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EVALUATION

**Ex Post Evaluation 2014-2020 Fund European for Aid to the most deprived (FEAD)
Annex X: Case Studies**

{SWD(2025) 190 final}

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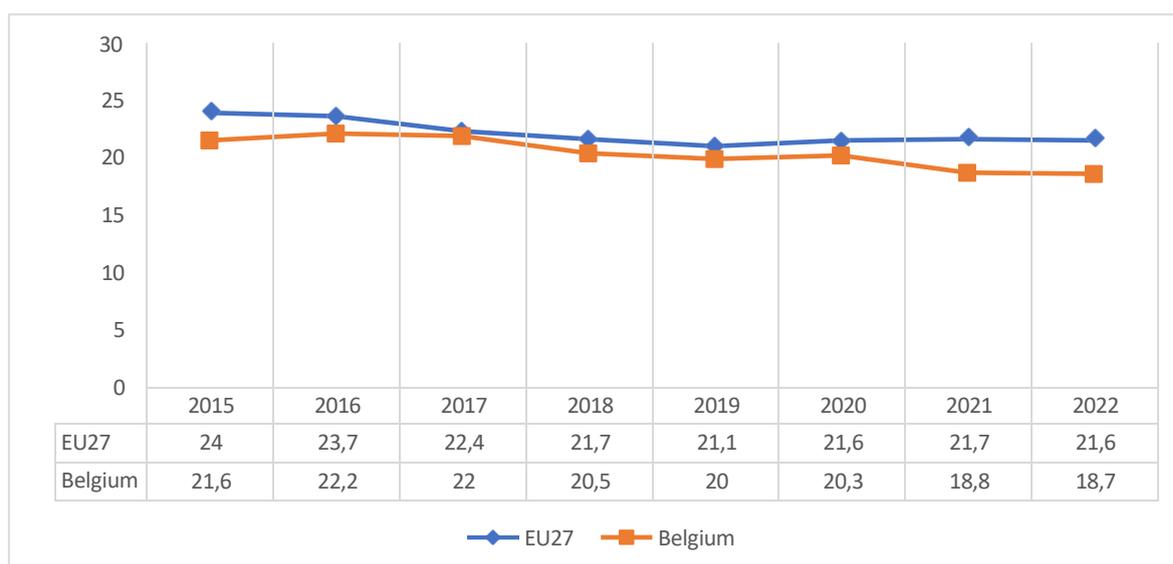
X.1 Belgium

1. Context and background

In this section, we will contextualise the implementation and effect of the European Fund for Aid to the most Deprived (FEAD) in Belgium by assessing the socio-economic context of the country during the evaluation period (2014-2020), both at national and regional level.

Belgium’s context was one of greater socio-economic wellbeing than other European Union Member States (EU27) throughout the evaluation period. For all indicators measuring social exclusion and economic stress (other than the rate of households with low work intensity), Belgian rates were lower than the EU27 average. For instance, while the rate of individuals At Risk of Poverty or social Exclusion (AROPE) was 21.6% for the EU27 in 2020, it was 20.3% for Belgium during the same year²⁸⁷.

Figure A. 63 – Percentage of People at Risk of Poverty or Social Exclusion, 2015-2022



Source: Eurostat

Despite the AROPE rate being lower than the EU27 average, it is important to note that the **Belgian AROPE rates both for adults and children were high throughout the evaluation period**, with a high of 22.2% in 2017²⁸⁸. The highest rate of AROPE children was reached in 2017 (23.7%), before decreasing to 19% in 2022²⁸⁹. The socio-economic indicators for Belgium did not show a gendered dimension, with 22.8% of women and 20.5% of men at risk of poverty or social exclusion in 2015. Belgium’s FEAD Operational Programme (OP) established two groups as particularly vulnerable to poverty: single parent families (33.2% AROPE in 2013) and unemployed individuals (34.1% AROPE in 2013).²⁹⁰ In 2022, those most at risk of poverty were those above the age of 75 (21.6%), unemployed people (48.3%), single-parent families (30.54%), those with low levels of education (26.2%), and renters (29.1%).²⁹¹

²⁸⁷ Eurostat.

²⁸⁸ Eurostat.

²⁸⁹ Eurostat.

²⁹⁰ Service Public de Programmation Intégration Sociale. (2013). “Programme opérationnel belge pour le Fonds européen d’aide aux plus démunis : aide alimentaire, aide matérielle et mesures d’accompagnement”

²⁹¹ [Privation matérielle et sociale \(EU-SILC\) | Statbel](#)

Table A. 38 – Percentage of population at risk of monetary poverty in Belgium in 2020 and 2022

Population	2020	2022
Belgium (whole)	14.1%	13.2%
Brussels Capital Region	27.8%	29.8%
Flanders Region	9.3%	7.7%
Wallonia Region	18.2%	17.8%
Men	13.8%	12.9%
Women	14.4%	13.5%
Low education level	26.8%	26.2%
High education level	5.9%	6.7%
Employees	3.5%	2.8%
Unemployed	50.0%	48.3%
Property owners	7.7%	7.6%
Renters	31.0%	29.1%
Single parents	29.3%	30.5%
Single person households	23.2%	20.7%
Households with children	14.4%	14.1%
Children under 18	15.6%	14.1%
Persons aged 75+	24.4%	23.1%

Source: Statbel.

Indicators show that **Belgium’s socio-economic situation improved over the evaluation period**, such as the AROPE rate, which decreased from 21.6% in 2015 to 18.7% in 2022. The Severe Material Deprivation rate (SMD) has been null (0%) since 2021, dropping from 5.9% in 2014. Furthermore, the COVID-19 pandemic showed no negative impact on socio-economic indicators, as the AROPE rate, the Severe Material and Social Deprivation (SMSD) and the SMD rate decreased from 2018 to 2021 (AROPE rate: 20.5% to 18.8%; SMSD rate: 6.5% to 6.3%; SMD rate: 5% to 0%)²⁹². Furthermore, with poverty, social exclusion, and material deprivation rates lowering over the evaluation period, employment rates in Belgium rose from 61.9% in 2014 to 66.5% in 2022.

A particularly vulnerable group were those in **situations of long-term unemployment**, as socio-economic indicators demonstrated their more unstable financial background. For instance, in 2022, 22.7% of unemployed individuals could not afford clothes reparations, in comparison with 7.2% of the general Belgian population²⁹³.

Food insecurity in Belgium was lower than the EU27 average, with 5.1% of the population unable to afford meat in 2015, compared to 9.7% of the EU27 population. Furthermore, **the share of people unable to afford meat decreased throughout the evaluation period and reached 4.1% in 2022**²⁹⁴. However, the number of

²⁹² Eurostat.

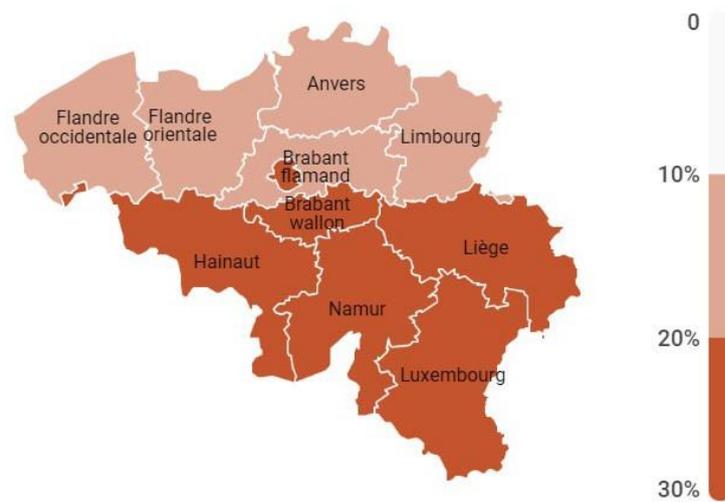
²⁹³ Eurostat.

²⁹⁴ Eurostat.

organisations and individuals benefitting from food aid programmes marked food insecurity as a high priority for Belgium in the FEAD OP. Indeed, while 224,000 individuals received food aid in 2010, this number rose to 237,000 individuals in 2013. Food insecurity in Belgium varied according to family situations and household arrangements, with single parent families the most likely to experience food insecurity (10.5% of single adults with children were unable to afford meat in 2013, compared to the 4.6% national average)²⁹⁵.

Regional socio-economic differences between the three Belgian regions (Brussels Capital Region, Flanders, and Wallonia) were high throughout the period, with the Brussels Capital Region showing the highest AROPE rates, followed by Wallonia and then Flanders. Brussels Capital's AROPE rate was 38% in 2022 and has been consistent since 2019; Wallonia's was 25.8%, and Flanders' was 11.2%. Regional inequality is also noticeable in the 2020 SMD rates, where the Brussels Capital Region saw 8.8% of its population experiencing SMD, Wallonia 6.8% of its population, and Flanders 1.5% of its population. Despite the high differences in socio-economic contexts between regions, both the Wallonia region²⁹⁶, the Flanders region²⁹⁷ and the Wallonia-Brussels Federation²⁹⁸ have developed an anti-poverty plan for the years 2020-2024.

Figure A. 64 – Regional Percentages of AROPE Population



Source: STATBEL.

²⁹⁵ Eurostat.

²⁹⁶ Wallonie (2019), *Plan Wallon de sortie de la pauvreté*
https://luttepauvrete.wallonie.be/sites/default/files/field/plan_wallon_de_sortie_de_la_pauvrete.pdf

²⁹⁷ Flanders Regions, (2019), *Vlaams Actieplan Armoedebestrijding 2020-2024*
https://www.vlaanderen.be/cjm/sites/default/files/2020-11/VAPA_2020_2024.pdf.

