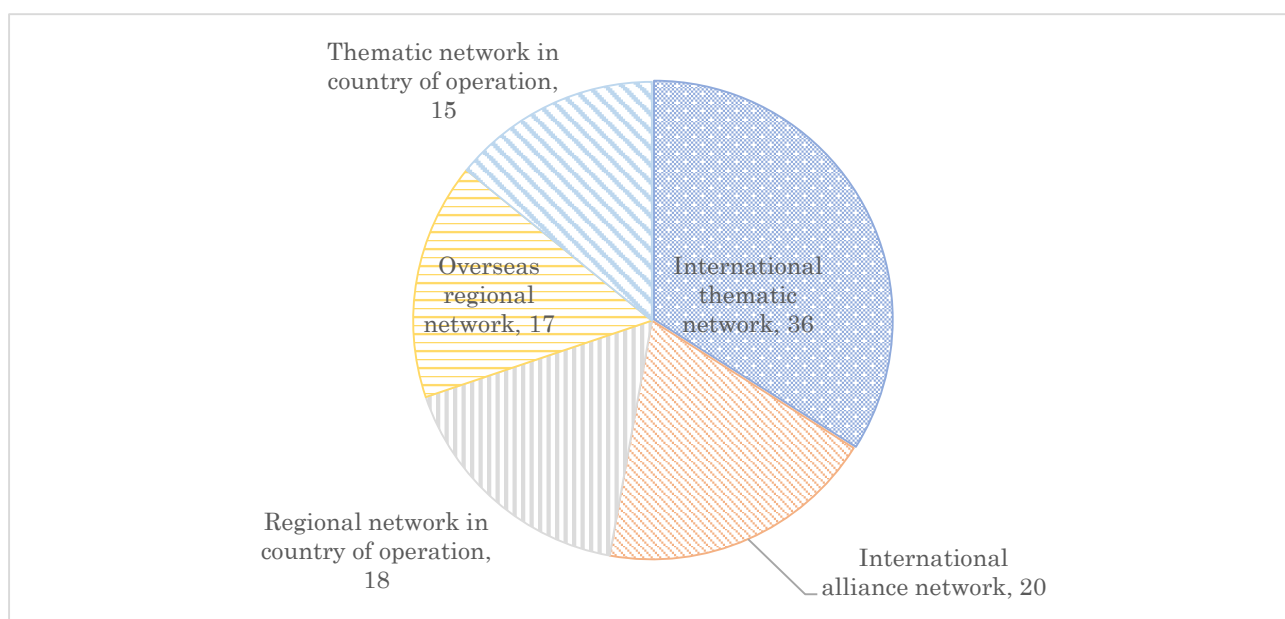
Figure 4.3.7 Proportion of Affiliated Overseas Networks
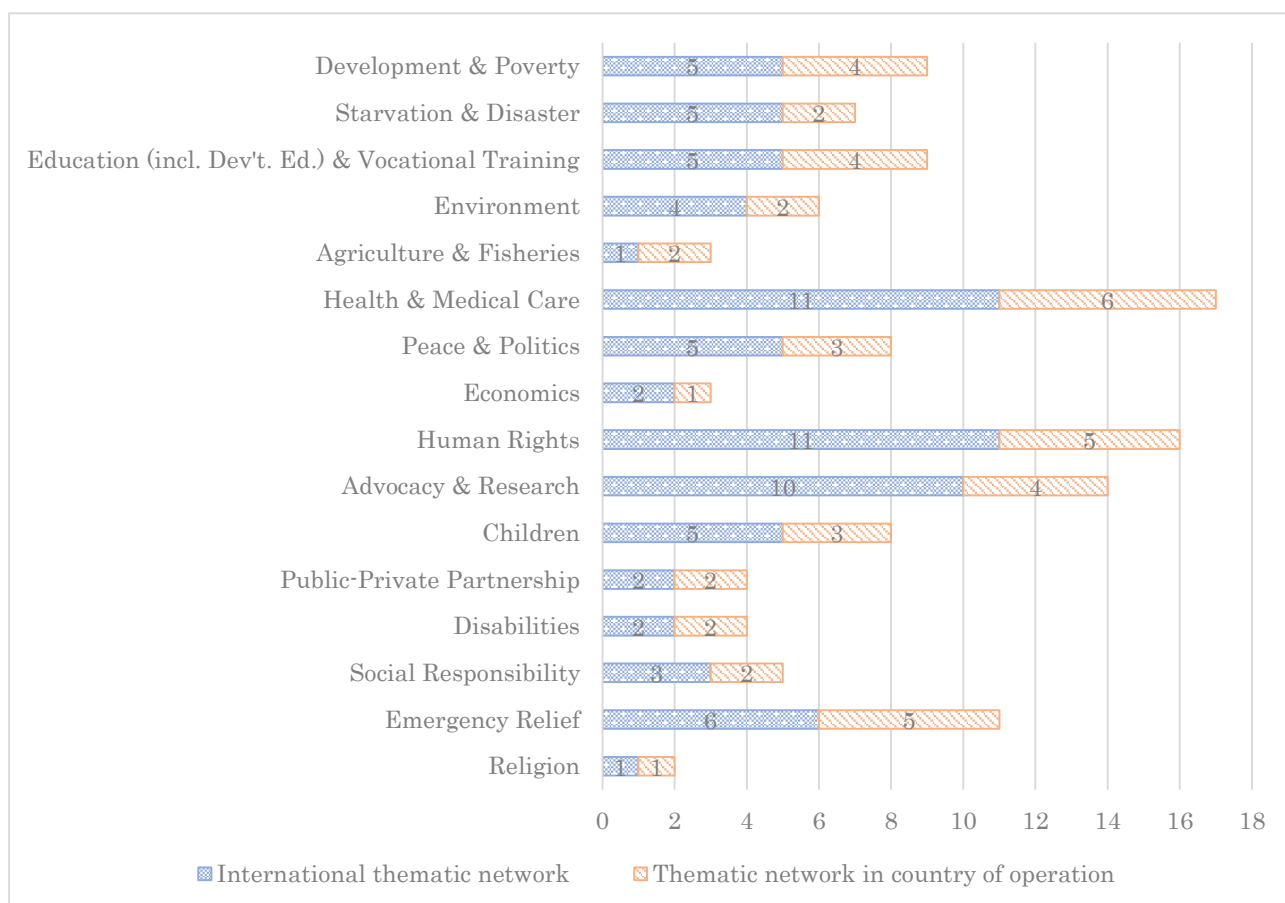
Figure 4.3.8 Breakdown of Affiliated Overseas Thematic Networks
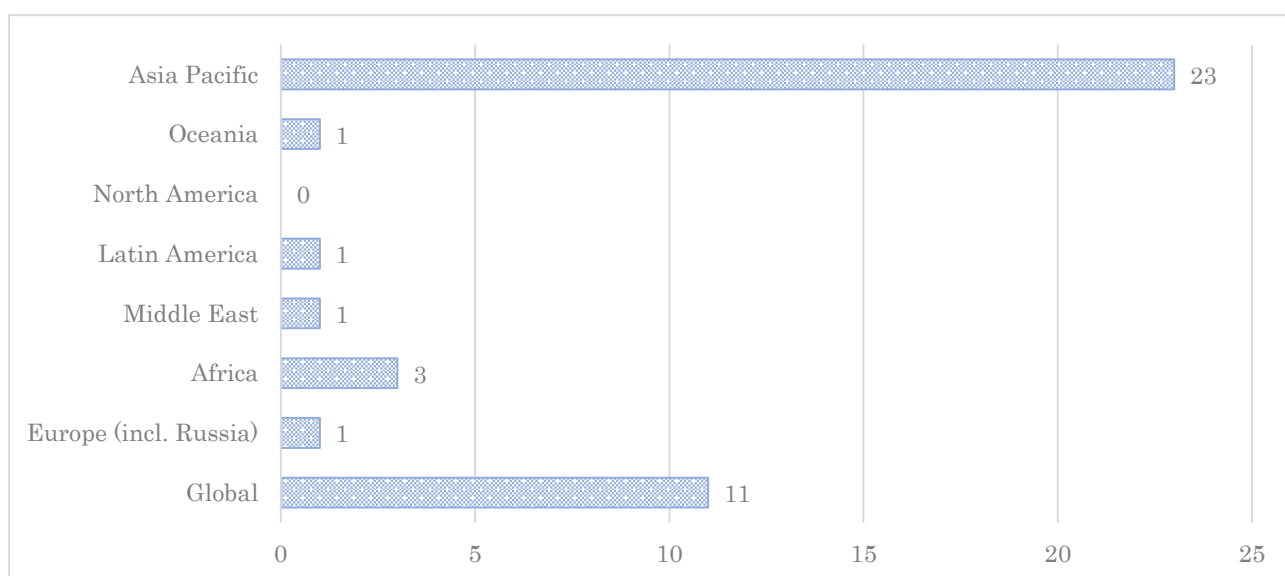
Figure 4.3.9 Breakdown of Affiliated Overseas Regional Networks

Chapter 5 Finances

General Introduction

The total income of NGOs has increased from 46.5 billion yen at the time of the previous survey in 2016 to 55.6 billion yen, of which donations, grants and subsidies, and independent activity income have increased.　The average income per organization has increased significantly from 137.29 million yen in 2016 to 196.56 million yen, but this is due to organizations with income of more than 100 million yen driving an increase in the average. The median income was 19.56 million yen in 2016 and 23 million yen in 2021, which is closer to the actual situation of NGOs and highlights the issue of their polarized structure.　The top 10 organizations in terms of income accounted for 66.3% of the total income of all organizations, which is higher than the 62.1% at the time of the previous survey.

For analysis, the income was broken down into five categories: membership fees, donations, independent activity income, grants and subsidies, and other income. The membership fee income averaged 8,446,000 yen with a median of 710,000 yen, and the donation income averaged 109,980,000 yen with a median of 4,190,000 yen, again highlighting the reality of the polarized structure.

Next is the expenditures of NGOs.　The total expenditure of NGOs in this survey was 54.48 billion yen, and 26.1 billion yen in FY2011, which is the year in which the total expenditure was specified in the previous surveys. This shows that NGOs have more than doubled their scale of operations in the last decade.　The breakdown of the total expenditures into the categories of "projects - other," "projects - personnel expenses," "administrative - other," and "administrative - personnel expenses" in accordance with the accounting standards for NPO corporations was such that "project expenses" accounted for 93.9% at 51.17 billion yen, and "administrative expenses" accounted for 6.1% at 3.31 billion yen.　Furthermore, 76.7% of the total project cost was accounted for by "other" and 23.3% by "personnel cost", while 46.9% of the total administrative cost was accounted for by "other" and 53.1% by "personnel cost."　Finally, as a unique result of this survey, it was found that 25.1% of the total expenditure was accounted for by personnel expenses at 13.7 billion yen (project expenses and administrative expenses).
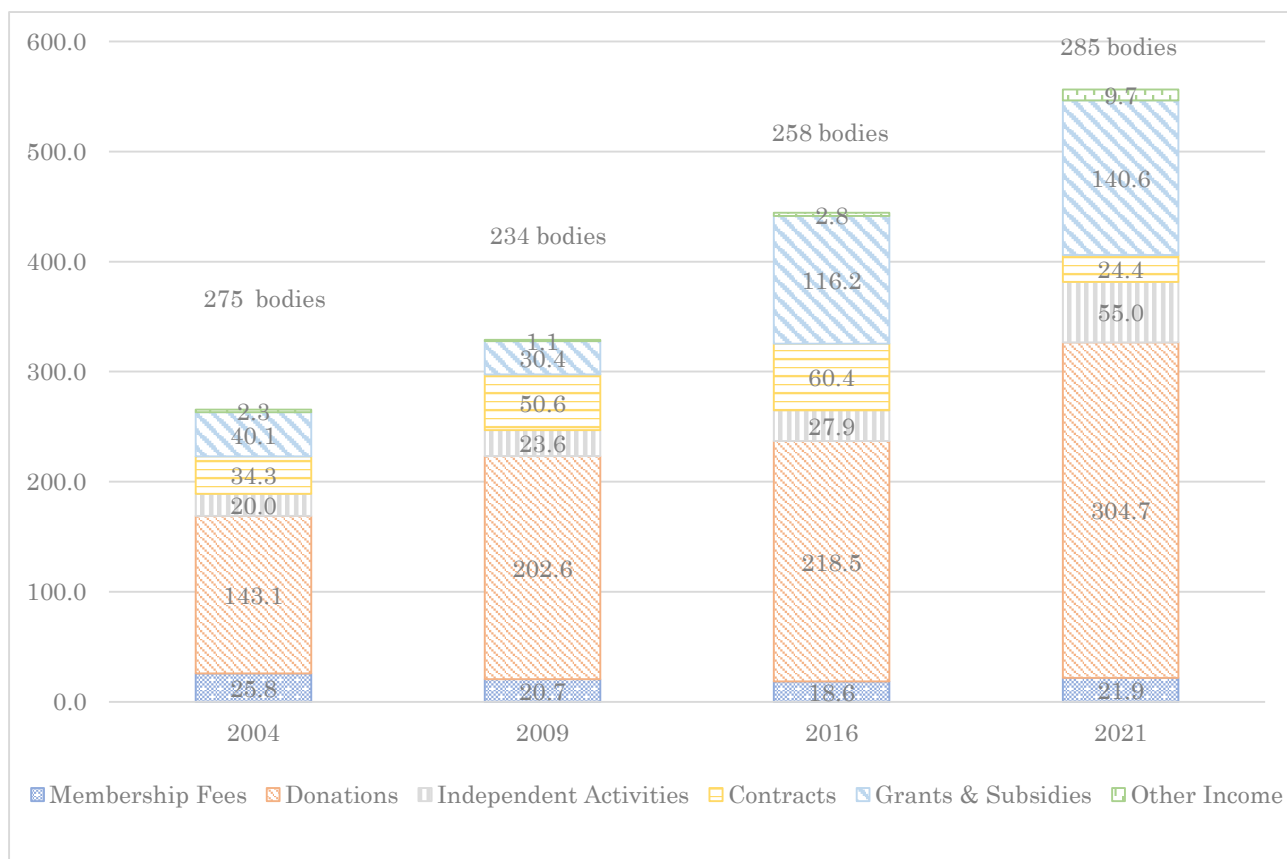
Figure 5.2.1 Changes over Time in Total NGO Income & Income Breakdown
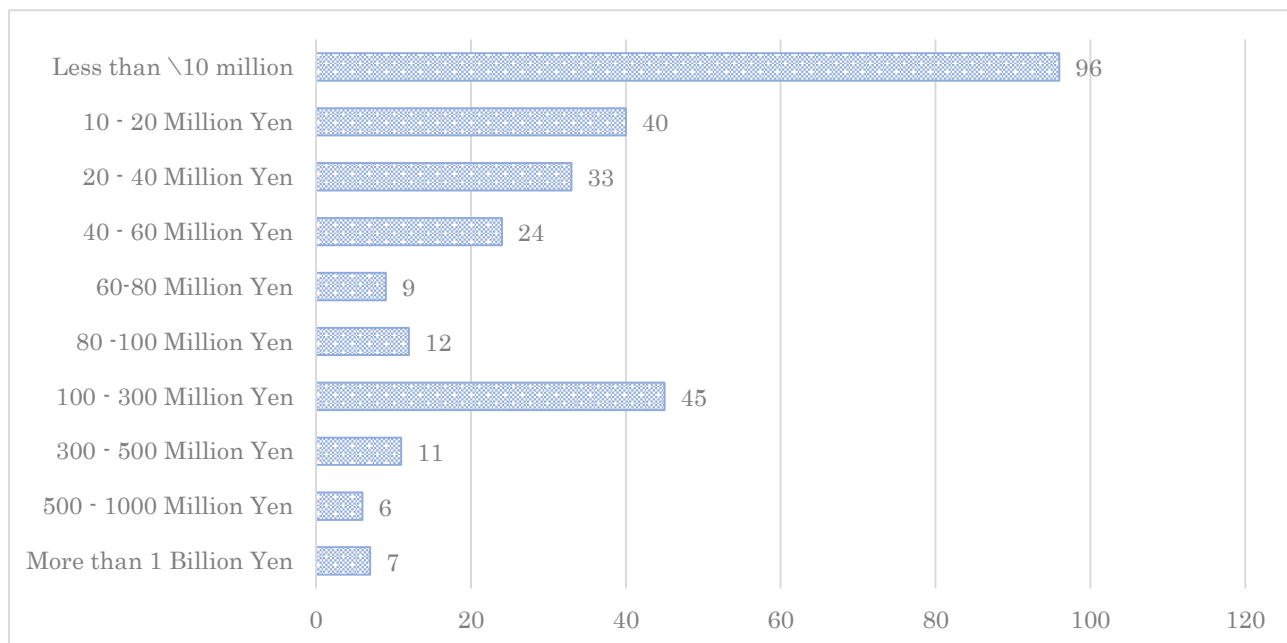
Figure 5.2.2 Total Income by Income Bracket
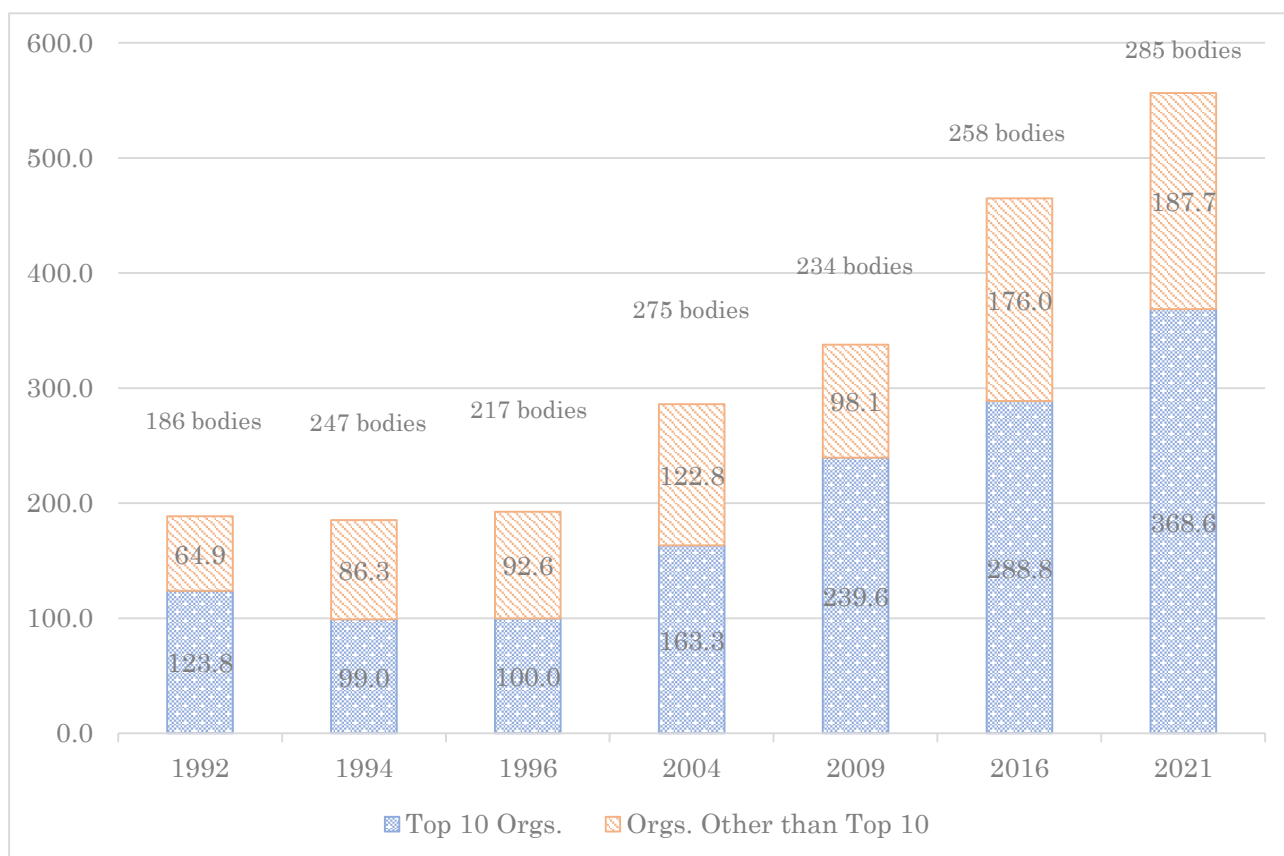
Figure 5.2.3 Changes over Time in Income of Top 10 Income-Earning Organizations and Other Organizations (¥100 M)

Figure 5.2.4 Top 10 Organizations in terms of Income Scale

No	Organization Name	Domestic / INGO	Fiscal Year	Annual Income (¥)
1	Medecins Sans Frontieres Japan	INGO	2020	13,869,924,567
2	World Vision Japan	INGO	2020	5,900,386,611
3	Peace Winds Japan	Domestic NGO	2020	4,833,805,105
4	Plan International Japan	INGO	2019	3,413,999,457
5	Japan Overseas Cooperation Volunteers	CNGO	2020	2,621,258,222
6	Save the Children Japan	INGO	2020	2,081,520,999
7	Association for Aid and Relief	Domestic NGO	2019	1,721,092,676
8	Japan Heart	Domestic NGO	2020	901,151,698
9	Shanti Volunteer Association	Domestic NGO	2020	765,141,088
10	OISCA	Domestic NGO	2020	752,199,836
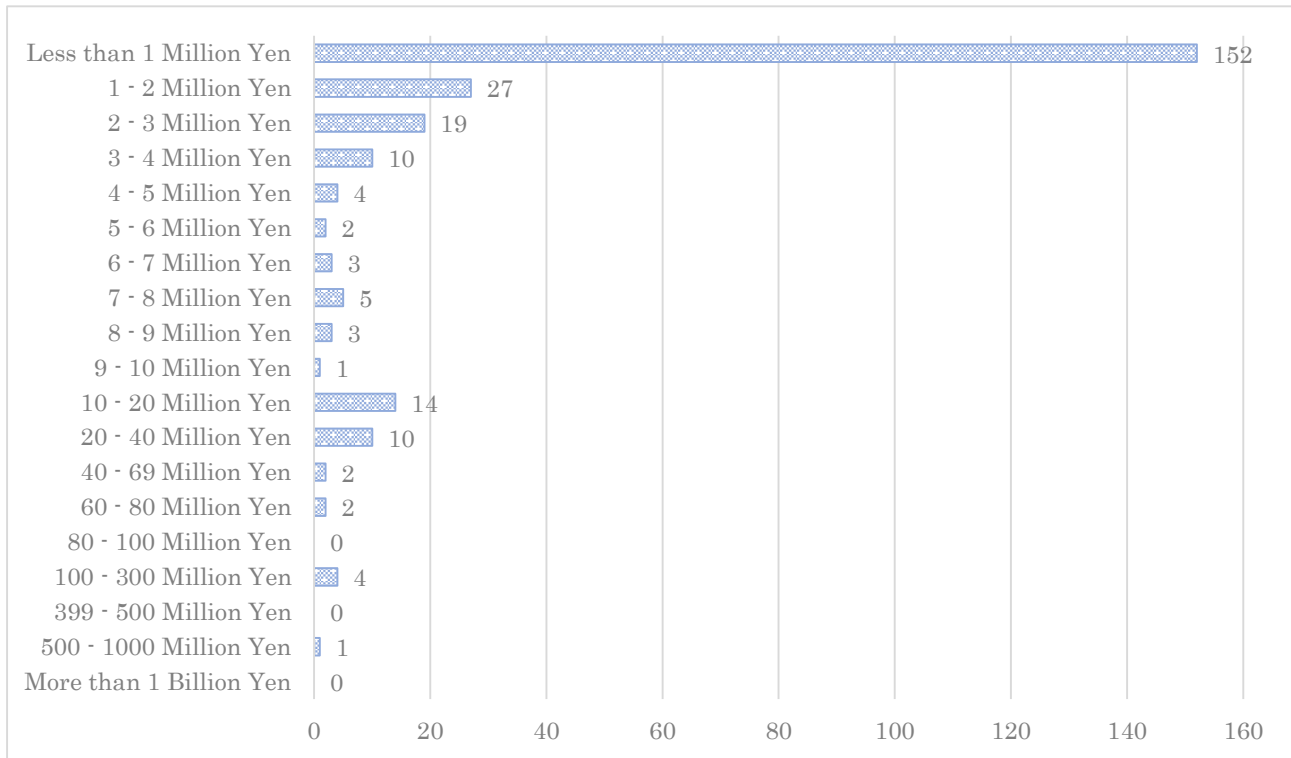
Figure 5.2.5 Membership Fee Income by Income Bracket
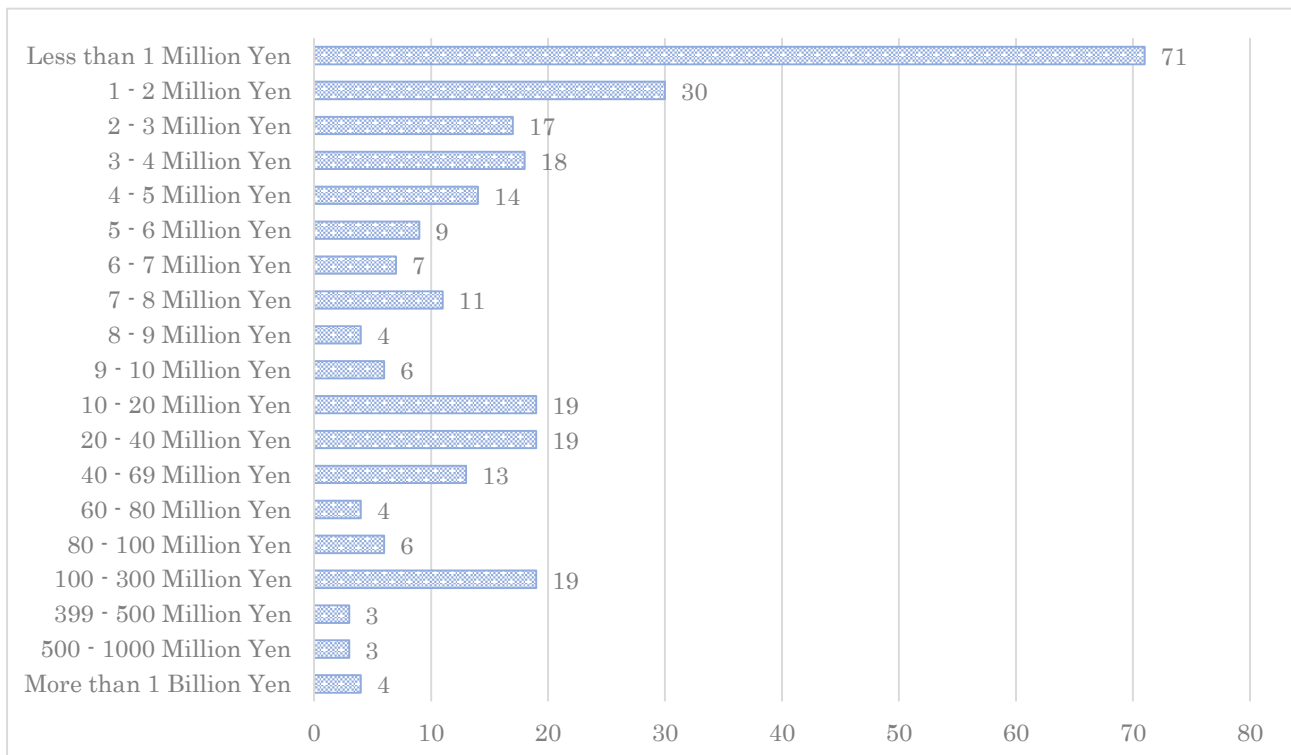
Figure 5.2.6 Donation Income by Income Bracket

Figure 5.2.7 Organizations with Donation Income of ¥100 Million or More

No	Organization Name	Fiscal Year	Donation Amount
1	Medecins Sans Frontieres Japan	2020	13,050,103,455
2	World Vision	2020	4,054,448,377
3	Plan International	2019	2,959,880,635
4	Save the Children Japan	2020	1,380,481,616
5	Japan Heart	2020	798,131,383
6	Peace Winds Japan	2020	659,448,790
7	Japan International Food for the Hungry	2014	582,002,868
8	National Federation of UNESCO Associations in Japan	2020	493,523,730
9	Shanti Volunteer Association	2020	351,997,413
10	Association for Aid and Relief, Japan	2019	314,740,601
11	Japan NPO Center	2019	298,433,505
12	ChildFund Japan	2019	278,143,527
13	OISCA	2020	227,095,026
14	Good Neighbors Japan	2020	199,722,304
15	Japan Committee, Vaccines for the World's Children	2020	188,166,519
16	EDF-JAPAN	2020	176,997,490
17	Hunger Free World	2020	154,352,932
18	Japan Relief Clothing Center	2020	144,059,457
19	WaterAid Japan	2019	139,412,726
20	Amnesty International Japan	2020	133,868,456
21	Médecins du Monde Japan	2020	132,611,917
22	Japan Association for Refugees	2019	131,910,238
23	JOICFP	2020	129,577,148
24	JIM-NET (Japan Iraq Medical Network)	2019	115,013,980
25	Japan Team of Young Human Power	2019	114,036,986
26	Greenpeace Japan	2020	113,580,000
27	Japan International Volunteer Center (JVC)	2019	113,002,526
28	Asian Education and Friendship Association	2020	109,199,327
29	SHAPLA NEER = Citizens' Committee in Japan for Overseas Support	2019	105,267,801
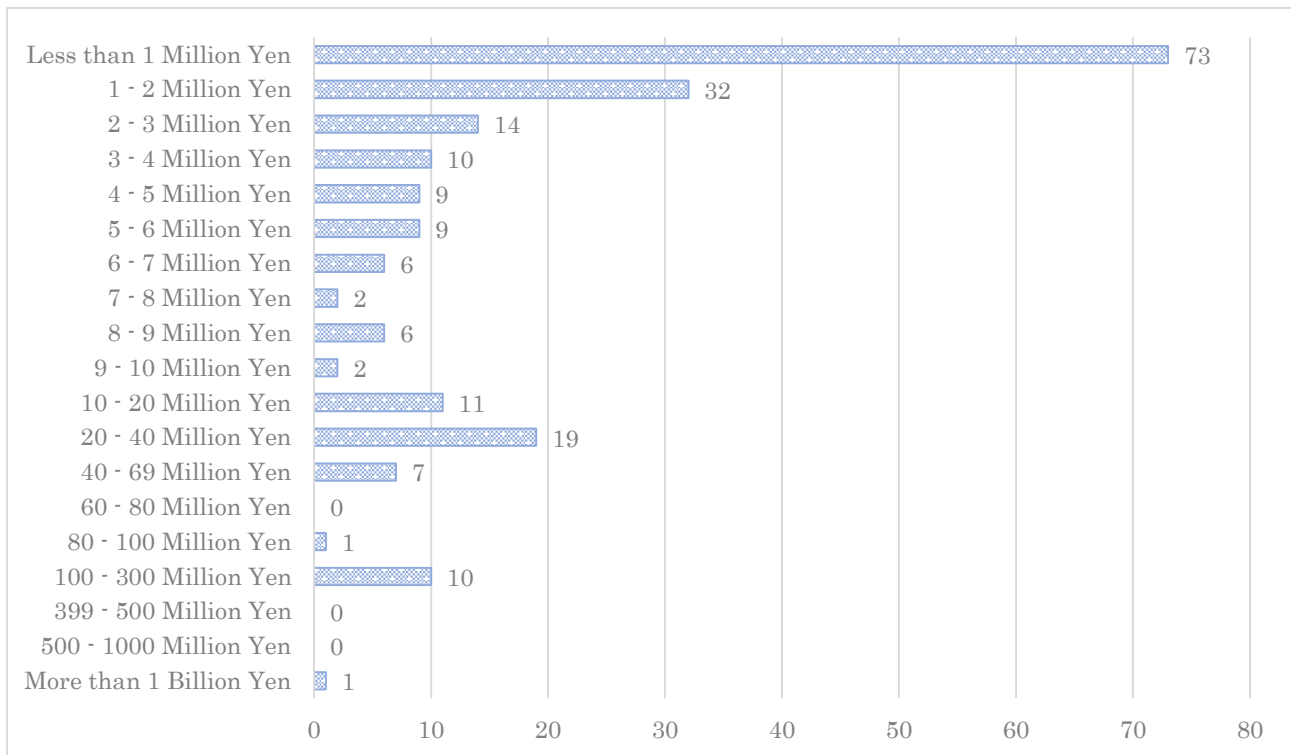
Figure 5.2.8 Independent Activity Income by Income Bracket
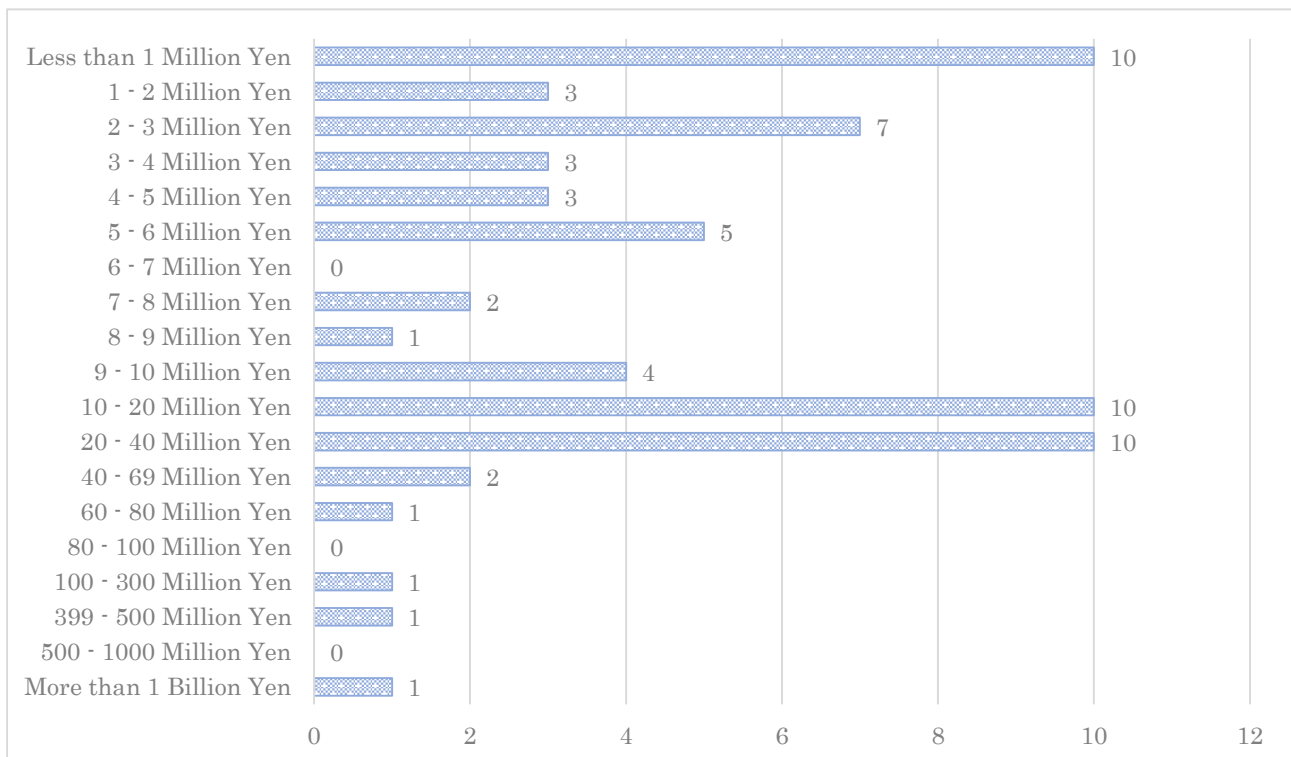
Figure 5.2.9 Contract Income by Income Bracket
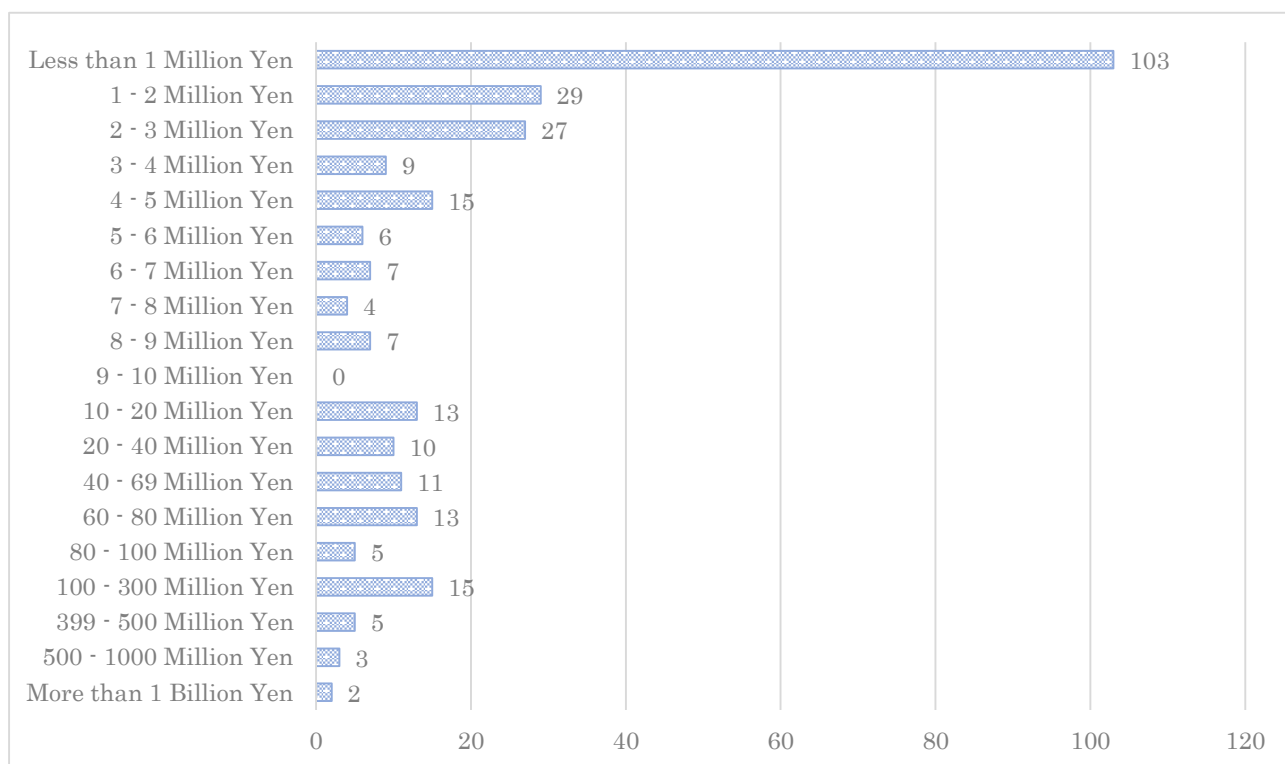
Figure 5.2.10 Grant & Subsidy Income by Income Bracket
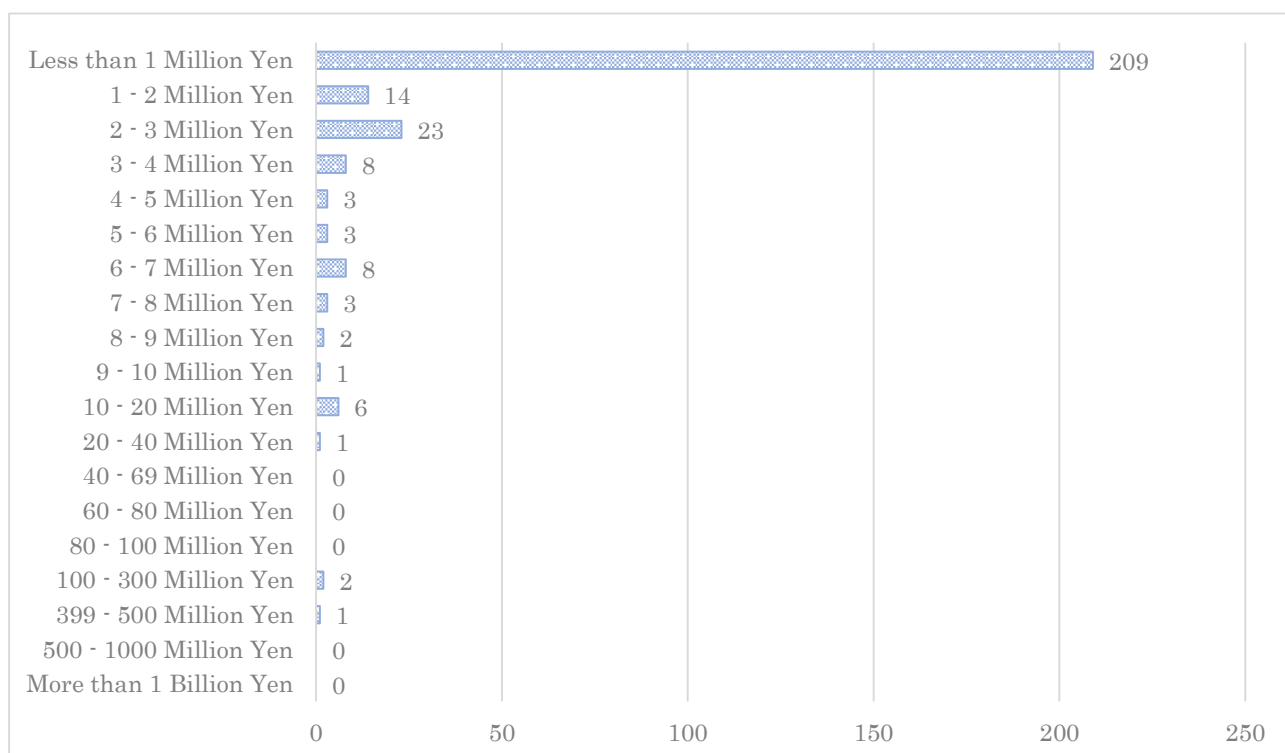
Figure 5.2.11 Other Income by Income Bracket
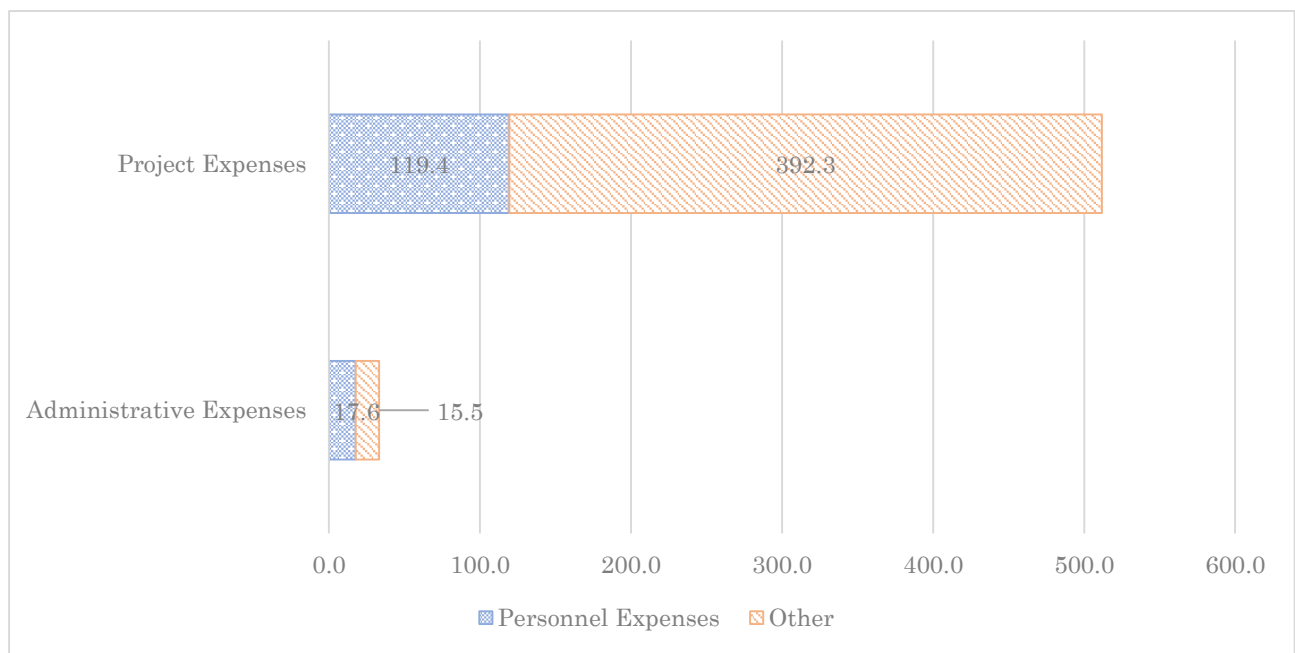
Figure 5.3.1 Breakdown of Expenses (Unit: ¥100 million)
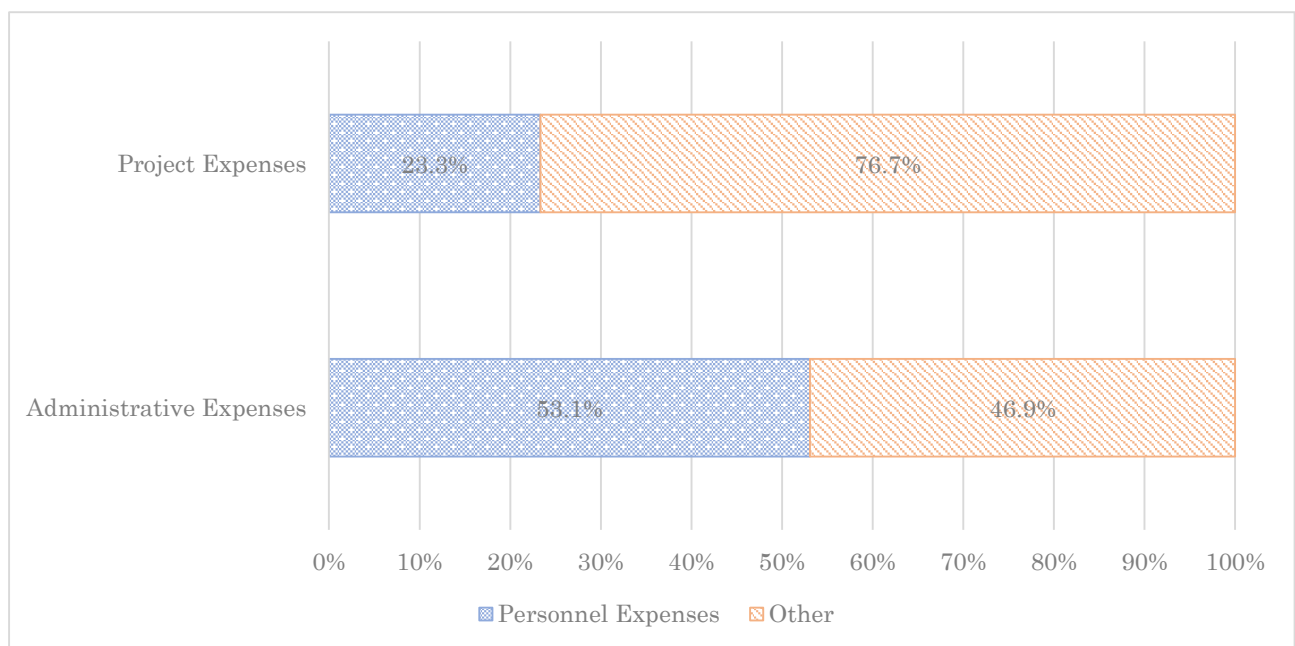
Figure 5.3.2 Proportion of Expenses

Chapter 6 Membership System

General Introduction

The existence of individuals and corporations who agree with the founding principles and activities of an organization is essential for NGOs, and the membership system is positioned as an important foundation for an organization. Ninety-eight percent of the responding organizations answered that they have at least one membership system.

An important aspect of membership systems is whether or not they provide for voting rights in the highest decision-making body such as the general assembly. In the survey, organizations were asked to choose from a total of six categories, namely, individual membership, corporate membership, and others, each with or without voting rights. The most common response was "individual membership (with or without voting rights) + corporate membership (with or without voting rights)." However, it was found that various membership and support systems had been made available, and there was diversity in the forms of participation.

Next, we surveyed the number of four types of members, namely, individual and corporate members with and without voting rights, and found that overall, the number of individual members, and especially those without voting rights, was the highest. The number of corporate members was generally less than that of individual members.

Finally, when organizations were asked about support systems other than membership systems that have a high repeat rate, the highest number of responses was for "unsent postcard/used stamp systems" and "used book donation systems," indicating that such support programs with a long track record of implementation were common. In addition, "crowdfunding" is becoming a well-established fundraising method, and new fundraising using the "hometown tax payment system" is also on the rise.
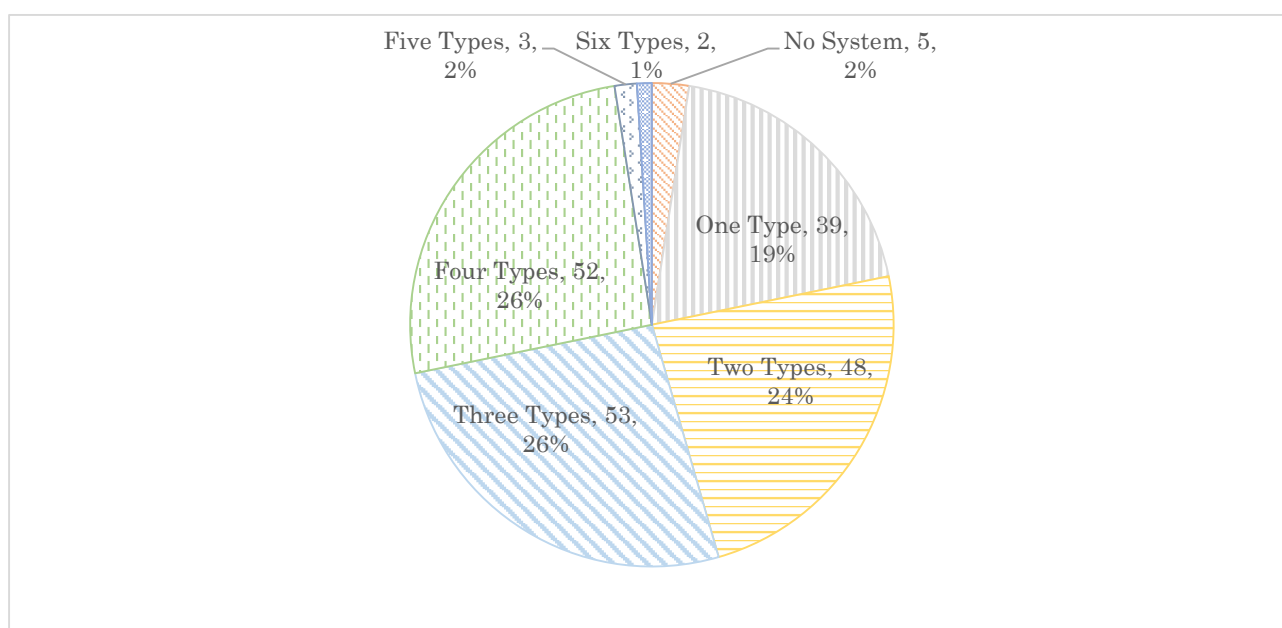
Figure 6.2.1 Existence of Membership Systems

Figure 6.2.2 Combinations of Membership Systems

Combinations	Breakdown		No. of Orgs
4 Types	Individual Membership:	with & without Voting Rights	49
	Corporate Membership:	with & without Voting Rights	
3 Types	Individual Membership:	with & without Voting Rights	41
	Corporate Membership:	only without Voting Rights	
2 Types	Individual Membership:	with & without Voting Rights	26
1 Type	Individual Membership:	only with Voting Rights	15
1 Type	Individual Membership:	only without Voting Rights	11
2 Types	Individual Membership:	only with Voting Rights	11
	Corporate Membership:	only with Voting Rights	
2 Types	Individual Membership:	only without Voting Rights	8
	Corporate Membership:	only without Voting Rights	
3 Types	Individual Membership:	with & without Voting Rights	8
	Corporate Membership:	only with Voting Rights	
3 Types	Individual Membership:	only without Voting Rights	5
	Corporate Membership:	with & without Voting Rights	
	Other Combinations		23
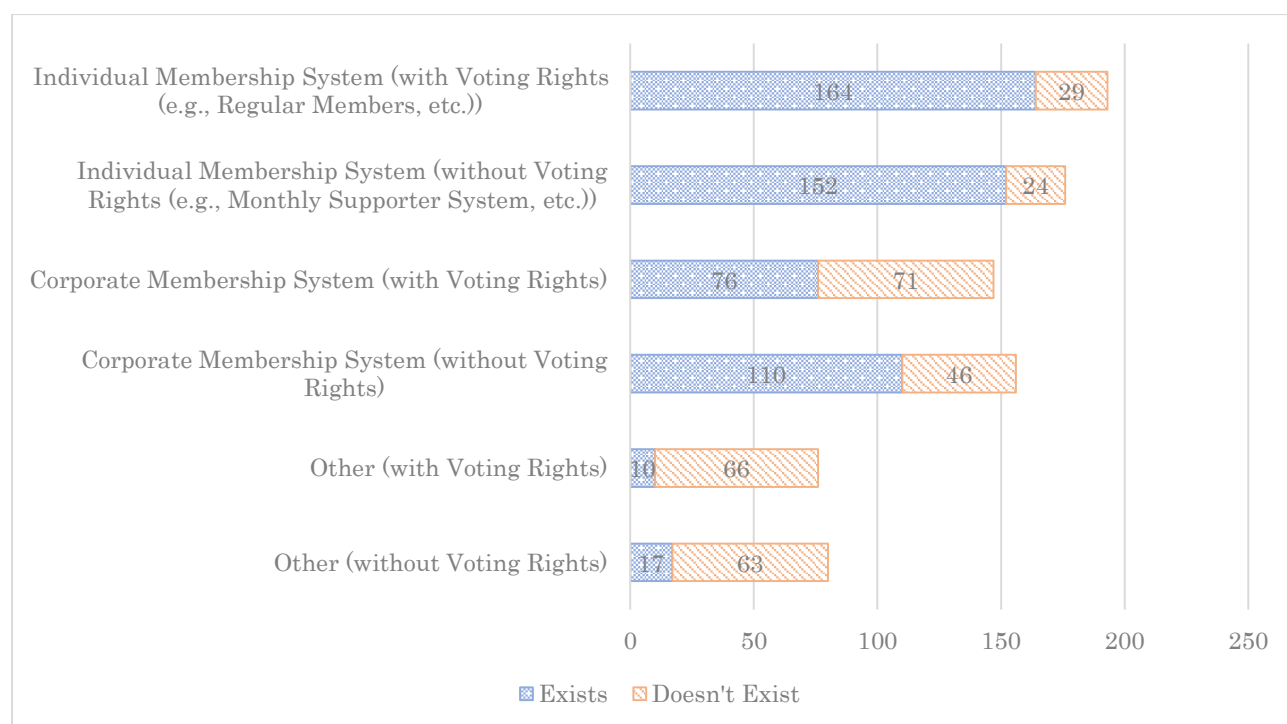
Figure 6.2.3 Types of Membership Systems
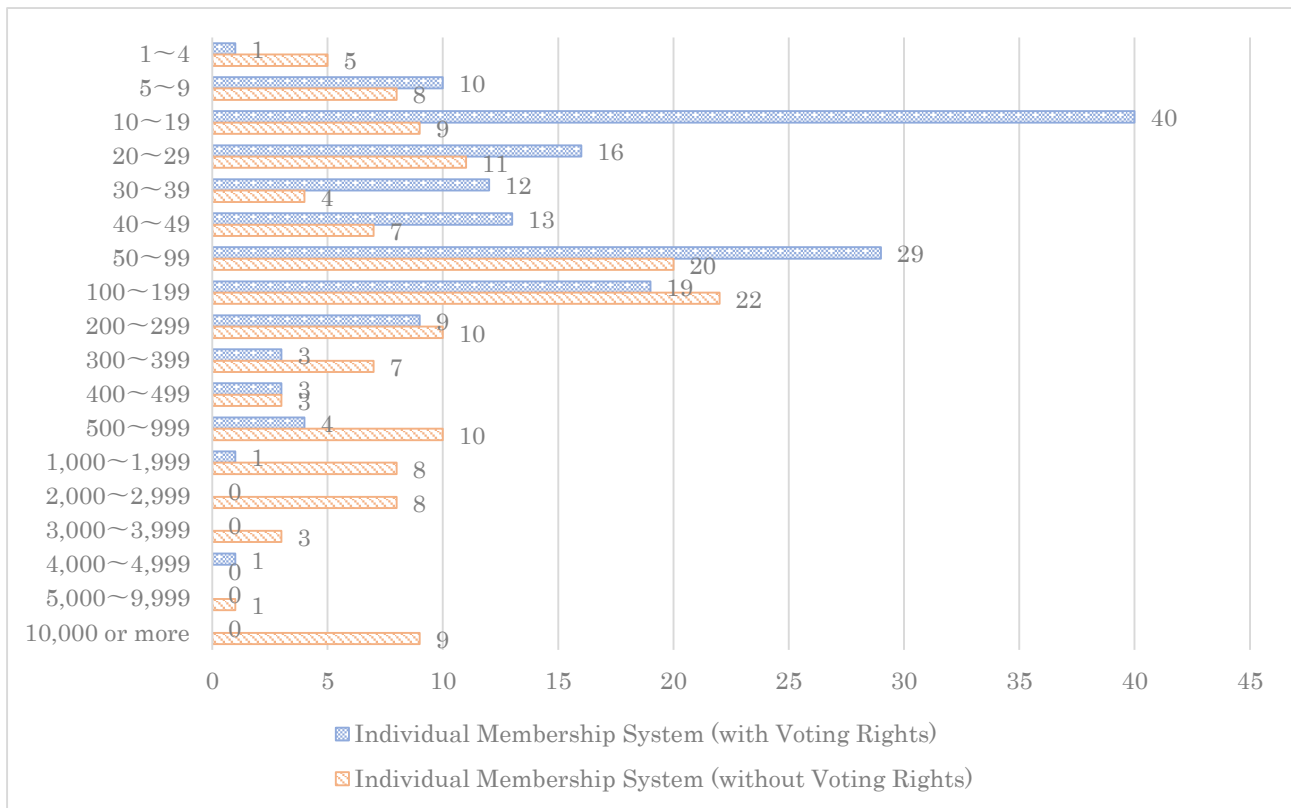
Figure 6.3.1 Number of Members under Individual Membership Systems
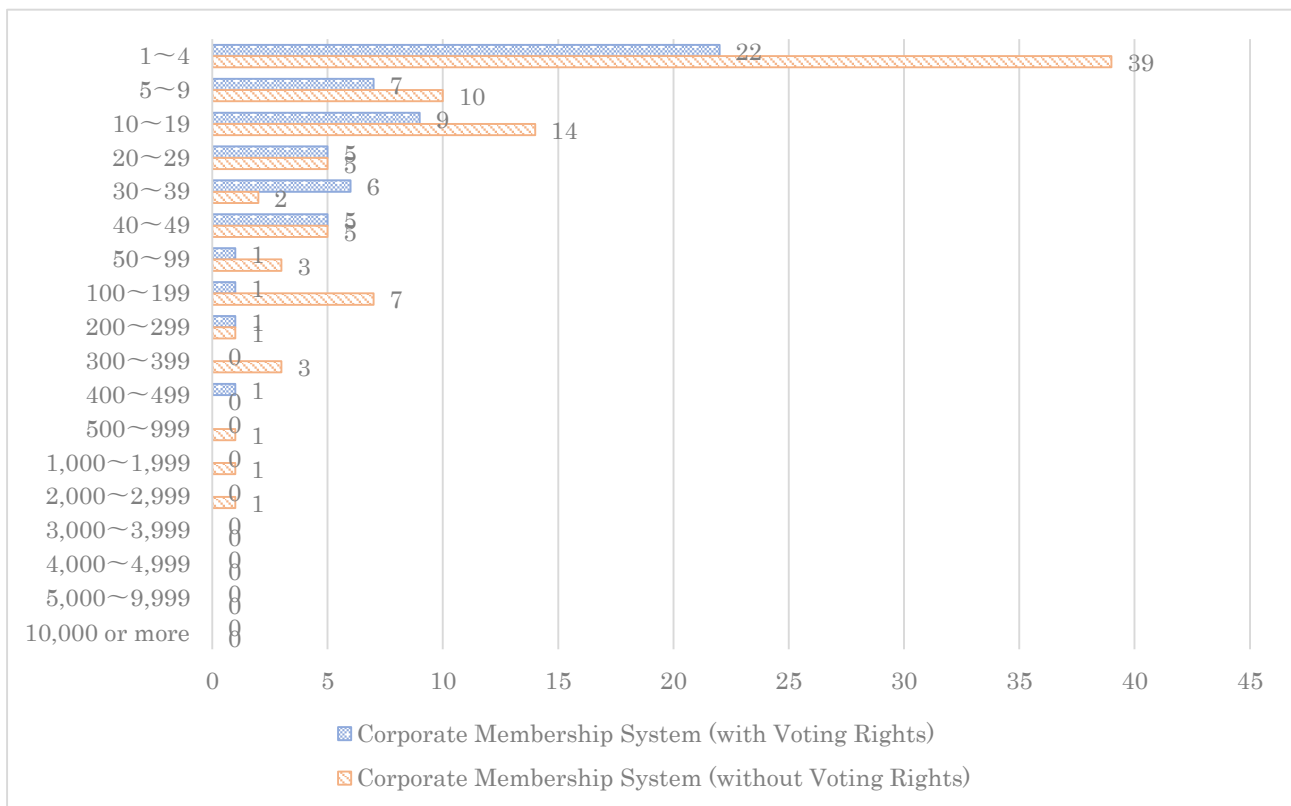
Figure 6.3.2 Number of Members under Corporate Membership Systems
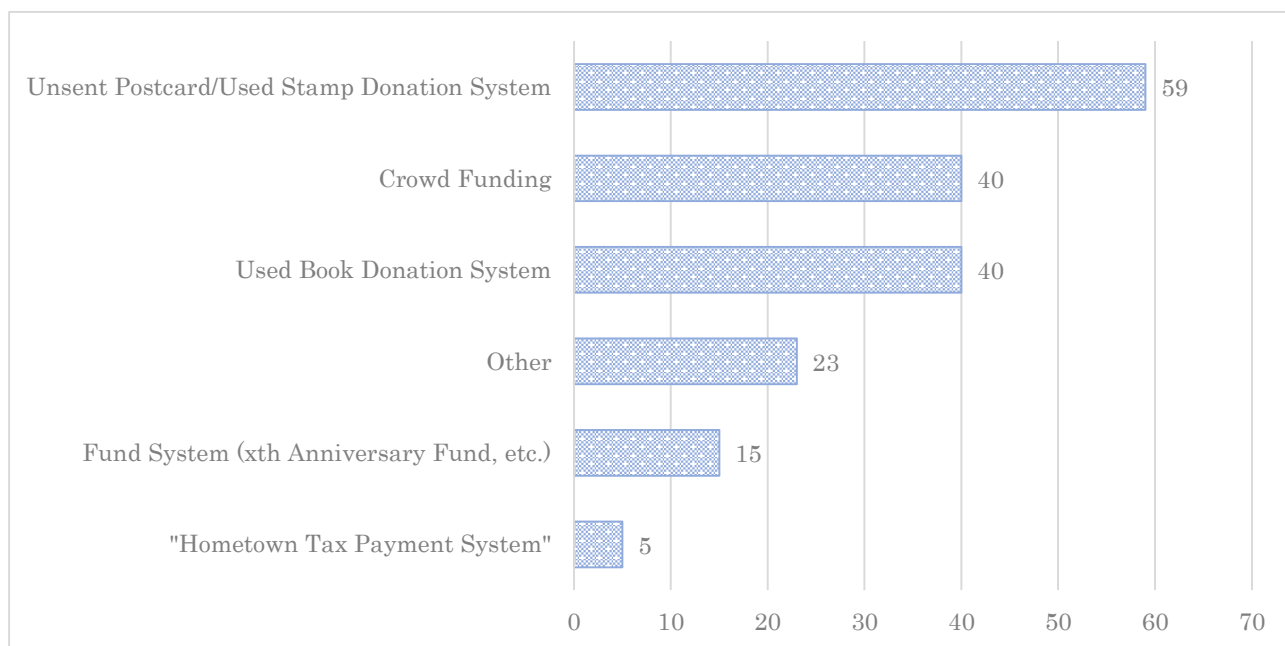
Figure 6.4.1 Support Systems with High Repeat Rates

Chapter 7 Decision-Making Bodies

General Introduction

The decision-making bodies of NGOs typically consist of two organs, the General Assembly, and the Board of Directors. The highest decision-making body was the General Assembly at 78% of the organizations, followed by the Board of Directors at 14% of them. In Chapter 1, it was mentioned NGOs most commonly acquire a legal personality as either "NPO corporations" or "certified NPO corporations." The highest decision-making body of these entities is generally the General Assembly. This fact is thought to be reflected in these figures. The frequency of the General Assembly, the highest decision-making body, was once a year for about 94% of the respondents, while the frequency of the Board of Directors meetings varied from once to six times a year.