²⁹⁸ Wallonia-Brussels Federation (2021), *Plan de Lutte contre la Pauvreté et pour la Réduction des Inégalités Sociales 2020-2025*.
https://www.federation-wallonie-bruxelles.be/index.php?eID=tx_nawsecuredl&u=0&g=0&hash=be119816ce69c7a95649d970ba83353f4476d5f3&file=fileadmin/sites/portail/uploads/PDF/Plan%20Pauvrete%20FW-B%202020-2025%20-%20Version%20finale%20%2810.02.21%20%29.pdf.

Table A. 39 – Socio-economic context in Belgium

Belgium	2014	2015	2016	2017	2018	2019	2020	2021	2022	Trend
1. At-risk-of-poverty or social exclusion rate (AROPE) Total		21.6	22.2	22.0	20.5	20.0	20.3	18.8	18.7	
2. AROPE Children		23.6	23.2	23.7	23.0	23.0	21.8	20.4	19.0	
3. Severe material and social deprivation rate (SMSD)		7.2	8.4	7.2	6.5	6.3	6.7	6.3	5.8	
4. Severe material deprivation rate (SMD)	5.9	5.8	5.5	5.2	5.0	4.4	3.9	0.0	0.0	
5. Inability to afford a meal with meat, chicken, fish (or vegetarian equivalent) every second day	5.1	5.1	6.1	5.7	5.5	3.6	3.7	3.7	4.1	
6. Impact of social transfers (other than pensions) on poverty reduction % reduction of AROPE	43.6	44.2	41.5	40.0	35.2	41.7	44.9	53.3	48.8	
7. Housing cost overburden	10.4	9.4	9.8	9.4	8.9	8.4	7.8	7.5	7.7	
8. Self-reported unmet need for medical care % of population 16+	2.5	2.4	2.5	2.2	1.8	1.8	1.5	1.7	1.0	
9. Households with very low work intensity		15.0	15.2	14.5	13.1	12.8	12.3	11.9	11.5	
11. Population in the EU could not afford unexpected financial expenses	24.0	25.7	26.0	25.5	24.5	25.3	23.3	22.3	22.7	
13. Share of total population having neither a bath, nor a shower in their dwelling	0.7	0.7	0.5	0.5	0.4	0.3	0.4			
14. No indoor flushing	0.7	0.7	0.5	0.5	0.4	0.3	0.4			
17. Persons who cannot afford a telephone	0.1	0.2	0.1	0.1	0.2	0.1	0.2			
18. Persons who cannot afford to replace worn-out clothes	8.1	7.6	9.1	7.5	7.1	6.9	8.0	7.9	7.2	
20. Persons who cannot afford to get-together with friends or family (relatives) for a drink or meal at least once a month	11.5	10.6	11.7	11.1	9.7	9.9	10.2	8.5	8.2	
21. Persons who cannot afford internet connection for personal use at home	3.6	2.9	3.6	3.2	2.2	2.3	2.3	1.8	1.3	
22. In-work risk of poverty	3.9	3.7	3.7	4.2	4.7	4.1	3.2	2.8	2.7	
23. Long-term unemployment	3.9	4.0	3.7	3.1	2.6	2.1	2.1	2.6	2.3	
25. Employment rate	61.9	61.8	62.3	63.1	64.5	65.3	64.4	65.3	66.5	
26. Children (aged less than 18) living in households with very low work intensity		13.7	13.2	13.2	12.2	10.5	10.8	9.7	9.7	
27. At-risk-of-poverty rate for children		18.0	17.6	18.4	20.1	18.9	15.6	15.1	14.1	
28. Severe material and social deprivation rate (SMSD) for children		9.9	11.1	9.7	9.2	8.4	8.1	8.6	7.7	

Source: Eurostat

2. Reconstructing the intervention logic

In this section, we will reconstruct the FEAD intervention logic in Belgium, exploring the Fund's national objectives, target groups, actors, policy framework, development and delivery.

The intervention logic of FEAD in Belgium rests on the main objective of transmitting **non-material assistance to those in need through the means of nutritional assistance**. Of the two OPs, Belgium chose to administer and implement OP I, and deliver food aid to those most in need, without the provision of basic material support. Belgium made the decision to not use the 5% of FEAD budget allocated to the delivery of accompanying measures for end recipients. Instead, FEAD partner organisations (POs), such as the 'Centres Publics d'Aide Sociale' (CPAS) / 'Openbare Centra van Maatschappelijk Welzijn (OCMW)' [*public social welfare centres*] and NGOs organising food and material aid activities, delivered their usual social integration activities for the benefit of FEAD end recipients, such as cooking or nutritional advice, debt alleviation advice, or poverty awareness and sensibilisation activities. CPAS/OCMW, being the main provider of social services at the municipal level, also provide financial, housing, and medical support services, as well as psycho-social counselling and crisis management services.

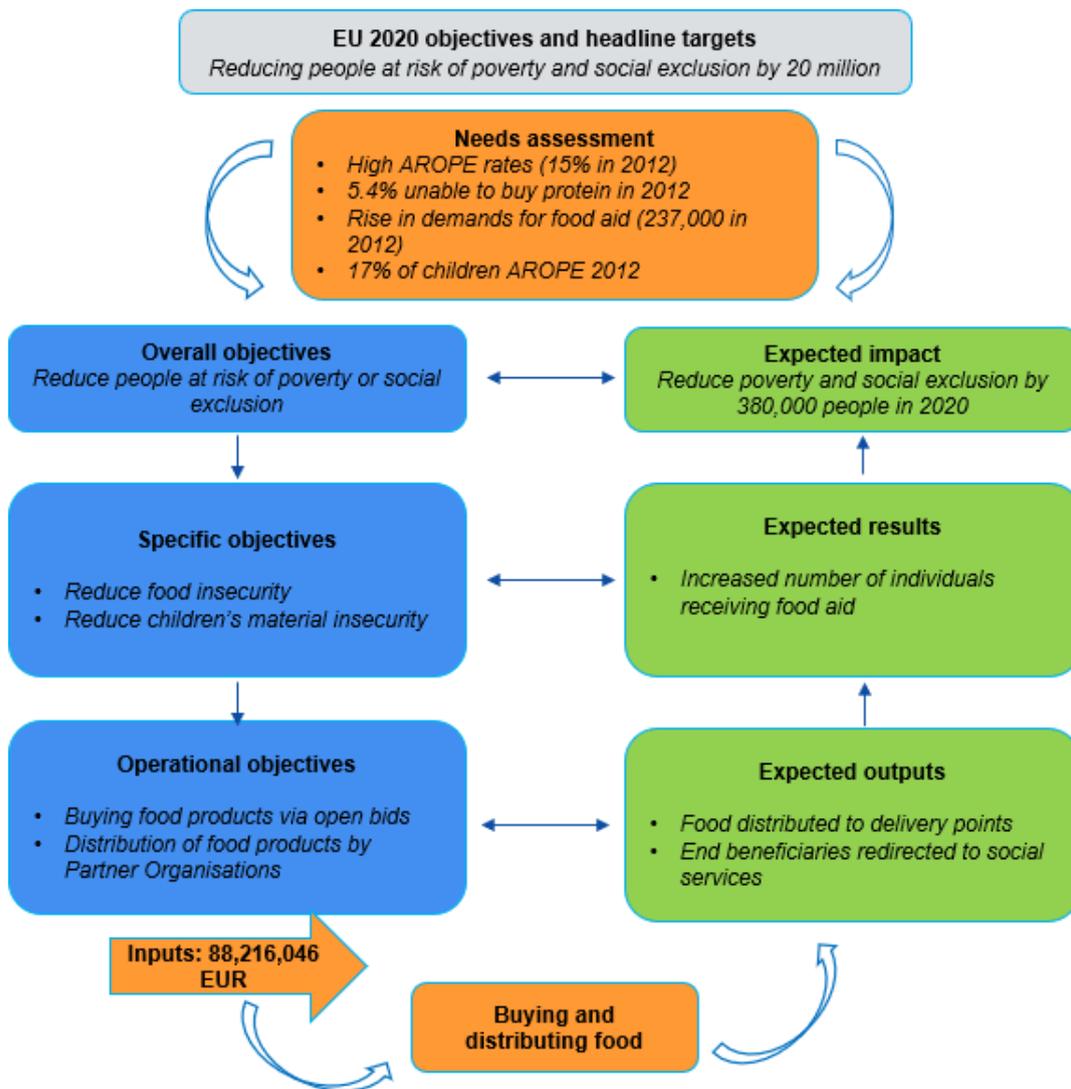
Belgium's OP defined the "most deprived" as those suffering from extreme poverty, those struggling to buy food, and children at risk of poverty or social exclusion (Belgium FEAD OP). With this logic, the target group for Belgium was set as all AROPE individuals, which equates to all individuals under the poverty line²⁹⁹.

²⁹⁹ [Informations générales | Chiffrespauvre.be](https://www.chiffrespauvre.be/)

This poverty line is defined in Belgium as all individuals with an income below 60% of the annual median national income, as set by STATBEL. In 2022, the poverty line was 1,366 EUR per month for a single person.³⁰⁰

FEAD products were distributed to all individuals who were given access³⁰¹ to food delivery organisations partnered with the MA. To access the food delivery organisations such as food banks in Belgium, individuals need to provide proof of their need for state help to CPAS/OCMW (including through financial statements)³⁰². Access to FEAD POs (local, regional, or national non-governmental organisations such as the Red Cross), was decided upon on a case-by-case basis and administered in several ways. Applicants could either apply to receive food aid from CPAS/OCMW and would then go through a process of financial checks from a social worker before being redirected to a FEAD PO, or applicants could apply directly to certain FEAD POs that oversaw their own end recipient lists.³⁰³

Figure A. 65 – FEAD Intervention Logic in Belgium



Source: adapted from FEAD mid-term evaluation.