Nest, as for the number of members of the highest decision-making bodies, the Board of Directors, Board of Trustees, and Steering Committee basically consisted of 10 or fewer members. Organizations that responded that their General Assembly was comprised of ten or less or twenty or less members accounted for only about 35% of the organizations for which the General Assembly was the highest decision-making body. Most organizations were comprised of 20 or more members, and organizations with more than 100 members accounted for about 25%. In terms of gender balance of the members, the proportion of men tended to be higher.
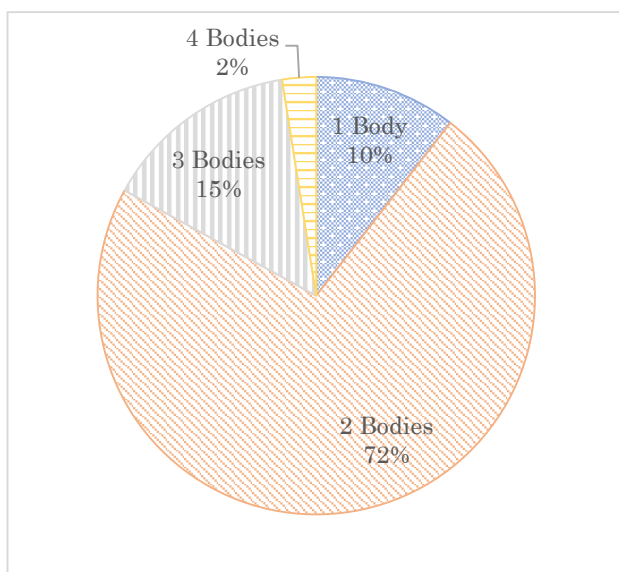
Figure 7.2.1 Number of Decision-Making Bodies
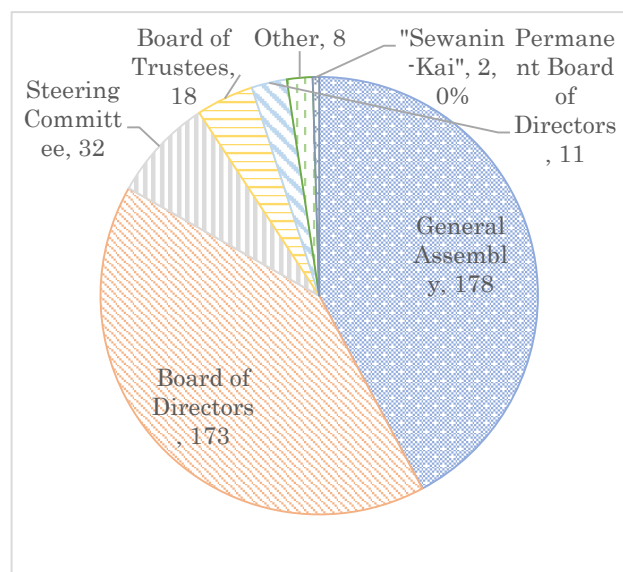
Figure 7.2.2 Names of Decision-Making Bodies Established

Figure 7.2.3 Combinations of Decision-Making Bodies Established

Combinations	Breakdown	Responding Organizations
2 Bodies	General Assembly & Board of Directors	123
3 Bodies	General Assembly & Board of Directors & Steering Committee	15
2 Bodies	Board of Directors and Board of Trustees	12
1 Body	General Assembly Only	10
2 Bodies	General Assembly & Steering Committee	9
3 Bodies	General Assembly & Board of Directors & Permanent Board of Directors	6
1 Body	Board of Directors Only	6
1 Body	Steering Committee Only	4
3 Bodies	General Assembly & Board of Directors & Board of Trustees	3
Other	Other Combinations	16
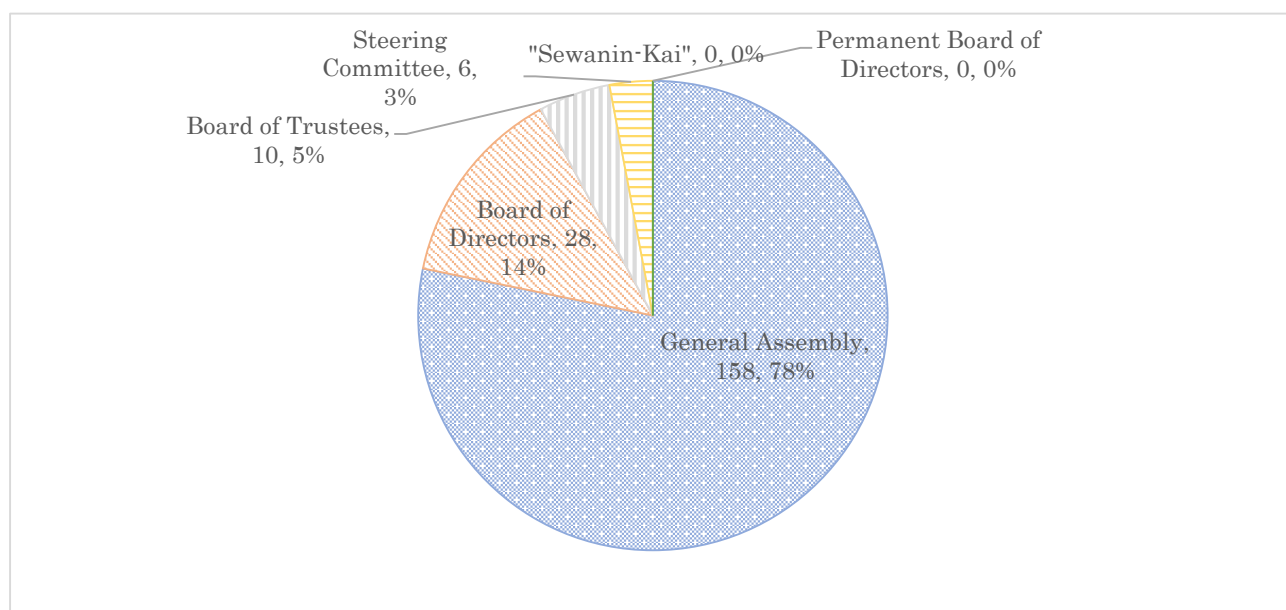
Figure 7.3.1 Type of Highest Decision-Making Body

Figure 7.3.2 Frequency of Meetings of the Highest Decision-Making Body

Highest Decision-Making Body	1 /year	2 /year	3 /year	4 /year	5 /year	6 /year	Total
General Assembly	133	7	1	0	0	0	141
Board of Directors	6	4	4	2	2	3	21
Board of Trustees	6	3	0	1	0	0	10
Steering Committee	3	0	1	0	0	1	5
Permanent Board of Directors	0	0	0	0	0	0	0
"Sewanin-Kai	0	0	0	0	0	0	0
Total (Organizations)	148	14	6	3	2	4	177
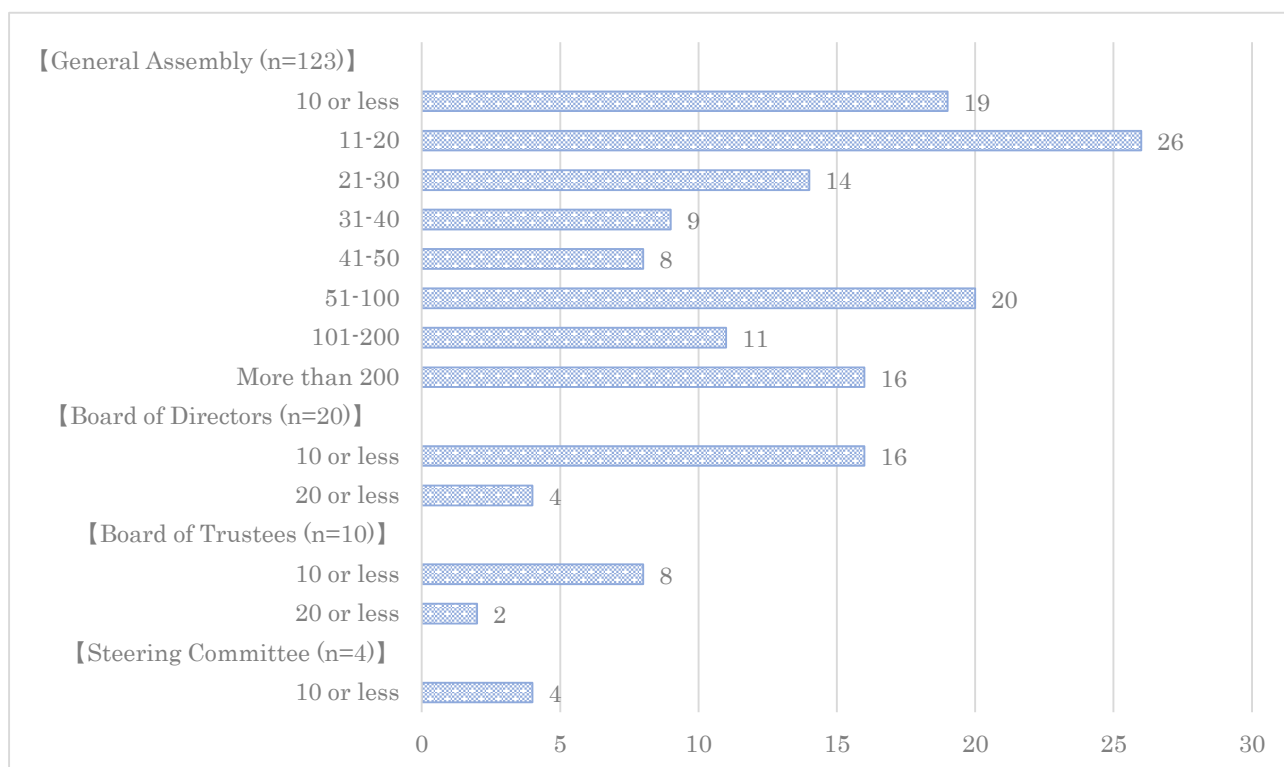
Figure 7.3.3 Number of Members of the Highest Decision-Making Body
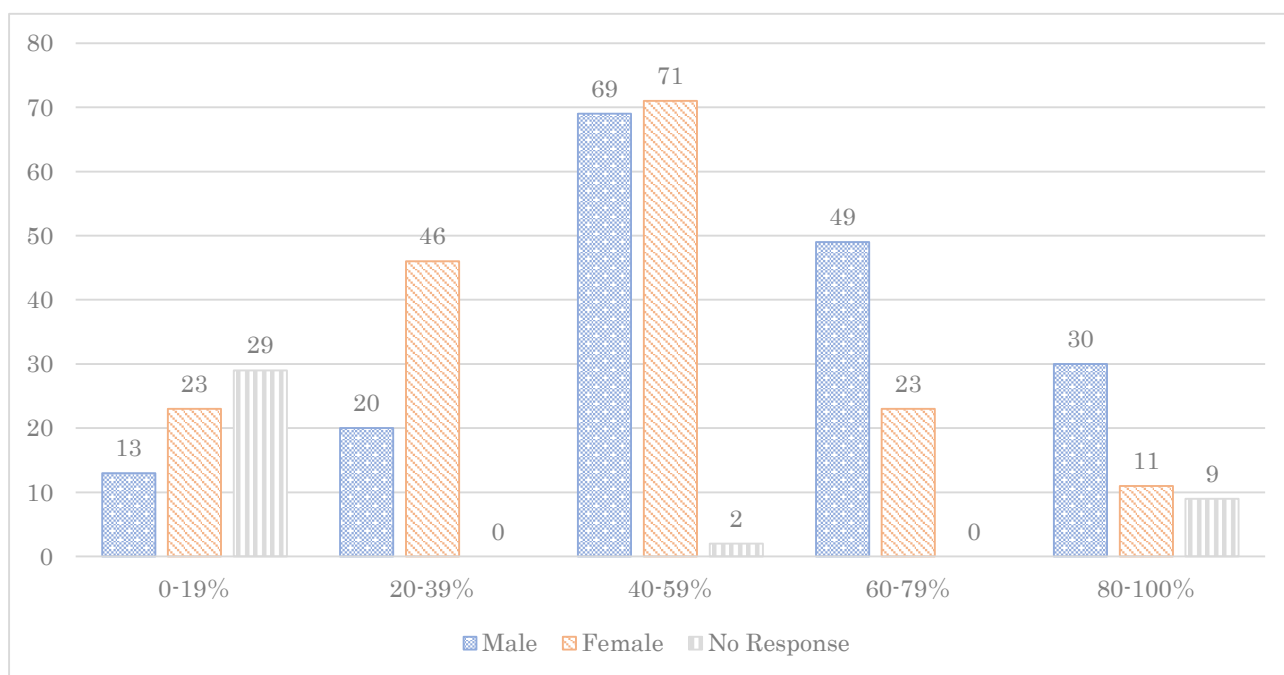
Figure 7.3.4 Gender Ratio of Members of the Highest Decision-Making Body

Figure 7.3.5 Gender Ratio Combinations

Breakdown of Combinations		Responding Organizations
Male: 40-59%	Female: 40-59%	56 Organizations
Male: 60-79%	Female: 30-39%	41 Organizations
Male: 20-39%	Female: 60-79%	18 Organizations
Male: 80-100%	Female: 0-19%	18 Organizations
Male: 0-19%	Female: 80-10%	13 Organizations
Male: 80-100%		8 Organizations
Other Combinations		48 Organizations

Chapter 8 Personnel Involved with NGOs and Their Remuneration and Benefits

General Introduction

This chapter summarizes information on the personnel involved in NGOs: NGO representatives, those in charge of the secretariat, staff, and volunteers/interns.

First, the most common titles of NGO representatives are President, Representative Director, Representative, and Chairperson, and they are people from diverse social backgrounds, such as NPO representatives, company employees, university or graduate school faculty (including retired) and self-employed people. Similar to the gender ratio of the highest decision-making bodies, over 60% of the representatives were male. Next, the title of the person in charge of the secretariat was Secretary-General for 74.8% of the organizations. Though there was a general tendency for the Secretary-General to be placed in charge of the secretariat, there were a certain number of cases where the representative such as Representative Director, Representative, President, or Chairperson also served as the head of the secretariat, depending on the size of the organization. The gender ratio of the person in charge of the secretariat was just under 50% male and over 40% female, so the gender imbalance was less than for representatives.

The staff were classified into three categories: "domestic staff," "expatriate staff," and "locally hired staff," as well as by whether they were "paid/unpaid," "female/male/no response," and "full-time/non-full-time." Consequently, the most common response was female "domestic full-time paid staff." In contrast to the gender ratio of representatives and persons in charge of the office, there tended to be more female than male staff. The results of the survey by income scale showed that the number of paid full-time employees tended to increase as the income scale increased. Organizations with income of less than 20 million yen employed a certain number of "full-time paid staff," but many of them were supported by "unpaid staff".

In addition, regarding the NGO working environment, the status of the establishment of various regulations, including work rules, and the provision of various allowances as welfare benefits was confirmed. First of all, in terms of the overall status of establishment of regulations, slightly more than 70% of NGOs had "work rules" but less than 70% had "salary regulations," "travel expense regulations," "personal information protection policies," and "accounting regulations," - a level that could not be said to be high. However, upon checking how these percentages varied by income scale, it was found that the rate of establishment of such regulations increased as the income scale increased. The same was true for welfare benefits, which improved as the scale of income increased.

Lastly, about 80% of the organizations accepted volunteers and about 60% accept interns. Of these, many were unpaid volunteers in Japan and unpaid interns in Japan, and these volunteers and interns were people from a variety of social backgrounds, such as students, company employees and homemakers.
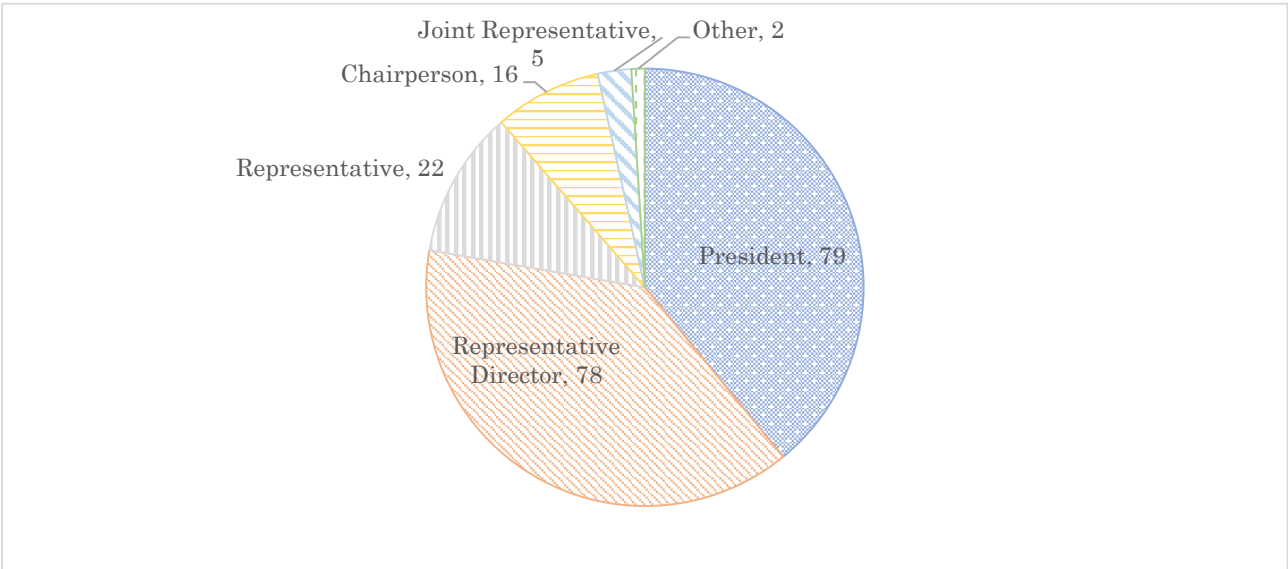
Figure 8.2.1 Title of the Representative
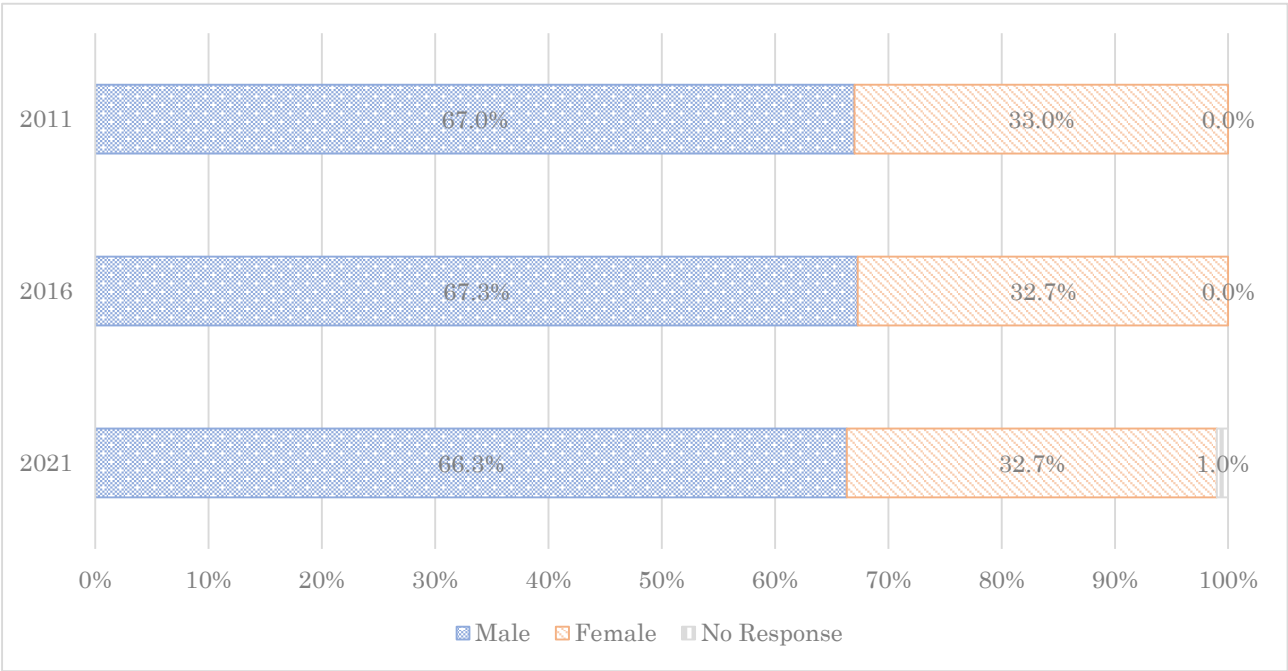
Figure 8.2.2 Gender of the Representative
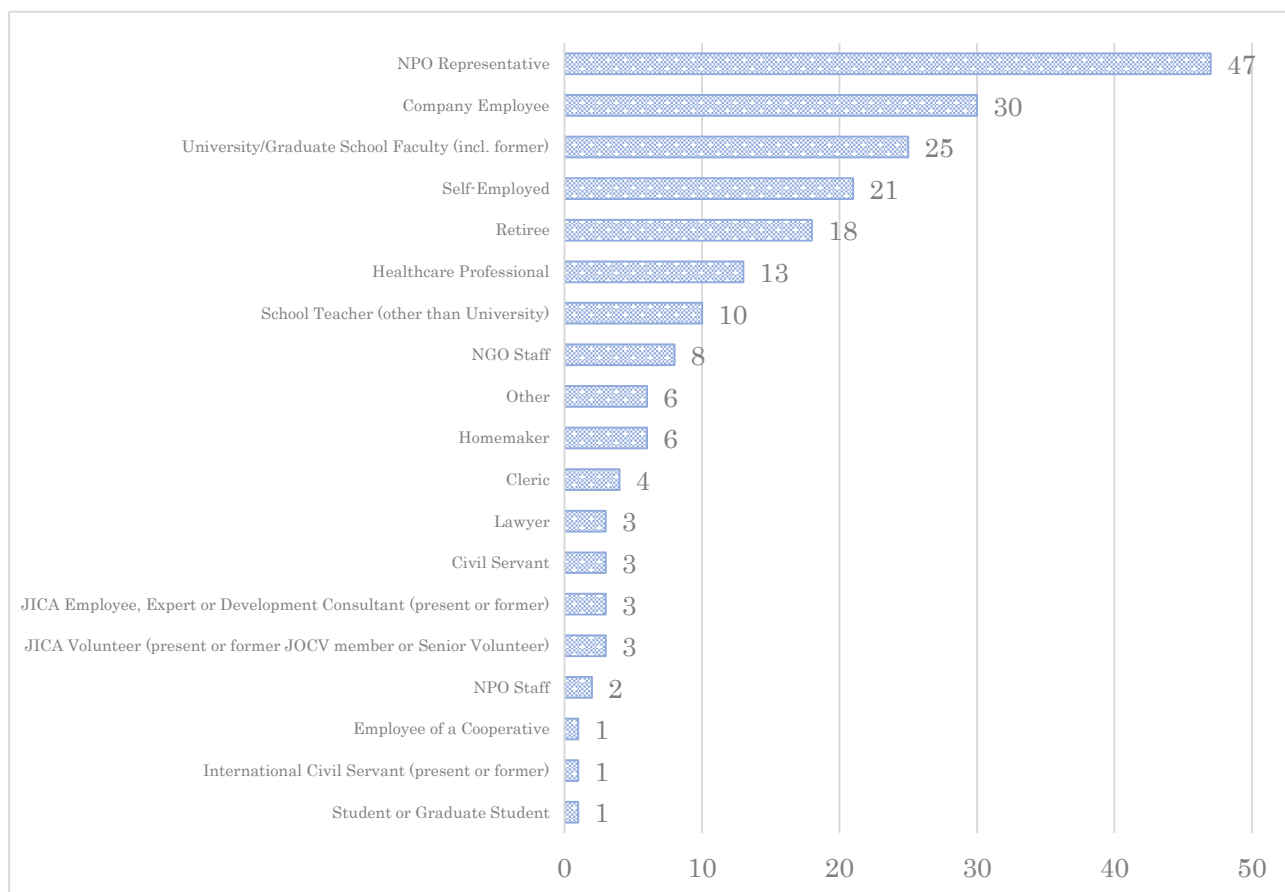
Figure 8.2.3 Social Background of the Representative
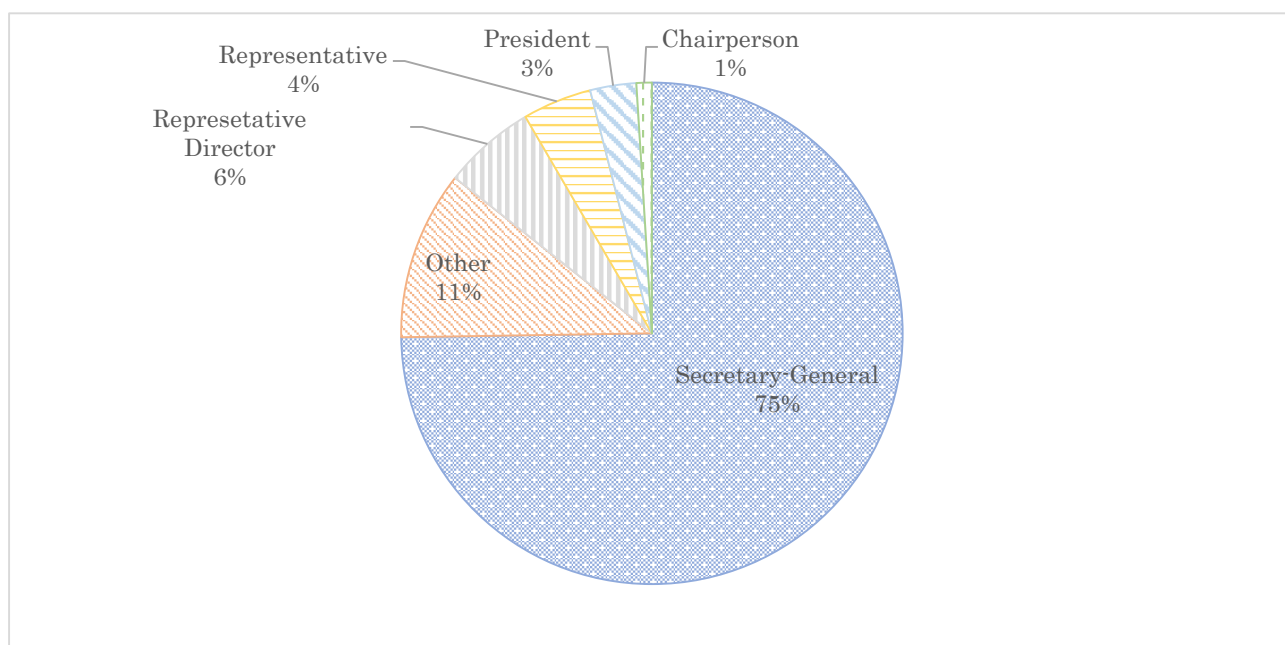
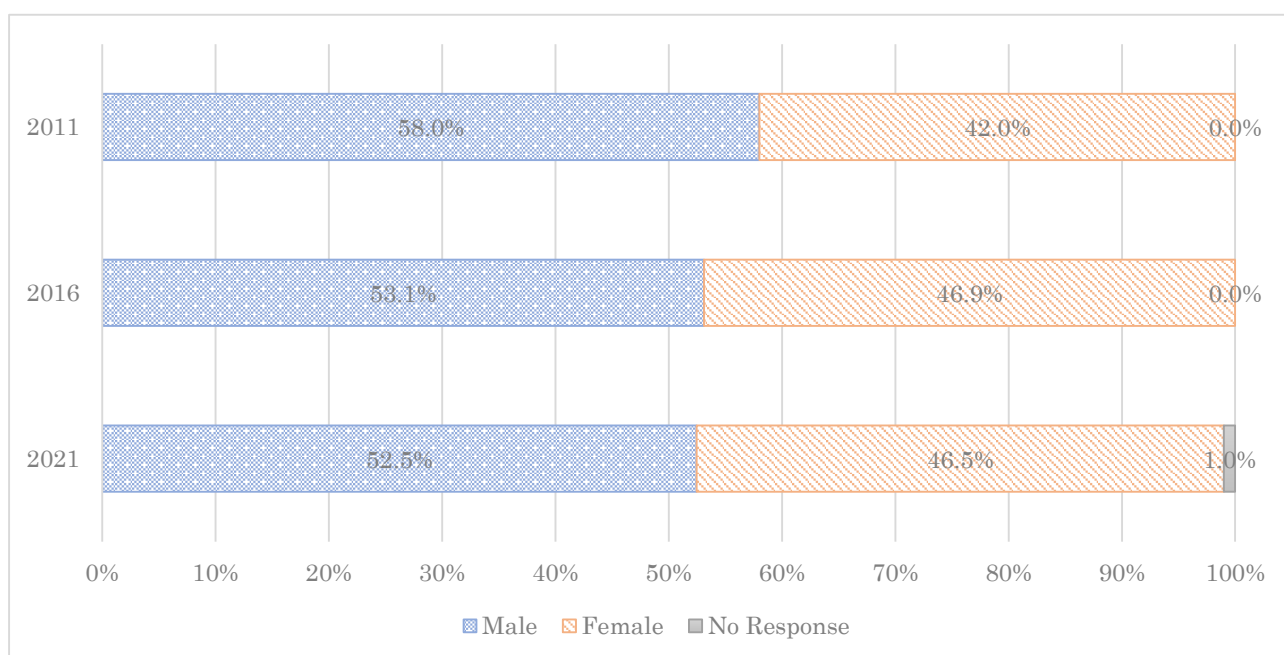Figure 8.2.4 Title of the Person in Charge of the Secretariat

Figure 8.2.5 Gender of the Person in Charge of the Secretariat

Figure 8.3.1 Classification of Workforce based on Employment Relationship and Remuneration

	Employment Contract	Remuneration	Comment
Paid Staff	Yes	Yes	Definition of paid staff is the same at many organizations
Paid Volunteer	No	Yes	Some organizations consider paid volunteers to be paid staff
Unpaid Staff	Yes	No	Some organizations consider unpaid staff to be unpaid volunteers
Unpaid Volunteer	No	No	
Intern	No distinction		
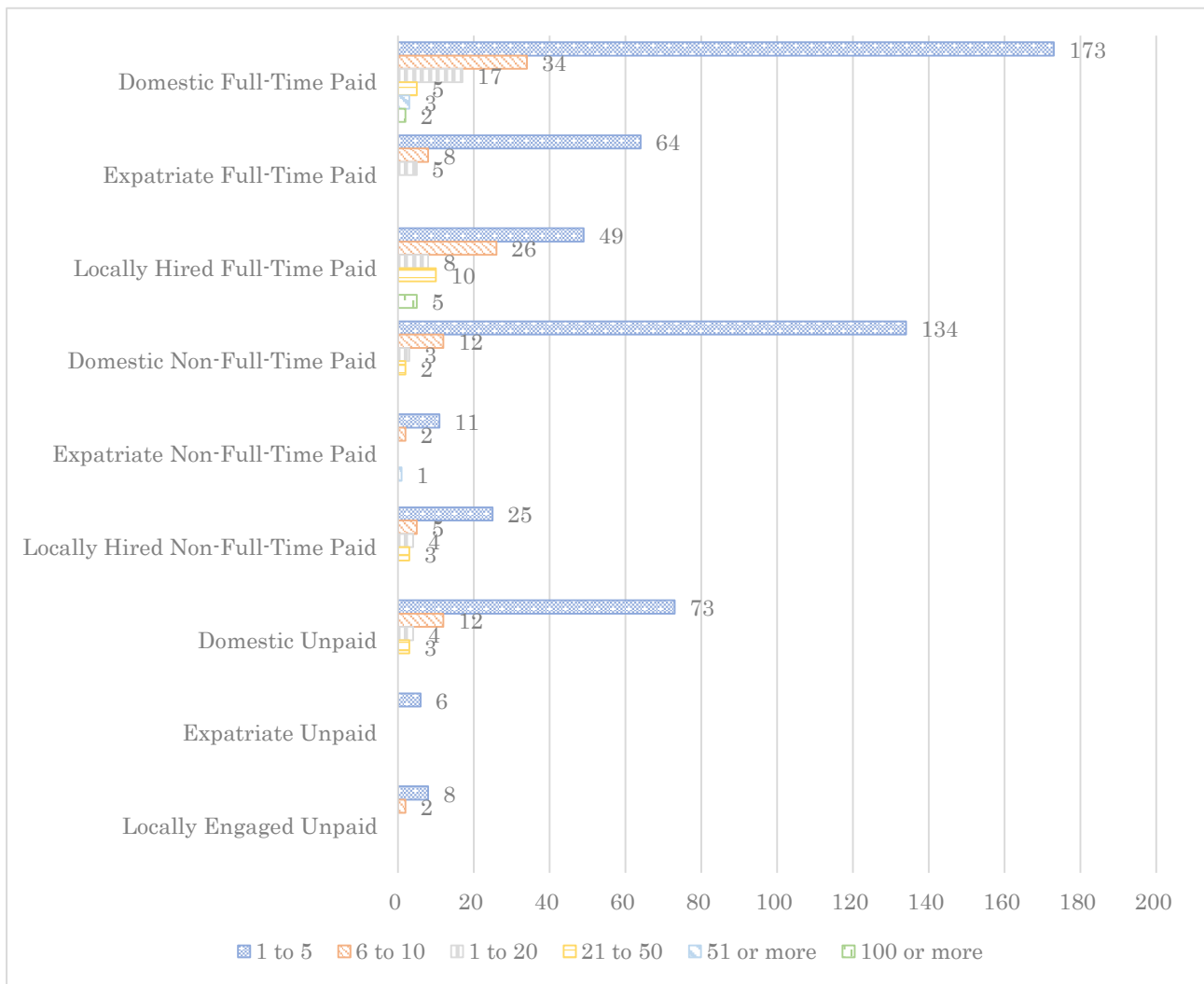
Figure 8.3.2 Number of Staff by Category
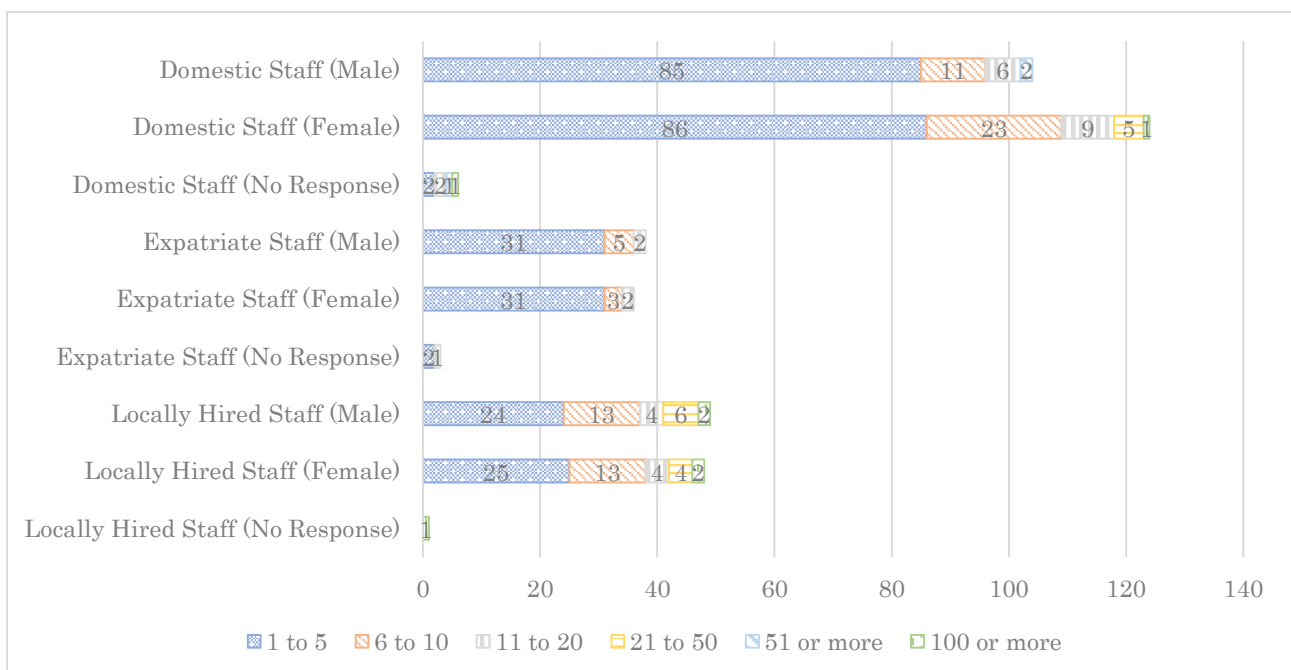
Figure 8.3.3 Number of Full-Time Paid Staff
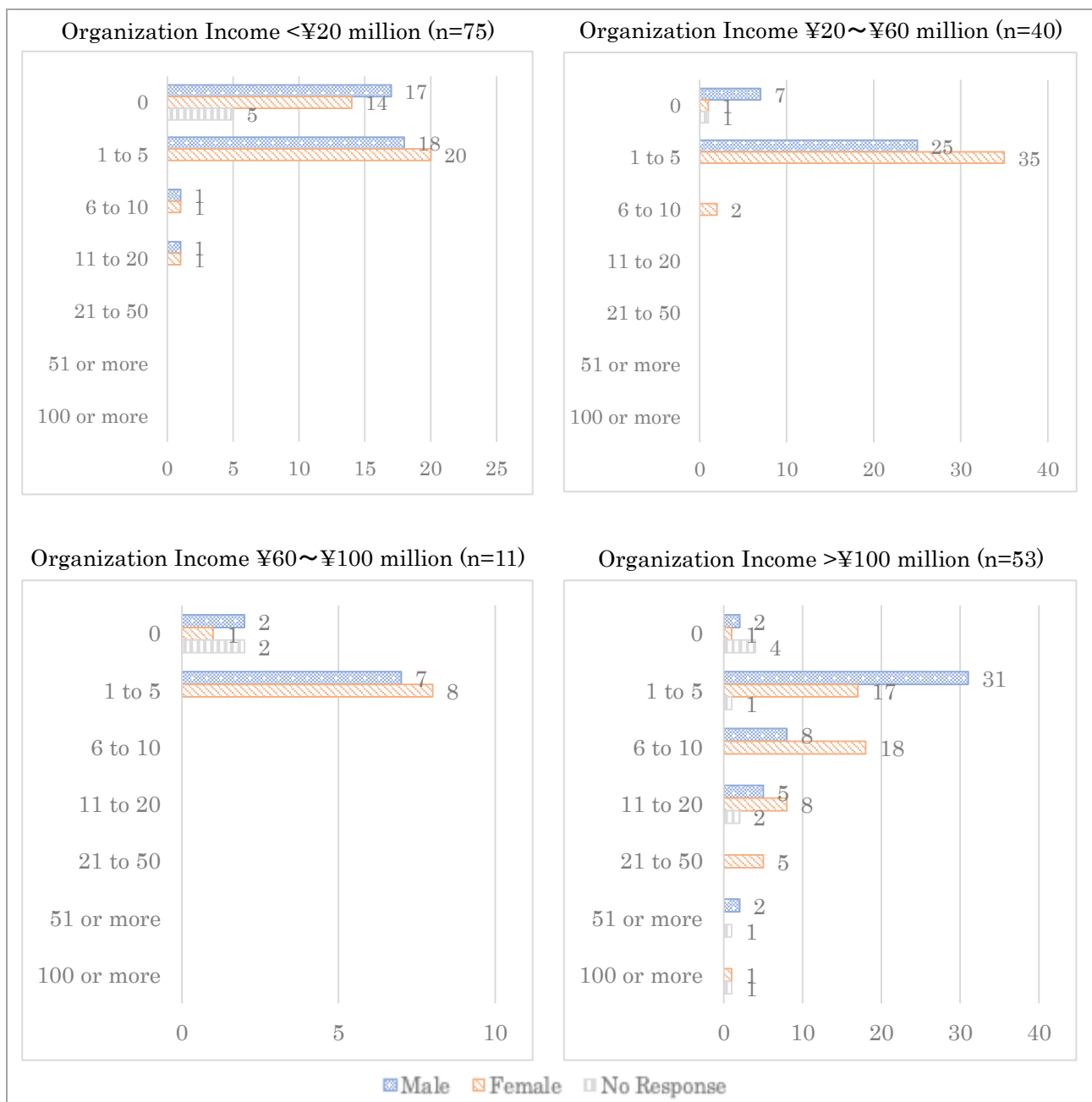
Figure 8.3.4 Number of Domestic Full-Time Paid Staff by Income Bracket
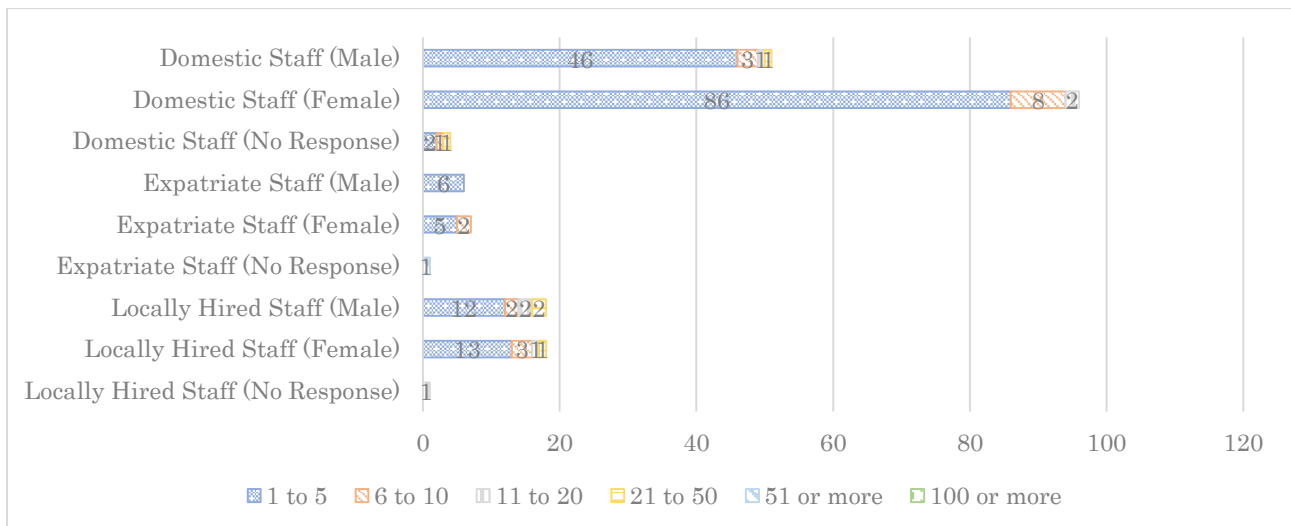
Figure 8.3.5 Number of Non-Full-Time Paid Staff
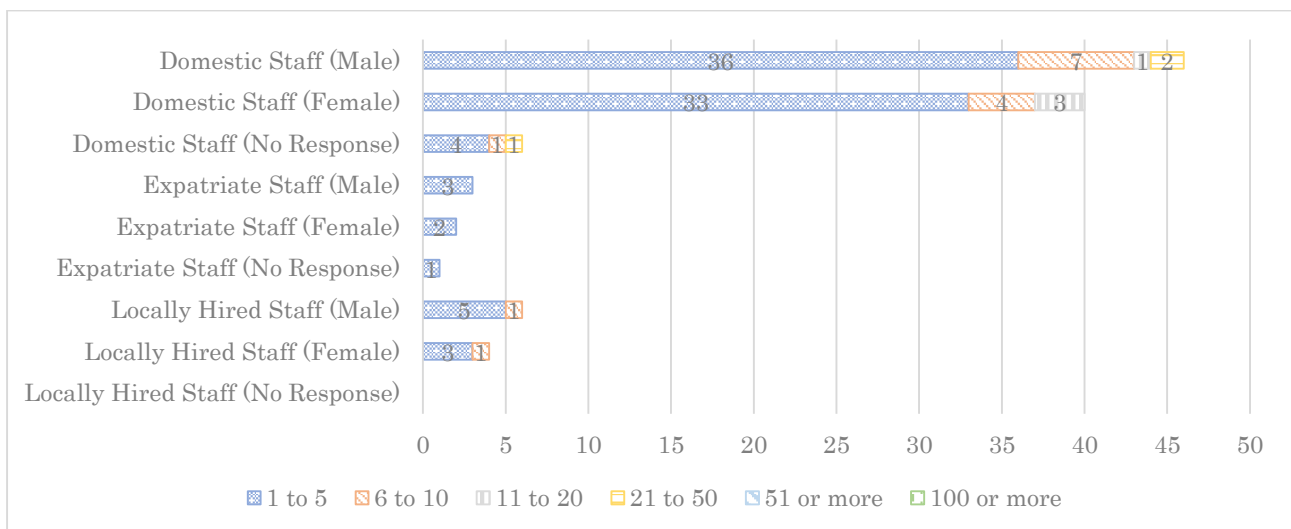
Figure 8.3.6 Number of Unpaid Staff
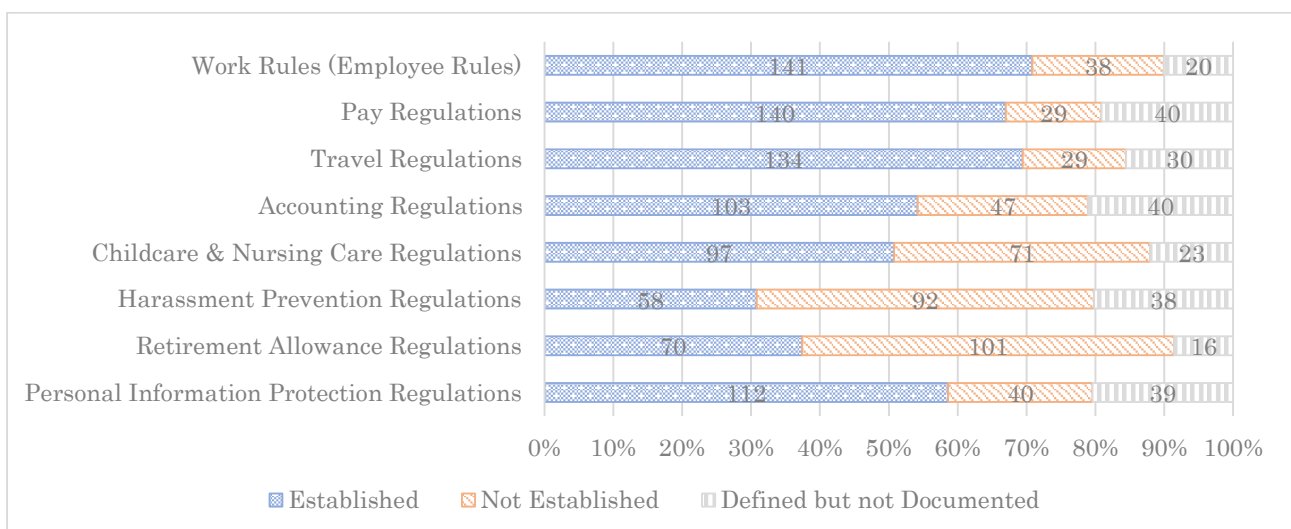
Figure 8.4.1 Establishment of Work Rules and Regulations
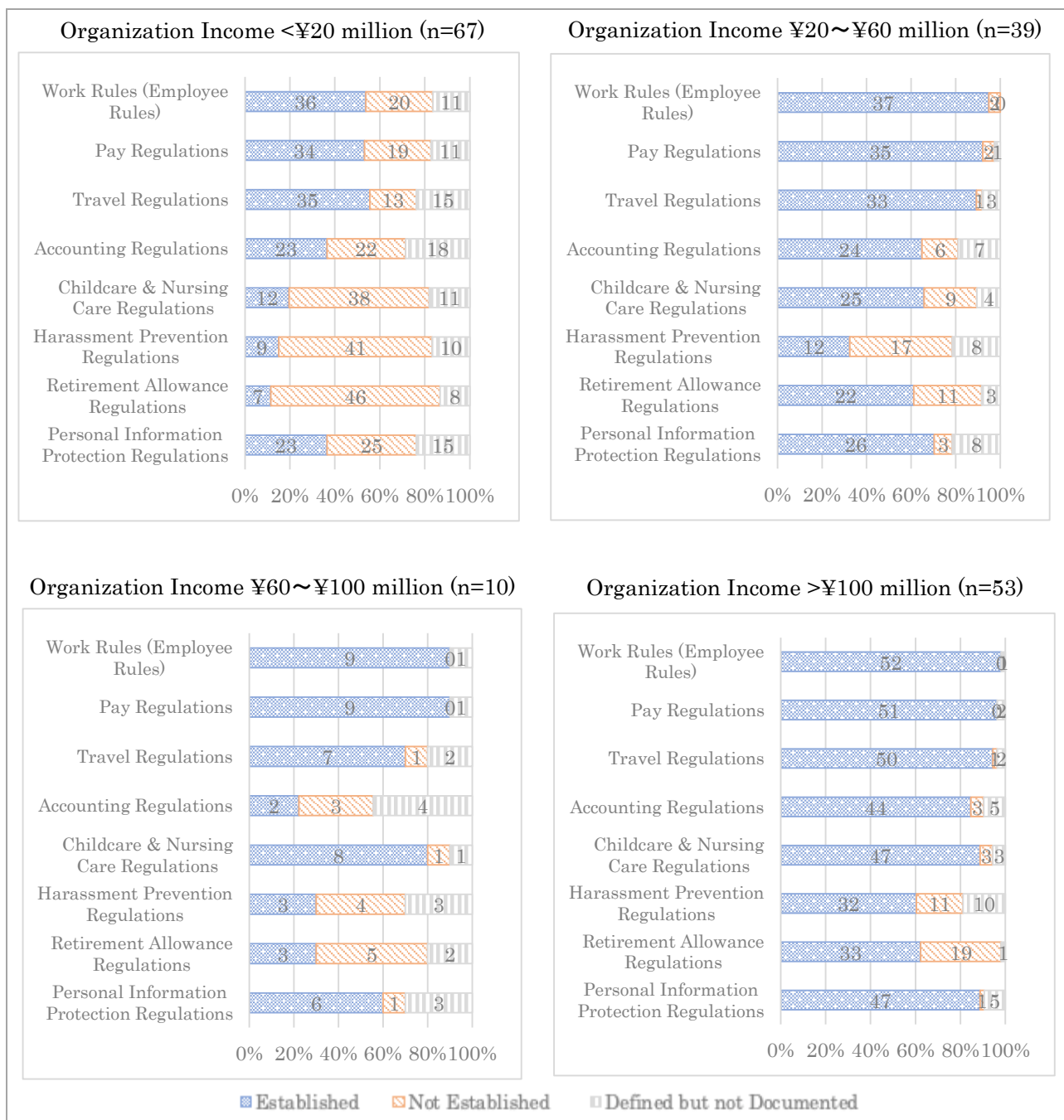
Figure 8.4.2 Establishment of Regulations by Income Bracket
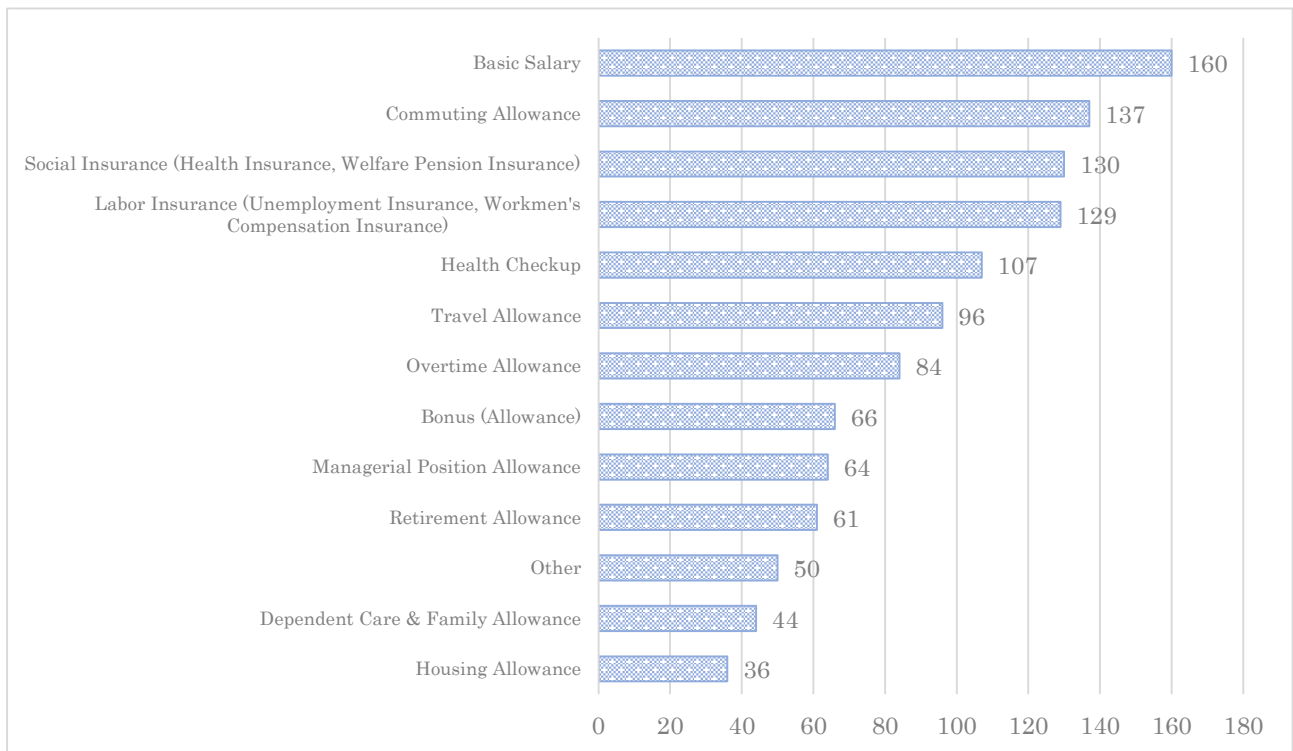
Figure 8.4.3 Maintenance of Benefits

Organization Income <¥20 million (n=67)

Benefit	Value
Basic Salary	46
Commuting Allowance	33
Housing Allowance	1
Managerial Position Allowance	2
Bonus (Allowance)	9
Overtime Allowance	11
Dependent Care & Family Allowance	5
Travel Allowance	16
Retirement Allowance	6
Social Insurance (Health Insurance, Welfare Pension Insurance)	23
Health Checkup	9
Labor Insurance (Unemployment Insurance, Workmen's Compensation...)	24

Organization Income ¥20～¥60 million (n=39)

Benefit	Value
Basic Salary	39
Commuting Allowance	35
Housing Allowance	6
Managerial Position Allowance	21
Bonus (Allowance)	24
Overtime Allowance	20
Dependent Care & Family Allowance	7
Travel Allowance	23
Retirement Allowance	18
Social Insurance (Health Insurance, Welfare Pension Insurance)	38
Health Checkup	30
Labor Insurance (Unemployment Insurance, Workmen's Compensation...)	36

Organization Income ¥60～¥100 million (n=10)

Benefit	Value
Basic Salary	10
Commuting Allowance	7
Housing Allowance	3
Managerial Position Allowance	4
Bonus (Allowance)	5
Overtime Allowance	5
Dependent Care & Family Allowance	5
Travel Allowance	6
Retirement Allowance	3
Social Insurance (Health Insurance, Welfare Pension...)	9
Health Checkup	9
Labor Insurance (Unemployment Insurance, Workmen's...)	9

Organization Income >¥100 million (n=53)

Benefit	Value
Basic Salary	53
Commuting Allowance	52
Housing Allowance	25
Managerial Position Allowance	34
Bonus (Allowance)	26
Overtime Allowance	44
Dependent Care & Family Allowance	26
Travel Allowance	43
Retirement Allowance	28
Social Insurance (Health Insurance, Welfare Pension...)	53
Health Checkup	51
Labor Insurance (Unemployment Insurance, Workmen's...)	53

Figure 8.4.4 Maintenance of Benefits by Income Bracket

	Accepted	Not Accepted
Volunteers	161	37
Interns	116	77
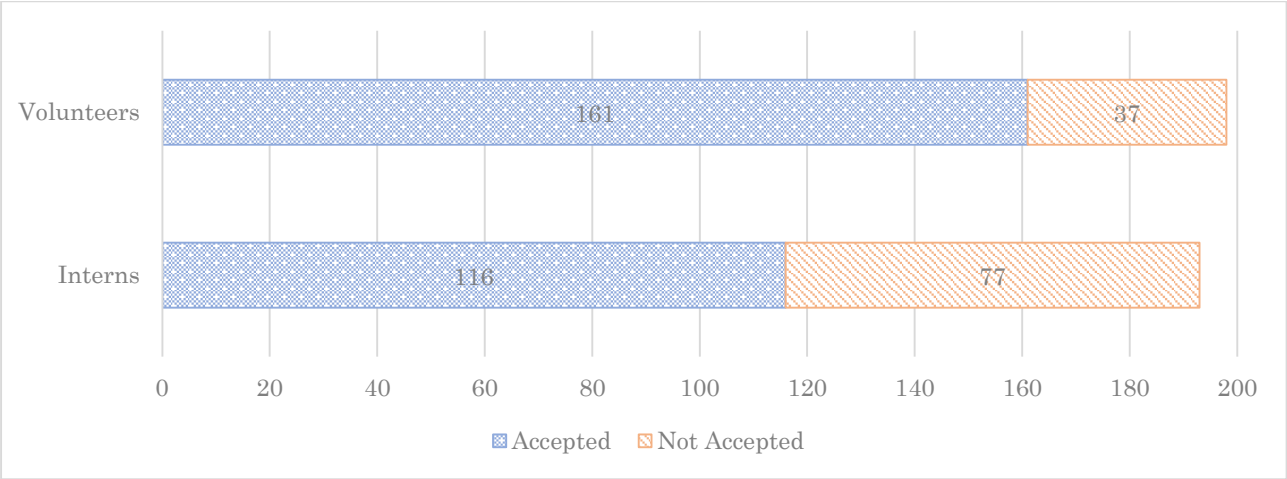
Figure 8.5.1 Acceptance of Volunteers and Interns
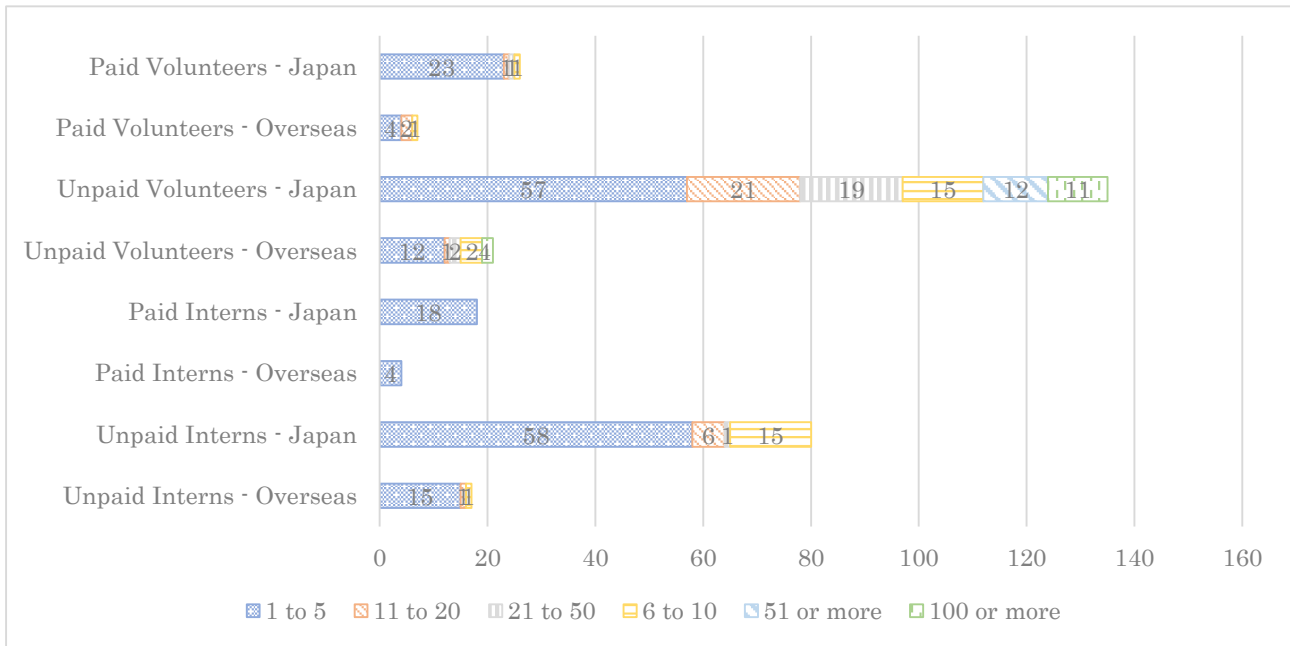
Figure 8.5.2 Number of Volunteers and Interns Accepted
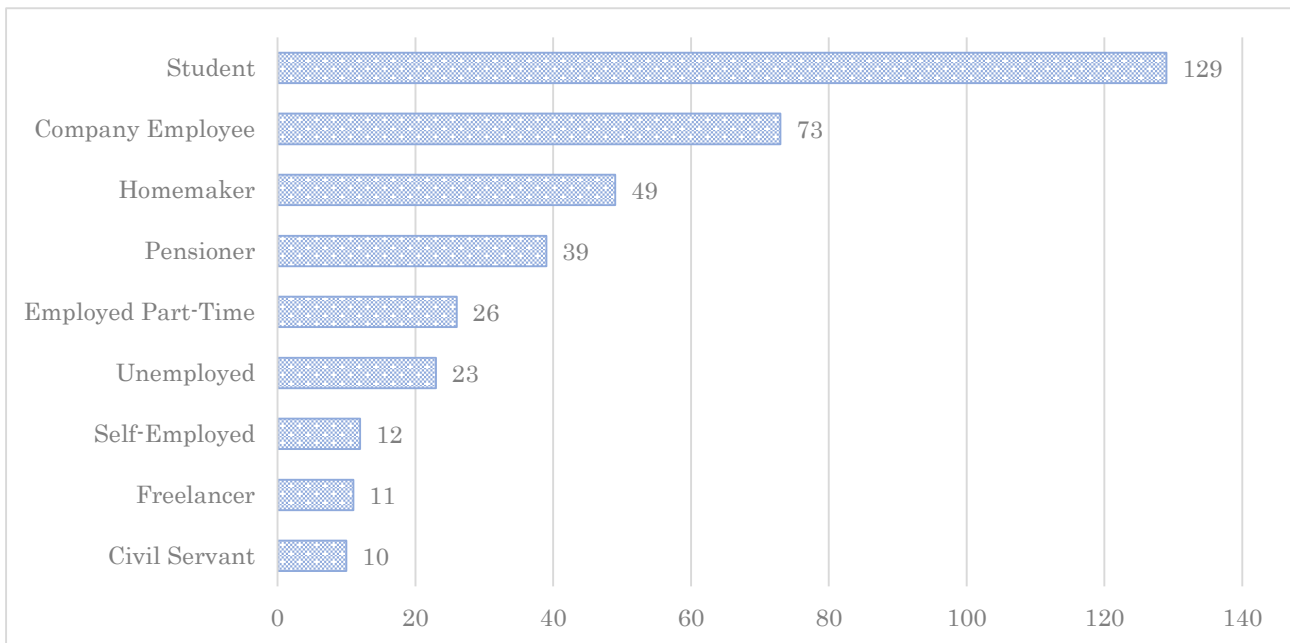
Figure 8.5.3 Social Background of Volunteers and Interns

Chapter 9 Connections with Citizens

General Introduction

NGOs have been conducting a large number of diverse activities in which citizens can participate. The most common of these include debriefing sessions, seminars, study groups, symposia, lectures, study tours, and a wide range of other "learning (experiential and didactic) activities" and "appreciation and exchange" activities such as work camps, charity concerts, bazaars, and parties. NGOs have leveraged their knowhow and characteristics to establish many points of contact with citizens according to their differing levels of interest in NGOs. However, with the spread of new coronavirus infections (COVID-19) (hereinafter, COVID-19) in 2020, the number of points of contact has narrowed, and activities that used to be conducted face-to-face have either been cancelled or replaced by online activities. A typical example of this is study tours. Study tours are an important type of activity for NGOs, as they allow a wide range of citizens to participate, but they are rarely conducted now, due to the impact of COVID-19. An increasing number of organizations are planning online tours, as on-site visits are not feasible.