³⁰⁰ <https://statbel.fgov.be/fr/themes/menages/pauvrete-et-conditions-de-vie/risque-de-pauvrete-ou-dexclusion-sociale#news>

³⁰¹ Based on income criteria as stated above

³⁰² [FBBA | J'ai besoin d'aide \(foodbanks.be\)](http://FBBA | J'ai besoin d'aide (foodbanks.be))

³⁰³ https://www.voeren.be/upload/pdf/2019-12-19_reglement-voedselpakket_FR.pdf

2.1. National policy framework

The implementation of FEAD was coherent with Belgian policies covering poverty alleviation, social integration, and food aid. Coherence with Belgian national anti-poverty policy is evident in the values and objectives of the Belgian FEAD MA, the “Service Public de Programmation Intégration Sociale (SPP IS)” / ‘Programmatorische Federale Overheidsdienst Maatschappelijke Integratie (POD MI)’ [*Public Planning Service for Social Integration*]. Belgium’s SPP/POD are federal services established to handle specific social issues which require coordination between several other federal services. The SPP IS/POD MI, therefore, acts as a coordinator for Belgium’s national and federal actions to combat poverty and social exclusion, and its main role is to support CPAS/OMCW³⁰⁴. On its website,³⁰⁵ the SPP IS/POD MI cites its objectives as: “upholding the right to social integration; tackling poverty in all its forms; acting for social cohesion; ensuring integration; and reimbursing the minimum income to the CPAS/OMCW”.

Several of the SPP IS/POD MI’s policies reflect the objectives of the FEAD OP, such as:

- The 2002 royal decree acting as a general ruling regarding the right to social integration, updated in 2017.³⁰⁶
- The 2020 ministerial decree granting a subsidy to CPAS/OMCW to support projects within the framework of the “Effectively and actively combating family poverty” call for projects.³⁰⁷

Other Belgian policies and state actions directly address social integration and poverty alleviation, both at the national and regional level. For instance, the Belgian government implements the “Revenu d’Intégration Sociale (RIS)” / ‘leefloon’ [*social integration income / living allowance*], which is a state-funded aid that can be received by individuals who either have no income, or whose income is less than the amount of the RIS / ‘leefloon’. As of 1 November 2023, the RIS / ‘leefloon’ is 1,263.17 EUR per month for a single person, and 842.12 EUR per month for a person within a shared household. The RIS / ‘leefloon’ acts as a last-resort state aid, as one of the conditions for receiving it is to have “done everything to receive other incomes within your rights, such as unemployment benefits, healthcare, handicap, or food aid”.³⁰⁸ Just as they oversee the delivery of food aid, CPAS/OMCW administer the RIS / ‘leefloon’.

Belgium established a **national plan to fight poverty** during the evaluation period, overseen by the SPP IS/POD MI. Covering the years 2016 to 2019, the Third Federal Plan to Fight Against Poverty quoted the definition of poverty provided by the EU’s 2015 “Joint Report on Social Inclusion”, which defined people living in poverty as those whose “income is so inadequate as to preclude them from having a standard of living considered acceptable in the society in which they live”.³⁰⁹ It also established six objectives in the national fight against poverty, as well as the monitoring methods used to ensure the success of the Plan. The six federal objectives were:

1. Social protection (including increasing the lowest net salaries, increasing the minimum income, combining benefits and work income, access to energy and water, automatic granting of rights, protection of independents, facilitating digital integration, and combatting debt overload);
2. Fighting child poverty;
3. Ensuring social and professional activity;
4. Fighting homelessness;
5. Accessible and quality healthcare;
6. Accessible public services.

Along with the federal bodies created to fight poverty, national plans to fight poverty in Belgium, and other social integration policies, the regions of Wallonia and Flanders established regional-level plans to fight poverty. The Wallonia region, through the Wallonian Service for the Fight against Poverty, centred their plan

³⁰⁴ ‘Centres Publics d’Aide Sociale’ (CPAS) / ‘Openbare Centra van Maatschappelijk Welzijn (OCMW)’

³⁰⁵ <https://www.mi-is.be/en>

³⁰⁶ <https://www.mi-is.be/fr/reglementations/arrete-royal-portant-reglement-general-en-matiere-de-droit-lintegration-sociale-du>

³⁰⁷ <https://www.mi-is.be/fr/reglementations/arrete-ministeriel-portant-octroi-dune-subvention-aux-cpas-en-vue-de-soutenir-des-2>

³⁰⁸ <https://cpasevere.brussels/aides/revenus-allocations/#:~:text=Les%20montants%20du%20RIS,sa%20charge%3A%201.707%2C11%20euros>

³⁰⁹ Service Public de Programmation Intégration Sociale. (2016). Troisième Plan Fédéral de Lutte Contre la Pauvreté.

against poverty on 11 thematic axes: housing, nutrition, energy, water, health, family policy, mobility, entertainment, digital, access to social rights, and partnership. In the thematic axis related to nutrition, the Wallonian Plan pledged to create social groceries and develop social food-buying platforms and policy related to unsold food items. Meanwhile, the Flanders poverty-reduction plan for 2015-2019³¹⁰ set out 17 objectives for poverty reduction, spread over 3 goals: Preventing individuals from falling into a situation of poverty and/or social exclusion; Effectively fighting poverty; and Supporting policy and “integrated governance”. Through its objectives, the plan focused on improving the image of those experiencing poverty and social exclusion, increasing the capacity of local services and administration, evaluating current anti-poverty policies, increasing cooperation amongst Flemish government bodies, and assisting families with children and young people. The plan mentioned access to quality and healthy food as a basic necessity and to combat infantile food insecurity, the Flemish government promised the rollout of 1 EUR meals and the redistribution of food to the most vulnerable. Finally, the Brussels Capital Region implemented an action plan for the fight against poverty for the 2014-2019 period³¹¹, with 5 key axes: 1. Reinforce the fight against poverty and social exclusion through specific actions; 2. Reinforce services for those in-need; 3. Reduce inequality and prevent social division; 4. Aim for professional and social integration and insertion; 5. Coordinate social actions and reinforce the participation of those in a situation of poverty. Within the first axe, the Brussels plan highlights the need for improved food aid services, with recommendations on reinforcing collaboration between actors in the food aid sector and diversifying the offer of food aid.

2.2. Objectives and target groups

According to Belgium’s OP, FEAD’s main objective was **to reduce the number of AROPE individuals in Belgium by 380,000 by 2020**.³¹² This objective follows from the EU’s overall objective of reducing the number of people experiencing poverty by 20 million by 2020.

To address the objective of reducing the number of people experiencing poverty in Belgium by the end of the programming period, Belgium opted for FEAD’s OPI, which focused on the procurement and distribution of food to the most deprived. Additionally, the Belgian FEAD implementation aimed to target horizontal principles, such as reducing food waste.

The first step in the implementation of the FEAD OP was the identification of end recipients. **Belgium granted access to FEAD products to individuals who had access to food banks, equivalent to all individuals deemed of being at risk of poverty or social exclusion.** Through interviews with the Belgian Red Cross, it was understood that an objective way to appoint FEAD end recipients, and therefore the main target group, was to target all those under the line of poverty (60% of the national median income; 15,403 EUR per year in 2021).³¹³ **POs were tasked with assessing whether potential end recipients fit this criterion**, before administering access to food banks and FEAD products. While the target group of “all those affected by or at risk of poverty and social exclusion” remained large, certain groups were specifically addressed by outreach activities, such as the homeless, single parents, or children. The definition of the target group did not change throughout the implementation period, but the poverty line criterion did evolve according to the yearly national median income, affecting the number of Belgian residents considered to be at risk of poverty or social exclusion.

Based on the poverty line criterion, POs and CPAS/OMCW were responsible for verifying that end recipients met the requirements to benefit from access to food banks and FEAD products. Three types of verification mechanisms existed, all relying on cooperation between the CPAS/OMCW and each individual PO.³¹⁴ Either:

- End recipients of a PO were granted an individual access slip by the CPAS/OMCW (one per household).
- The PO’s end recipient list was approved by the CPAS/OMCW.
- The CPAS/OMCW and PO agreed that the PO could itself assess whether an end recipient met the eligibility criterion.

³¹⁰ Vlaams Actieplan Armoedebestrijding 2015-2019 (2015).

³¹¹ Programme d’Actions Bruxellois de Lutte contre la Pauvreté 2014-2019 (2018).

³¹² Food and/or Basic Material Assistance Operational Programme (2013).

³¹³ Interview with a representative of the Belgian Red Cross, in Belgium, conducted in August 2023.

³¹⁴ Interview with a representative of the Belgian Red Cross, in Belgium, conducted in August 2023.

2.3. Implemented operations and accompanying measures

The main objective of the FEAD programme in Belgium was the reduction of poverty through the distribution of food aid, and the FEAD OP established three operations to achieve this: 1. The buying of food and other articles through public procurement and providing them to POs; 2. The delivery of food and other items by POs; 3. Technical assistance.

According to the 2017 Annual Report,³¹⁵ **the first operation** – buying food items and other articles via public procurement and distribution to POs – first involved a yearly call for bids for suppliers of FEAD products. In 2017, these products were a mixture of dairy products, protein, ready-cooked meals, gluten-rich products, fruits and vegetables, and oils. The choice of products was made after discussions between FEAD actors, and with the advice of public health and nutrition experts. Additionally, the main FEAD POs met every four months with the MA to discuss the relevance of current FEAD products. Exceptionally, in 2015 and 2018, material aid was provided through the administration of hygiene kits and wet wipes.³¹⁶ Once bids were received, the MA selected contractors responsible for providing the yearly FEAD products, based on the most competitive prices per product. In 2017, these were four French contractors. Once the FEAD products were received by the SPP IS/POD MI, they would then be distributed to the CPAS/OMCW and FEAD POs. However, in 2022, the distribution method changed so that CPAS/OMCW and POs would collect their products from four centralised warehouses/delivery centres themselves.