Next is the sharing and dissemination of information to citizens. Organizations have been sharing information on their activities with the public through annual reports and newsletters, not only through conventional paper media but also through digital media such as PDF files on their websites. The most common method of disseminating information such as event announcements, volunteer recruitment ads, and activity reports was through their websites, followed by social networking services such as Facebook, Instagram, and Twitter. In addition, digital tools such as payment functionality for donations and product purchases, online membership application and registration systems, and site analysis tools are being introduced, while security measures are also becoming more important. In particular, about 30% of NGOs have still not taken specific security measures, despite dozens of cyberattacks such as unauthorized accesses around the fall of 2019. There are measures that can be applied immediately, such as installing anti-virus software, changing passwords on a regular basis and upgrading OS versions, etc. There are also a wide range of measures that can be taken with the cooperation of external supporters and the introduction of technology. These are issues that need to be addressed by all NGOs.

【Learning (Experiential & Didactic)】

Debriefing Sessions
141
24
21

Online Debriefing Sessions
10
98
102

Seminars & Study Meetings
120
31
26

Online Seminars & Study Meetings
8
111
119

Symposia & Lectures
114
12
15

Online Symposia & Lectures
5
69
85

Study Tours
91
6
4

Online Study Tours
3
21
29

【Appreciation & Exchange】

Work Camps
24
5
4

Charity Concerts
25
2
5

Online Charity Concerts
1
3
2

Charity Sports Events
11
3
3

Shops (incl. Online Shops)
41
36
37

Bazaars
58
9
15

Online Bazaars
2
5
3

Parties
38
3
2

Online Parties
2
11
12

Film and Video Screenings
17
3
3

Panel & Photo Exhibits
37
13
11

【Other】
5
7

Cooking Classes
15
1
0

Child Sponsorship
2
14
13

Other
16

0   50   100   150

⬛ FY2019 (Before Pandemic)   ⬛ FY2020   ⬛ FY2021

Figure 9.2.1 NGO Activities Citizens Can Participate in
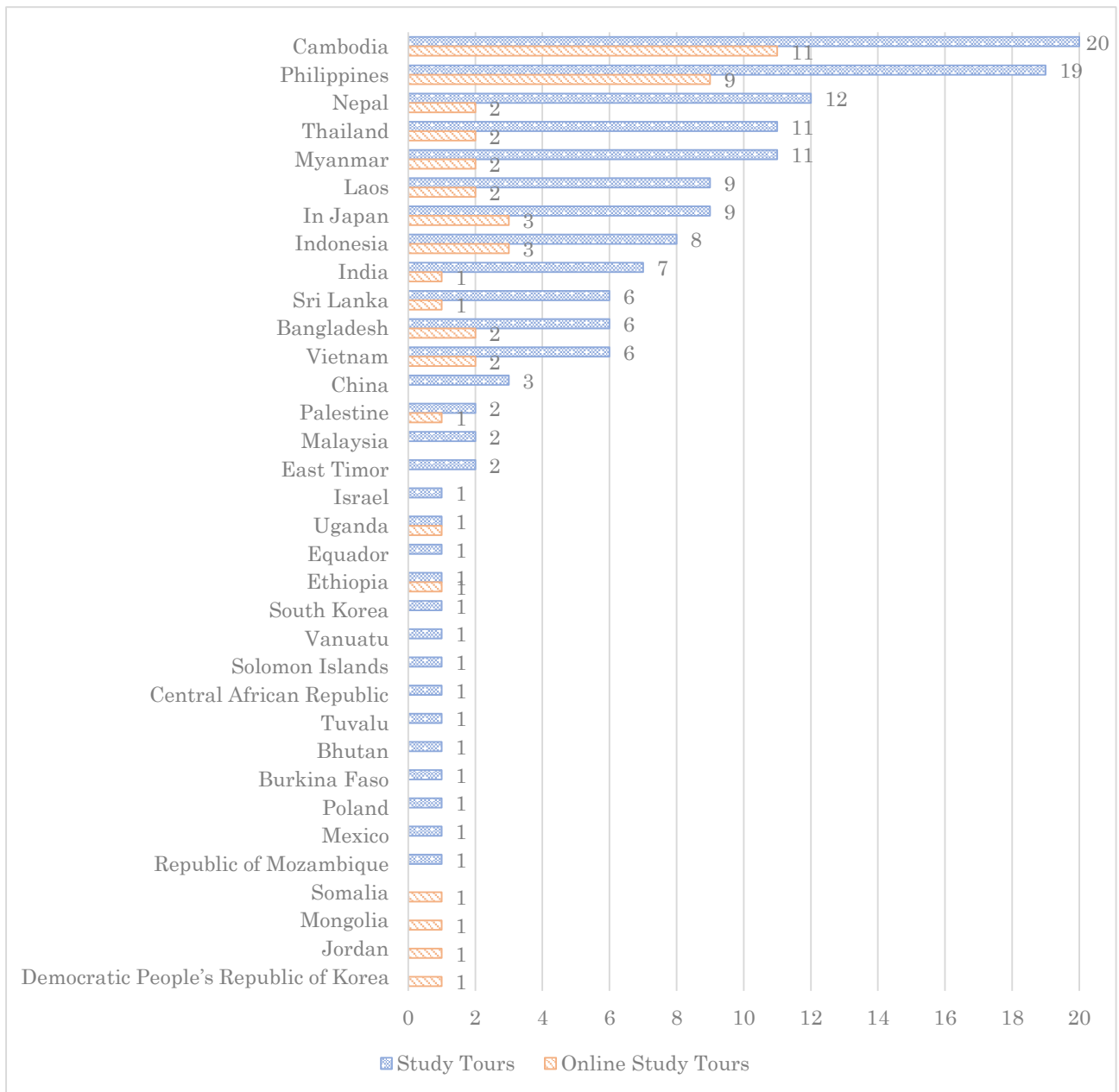
Figure 9.2.2 Study Tour & Online Study Tour Destinations
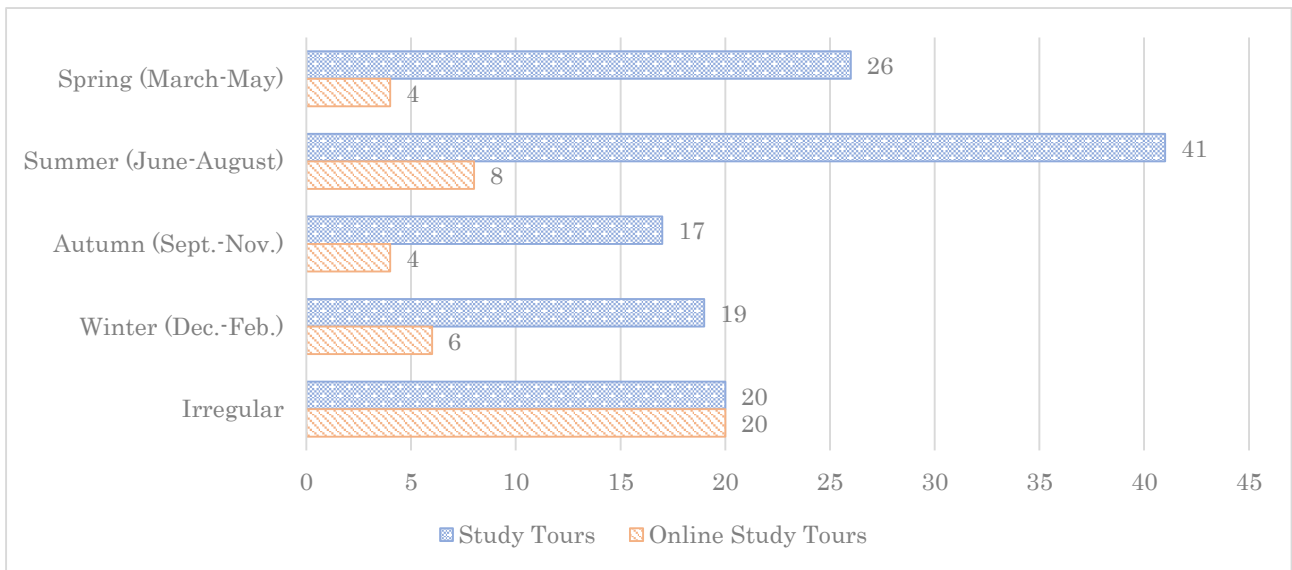
Figure 9.2.3 Season for Study Tours & Online Study Tours
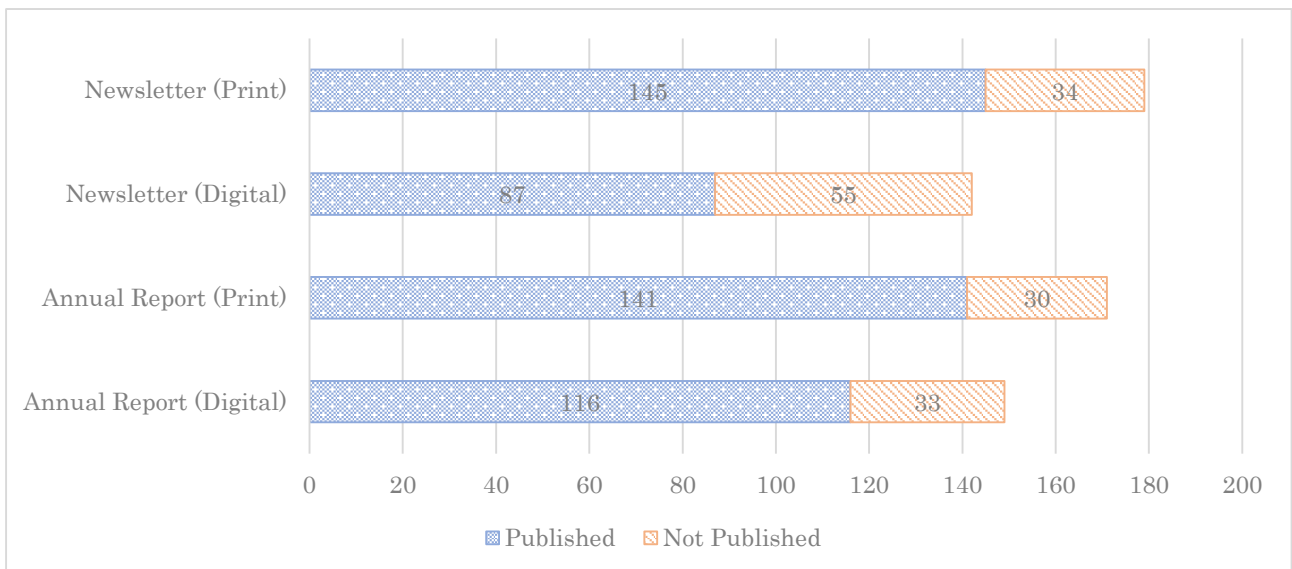
Figure 9.3.1 Publication of Information Sharing Media
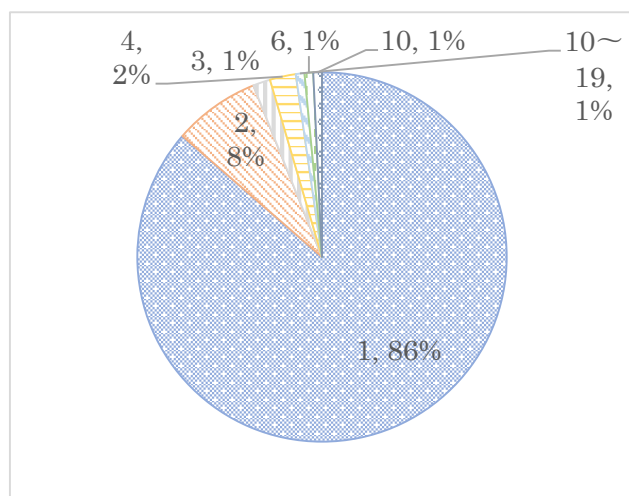
Figure 9.3.2 Types of Newsletters Published Annually
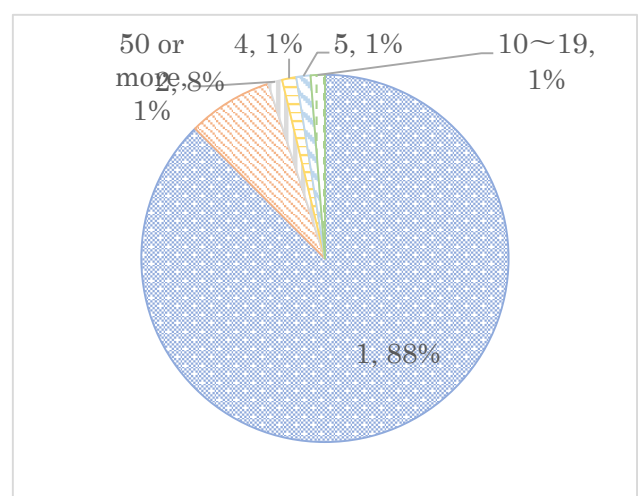
Figure 9.3.3 Types of Newsletters (Digital) Published Annually
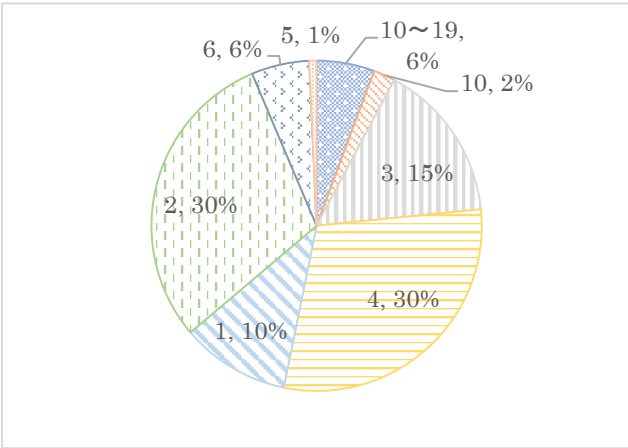
Figure 9.3.4 Issues of Newsletter Published Annually
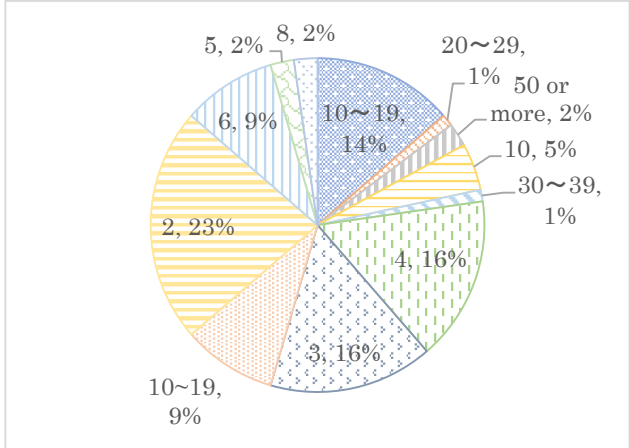
Figure 9.3.5 Issues of Newsletter (Digital) Published Annually
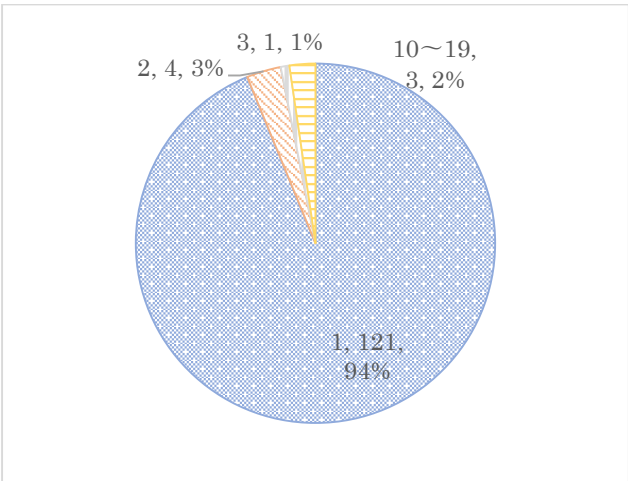
Figure 9.3.6 Types of Annual Reports Published Annually
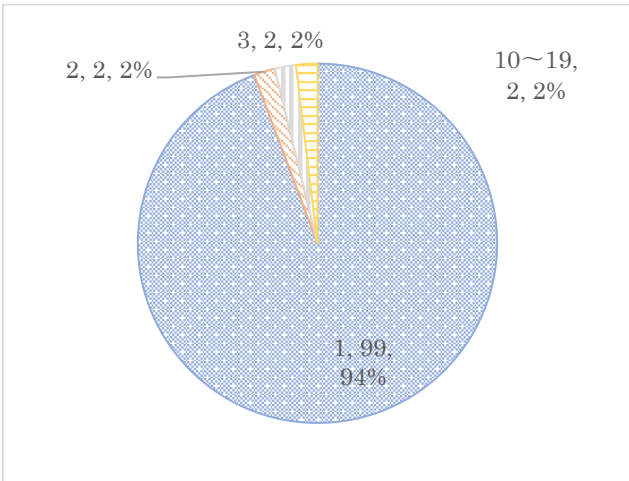
Figure 9.3.7 Types of Annual Reports(Digital)Published Annually
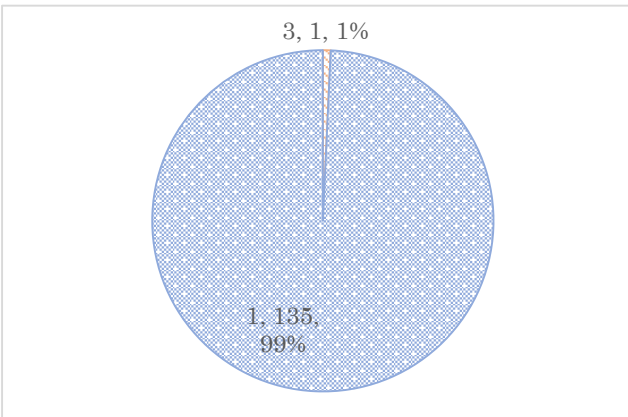
Figure 9.3.8 Issues of Annual Report Published Annually
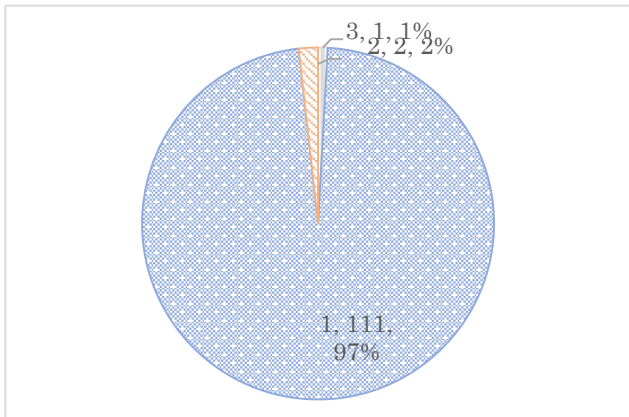
Figure 9.3.9 Issues of Annual Report(Digital)Published Annually

Figure 9.3.10 Languages of Publications

	Japanese only	English only	Japanese + English	Japanese + Other	English + Other
Newsletter	143	0	16	2	0
Annual Report	166	1	32	0	0
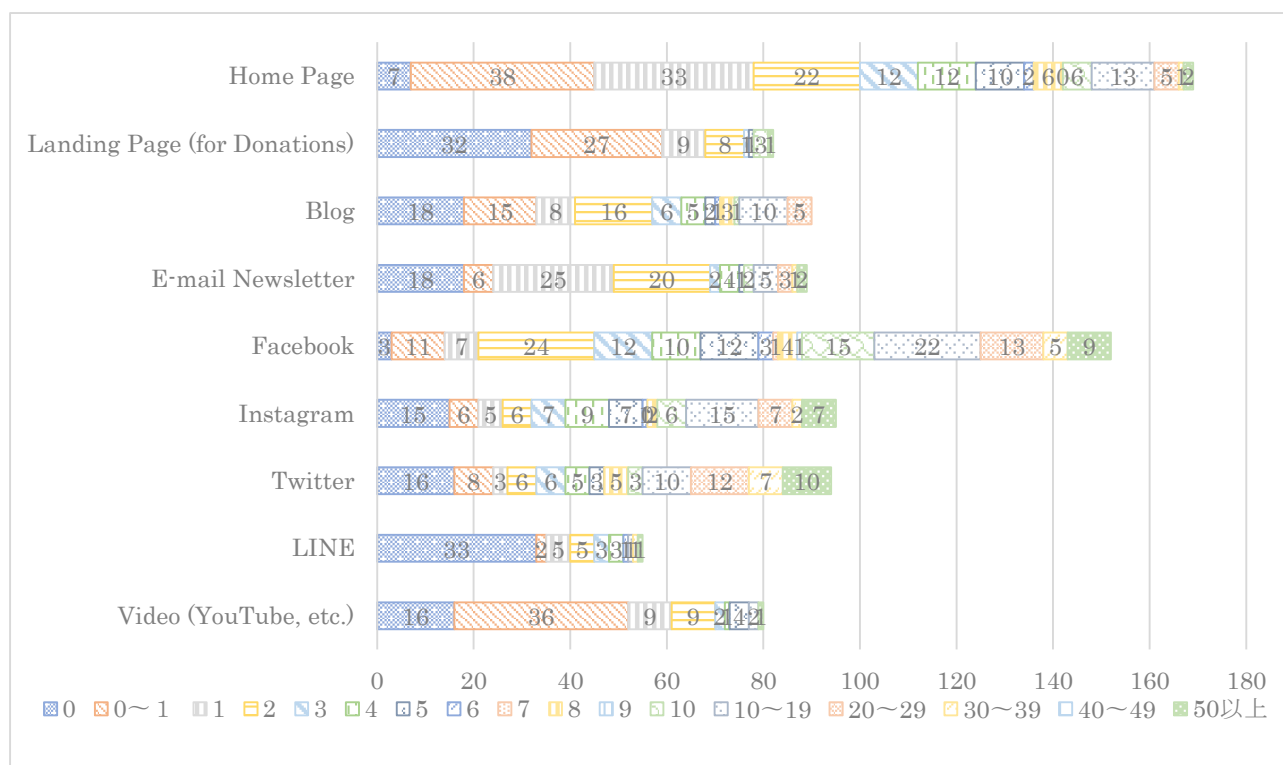
Figure 9.4.1 Publicity Media Used and Frequency of Updates per Month
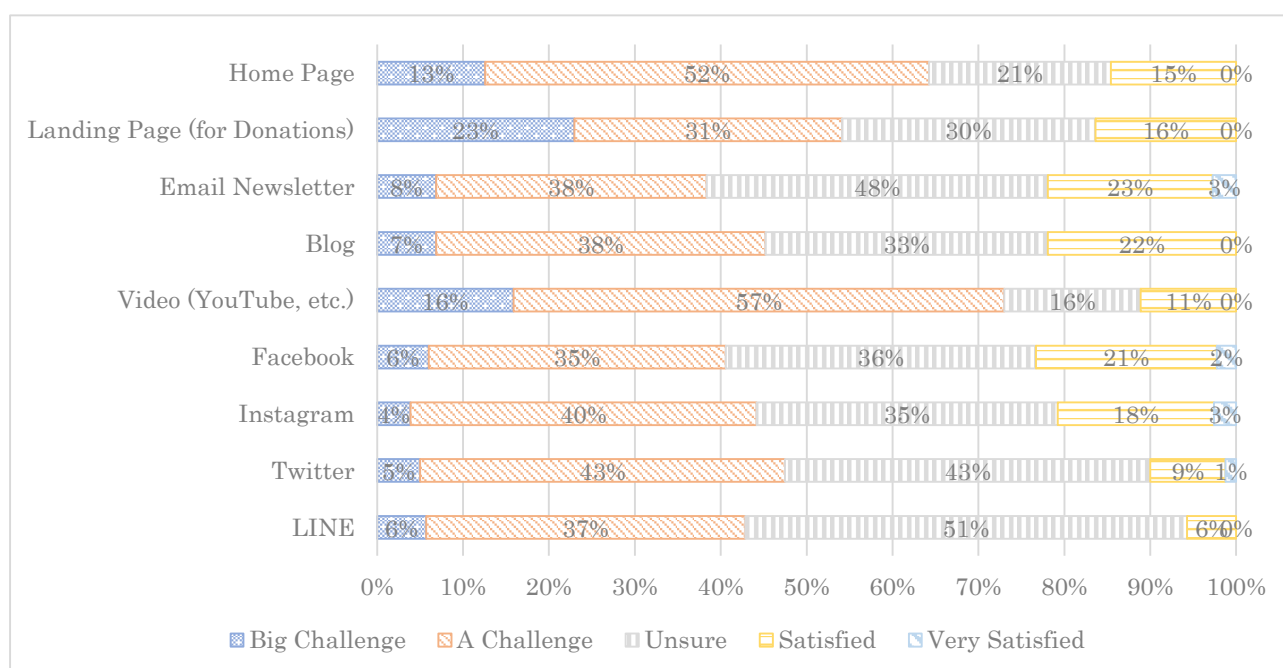
Figure 9.4.2 Sense of Challenge about Update Frequency
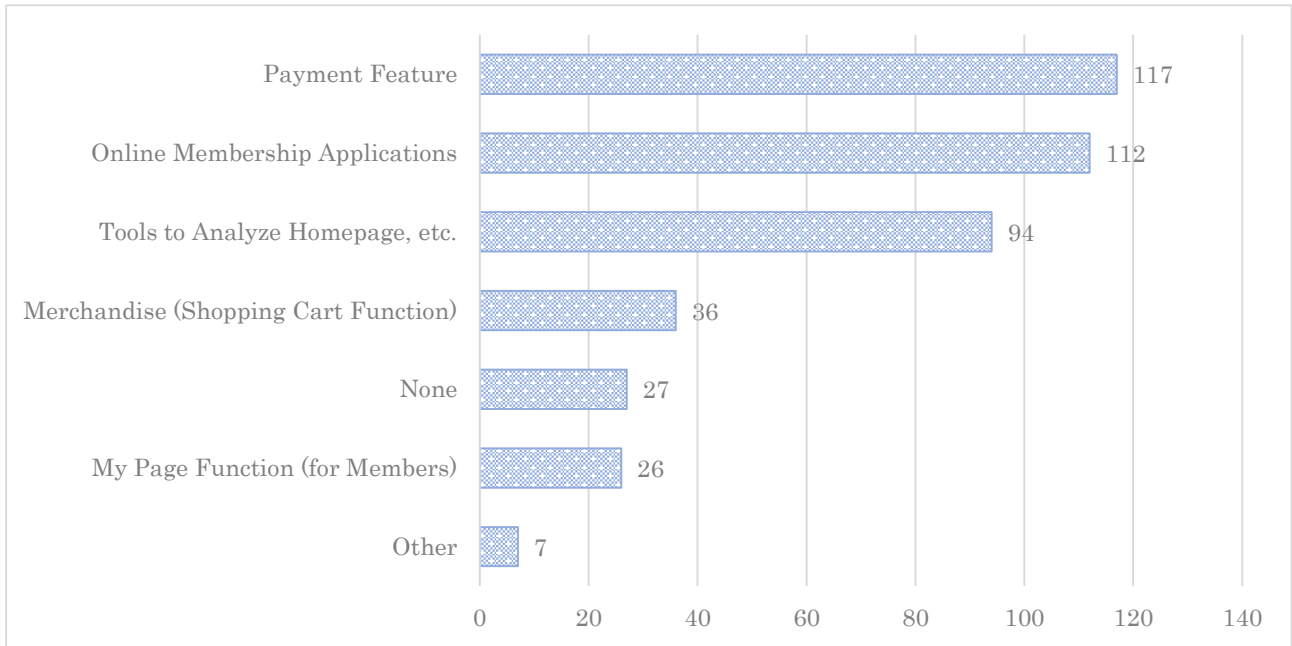
Figure 9.5.1 Functions Implemented
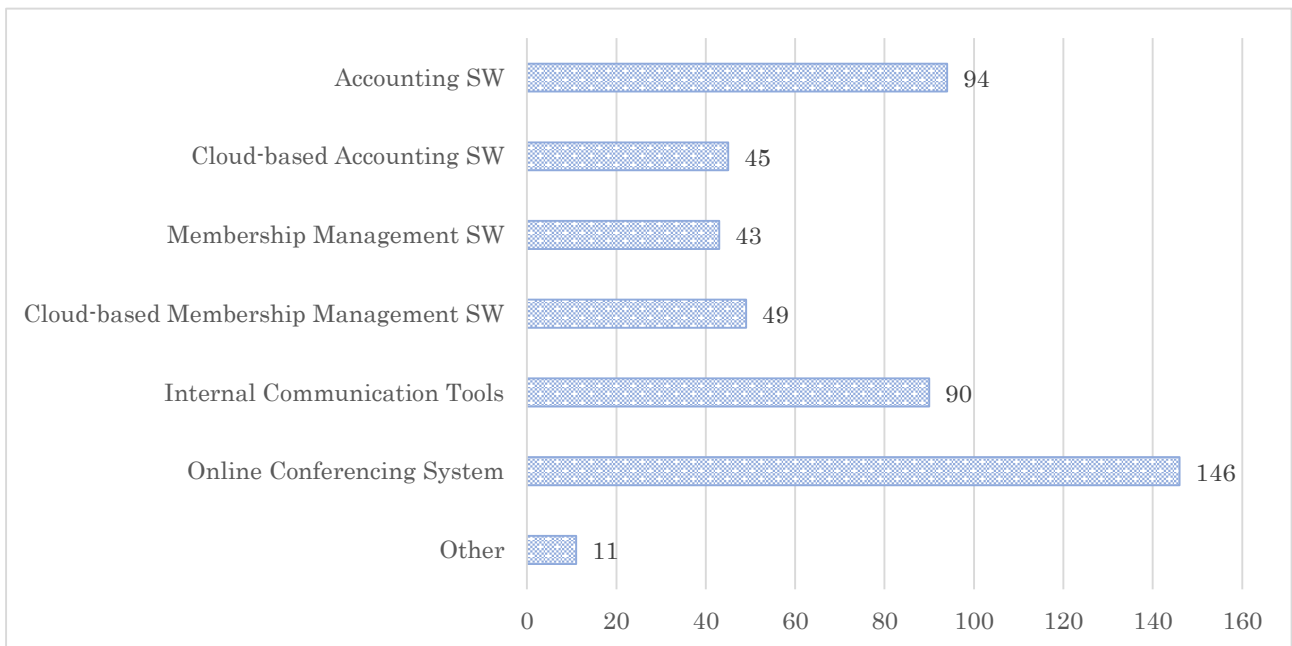
Figure 9.5.2 Software and Cloud-based Software in Use
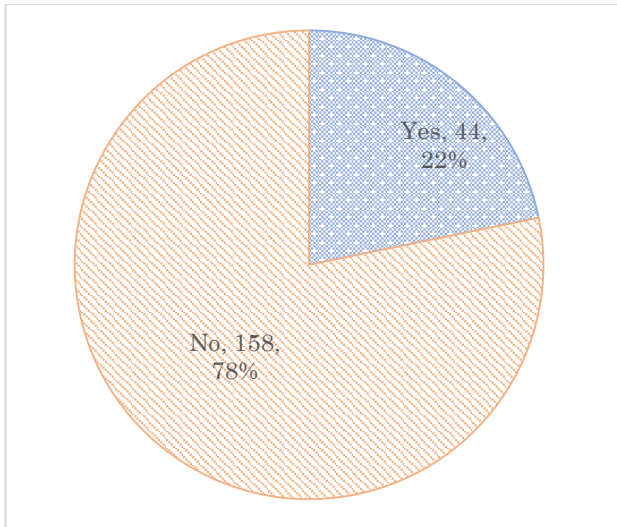
Figure 9.5.3 Occurrence of Unauthorized
Access to Site or Cyber Attack
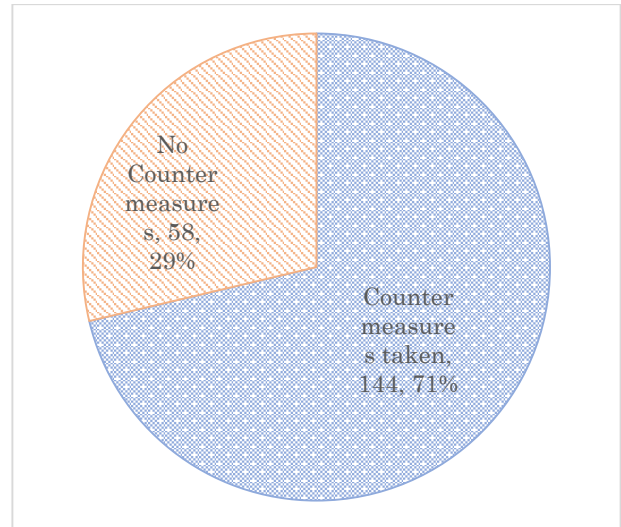
Figure 9.5.4 Countermeasures Against
Unauthorized Access and Cyber Attacks
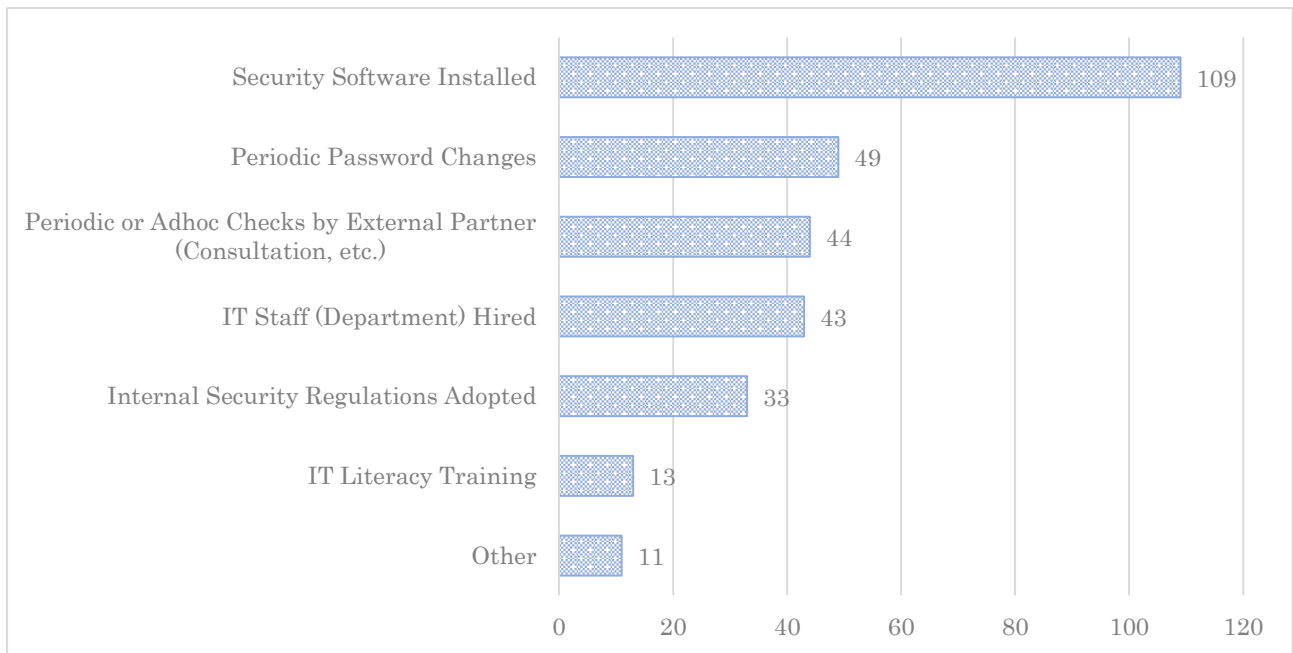
Figure 9.5.5 Countermeasures as an Organization
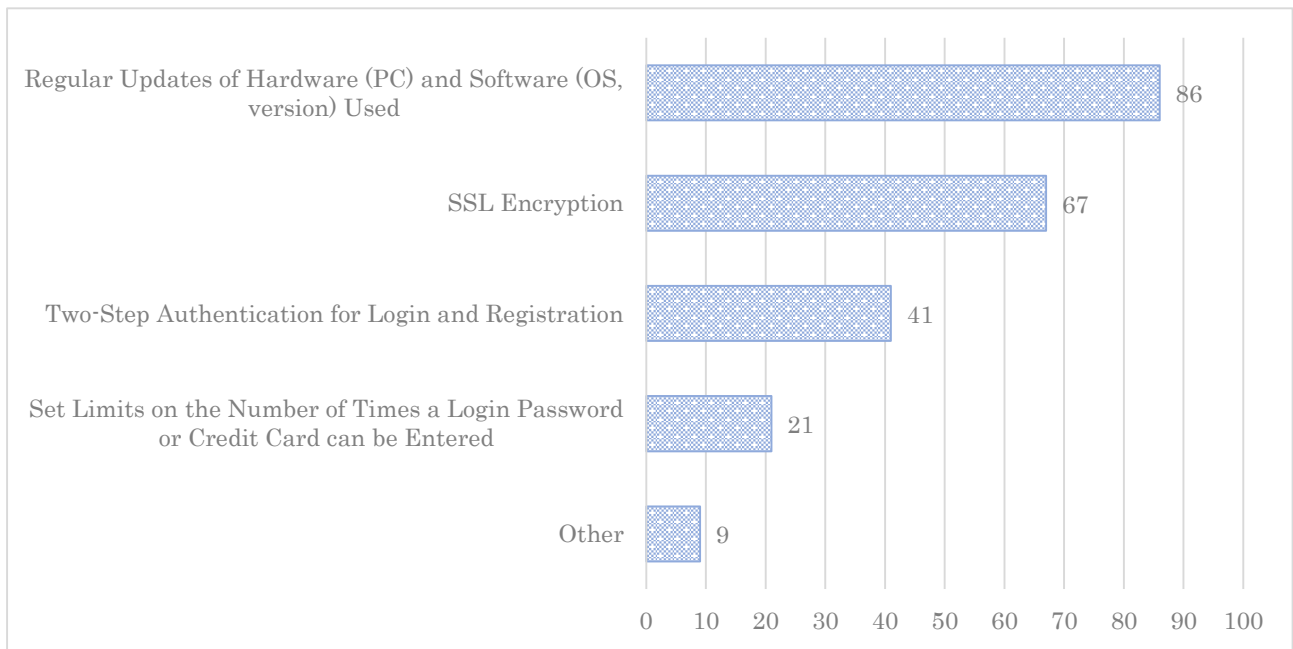
Figure 9.5.6 Personal or Technical Countermeasures

Chapter 10 Impacts of COVID-19 on Organizations and Projects

General Introduction

In this chapter, the impact of the prolonged COVID-19 pandemic on NGO projects implemented in Japan and overseas, collaboration with stakeholders, operations, personnel, and finances was confirmed.

Firstly, it was found that of the existing projects conducted in Japan or overseas from before the pandemic, 96.3% of the overseas projects and 96.9% of the domestic projects have been negatively impacted, and the situation of half of them has not improved till today, some two years since the outbreak.　However, some organizations have been expanding their activities by launching new projects not only in locations they had been supporting but also in new locations.　As for impacts of COVID-19 on collaboration with stakeholders, some organizations reported "no change" but others reported either that "collaboration and support had decreased" or that "collaboration had increased." The predominant expectations toward stakeholders were for "financial support" and "project partnership."

Next, regarding impacts of COVID-19 on operations of organizations and their projects, it was found that most organizations "introduced telework," "changed their information dissemination methods," and "changed how internal approvals and decisions and payments are made" with regard to their offices and projects both in Japan and overseas.　Meanwhile, some organizations "relocated their offices" or "reviewed their personnel expenses" in an effort to revisit fixed costs.　As for impacts on personnel, the majority of organizations reported "no impacts or changes" while some organizations said that they had terminated the employment of directors or staff or had reduced salaries or pay raises.

Finally, organizations that responded that their income had "declined" in FY2020 compared to FY2019 were about 56% of the total.　Some organizations utilized benefit, grant or subsidy programs of the central government or local governments to alleviate these losses.　Despite the prolonged effects of COVID-19, the majority of the organizations (95%) answered that they would continue to carry out their projects in the future.　However, there were a few organizations that said they were considering dissolution during this fiscal year.
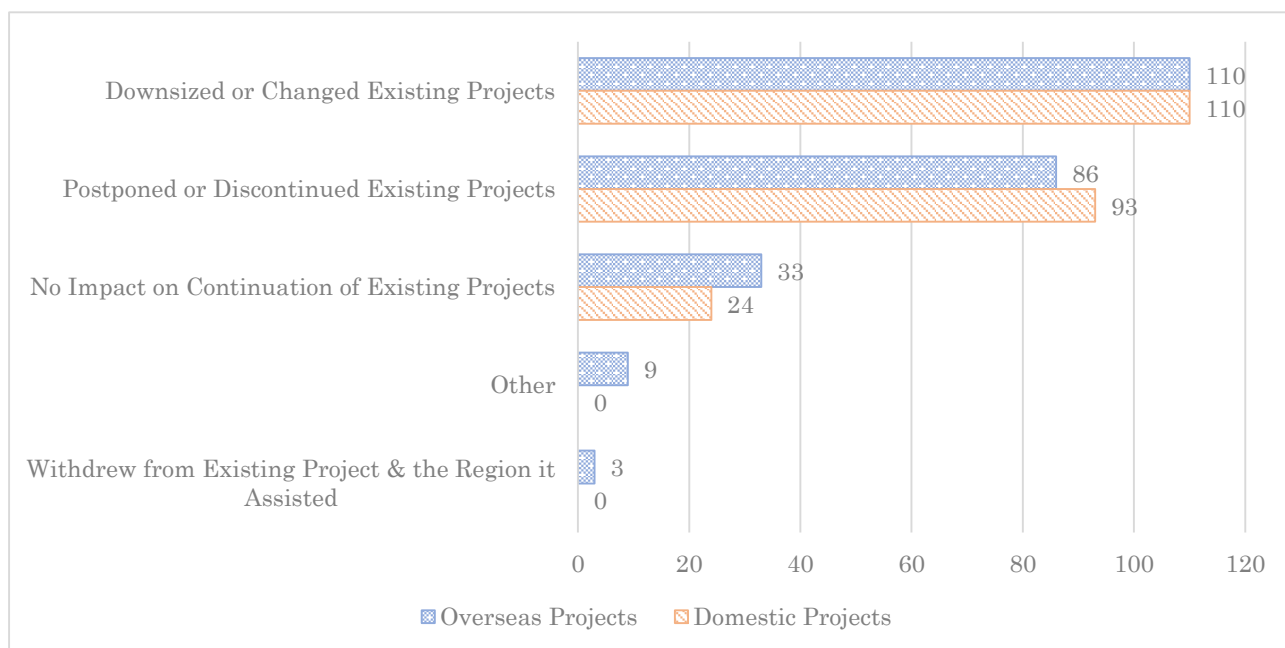
Figure 10.2.1 Impacts on Domestic/Overseas Projects
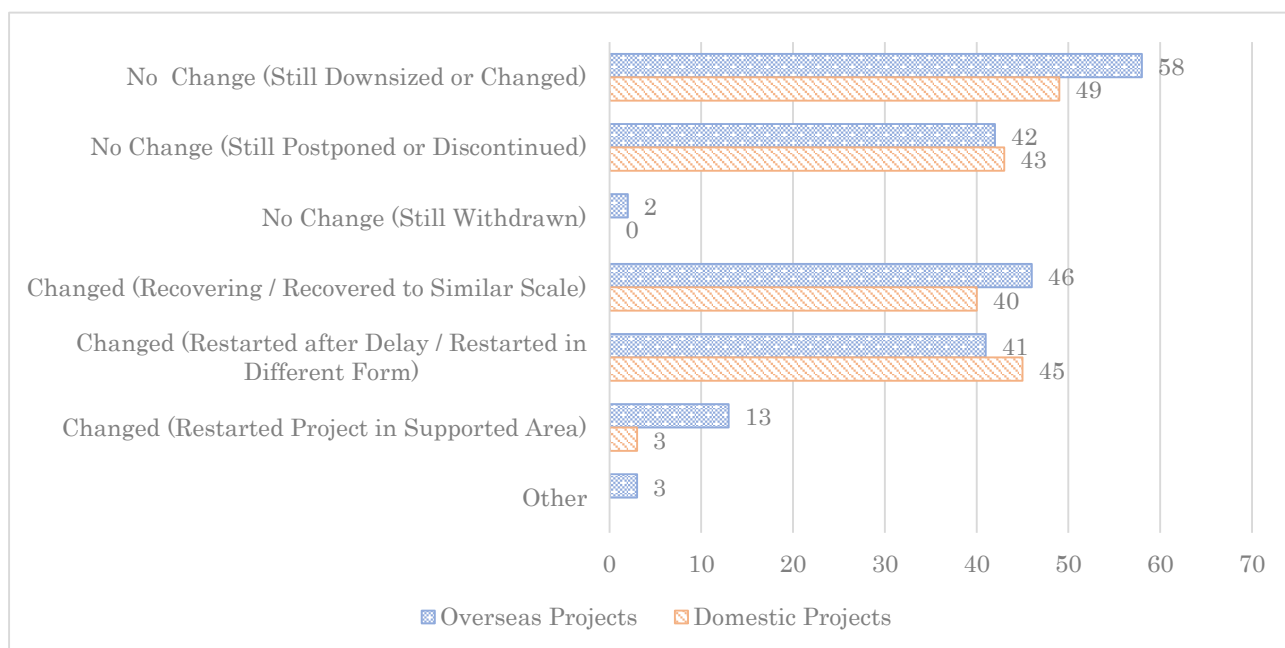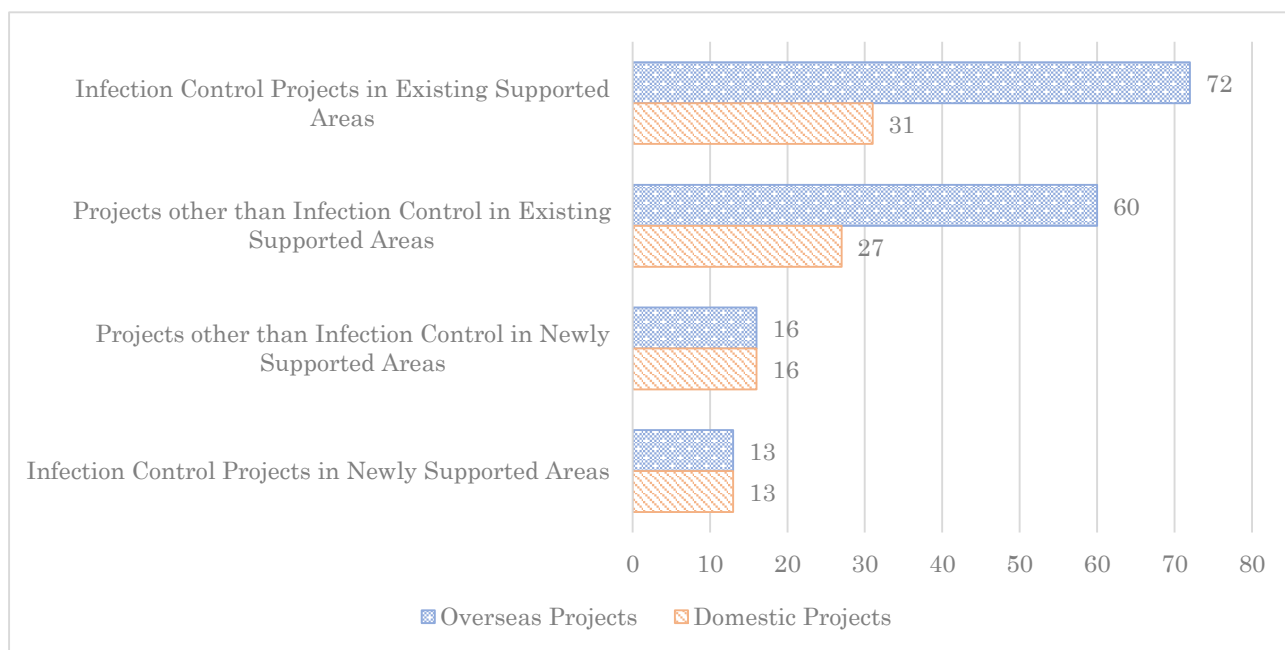

Figure 10.2.2 Status of Impacted Projects

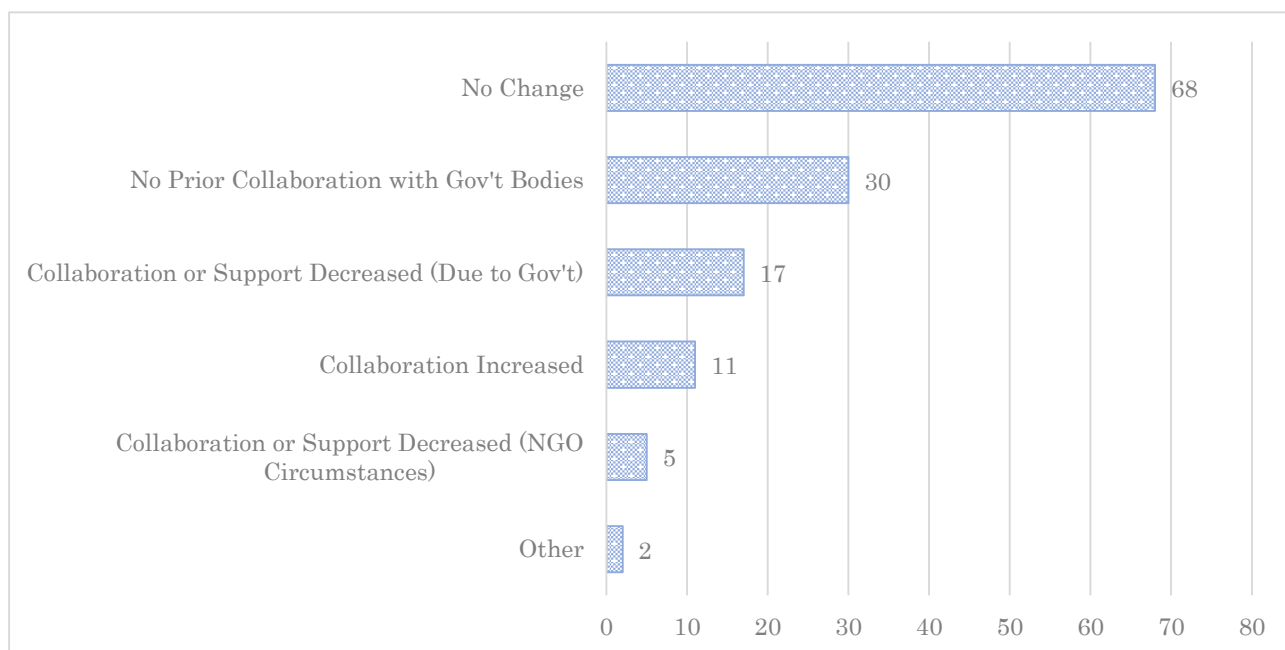Figure 10.2.3 Implementation of New Projects

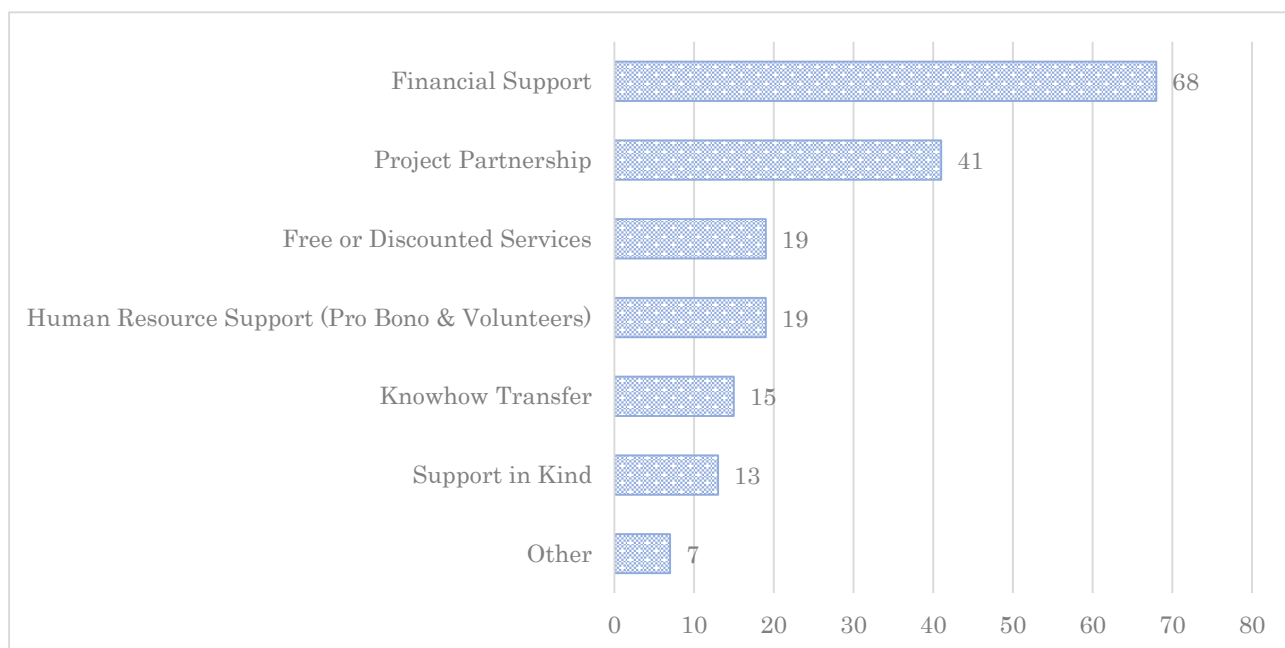Figure 10.3.1 Impacts on Collaboration with Government Bodies

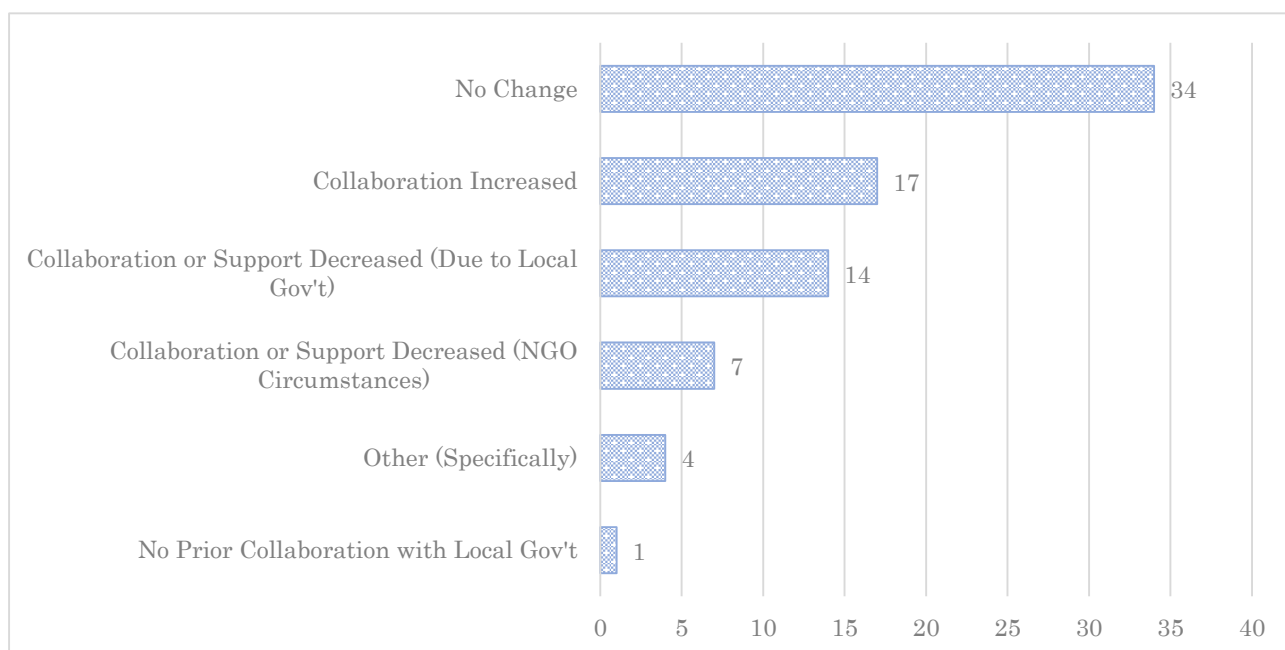Figure 10.3.2 Expectations towards Gov't Bodies regarding Future Collaboration

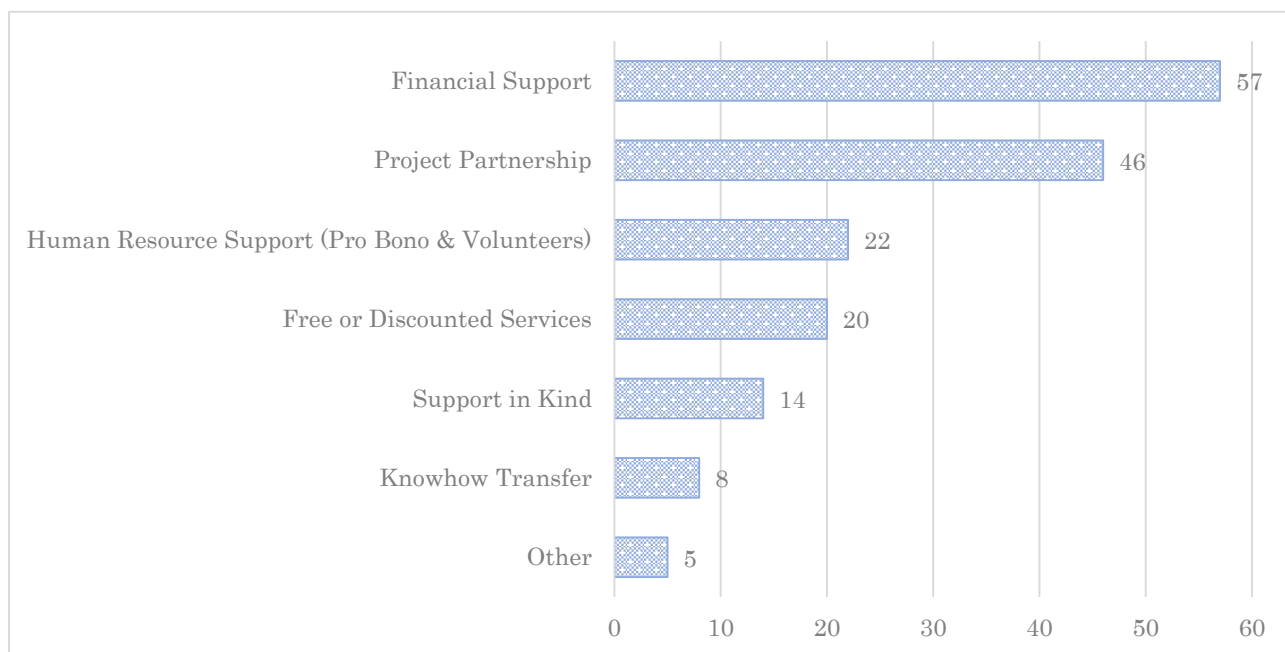Figure 10.3.3 Impacts on Collaboration with Local Governments