The **second operation** was the distribution of food and other items by POs. In Belgium, selected POs were free to determine themselves how FEAD products should be distributed. The 2017 Annual Report³¹⁷ states that most Belgian POs distributed FEAD products through frequent food parcels (more than once per month) (52% of POs chose this method in 2017). If distributing in this manner, the quantity of food in each food parcel, or “pack”, depended on the size of each end recipient’s household. Alternatively, POs could also use a “self-service” distribution method, where end recipients could themselves choose which FEAD products they would like to receive (34% of POs in 2017). 11% of POs in 2017 opted for a blended method, wherein end recipients could edit the content of their food parcel according to food taste, allergies, or religious diets. Finally, 3% of FEAD POs in 2017 distributed FEAD products in the form of hot meals. The 2017 Report stated that one out of three POs distributed only FEAD products.

The budget allocated to technical assistance, covered the costs of civil servants overseeing FEAD implementation, monitoring and controls, translations, digital FEAD systems, and any travels of FEAD public servants across the country.

Aside from the acquisition and distribution of food aid, 5% of FEAD budget was designated by the EU to finance accompanying measures. In Belgium, these accompanying measures were not implemented by the MA through FEAD funding, instead dedicating the total amount of the FEAD budget to nutritional and material aid. However, the SPP IS/POD MI did instruct its actors to steer end recipients towards CPAS/OMCW, where they could benefit from the services usually provided. These proposed activities varied according to region and budget but included financial help, medical help, short-term housing aid, debt management, poverty-sensibilisation activities, cooking classes, or nutritional advice. An example of sensibilisation activities includes the “*Maman Zéro gaspi!*” (“Zero-waste mum!”) programme of the Berchem-Sainte-Agathe CPAS/OMCW, in collaboration with Nurtantio Projects, where end recipients could receive information, group classes and seminars on zero-waste cooking.³¹⁸

2.4. FEAD governance and delivery system

The budget for the FEAD programme in Belgium was **88.2 million EUR over the entire programming period**, rounding up to roughly 12 million EUR per year. Of the 88 million EUR budget, 73.8 million EUR came from FEAD, and 14.4 million EUR came from national funding. The budget allocation was as follows: 84.5 million EUR was allocated to the implementation of OPI, and 3.7 million EUR was allocated to technical

³¹⁵ SPP Intégration Sociale. (2017). *Programme opérationnel belge pour le Fonds européen d'aide aux plus démunis: aide alimentaire, aide matérielle et mesures d'accompagnement 2014-2020 – Rapport Annuel 2017*.

³¹⁶ SPP Intégration Sociale (2018). *Programme opérationnel belge pour le Fonds européen d'aide aux plus démunis: aide alimentaire, aide matérielle et mesures d'accompagnement 2014-2020 – Rapport Annuel 2018*.

³¹⁷ SPP Intégration Sociale. (2017). *Programme opérationnel belge pour le Fonds européen d'aide aux plus démunis: aide alimentaire, aide matérielle et mesures d'accompagnement 2014-2020 – Rapport Annuel 2017*.

³¹⁸ <https://www.justkeepit.be/MamanZeroGaspi.html>

assistance. Furthermore, Belgium received additional means in 2021 and 2022 through the allocation of REACT-EU funding (31.8 million EUR in 2021, 14.3 million EUR in 2022), which helped fund FEAD operations for 2022 and 2023, respectively. With this budget, the FEAD programme distributed more than 38 million tonnes of food, and a total of 3,143,646 end recipients were reached between 2014 and 2022.

The **FEAD MA in Belgium did not opt for the use of vouchers to simplify operations**. This decision was made in order for the MA to buy products directly from suppliers, through an open bid system, which would allow for FEAD products to be considerably cheaper than if end recipients were buying products at supermarket prices with the use of vouchers.

The FEAD programme in Belgium was overseen by two separate bodies: the MA and the Audit Authority (AA). The MA, SPP IS/POD MI, was responsible for overseeing and implementing the FEAD programme, as well as receiving and allocating the Commission's funding. This involved: determining the FEAD POs; buying FEAD products through open bids; agreeing on the methods used by CPAS/OMCW and POs to identify end recipients; defining the criteria for end recipients to receive FEAD support; monitoring and evaluating FEAD implementation. The MA also controlled the quality of FEAD products, so that they were in line with the 2005 Royal decree related to the hygiene of food aid, and organised checks and controls of FEAD product deliveries. The AA for the FEAD programme was the Inter-Federal Corps of the Inspectorate of Finance.

There were **765 partner organisations distributing FEAD products at the national, regional, or local level** across Belgium during the evaluation period. To be selected as a PO for the FEAD programme, organisations needed to have a status as a public organisation or a non-profit, promote social activities such as the distribution of food or material aid, and be recognised as a competent charitable organisation.³¹⁹ POs were tasked with: distributing FEAD products to end recipients in the manner they seemed fit; expressing the need for products to the MA; ordering FEAD products; delivering accompanying activities; and agreeing on a list of end recipients. The POs included:

- CPAS/OMCW: Their roles were: agreeing to end recipients receiving FEAD support and/or granting access to FEAD support for end recipients; ordering FEAD products; offering existing social integration activities to FEAD end recipients.
- The Federation of Food Banks: The Federation operated nine regional foodbanks and was involved with earlier European food aid programmes before FEAD. They owned the largest depot of FEAD products, with 85% of FEAD products being stored through the Federation.
- The Belgian Network for the Fight against Poverty (BAPN): The BAPN was invited to write the OP along with the Federation of Food Banks, the CPAS/OMCW and the Belgian Red Cross.
- Not-for-profits: The Belgian Red Cross, Alimen't, Food savers Antwerpen, etc.
- Several city or municipal associations.

3. Key findings on the implementation of FEAD

In the following section, we will lay out key findings on the implementation of FEAD operations in Belgium between the years 2014-2022. To do so, we will examine the implementation of FEAD in Belgium along the five criteria for EU evaluations: effectiveness, efficiency, coherence, EU added value and visibility. This will create a strong basis to inform lessons learned and add to the overall evaluation of the programme.

Through desk research and interviews with key stakeholders in the Belgian FEAD MA and POs, it is evident that:

- FEAD was **effective** in reaching its target group and those most in need of nutritional aid. However, there is limited evidence to support the idea that the nutritional aid provided by FEAD implementation reduced the rate of poverty in Belgium or had a poverty-alleviating effect on the end recipients.
- The implementation of FEAD in Belgium was very **cost-effective** and underwent a series of simplification measures to improve the efficiency of operations, such as the digitalisation of the ordering procedures, and the centralisation of the delivery system.

³¹⁹ Food and/or Basic Material Assistance Operational Programme (2013).

- FEAD food buying and distribution was **relevant** to end recipients, which is evident in feedback from end-user surveys across the evaluation period, as the FEAD MA in Belgium paid specific attention to the quality and usefulness of FEAD products.
- The **EU added value** in Belgium was seen in the upscaling of existing food aid operations and providing a new food aid basis for many non-profit organisations.
- FEAD operations were very **coherent** with national and European policies on poverty alleviation.

3.1. To what extent was FEAD support successful or not – and why?

Overall achievement of FEAD objectives [*criterion: effectiveness*]

The EU's overall objectives for the FEAD programme were to promote social inclusion, advance towards the eradication of poverty in the EU, alleviate the worst forms of poverty, and provide non-financial assistance to the most deprived through food aid and social inclusion activities. Specifically, the EU aimed to reduce the number of people experiencing poverty by 20 million by 2020. To work towards this goal, Belgium set out to reduce the number of people experiencing or at risk of poverty and social exclusion by 380,000 by 2020.

FEAD operations managed to reach 3.1 million end recipients between 2014-2022, and while 225,549 end recipients were reached in 2014, this number rose to 449,372 end recipients in 2022. This represents an increase of 99,2%, indicating that the number of end recipients nearly doubled from the start to the end of the programme. This figure demonstrates the increasing importance of FEAD operations in Belgium over the evaluation period.

Interviews with the Managing Authority, Audit Authority, and partner organisation staff demonstrated a positive view of FEAD support among FEAD actors in Belgium, as interviewees expressed appreciation of the programme, and a concern that the effectiveness of the programme may diminish when merged into the ESF+.³²⁰

According to the FEAD evaluation,³²¹ however, **end recipients and stakeholders were reportedly uncertain of the effectiveness of FEAD operations in reducing the effects of poverty** on the lives of end recipients, as the distribution and buying of food were not seen as the most effective activities to reduce the number of people affected by poverty. In the evaluation, focus group participants expressed uncertainty that FEAD food aid, while helpful and necessary for end recipients, would change their socio-economic standing. However, through interviews, it is known that FEAD did allow end recipients to free up budget for expenses such as rent and healthcare, which alleviated some other effects of poverty, and redirected end recipients towards CPAS/OMCW, which could provide ways for them to structurally exit situations of poverty.³²²

FEAD activities were also **effective in their ability to increase the social inclusion of end recipients**, who found being able to meet other end recipients through the activities proposed by CPAS/OMCW and the POs very positive. The FEAD programme also allowed end recipients to be redirected to CPAS/OMCW and introduced to non-profit organisations that performed additional activities, other than food aid.

³²⁰ Interview with a representative of SPP Intégration Sociale, conducted in August 2023.

³²¹ SPP Intégration Sociale. (2022). *Rapport Enquête Structurée du FEAD 2022 : Résultats Agrégés de l'Etat Membre Belgique*

³²² Interview with a representative of SPP Intégration Sociale, conducted in August 2023

Table A. 40 – FEAD end recipients in Belgium, 2014-2022

Indicator	2014	2015	2016	2017	2018	2019	2020	2021	2022	2014-2022
Total number of persons receiving food support	225,549	273,121	300,526	311,205	393,824	358,726	381,951	449,372	449,372	3,143,646
Number of children aged 15 years or below	61,168	70,143	75,824	88,141	132,867	116,993	114,482	131,496	131,496	922,610
Number of persons aged 65 years or above	14,892	19,241	15,782	21,980	36,368	30,191	29,395	40,139	40,139	248,127
Number of women	69,589	89,980	87,331	98,913	168,206	138,073	138,855	177,334	177,334	1,145,615
Number of migrants, participants with a foreign background, minorities (including marginalised communities such as the Roma)	87,018	99,111	93,466	102,269	118,448	105,821	106,155	130,104	130,104	972,496
Number of persons with disabilities	5,013	5,858	10,611	9,788	12,658	12,620	10,639	14,575	14,575	96,337
Number of homeless	21,349	11,021	10,378	20,414	19,929	19,800	16,009	20,566	20,566	160,032

Source: SFC 2014 database.