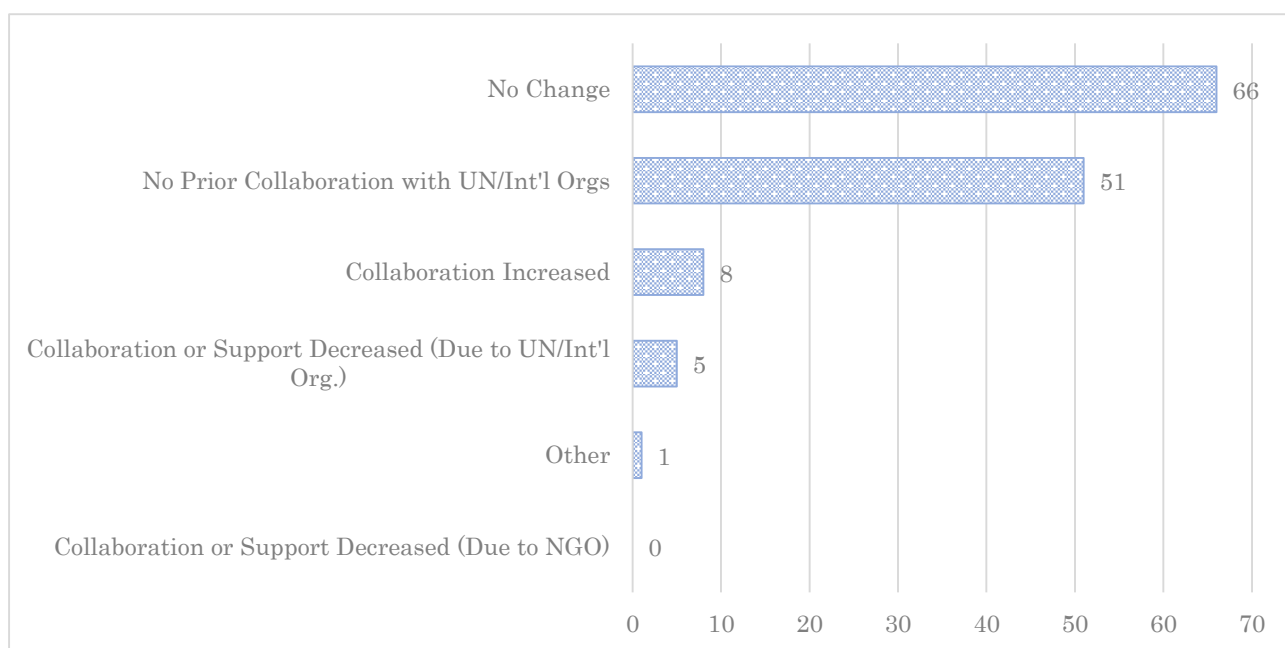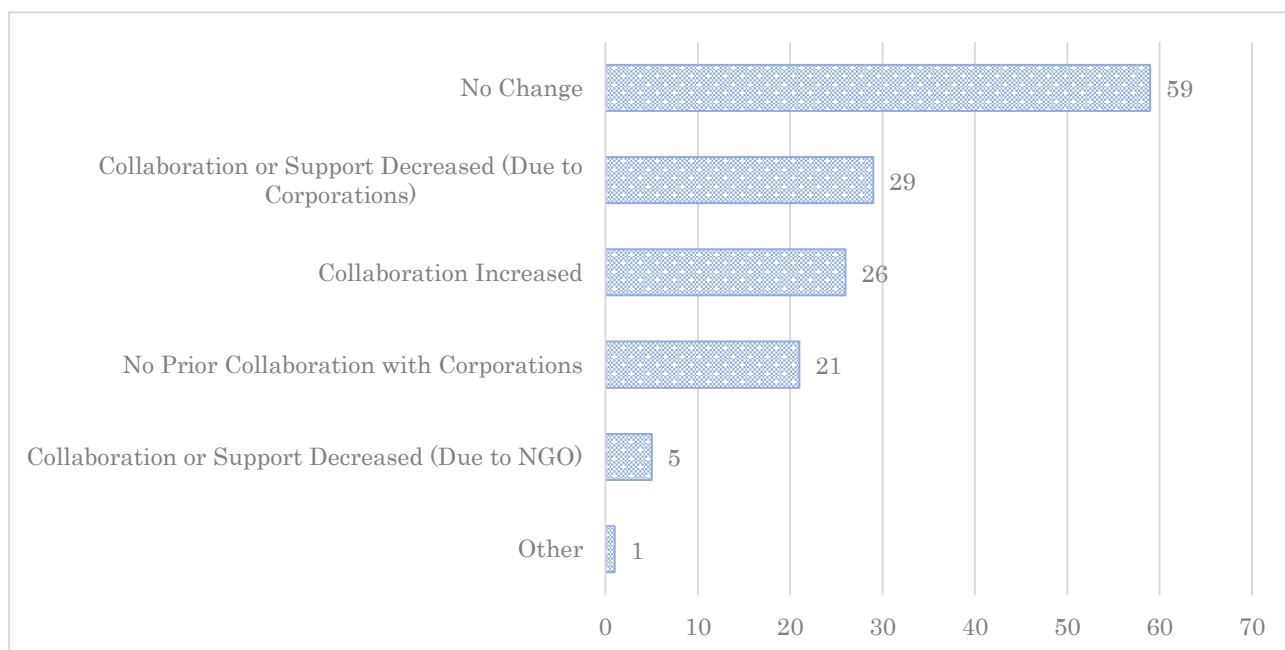Figure 10.3.4 Expectations Toward Local Gov't regarding Future Collaboration

Figure 10.3.5 Impacts on Collaboration with UN & International Organizations
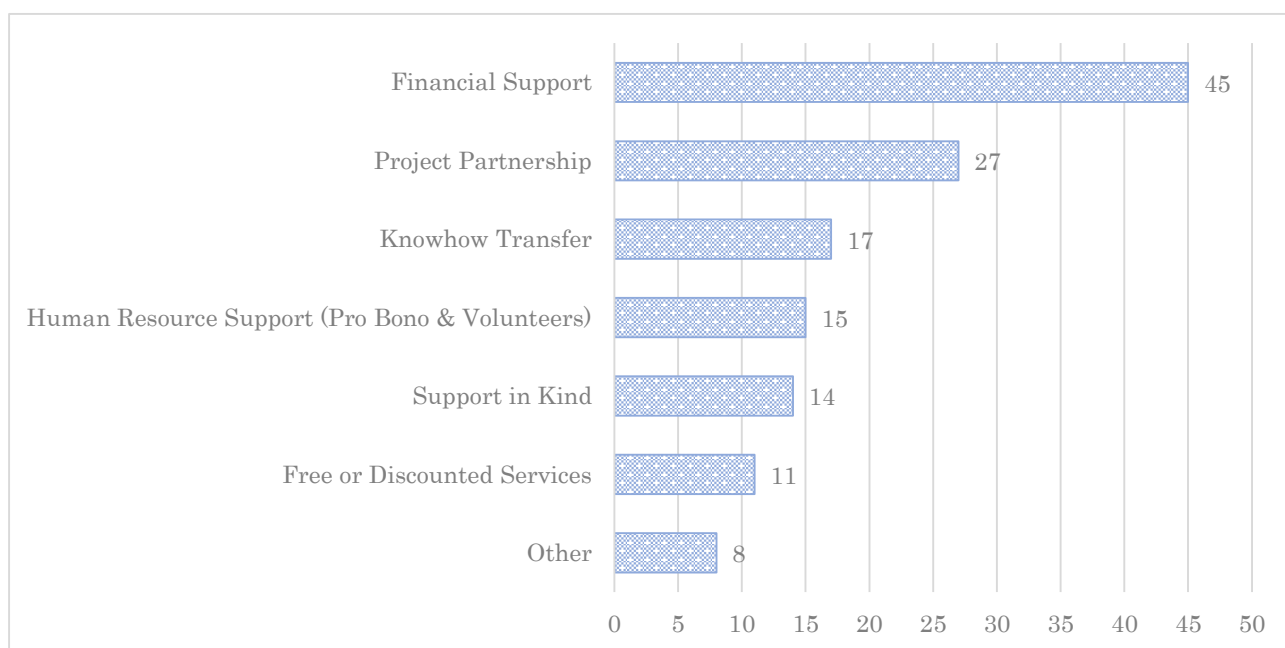
Figure 10.3.6 Expectations Toward UN/Int'l Organizations regarding Future Collaboration
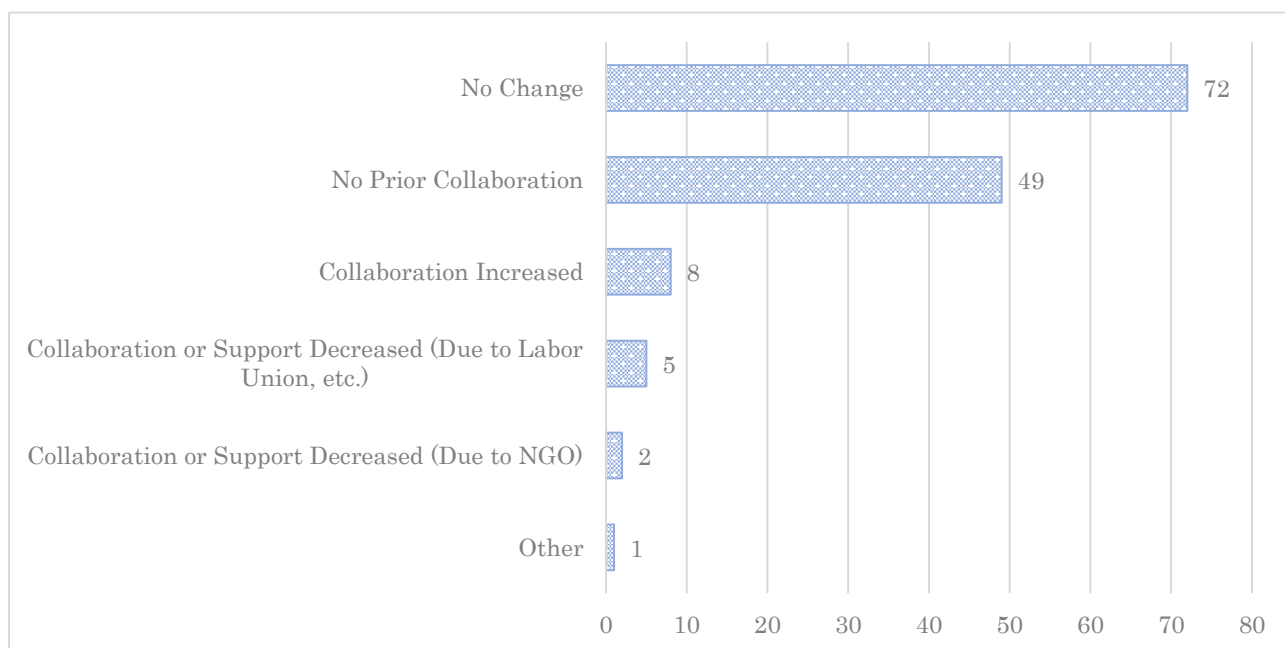
Figure 10.3.7 Impacts on Collaboration with Labor Unions, Cooperatives or Religious Bodies
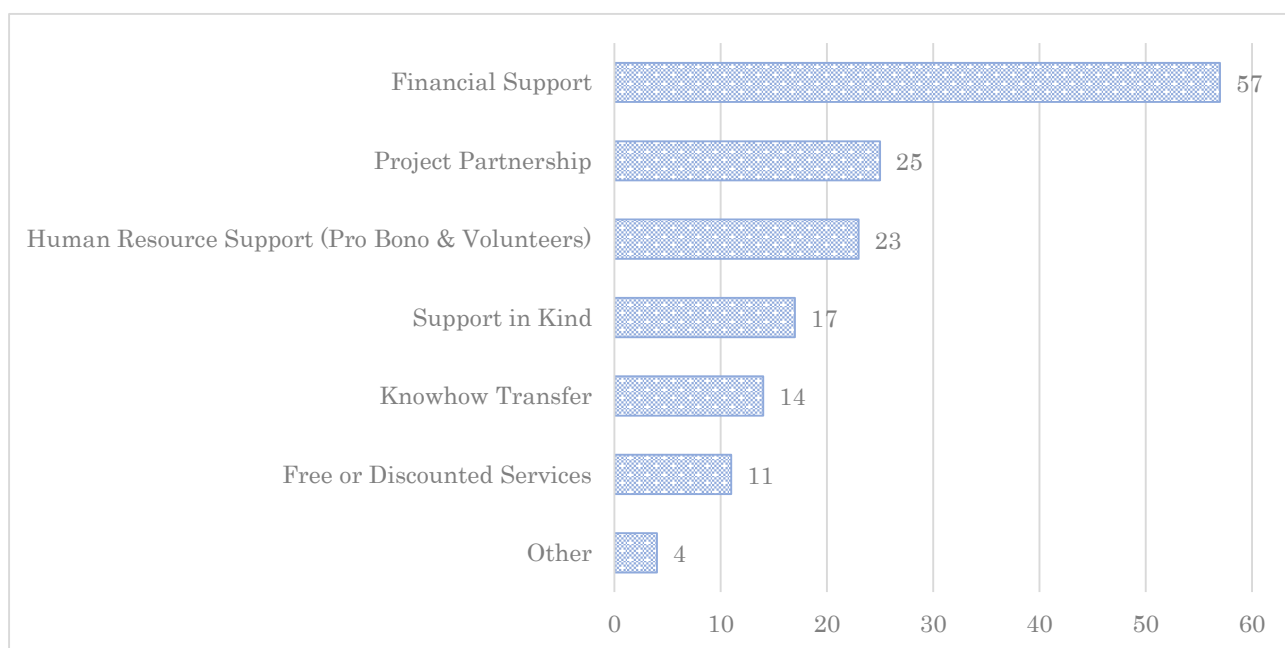
Figure 10.3.8 Expectations Toward Labor Unions, Cooperatives & Religious Bodies regarding
Future Collaboration
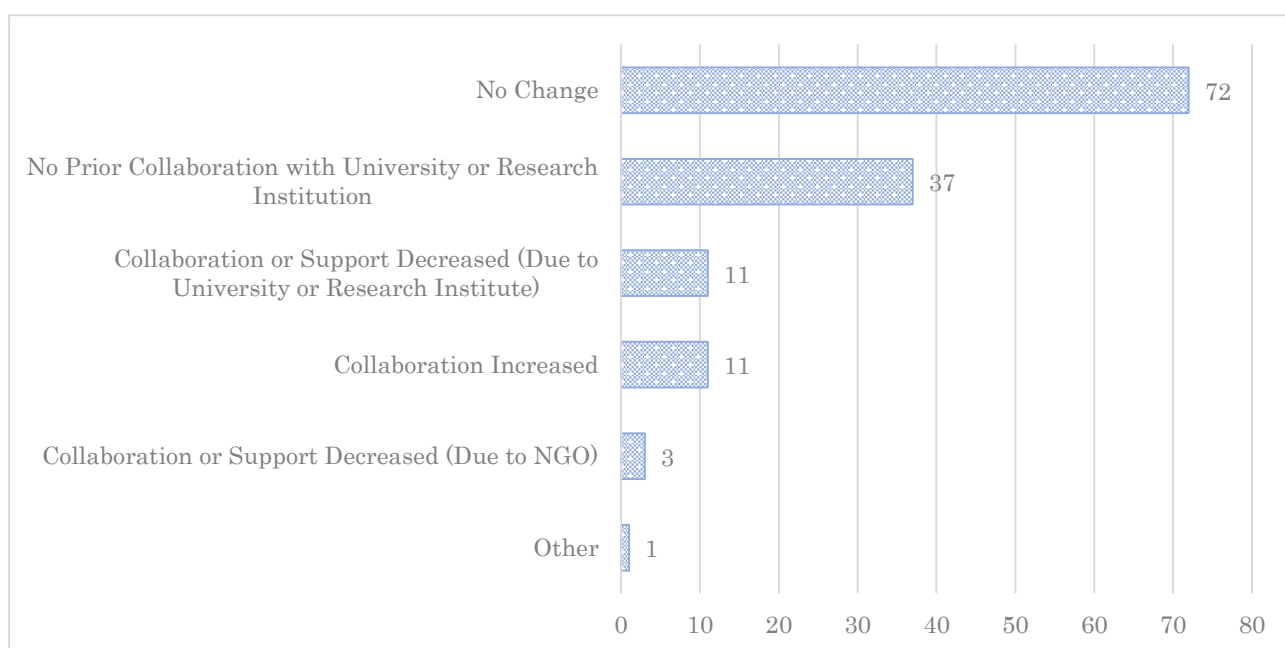
Figure 10.3.9 Impacts on Collaboration with Universities & Research Institutions
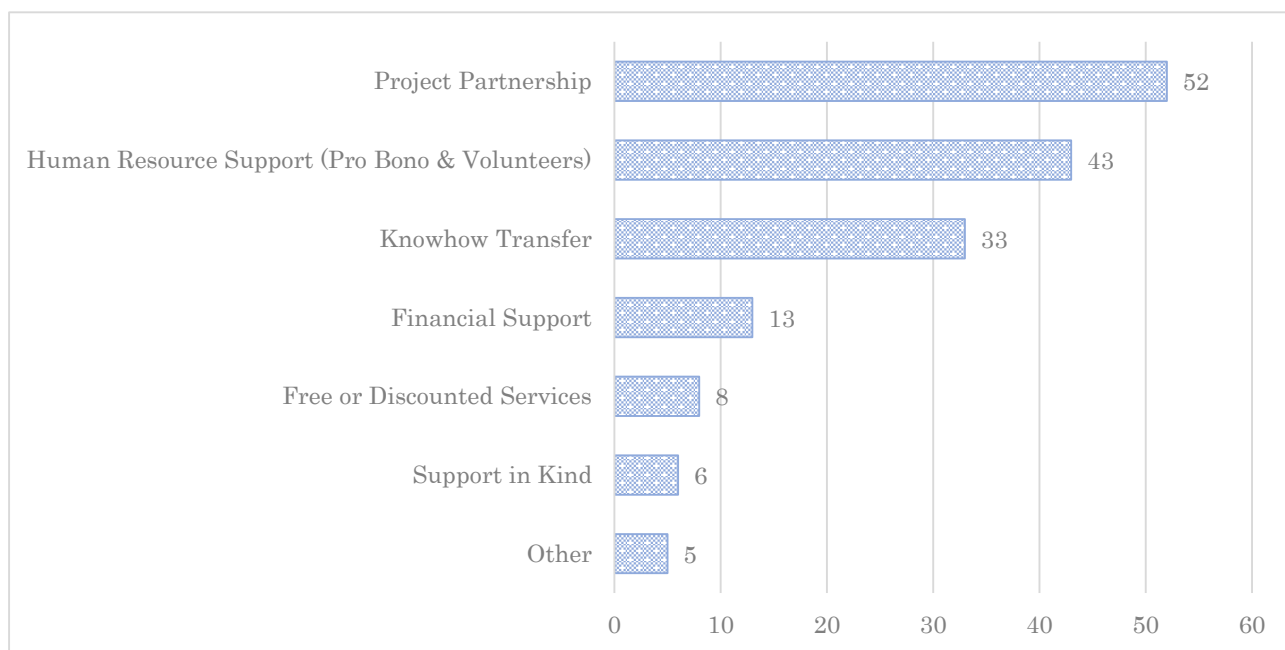
Figure 10.3.10 Expectations Toward Universities & Research Institutions regarding Future Collaboration

Figure 10.3.11 Impacts on Collaboration with Corporations
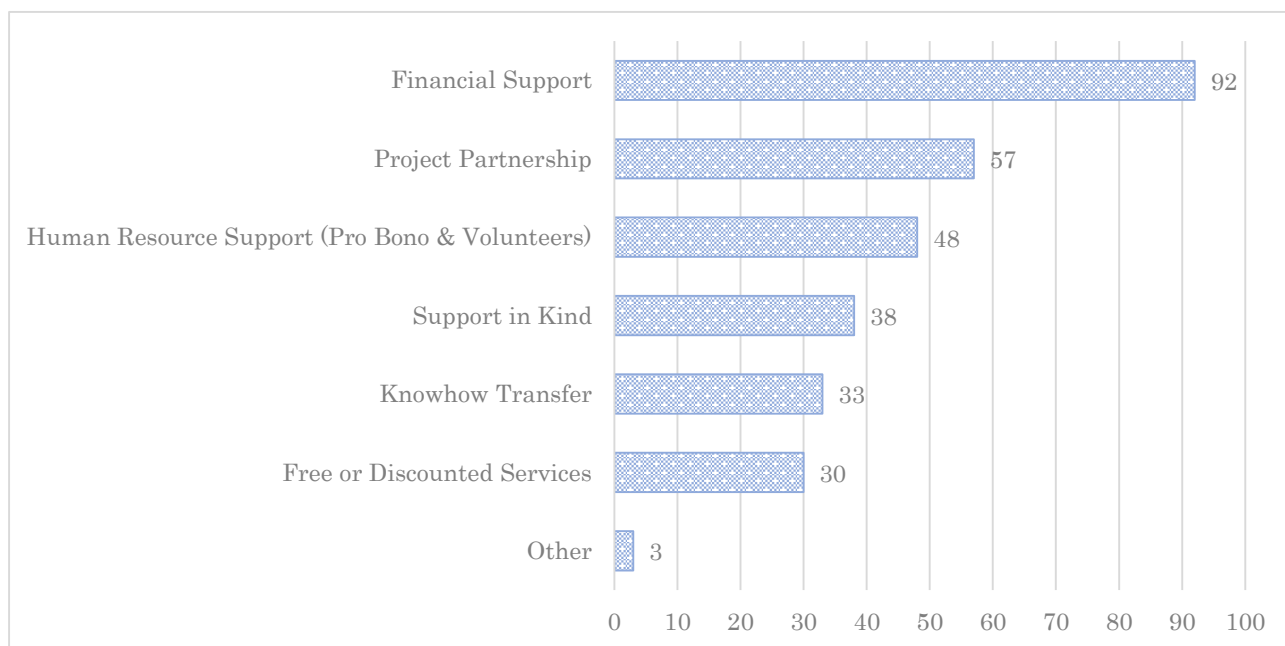
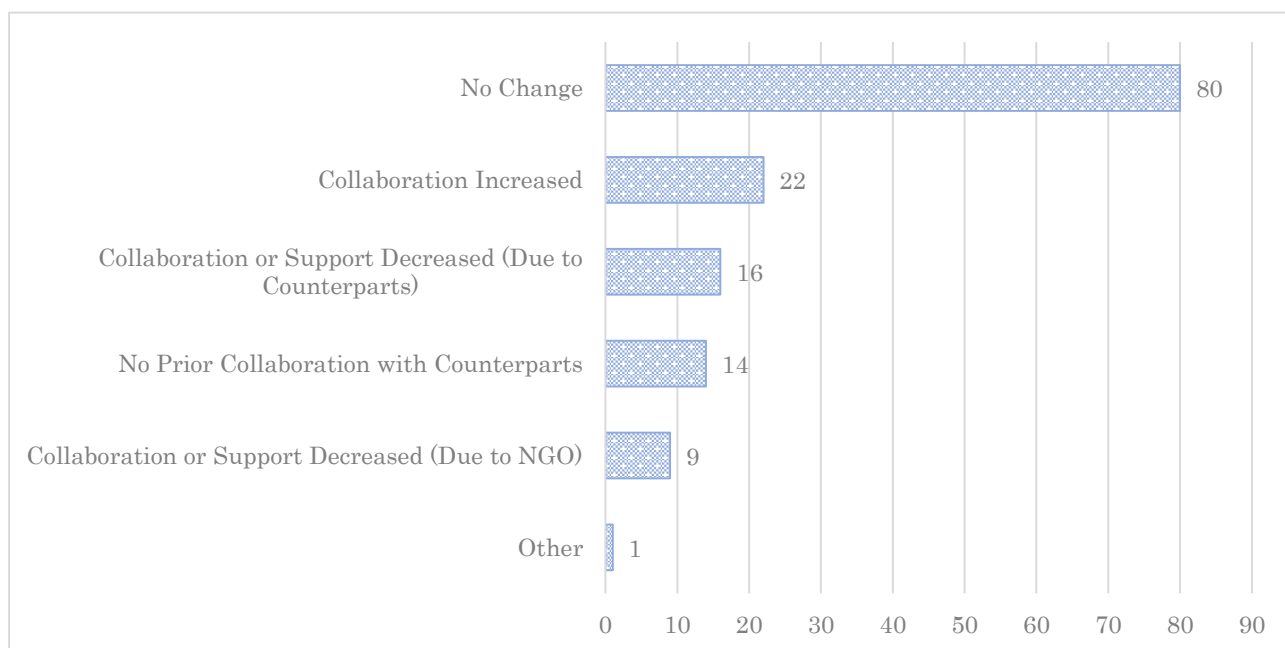Figure 10.3.12 Expectations Toward Corporations regarding Future Collaboration

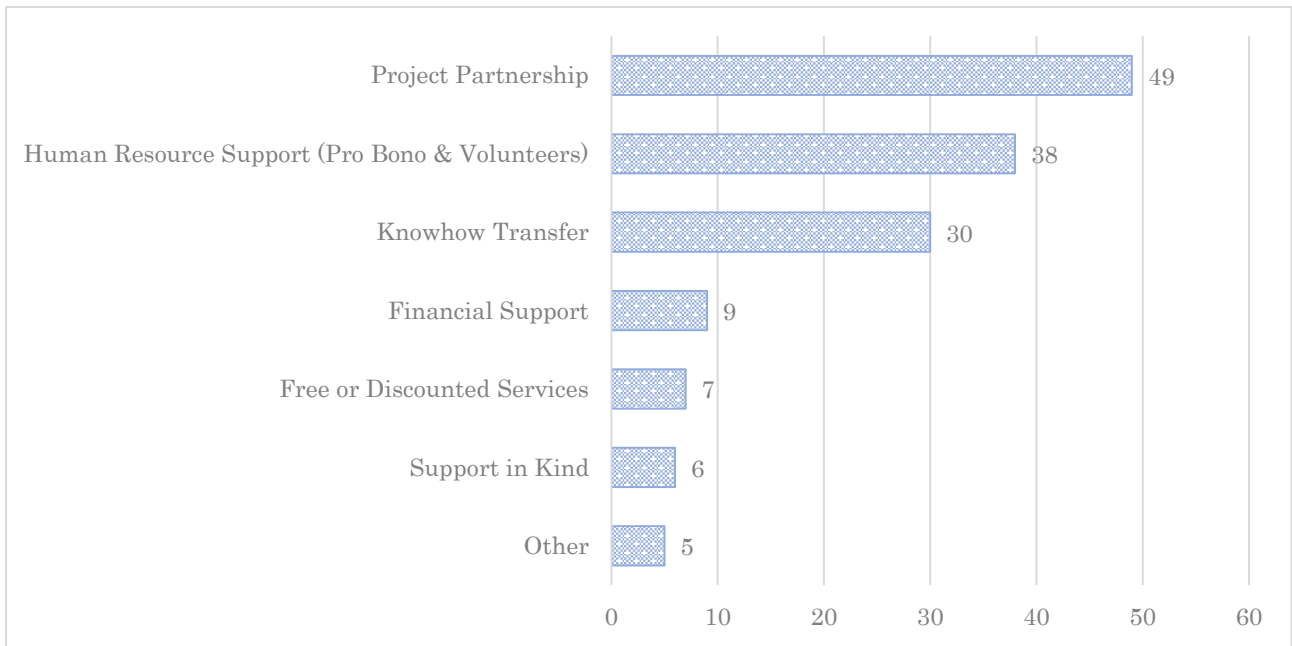Figure 10.3.13 Impacts on Collaboration with Local Partner Organizations

Figure 10.3.14 Expectations Toward Local Partner Organizations regarding Future Collaboration
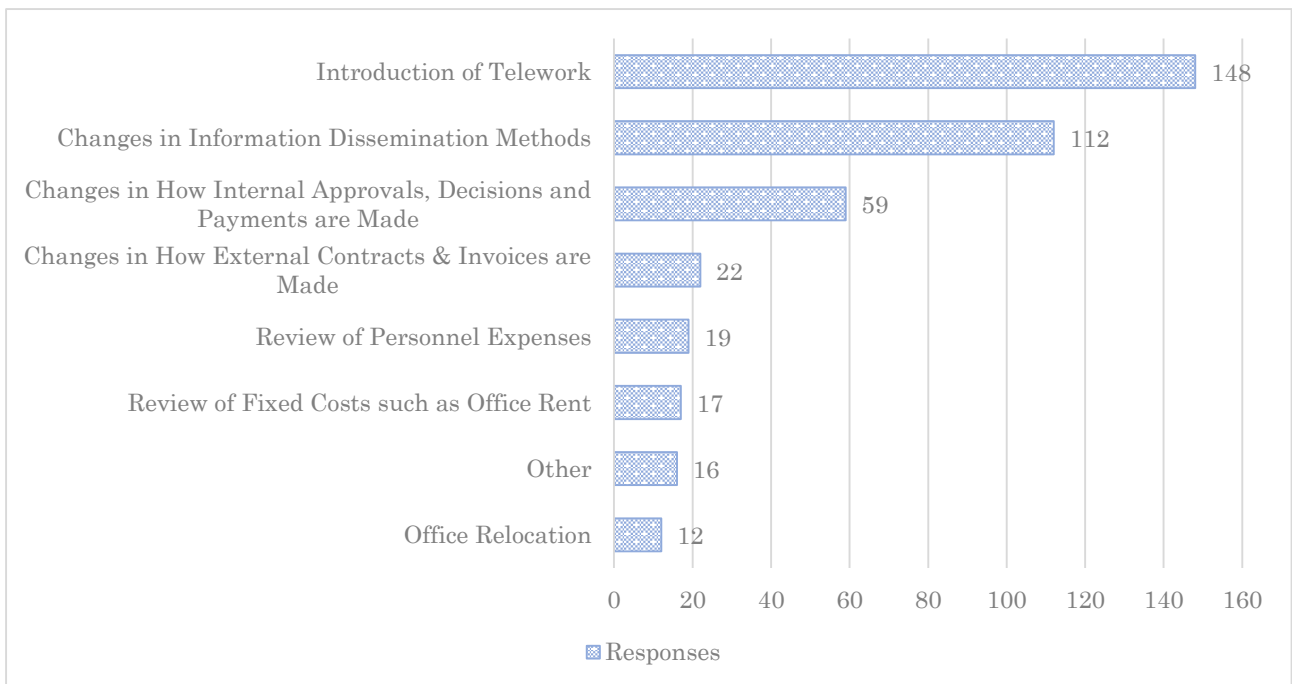