The FEAD target group in Belgium was defined as all **individuals experiencing or at risk of poverty and social exclusion**. This was roughly equivalent to individuals below the poverty line, and/or individuals receiving the RIS. As discussed previously, this large target allowed for a great number of end recipients to be reached (3,143,646 in total). The evolution of the definition of the target group linked to the annual poverty line also allowed for a greater number of end recipients to be reached each year, with a 99.2% increase in end recipients between 2014 and 2022. Within this large group of end recipients, 922,610 were children under the age of 15, while 248,127 were seniors over the age of 65. 1,145,615 were female, 972,496 were migrants and/or minorities, 96,337 were persons with disabilities, and 160,032 were homeless people. According to Table A. 40 **Table A. 40 – FEAD end recipients in Belgium, 2014-2022**, the number of FEAD end recipients for all categories mentioned above increased throughout the evaluation period.

Certain implementation decisions for FEAD in Belgium **increased the outreach to potential end recipients**. First, by selecting POs at national, regional, and community level that had experience in delivering social activities and were well-known by potential end recipients – such as the CPAS/OMCW or the Belgian Red Cross – end recipients were more likely to be made aware of FEAD support. Second, the objective and wide-reaching criterion for FEAD support enabled many potential end recipients to be reached. Furthermore, as the definition of the target group relied on the criterion of the poverty line, it evolved yearly. In interviews, the MA expressed that this flexibility in the definition allowed, for example, Ukrainians fleeing Russian military aggression arriving to Belgium to be eligible as end recipients of FEAD, as they were considered as below the national poverty line.³²³ This objective criterion allowed for specific socio-economic groups, such as single parent households, women, multiple-breadwinner households, refugees, and children, to be FEAD recipients.

FEAD end recipients received FEAD products either by approaching CPAS/OMCW, or by approaching POs directly. The OP did not account for outreach activities or advertising about FEAD activities to potential end recipients. As such, the FEAD programme was effectively able to reach individuals receiving state aid through CPAS/OMCW, as they were instructed with directing CPAS/OMCW visitors to the various POs delivering FEAD products. However, **individuals that were undocumented (and who could therefore not prove their financial situation), or individuals that did not visit either CPAS/OMCW or POs, could not benefit from FEAD support**. Groups particularly at risk and that were less likely to visit CPAS/OMCW and POs – due in part to fear of judgement or language barriers – were homeless people, migrants, or minorities.

Another barrier to receiving FEAD support, other than a lack of knowledge of the programme or an inability to access a CPAS/OMCW, was the **administrative burden of the selection process and the eligibility criteria**. Indeed, needing to provide documentation of one's financial situation to receive FEAD aid was seen as potentially stigmatising, and difficult for individuals who did not understand the eligibility process or who faced language barriers. According to the national evaluations, individuals who did not have the appropriate paperwork to prove their financial situation were excluded from receiving FEAD aid.

Finally, interviewees expressed that the **'objective' criterion of the poverty line excluded certain vulnerable groups from receiving FEAD support**, despite their need for food aid. These groups include

³²³ Interview with a representative of SPP Intégration Sociale, conducted in August 2023.

students or low-income households, whose revenue is slightly higher than the poverty line but who might still require social inclusion and nutritional aid.³²⁴

Adjustments to FEAD to address new challenges [*criterion: effectiveness*]

Following the various challenges during the evaluation period, notably the Russia's war of aggression against Ukraine, the COVID-19 pandemic, and the energy crisis, **FEAD operations in Belgium were adapted to mitigate the effects of these crises**. Such changes included the additional budget allocated to FEAD activities from REACT-EU funds. Belgium received 46.1 million EUR of REACT-EU funding and made use of 100% co-financing under CRII/CRII+. Both funds allowed for a continuation of FEAD activities.

Through the additional financial resources of REACT-EU and CRII+, the FEAD MA redistributed its FEAD budget for the seven years of the evaluation period: The REACT-EU and CRII+ funding would be used for the last two years of the fund, and the original budget allocated towards FEAD would be condensed into a five-year period. This, in turn, created an increase in buying budget for the MA, enabling the acquisition of larger quantities of food from their subcontractors.

Other changes to adapt to the COVID-19 pandemic include **the provision of material aid in the form of facemasks and hand sanitiser gel** by the SPP IS/POD MI. POs such as the Belgian Red Cross also adapted the distribution of FEAD products, by allocating pick-up appointments for end recipients, or even by **delivering FEAD products to end recipients' homes**.

While REACT-EU and CRII+ allowed for a simplification, flexibilization, and prolongation of the FEAD programme, **interviewees expressed discontent with their limited ability to counter the effect of inflation and the rising price of energy**.³²⁵ Rising prices in Belgium were quoted as having a negative effect on the number of products the SPP IS/POD MI could buy with FEAD funding each year. To counter these conditions, the FEAD programme in Belgium greatly benefitted from additional budget provided by the state. According to the National FEAD evaluation,³²⁶ the Belgian government provided an additional 743,156 EUR for the continuation of FEAD activities in 2021 to address rising prices.

Horizontal principles of FEAD [*criterion: effectiveness*]

Throughout the implementation of FEAD, **Belgian MAs, POs, and food banks were able to respect certain, but not all, horizontal principles**. Attention was paid to the respect of the dignity of end recipients: the application process to receive FEAD products changed so that potential end recipients were guaranteed discretion and confidentiality when applying to CPAS/OMCW. In turn, MAs hoped that this would stop deterring potential end recipients from asking for food assistance due to stigmatisation. The possibility for end recipients to choose their products also diminished potential power imbalances between providers and receivers of help, as it brought end recipients closer to the position of customer. Specific attention was brought to the nutritional value of FEAD products, with MAs asking advice from nutritional experts and members of the Health Ministry on which products to provide under the buying scheme. The MA collaborated with experts to create yearly lists of products which were considered sustainable, fair trade, durable, and had good nutritional value.

While the **prevention of discrimination and the respect of equality are values of the organisations funded by the FEAD, no new activities were implemented to increase compliance with these horizontal principles**. Furthermore, while efforts were made to reduce food waste through initiatives such as a soup made from discarded food, these activities were cancelled due to logistical issues. The delivery of food products could also have paid more attention to food waste, as FEAD products were often distributed in quantities above those required by each end recipient, leading to waste. Through interviews, POs also said that the call for bids system established by the MA required the acquisition of new products, which is more wasteful than other food aid systems such as those based on food donations.³²⁷

Success and failure factors [*criterion: effectiveness*]

The effectiveness of the programme delivery was ensured by certain implementation decisions made by SPP IS/POD MI throughout the evaluation period. These were as follows:

- The MA selected FEAD **POs that had experience with charity work** and in social activities such as food aid. This ensured that the selected POs' values aligned with the horizontal principles of respect for the

³²⁴ Interview with a representative of the Interfederal Corps of the Inspectorate of Finances, conducted in August 2023

³²⁵ Interview with a representative of the Interfederal Corps of the Inspectorate of Finances, conducted in August 2023.

³²⁶ SPP Intégration Sociale. (2021). *Résumé du Rapport Annuel 2021 du FEAD*

³²⁷ Interview with a representative of the Belgian Red Cross, conducted in August 2023.

end recipients, and they were able to provide accompanying measures (outside the scope of FEAD funding).

- **Communication between the MA, FEAD POs, nutritional and health experts, and the Ministry of Health** ensured that the FEAD products provided to end recipients were of a good nutritional quality and answered to the needs of end recipients. The list of products increased from 14 in 2014 to 20 in 2019 and shows the continuous effort in providing end recipients with quality and helpful products. Other examples of appropriate and helpful products include the hygiene products of 2015 and 2018.

- **The allocation of FEAD budget solely towards the buying and distribution of food** increased the effectiveness of the programme by increasing the MA's budget for buying products. In turn, a greater amount of food bought by the MA allowed for the increasing number of end recipients throughout the programme to be adequately supported. Additionally, the decision to procure FEAD products directly from producers, and not through supermarkets (as would be the case if the use of vouchers was implemented) allowed for advantageous prices on FEAD products.

- **The broad eligibility criterion for receiving FEAD support** contributed to the effectiveness of the programme by allowing for many individuals to receive FEAD products.

On the other hand, several implementation decisions could be seen as negatively affecting the FEAD programme's effectiveness in Belgium:

- **The distribution of food products** was done in large quantities, and before changes to the distribution system, POs were expected to hold orders in their own storage facilities, which were not always equipped to store the deliveries efficiently. End recipients could receive the same one product twice in a row and the quantities were larger than necessary for each household. Furthermore, as food products were delivered in large quantities, some end recipients expressed issues transporting their FEAD food products from the delivery points to their individual homes.

- The national FEAD evaluation reported that there were **inefficiencies in the ordering system** that created issues with distribution.³²⁸ These included orders with missing products, or orders including expired products.

Overall cost-effectiveness of FEAD operations [*criterion: efficiency*]

FEAD operations in Belgium were cost effective, and conscious efforts were made throughout the evaluation period to reduce the costs of programme implementation. Several actions from both the MA and the POs throughout the programme, whether during the buying or distribution of food, ensured that the costs of implementation were kept as low as possible.