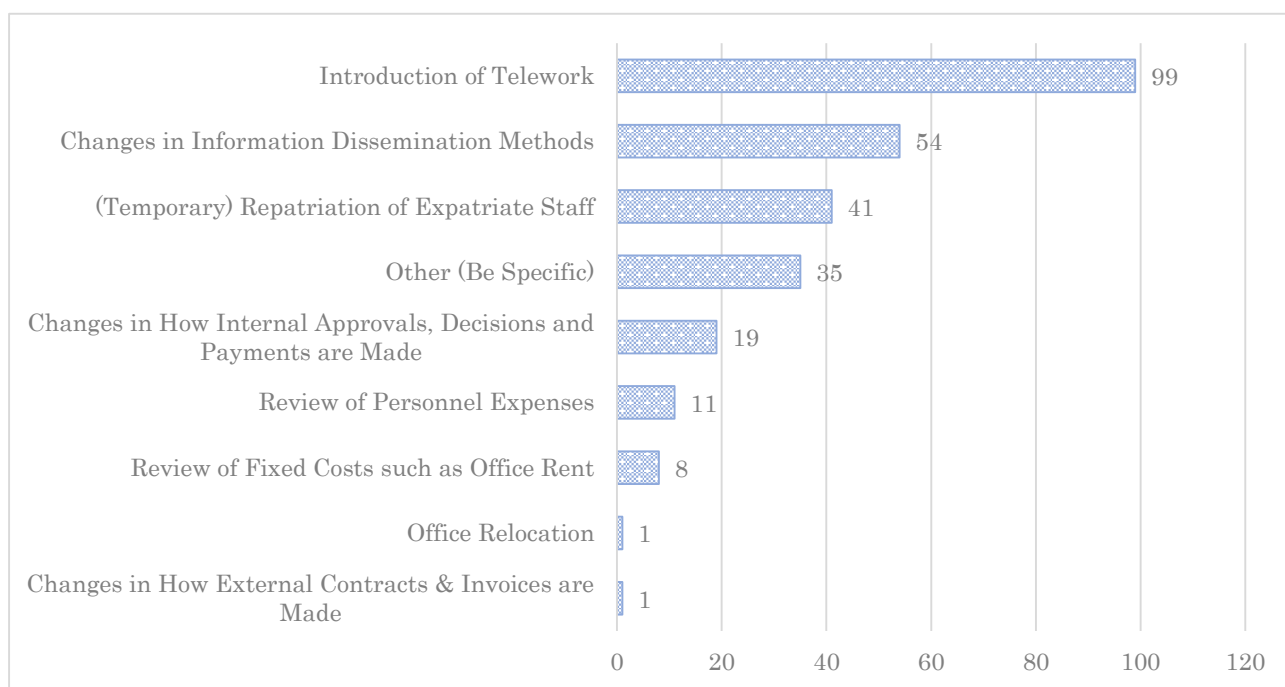Figure 10.4.1 Impacts on Operations of Domestic Activities

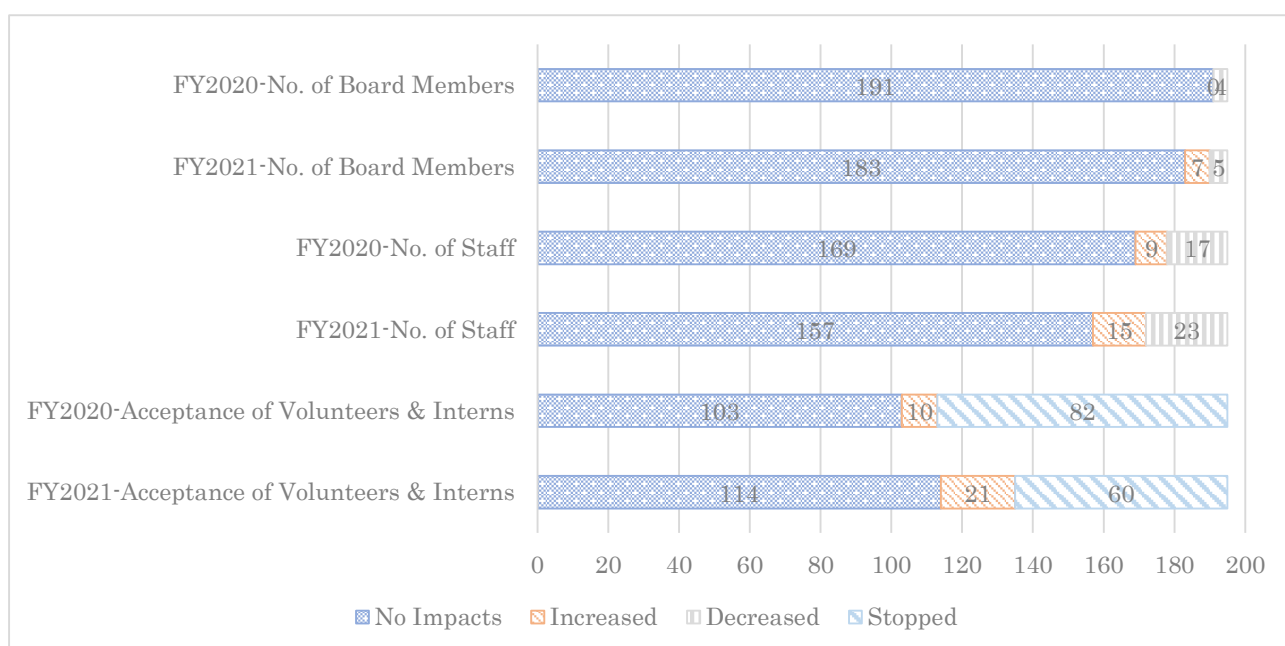Figure 10.4.2 Impacts on Operation of Overseas Projects

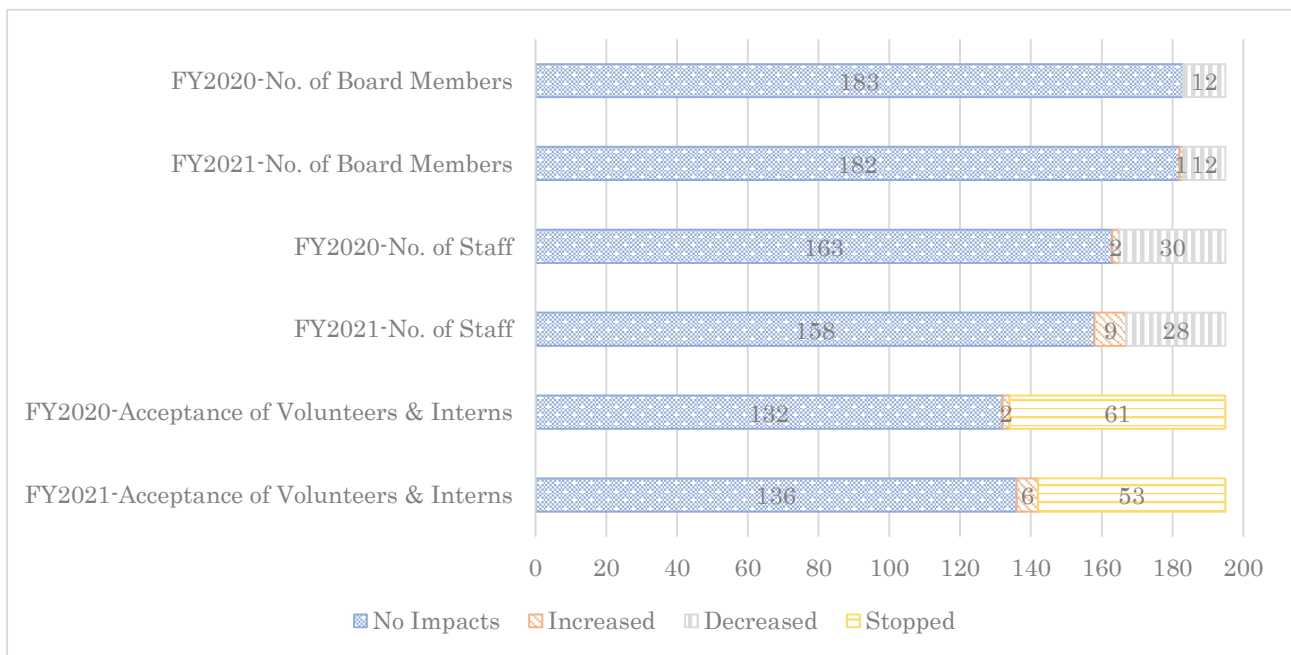Figure 10.5.1 Impacts on Personnel for Domestic Projects

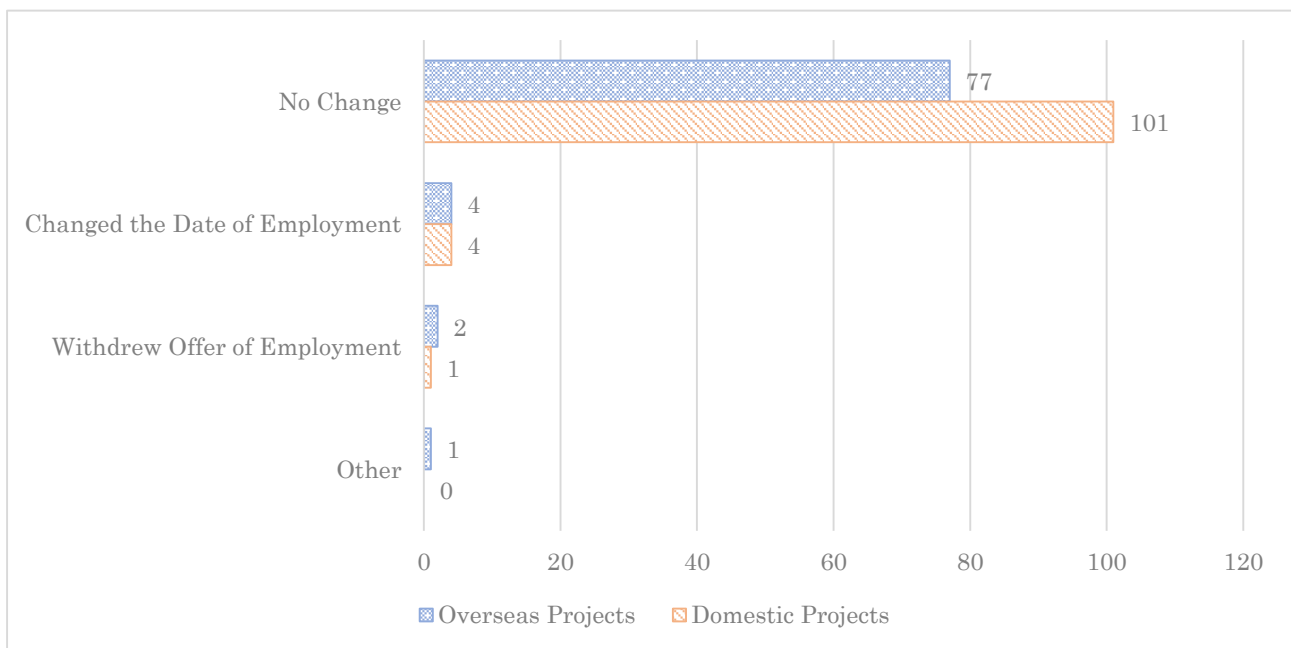Figure 10.5.2 Impacts on Personnel for Overseas Projects

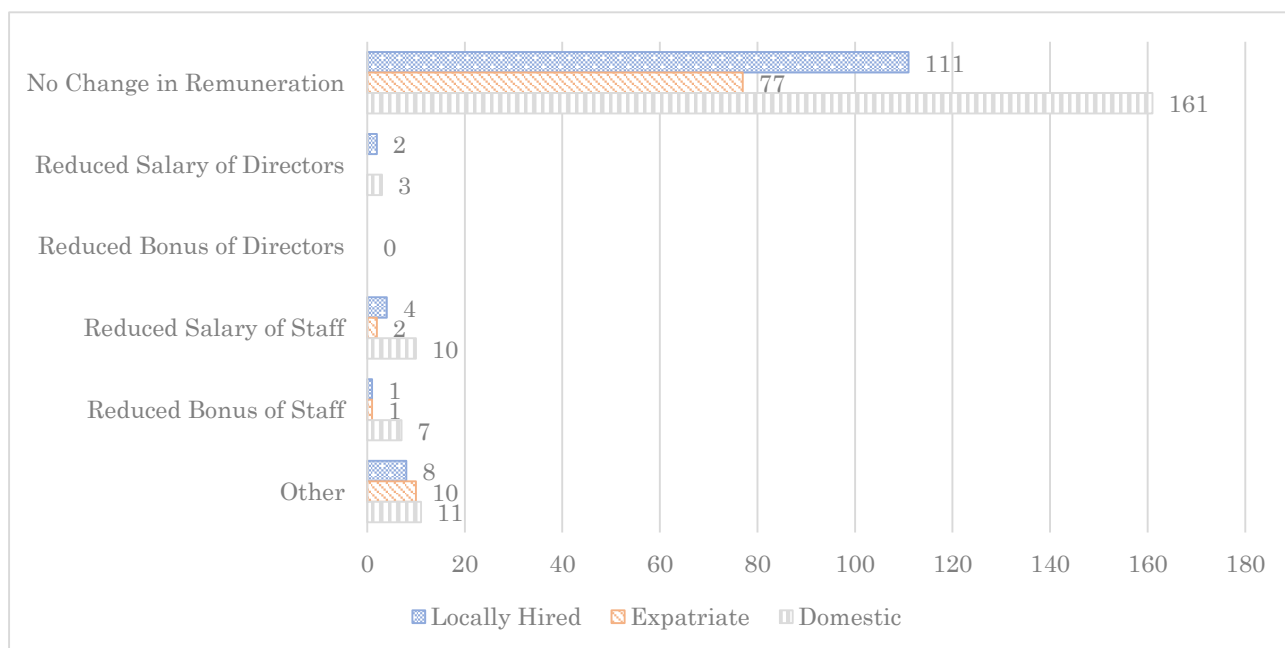Figure 10.5.3 Impacts on People due to be Hired
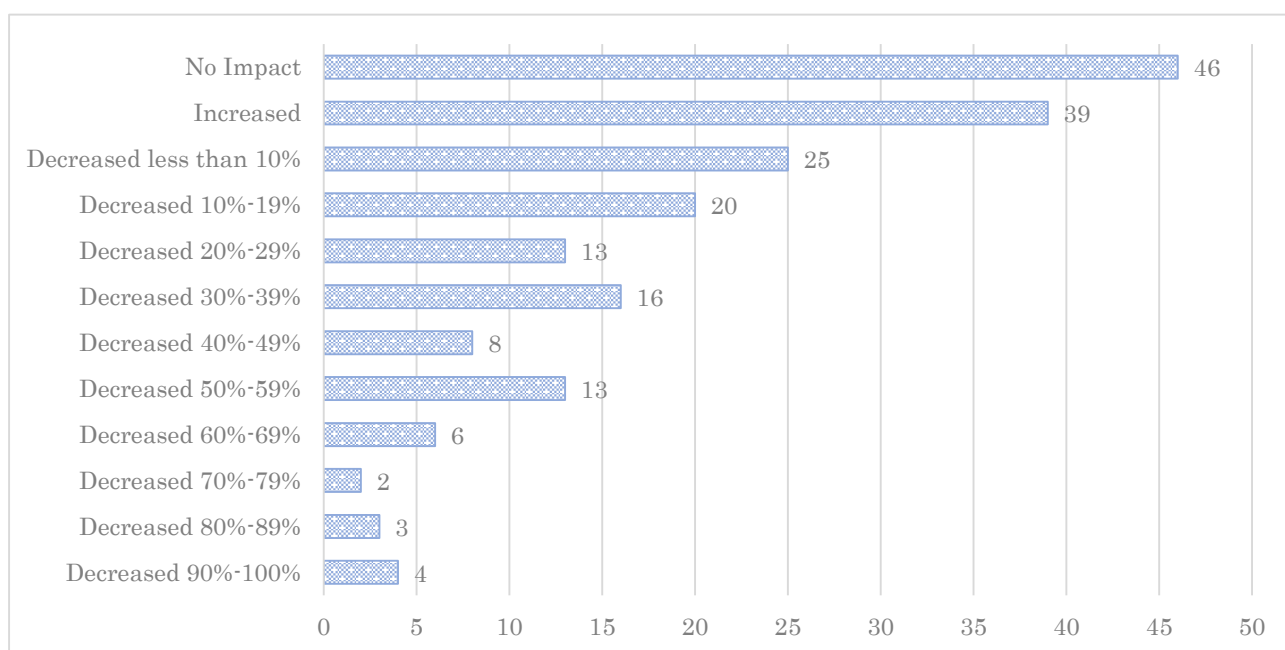
Figure 10.5.4 Impacts on Remuneration

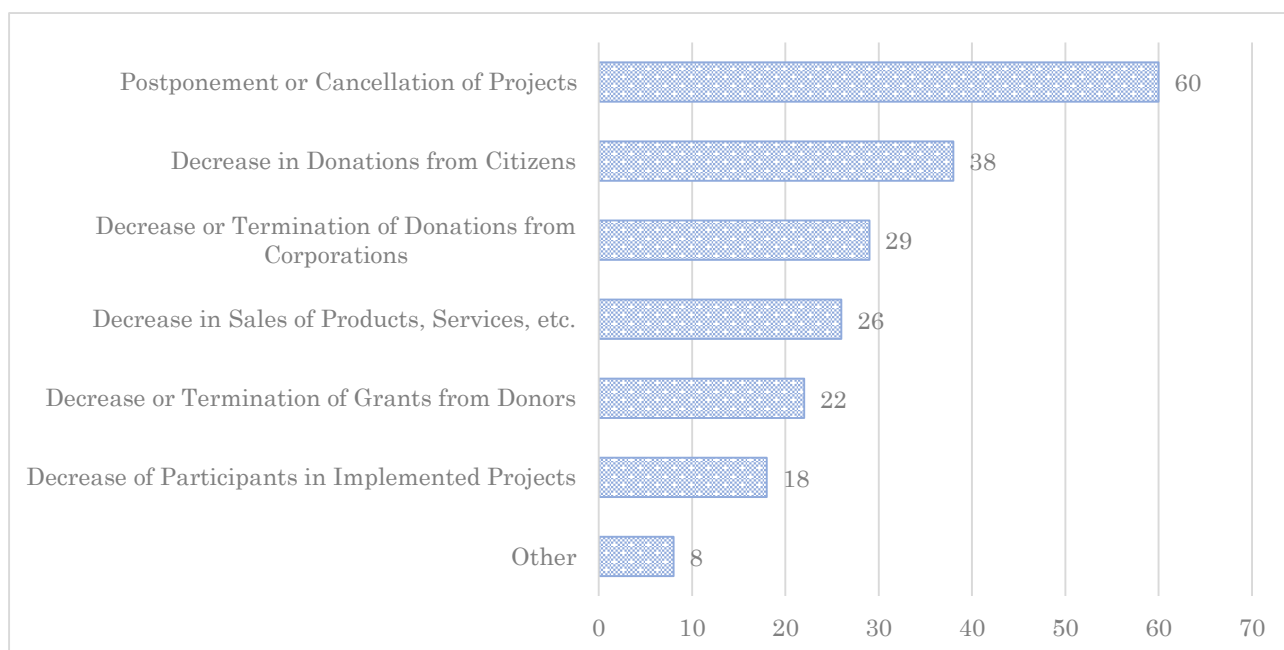Figure 10.6.1 Financial Status Compared to Previous Year

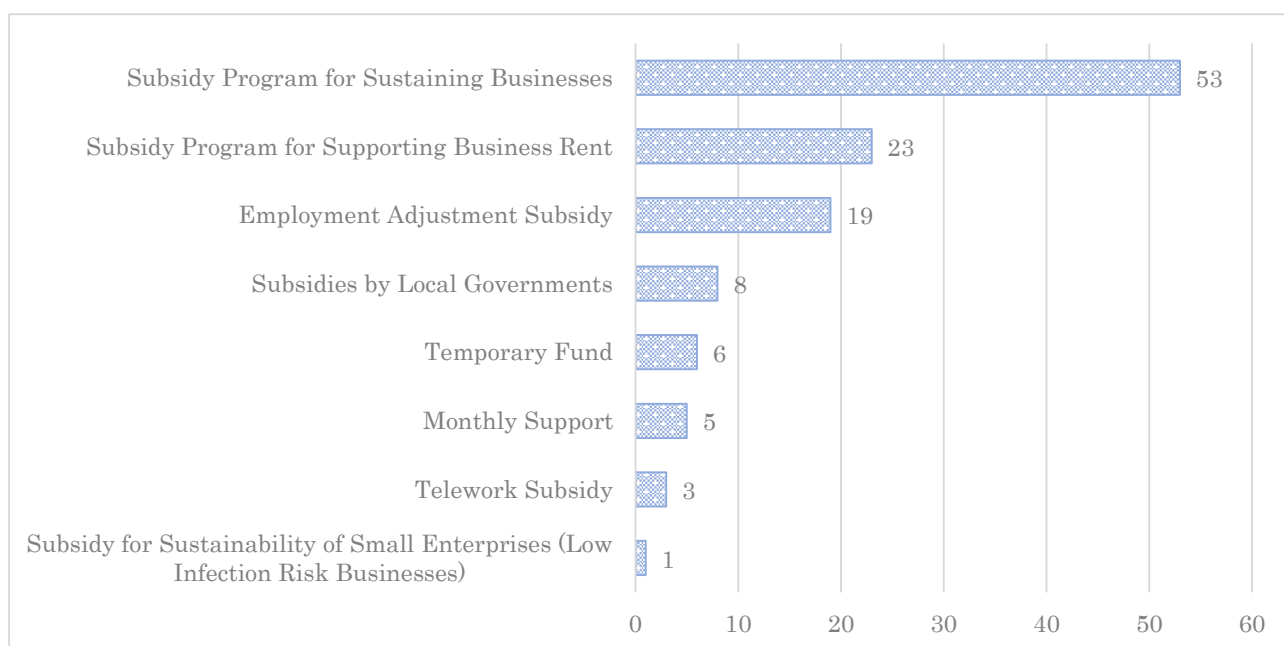Figure 10.6.2 Main Reasons for Decrease
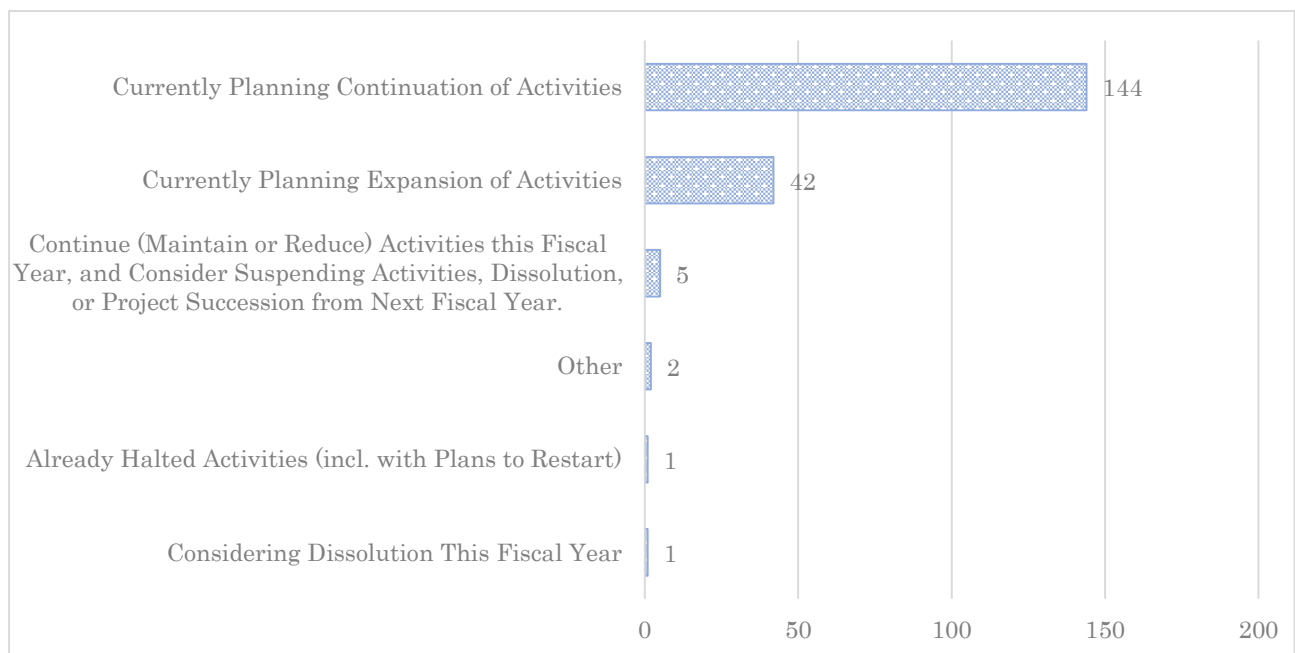

Figure 10.6.3 Benefits and Subsidies Utilized

Figure 10.6.4 Direction of Future Activities

Conclusion

In 1994, JANIC started conducting periodical surveys of NGOs with the title "Data Book on NGOs in Japan." The survey was first commissioned by MOFA in 2011, and the present survey follows the one conducted in 2016. We would like to express our heartfelt gratitude to everyone involved in the NGOs for cooperating with our publication of the "Data Book on NGOs in Japan 2021" by spending quite a long time to provide answers to the many survey items. We hope that it will be put to good use in various fields. As a result of surveying through various channels, the number of organizations covered has increased to 424, and thanks to your great cooperation, the number of organizations that actually responded to the questionnaire has almost doubled from the previous survey, hopefully resulting in more accurate data.

Looking back at this publication as a whole, it is noted that the total income of organizations and donations, etc., have increased, and NGOs have been able to respond to changes in the environment such as the COVID-19 pandemic to some extent, but the greatest concern is that the number of newly established NGOs is not increasing. There were 160 newly established NGOs in the 1990s, 98 in the 2000s, and 40 since 2010, and this downward trend has not stopped. At the same time, the average age of NGO directors and staff has been increasing over the past half-century of NGO history, and a certain number of NGOs have been dissolved due to lack of generational turnover. In other words, the total number of NGOs is not increasing, and may even be decreasing. The gap in terms of income, including donations, between small and medium-sized NGOs versus medium-sized and larger NGOs (with income of 100 million yen or more) has not narrowed, and the polarized structure continues, suggesting the vulnerability of small and medium-sized NGOs. It has been more than 20 years since the NPO Law came into effect, but the number of voluntary organizations without legal personality is still high at 99 organizations (23.9%). In the past 10 years, due in part to the influence of the SDGs, the way corporations deal with society has also changed. As expressed by the term stakeholder capitalism, private corporations have started to take the stance that the objective of their activities is to contribute to various stakeholders rather than just to shareholder returns. It is also becoming more common for companies to take the stance that they can contribute to the creation of a sustainable society by promoting business activities that meet the needs of addressing various social issues in society.

The number of actors working on development issues, including in developing countries, continues to increase. Nowadays, these actors include not only the government, JICA, international organizations, and NGOs, but also an increasing number of private corporations, local governments, consulting firms, social business-type companies, universities, foundations, entrepreneurs who start

their own businesses directly in the field, CSOs that work on international cooperation using their domestic experience, and so on.   The relative decline in prominence of NGOs is undeniable. Signs of this trend can be seen in the decline in the number of newly established NGOs, the interest of young people in NGOs, and the number of people working for NGOs.

Some noteworthy findings from the questionnaire survey are touched upon next.   First of all, in accordance with past trends, 63% of NGO offices are located in the Kanto region, with most of them concentrated in Tokyo. The number of overseas offices is also on a gradual decline, and they are concentrated in Southeast Asia, including the Philippines, Cambodia, Laos, Vietnam, and Thailand, with a total of 45 locations.   As for the method of project implementation, although there are still a certain number of NGOs that work on their own, more and more NGOs are working in cooperation with local counterpart organizations.   With regard to geographic region, the largest proportion of Japanese NGOs, 54% of the total, conduct their activities in Asia, especially Southeast Asia, which has close historical and geographical ties to Japan.   In Africa as well, there are many NGOs active in 33 countries, covering 60% of all the countries in Africa, mainly in English-speaking countries such as Kenya and Uganda.

In descending order, the most common fields of initiatives are education and vocational training, development and poverty, health and medical care, environment, and agriculture.   Regarding promotion of the SDGs, there has been some fluctuation, as the SDGs have become more widely known than at the time of the previous survey.   The top three are basically unchanged: Goal 1, no poverty; Goal 4, education; and Goal 3, health and welfare. On the other hand, there has been a significant increase in the number of initiatives related to Goal 17, which aims to solve problems through partnerships with the sector as a whole or with other sectors; Goal 16, which aims to create a peaceful and just society through the right to freedom, an inclusive society, the rule of law, and the eradication of all forms of violence; and Goal 10, which aims to eliminate inequality and disparity within and among countries. These are characteristics that reflect the times.

As for "collaboration," about 80% of NGOs are collaborating with other organizations or sectors in some way.   The most common collaboration partners are private corporations, followed by the government and JICA, local governments, the United Nations and international organizations. Private corporations still tend to collaborate with NGOs mostly through "financial cooperation" and "social contribution" such as "donations" and "grants and subsidies."   It is hoped that in the future there will be collaboration with NGOs on solving social issues through the corporations' core businesses (CSV management), a focus area for many corporations nowadays.   In addition, about 80% of NGOs belong to domestic and international network NGOs but cooperation with the United Nations and international organizations is limited to only 56 organizations (out of 176).   There were

only 12 organizations entrusted with or implementing projects meeting certain criteria of performance and scale.   In light of Japan's presence and the scale of Japan's contributions to the United Nations and international organizations, there are expectations for increased collaboration in the future.

In terms of "finances," the scale of income has increased from 46.5 billion yen in 2016 to 55.6 billion yen this time, an overall increase of about 1.2 times due to an increase in donations, grants and subsidies, and independent activity income.   The average income per organization increased greatly to about 200 million yen, but this was because there were as many as 69 organizations with income of 100 million yen or more, resulting in an increase in the overall average.   Meanwhile the median income was 23 million yen, which is closer to the actual situation of small and medium-sized NGOs and highlights the structural problem of polarization among NGOs.   The top 10 organizations in terms of income accounted for 66.3% of total income, up from 62.1% in the previous survey.   In terms of the breakdown of income, 152 organizations (about 59%) received less than 1 million yen in membership income, while 33 organizations received more than 10 million yen, raising the total. The average for donations was 110 million yen, but the median was 4.19 million yen, showing a similarly polarized structure. Crowdfunding has been used by 40 organizations, showing steady growth, and becoming a well-established fundraising method.   There is also an interesting new trend of fundraising using the "hometown tax payment system."

Very many organizations were impacted in some way by COVID-19.   Out of the 241 organizations that responded to the survey, 110 organizations were forced to scale down or change their overseas projects (projects in Japan, 110 organizations) and 86 organizations were forced to postpone or cancel their overseas projects (projects in Japan, 93 organizations).   Similarly, about 60% of the organizations suffered reduced income due to the effects of the pandemic, and as many as 59% of the organizations took advantage of government subsidies, etc., such as the Subsidy Program for Sustaining Businesses and the Subsidy Program for Supporting Business Rent.   Despite the prolonged effects of COVID-19, the impact of the pandemic seems to have been reduced considerably due to the efforts of NGOs.   However, also in light of other environmental change factors, it would not be an exaggeration to say that the future of international cooperation by NGOs is at stake.

These are the major findings of the data analysis, but the overall impression received, also in light of the free text responses, is that while NGOs as a whole are putting up a good fight, they are declining in relative prominence and struggling in the midst of the growing number of actors involved in international cooperation.   It is not only the NGO sector that is facing many challenges, but the barometer for future advancement is whether the next generation of young people will be interested in the work of NGOs and be provided opportunities to play an active role at NGOs. ***

Looking around the world, although some progress has been made in achieving the SDGs, such as gender equality and advancement of science and technology, it is apparent that hunger and environmental problems have rather worsened, and furthermore, poverty, inequality, and injustice have been exacerbated amidst the impacts of COVID-19. At the same time, there have been challenges to universal values such as human rights, including the use of force to overthrow civilian rule and restrictions on freedom of expression and civic space, and there is a heightening need for emergency humanitarian assistance and for support related to democratic governance systems and the movement of refugees and other people.   Though the number of actors involved in international cooperation is increasing, NGOs need to draw on their strengths and differentiate themselves from other sectors, or rather, see this situation as an opportunity for activities that give prominence to the unique characteristics of NGOs, and for this purpose, structural reform of the NGO sector is also necessary.   If the next edition, the Data Book on NGOs in Japan 2026 is published, it is greatly hoped that at that time it will be possible to feel with certainty that the NGO sector has undergone reforms and become an attractive sector for new advancement.

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