Most of the MA's implementation decisions were made to free up the FEAD budget for the buying of food, with the aim of distributing, as much as possible, large amounts of food to many end recipients, at low prices. To accomplish this goal, the **MA increased the food-buying budget by redirecting the 5% of FEAD budget allocated by the European Commission to implementing accompanying measures to the acquisition of food**. The capacity to buy greater amounts of food products was also guaranteed with the open bid system to select food providers, as producers were chosen based on the lowest price. The open bid system and the MA's role in the buying of products also allowed for economies of scale to reduce the price per item of FEAD products. Finally, low prices were guaranteed by the choice not to implement the voucher system in Belgium. Indeed, throughout interviews, members of the MA explained that this decision was taken to ensure that end recipients did not have to pay the "20% mark-up price"³²⁹ charged by supermarkets on food products but could instead benefit directly from the products bought at low prices by the MA.

The **cooperation between the MAs and the POs ensured a cost-effective implementation** of the FEAD programme. Through this cooperation, the MA changed its distribution method to reduce the transport costs associated with FEAD product delivery. Prior to 2022, the MA would receive products from its distributors and would deliver these products to each PO. This system was changed so that the distributors delivered FEAD products to four centralised delivery centres throughout the country, from which each PO could collect their individual orders. Lower transport prices were equally helped by the relatively small size of the country.

Actions taken by POs also ensured cost-effectiveness. By partnering with CPAS/OMCW and other well-known organisations such as the Red Cross and the Federation of Food Banks, the **MA reduced the need for outreach activities to end recipients**, as potential end recipients were redirected from these known

³²⁸ SPP Intégration Sociale. (2022). *Rapport Enquête Structurée du FEAD 2022 : Résultats Agrégés de l'Etat Membre Belgique*.

³²⁹ Interview with a representative of the Federation of Food Banks, conducted in August 2023.

organisations to the FEAD programme. The POs were also selected based on their capacity to implement charitable or social enterprise activities. In so doing, most POs already had the infrastructure and staff on hand to deliver FEAD products. Throughout interviews with members of the Belgian Red Cross,³³⁰ it was found that most PO workers were volunteers, which considerably reduced the price of FEAD distribution. However, interviewees also remarked that volunteers were more likely to need additional training, or tended to be individuals who, due to age or language restraints, were unfamiliar with digital monitoring and stocking systems.

Administrative burden of monitoring and reporting requirements [*criterion: efficiency*]

Administrative requirements for FEAD monitoring and reporting were more or less burdensome for organisations depending on their role in the FEAD implementation process, their size, and their previous knowledge of EU funds.

While the Belgian national evaluation of FEAD (2019)³³¹ found that **no gold-plating took place** in Belgium, Managing Authority (MA) and partner organisations (POs) expressed during interviews that the **eligibility rules, monitoring, auditing, and evaluation requirements were burdensome for their organisation and/or end recipients**. The time allocated towards FEAD administration represents roughly one month a year for those in charge of FEAD activities, both in the MA and in the POs.

Interviewees from the MA, Audit Authority, and POs expressed discontent with the inconsistency of FEAD requirements across the year, as periods closer to national evaluations or reports represented a heavy time-burden. Interviewees also expressed **dissatisfaction with the lack of additional resources allocated towards administrative or technical assistance**. However, while the administrative requirements for FEAD may have been burdensome, interviewees regularly repeated understanding for the necessity of such requirements, as they were seen as vital for ensuring the quality of the programme.

The Belgian FEAD OP describes the monitoring and evaluation responsibilities as such: POs were tasked with collecting and sharing information on FEAD end recipients with the MA. Data requested from POs included the quantities and types of food distributed, the number of end recipients, their age, and their gender. This information was then compiled and updated yearly by the MA, in the form of reports. A digital system was used throughout the programme, which contained information on deliveries, orders, ongoing operations, beneficiaries, and allocated funding per beneficiaries, accessible by the MA and updated by POs.

Throughout interviews with individuals working for Belgium's FEAD POs, it was found that the collection of data on end recipients for yearly reports represented a burden for volunteers and workers from POs. Indeed, individuals distributing food aid in POs were mostly volunteers, who might not have skills or knowledge in data collection and information handling. The MA reported that, in the first years of the programme, additional help was required from the MA to train PO workers in the distribution of surveys and the collection of personal data on end recipients. Furthermore, the data received by POs and non-profits distributing food aid needed to be cleaned and verified once received by the MA, which represented additional time and labour for the MA. To increase the quality of the data collected by beneficiaries and POs, they were later required to submit data on end recipients to receive FEAD aid.

FEAD operations did represent an **administrative burden for end recipients, who struggled with the verification process to access food banks and FEAD products**. Indeed, end recipients were asked to prove their financial status and were assessed as "in need" by a member either of a CPAS/OMCW or a PO, which proved difficult for individuals with language difficulties or who did not keep records of their incomes and expenses. Interviewees stressed that the administrative burden and the inquiry into end recipients' finances may deter some from applying for FEAD aid. The national evaluation also reported that despite efforts to mitigate this problem, all end recipients describe the process of accessing the food aid as particularly stigmatising, embarrassing, and disrespectful.³³²

Simplification measures [*criterion: efficiency*]

In Belgium, **several initiatives were made to simplify the buying and distribution of food**, which improved the cost-effectiveness of FEAD operations.

First, there have been **continuous efforts to digitalise the FEAD programme**, across various steps of the programme's implementation. A digital ordering system was introduced, so that POs could order FEAD

³³⁰ Interview with a representative of the Belgian Red Cross, conducted in August 2023.

³³¹ SPP Intégration Sociale. (2019). *Evaluation de la politique d'achat et de la distribution des denrées alimentaires en vertu du Programme opérationnel belge 2014-2020 dans le cadre du FEAD*

³³² Herman Deleeck Centre for Social Policy and Service Public de Programmation Intégration Sociale. (2019). *Evaluation de la politique d'achat et de la distribution des denrées alimentaires en vertu du Programme opérationnel belge 2014-2020 dans le cadre du FEAD*.

products in a simplified manner. These digitalisation measures were well appreciated throughout all interviews and were seen as necessary for the continuous effective implementation of the programme. Digitalisation measures included the use of a digital platform for ordering of food products by POs, and the introduction of two apps, “e-Tendering” and FOOD-IT.

Second, after several years of the programme being implemented, the **MA introduced a centralisation of delivery centres**. During the first years of the programme, suppliers of food products would deliver products to the MA, who would then deliver to each PO. From 2022, POs would instead collect FEAD products from four delivery centres across the country, greatly reducing the MA’s transport costs. While this newer system may have benefitted the MA, it is noted in the 2019 national FEAD evaluation³³³ that POs expressed discontent with the idea, as collecting food products from centres would increase their own transport costs.

Coherence of FEAD with other interventions [*criterion: coherence*]

As mentioned in Section 1, **FEAD operations were coherent with Belgian policies for the alleviation of poverty and social exclusion**. Prior to and throughout the implementation period, several measures and policies implemented in Belgium demonstrated the importance of poverty alleviation as a priority in the Belgium government, at national and regional level. Such policies include the national and regional plans to address poverty and social exclusion. The coherence of the programme with national initiatives is also evident in the role of the Belgian state as a financial help for the programme. Indeed, the government set out, during the elaboration of the FEAD programme budget, to provide 14.4 million euros for the programme. This sum increased throughout the programme, to address challenges such as rising inflation and the COVID-19 pandemic.

FEAD was also coherent, more specifically, with the overall food aid delivery system in Belgium. Indeed, throughout the implementation period, FEAD-funded food aid operations and food products were seen as the “basis” of food aid in Belgium, to then be complemented by other forms such as un-sold supermarket products or food donations. According to the Federation of Social Services³³⁴, European funds including FEAD are one of the five main sources of food aid in Belgium, along with: donations from producers; collections of unsold food items; products bought by non-profit organisations and social organisations; donations from supermarkets and other stores. Certain of the FEAD POs also benefitted from other sources of food aid, such as the Belgian Federation of Food Banks. According to the national evaluation of FEAD,³³⁵ one third of the POs involved in FEAD receive only FEAD food products as their source of food aid.

3.2. Is FEAD still relevant?

Relevance to target groups [*criterion: relevance*]

In both the national evaluation of FEAD in Belgium³³⁶ and the 2022 structured survey,³³⁷ the **FEAD programme was found to be relevant to end recipients**, as the products offered were both appreciated and useful. In the 2019 national evaluation, 30% of end recipients reported themselves as very satisfied with FEAD products, and 70% reported being satisfied. The usefulness of the products can be explained by the great attention paid by the MA to establishing the yearly list of products. Indeed, the MA consulted with nutritional experts, health experts, and representatives from the POs to collect feedback that would serve to collate a list of nutritional, quality, and useful products for the end recipients. This list of products was created to act as a “basis” for end recipients’ nutrition, including essential household products such as rice, pasta, milk, and coffee. End recipients participating in the 2019 national evaluation equally expressed appreciation for dietary considerations, including religious diets.

Interviewees from FEAD POs in Belgium also noted that distribution centres, due to their nature as food banks, social enterprises, or charities, often **considered the comfort and dignity of end recipients**.

³³³ Herman Deleeck Centre for Social Policy and Service Public de Programmation Intégration Sociale. (2019). *Evaluation de la politique d’achat et de la distribution des denrées alimentaires en verty du Programme opérationnel belge 2014-2020 dans le cadre du FEAD*.

³³⁴ <https://www.fdss.be/fr/concertation-aide-alimentaire/laide-alimentaire-en-belgique/>

³³⁵ Herman Deleeck Centre for Social Policy and Service Public de Programmation Intégration Sociale. (2019). “*Evaluation de la politique d’achat et de la distribution des denrées alimentaires en verty du Programme opérationnel belge 2014-2020 dans le cadre du FEAD*.”

³³⁶ Herman Deleeck Centre for Social Policy and Service Public de Programmation Intégration Sociale. (2019). “*Evaluation de la politique d’achat et de la distribution des denrées alimentaires en verty du Programme opérationnel belge 2014-2020 dans le cadre du FEAD*.”

³³⁷ Service Public de Programmation Intégration Sociale. (2022). *Rapport enquête structurée du FEAD 2022: résultats agrégés de l’état membre Belgique*. [“2022 Report on the FEAD Structured Survey: Aggregated Results of the Belgium Member State”].

Distribution and delivery centres would often provide waiting rooms, access to hot drinks, and act as meeting places for end recipients in need of a community and contact.

Despite the usefulness of FEAD products and the ability for delivery points to act as centres of social inclusion, certain elements of the distribution chain hindered the relevance of the FEAD operation for end recipients. First, **PO representatives reported that FEAD end recipients had no need for the FEAD deliveries of certain products**, if they did not match their need for said product, increasing the potential for food waste.

Second, as food distribution relied on the delivery of food products to various storage locations, fresh food was not included in the list of FEAD products, and only 3% of POs distributed the products in the form of hot meals. **As the food aid was distributed in the form of raw ingredients, this negatively affected end recipients who did not dispose of the necessary equipment and resources to cook their ingredients** (including homeless people, individuals without a kitchen, or individuals unable to pay for electricity, gas, or heating).

Furthermore, while the products were found to be overall useful to end recipients, the 2022 structured survey results demonstrated that **FEAD support did not alleviate end recipients from their situation of poverty**. End recipients reported needing greater support in addressing the structural causes of poverty, which may be helped by granting greater attention to accompanying measures and social inclusion activities.

Relevance of FEAD now and in the future [*criterion: relevance*]

The **future relevance of FEAD in Belgium is still high**, given the continued high rates of individuals at risk of poverty and exclusion, and the increasing number of FEAD recipients throughout the evaluation period. FEAD operations in the programming period 2014-2022 demonstrated a concentrated effort at reducing food insecurity in Belgium, and the buying and distributing of food from the MA and its POs are still reported as relevant today.

Interviews with the MA, the AA, and members of Belgium's major POs (the Red Cross and the Federation of Food Banks) drew insights on potential socio-economic phenomenon that might affect the relevance of FEAD operations in the future. First, national and regional political changes have the potential to affect the coherence of FEAD operations, ESF+ operations, and other EU social policies. A member of the Federation of Food Banks highlighted the **potential of the upcoming Belgian elections to create policy differences between the Walloon region and the Flanders region**, as poverty and social exclusion are less prevalent in Flanders. Second, all interviewees expressed concern with the allocated budget for FEAD operations in the upcoming programming period. Indeed, as the FEAD budget increased due to additional CRII+ measures, and as FEAD operations are incorporated into the new ESF+ programme, the budget allocated for FEAD operations will be comparatively reduced in the new programming period. This is a cause of concern both for the MA and for POs, as it represents a potential obstacle if FEAD operations are to help the same number of end recipients in the upcoming years.

While the FEAD programme is not seen as a solution to poverty in Belgium, either by MAs or POs, **the discontinuation of the FEAD programme would result in major financial issues for its existing end recipients**, including the risk of food deprivation. A potential discontinuation would also result in a serious decrease in motivation of volunteers thus far involved in the programme.

3.3. Did FEAD make a difference and to whom?

EU added value [*criterion: EU added value*]

FEAD operations in Belgium represented **added value in their ability to support, upscale, and start new food aid operations throughout the evaluation period**. Indeed, the FEAD budget represented a significant resource for SPP IS/POD MI's food aid system, as 30% of their budget corresponded to food bought with FEAD funding. Throughout the evaluation period, there was a net increase in end recipients. Furthermore, for many POs and non-profit organisations, FEAD operations were the only food aid programme they had participated in. This demonstrates the ability of FEAD programmes in Belgium to increase the activities and infrastructural capacity of national NGOs. The interviewee from the Red Cross, for instance, stated that their participation in FEAD activities increased their reach by bringing new individuals to their centres, who would not have known of the Red Cross would it not have been for their food aid activities.

Food aid bought through FEAD funding also significantly helped end recipients through its nature as a continuous source of aid. Compared to the changing and unreliable resource of food donations, **the regularity and consistency of FEAD product deliveries was a positive** both for POs and for those regularly in need of food aid.

The FEAD programme also created added value for POs in its ability to **increase cooperation** between them. Furthermore, POs such as the Federation of Food Banks or the Red Cross were granted certain decision-making powers during the drafting of the OP. For example, in 2014, representatives from the Federation of Food Banks, the CPAS/OMCW, the Belgian Network for the Fight against Poverty and the Red Cross joined to discuss the OP, suggesting amendments, and agreeing on its final form. Cooperation between the MA and its POs was also ensured throughout the programme, for example during agreements on end recipient lists or through the feedback process elaborated when creating the yearly list of FEAD products, as mentioned earlier. The Belgian Federation of Food Banks, the Red Cross, the Federation of Social Services, Alimen't, the BAPN, and others were also invited to meet quarterly to share information on FEAD operations.

Visibility

Visibility of the European Union and awareness of its involvement in FEAD were actively promoted in Belgium through different means. For instance, the SPP IS/POD MI's page dedicated to the FEAD included a large EU logo, and the tagline "Co-financed by the European Union". The SPP IS/POD MI's newsletter dedicated to FEAD activities equally contained the flag and the tagline "with the support of the FEAD". According to interviews with Red Cross representatives, food banks differentiated FEAD products from other food donations by labelling them with flags and mentions of the EU. This physical distinction of FEAD produce created a differentiation in the mind of end recipients, who were reported to naming them as the "European products".

While FEAD products were differentiated by explicit labelling, it is unclear whether this translated into an awareness of FEAD activities or the role of the EU in distributing FEAD products both for the general public or for FEAD end recipients. Indeed, all Belgian interviewees explained that **end recipients mostly did not care about the provenance of food aid.**

4. Good practices

Throughout the implementation of the programme, certain logistical decisions were made by the MA, that increased the efficiency, cost-effectiveness, added value, coherence, relevance, or visibility of the FEAD programme. Such decisions include:

The centralisation of delivery

In 2022, the delivery of FEAD products changed. While during the first years of the programme, deliveries were sent directly from the MAs to the beneficiaries, following the changes, beneficiaries would collect their FEAD orders from four centralised delivery centres across the country. This improved the cost-efficiency of the programme, as it allowed for the MA to reduce the costs of transport. Furthermore, not all end beneficiaries had the infrastructure to store food products for extended periods of time, and in large quantities. By centralising the delivery system with the use of four large delivery and storage centres, beneficiaries were no longer required to store large amounts of FEAD products in their own locations.

A digitalised ordering and data collection system

The ordering system for FEAD products in Belgium relied on a digitalised system. Notably, the FEAD POs could order the necessary quantities of FEAD produce using the hospitality phone application "FoodIt", which allowed customers to order from a restaurant's menu. In the case of FEAD, the MA would display the available produce on a menu through the application, which POs could digitally order. The digitalised ordering and reporting systems helped the implementation of FEAD in two ways. First, the use of "FoodIt" allowed for a removal of administrative backlog and paper trails, by removing the need for paper orders between the POs and the MA. Second, by using a digital feedback and reporting system, MAs could access data on end recipients and the ongoing operations in real time. This helped monitoring and evaluation activities.

Buying food products through open-bid system

The use of an open-bid system for the distribution of FEAD-bought products was highlighted as a beneficial activity by all interviewees. The open-bid system ensured that low prices were there for FEAD products, by choosing the producers of FEAD food aid based on the lowest price.

Increasing the relevance of the product list through communications with experts, PO workers, and end beneficiaries.

The FEAD MA in Belgium paid particular attention to the creation of a relevant food list for end recipients. This was done through yearly consultations with a variety of individuals, who collectively gathered knowledge on nutrition and the needs of end recipients. Through a collaborative back-and-forth process

between the MA, POs such as the Federation of Food Banks, and nutritional and health experts, lists of products were adapted from the previous year to correspond to the needs and nutritional requirements of the end recipients. The list-making took into consideration several elements, including:

- The overall quality and nutritional value of the products: products were often fair-trade and organic. Furthermore, items which were not considered to provide nutritional value, such as sugar, were removed from the product list.
- The relevance of the products to the needs of end recipients: by communicating with the larger non-profits and POs such as the Federation of Food Banks and the Red Cross, the MA gathered the overall sentiment of end recipients on the previous year's FEAD products. Comments, recommendations, and complaints were considered when elaborating new lists.
- Composing and complementing a food "basis": the MA attempted, as much as possible, to create a list of FEAD products that would represent for end recipients a basis for their daily nutrition. All food groups were represented in the list of products, and items that could easily be bought elsewhere or that end recipients were thought to already have in their homes were not included (such as flour).
- Dietary requirements and inclusivity: the MA ensured that food products were adaptable to all end recipients. For example, canned fish was seen as an inclusive protein, which could be eaten by all religious diets. The list also included products which corresponded to religious diets, such as halal or kosher products.

5. Conclusions and lessons learned

In conclusion, this case study of the implementation of FEAD in Belgium has demonstrated that several choices made by the MA, the Belgian state, the AA, and FEAD POs increased the success of the programme throughout the implementation period.

The focus of the programme on the delivery of food to a wide, objective target group aimed to alleviate poverty for a large number of individuals. The increasing number of individuals reached can be considered a success of the programme, in this regard. The food delivered by FEAD funding was relevant to the target group and answered their need for a stable basis of quality food. Thanks to the use of REACT-EU and CRII+ funding, the amount of food bought by the MA increased to meet the needs of the population following the Covid-19 pandemic. Simplification measures were considered by the MA on a yearly basis, based on feedback from its POs, and a conscious effort to digitalise the programme was made throughout the evaluation period. The programme acted as a core element of the national food aid system and was entirely coherent with the Belgian strategy to fight poverty. Finally, the implementation of FEAD majorly upscaled existing food aid operations and allowed many organisations to start enacting food aid activities, with one third of the FEAD POs only distributing FEAD aid.

Lessons learned from desk research and interviews with the MA, the AA, and POs, include:

- The need to **include end recipients and their feedback to a greater extent** when preparing the product lists. Currently, and as reported in the national evaluation of FEAD operations 2014-2020³³⁸, end recipients may not feel represented by the POs and there is a greater need for variety in the list of products currently bought by FEAD funding.
- Interviews with members of the Belgian Red Cross and the Belgian Federation of Food Banks found that, in order to better address the structural causes of poverty, **end recipients would welcome greater investment into accompanying measures.**

³³⁸ Service Public de Programmation Intégration Sociale. (2018). *Programme opérationnel belge pour le Fonds européen d'aide aux plus démunis : aide alimentaire, aide matérielle et mesures d'accompagnement 2014- 2020 – Rapport Annuel 2018*

Appendices

Appendix 1: Methodology

To conduct this case study, we used a mixture of desk research, quantitative analysis, and interview analysis. The first step in conducting the case study was to familiarise ourselves with the socio-economic data for Belgium (including AROPE rates, etc...). This data was the main evidence for the writing of Section 1: Context and background.

The evaluation of Belgium's FEAD implementation was then written based on data provided by interviews with members of the Belgian MA and AA, as well as the Belgian Red Cross and the Belgian Federation of Food Banks. Data from interviews was complemented by the findings of national evaluations of the FEAD programme. Finally, a final round of desk research provided crucial information to bolster claims made in interviews. The desk research provided relevant information from the Belgian FEAD PO, its national plan for poverty alleviation, and the yearly monitoring reports on FEAD implementation.

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Appendix 3: FEAD indicators

Table A. 41 – Input indicators for the implementation of FEAD in Belgium in 2014-2022

Indicator	Total amount of eligible public expenditure approved in the documents setting out the conditions for support of operations (EUR)	Total amount of eligible public expenditure incurred by beneficiaries and paid in implementing operations (EUR)	Total amount of eligible public expenditure declared to the Commission (EUR)	Implementation rate (expenditure declared as share of allocated budget)
2015-2022	74 066 728,43	93 073 826,00	89 346 137,00	121%

Source: SFC 2014 database.

Table A. 42 – FEAD output indicators in Belgium in 2014-2022, per year

Common output indicators	2014	2015	2016	2017	2018	2019	2020	2021	2022
Quantity of fruits and vegetables	516.2	1 101.0	1 198.1	2 422.2	1 296.5	1 753.7	2 234.2	2 244.9	2 716.1
Quantity of meat, eggs, fish, seafood	582.3	389.8	249.6	256.4	69.5	209.0	177.2	191.1	223.6
Quantity of flour, bread, potatoes, rice and other starchy products	775.7	1 078.8	2 252.2	3 640.4	1 904.6	2 490.2	2 2512.2	2 869.2	3 817.8
Quantity of sugar	0.0	0.0	0.0	488.3	79.1	0.0	0.0	0.0	0.0
Quantity of milk products	2 154.0	3 177.4	1 815.7	3 893.1	3 606.8	3 337.6	3 898.1	4 421.9	5 265.2
Quantity of fats, oil	131.6	142.9	422.7	420.5	351.4	331.6	272.2	337.1	309.2
Quantity of convenience food, other foodstuff (not falling in above-mentioned categories)	449.2	791.7	599.6	1637.9	952.8	1037.6	1356.6	1421.9	1740.2

Common output indicators	2014	2015	2016	2017	2018	2019	2020	2021	2022
Total quantity of food support distributed	4 608.9	6 681.6	6 537.8	12 758.9	8 260.7	9 159.7	10 450.4	11 486.2	14 072.1
Share of food for which only transport, distribution and storage were paid for by the OP	0	0	0	0	0	0	0	0	0
Proportion of FEAD co-financed food products in the total volume of food distributed by the partner organisations	50	50	50	50	50	50	50	50	50
Total number of meals distributed partly or totally financed by the OP	1 570 522	1 136 460	1 111 363	978 223	776 690	889 677	857 736	1 343 278	1 451 147
Total number of food packages distributed partly or totally financed by the OP	1 377 488	1 695 777	1 702 987	1 789 069	1 953 248	1 908 284	2 021 607	2 439 554	2 760 043

Source: SFC 2014 database.

Table A. 43 – Number of FEAD participants in Belgium in 2014-2022

Result indicators on food support distributed	2014	2015	2016	2017	2018	2019	2020	2021	2022
Total number of persons receiving food support	225 549	273 121	300 526	311 205	393 824	358 726	381 951	449 372	462 719
Number of children aged 15 years or below	61 168	70 143	75 824	88 141	132 867	116 993	114 482	131 496	134 933
Number of persons aged 65 years or above	14 892	19 241	15 782	21 980	36 368	30 191	29 395	40 139	32 335
Number of women	69 589	89 980	87 331	98 913	168 206	138 073	138 855	177 334	180 723
Number of homeless	87 018	99 111	93 466	102 269	118 448	105 821	106 155	130 104	130 228

Source: SFC 2014 database

1. Context and background

Bulgaria is one of the countries in the European Union with **the highest percentage of people at risk of poverty or social exclusion (AROPE)** – 32.2 % in 2022³³⁹. Even though the rate has dropped by more than 10% since 2015, it remains significantly high, with people with only primary or secondary education being more at risk. According to data on the level of poverty for 2022, the relative share of the poor is highest among single-member households with a person over the age of 65 - 61.3%, single-member households with females - 56.2%, and households with two adults and three or more children - 48.5%. For Roma, this share is even higher – 71%³⁴⁰. **Almost one-fifth of the population suffers from severe material and social deprivation**, while for Roma this rate was 61% in 2021³⁴¹. However, we can see a significant percentage decrease – from 38.8% in 2015 to 18.7% in 2022. 21.6% of the Bulgarian population cannot afford meals with meat, chicken, and fish (or vegetarian equivalent) every second day.³⁴² This percentage has dropped significantly since 2015, when it was nearly 40%.

Among the plausible reasons for the decrease in the number of people in Bulgaria suffering from severe material and social deprivation is the introduction of various supporting mechanisms like those funded by FEAD, the implementation of smaller-scale regional projects by municipalities and non-governmental organisations, and the overall efforts of the government to stabilise the economic performance of the country and attract investments to the poorest regions, thus, increasing the level of employment and improving the infrastructure. Nonetheless, **half of the population remains unable to deal with unexpected financial expenses**. This share has gradually declined from 73.12% in 2013 to 32.1.6% in 2018, followed by an increase to up to 46.7% in 2023 according to Eurostat (EU-SLIC survey).³⁴³ The share of people in employment at risk of poverty in Bulgaria is 9.93%, which is comparable to the average for the EU, but there have been no significant changes throughout the evaluation period.

The AROPE by degree of urbanisation **for the period from 2015 to 2022 shows a decreasing trend for Bulgarians living in cities** – from 32.7% in 2015 to 23.7% in 2022.³⁴⁴ For people living in rural areas, the rate has also decreased significantly, (57.9% in 2015 and 43.1% in 2022), especially in recent years, declining from 48.8% in 2020 to 43.1% in 2022). Information published by the National Statistical Institute of the Republic of Bulgaria indicates that the AROPE is highest in some of the most rural **regions**: in the Severozapaden region, the region with the highest percentage of rural population³⁴⁵, 41.4% of the population were at risk of poverty and social exclusion in 2022.³⁴⁶ This percentage was lower for more urban regions, such as the Yugozapaden region (approx. 83.8 % of the population live in urban areas, with 22.2% at risk of poverty and social exclusion) and the Severoiztochen region (74.6 % of the population live in urban areas, with 28.7% for at risk of poverty and social exclusion). The dynamics of the percentage of people living in poverty or social exclusion in both categories can be attributed to several social, economic, and demographic factors, among which the most prominent being the declining population in the country, people shifting from the cities to the rural areas during the peak of the COVID-19 pandemic in 2020-2021, and permanent and seasonal labour migration processes. Nonetheless, both statistical sets of data showcase that the number of people living in poverty and social exclusion is considerably higher in rural areas compared to the cities.

In Bulgaria, **the risk of poverty and severe material deprivation is especially acute in several vulnerable groups, including children, the elderly, the Roma, people with disabilities, and people without housing**. The proportion of **children** at risk of poverty or social exclusion is 32.2% in 2022 as per the data published

³³⁹ Eurostat (2023a). *People at risk of poverty or social exclusion in 2022*. Available at: <https://ec.europa.eu/eurostat/web/products-eurostat-news/w/ddn-20230614-1>

³⁴⁰ FRA (2021) *Roma Survey*

³⁴¹ FRA (2021) *Roma Survey*

³⁴² Eurostat (2023b). *Income and living conditions*: Database. Available at [Database - Income and living conditions - Eurostat](#)

³⁴³ Eurostat (2024a). *Inability to face unexpected financial expenses – EU-SILC survey*. Available at: [Statistics | Eurostat](#)

³⁴⁴ Eurostat (2024b). *Persons at risk of poverty or social exclusion by degree of urbanisation*. Available at: [https://ec.europa.eu/eurostat/databrowser/view/ilc_peps13n\\$defaultview/default/table?lang=en](https://ec.europa.eu/eurostat/databrowser/view/ilc_peps13n$defaultview/default/table?lang=en)

³⁴⁵ National Statistical Institute (2023). *Structure of the population by place of residence, sex ratio and age coefficients of age dependence* (“Структура на населението по местоживеење, полово сѳотношение и вѳрастови коефициенти на вѳрастова зависимост”). Available at: [Структура на населението по местоживеење, полово сѳотношение и вѳрастови коефициенти на вѳрастова зависимост | Национален статистически институт](#)

³⁴⁶ Eurostat (2023a). *People at risk of poverty or social exclusion in 2022*. [People at risk of poverty or social exclusion in 2022](#)

by Eurostat for people aged less than 18 years.³⁴⁷ The income poverty rate was 26.1% (statistics for 2019-2020), according to latest data from UNICEF published in December 2023³⁴⁸ The income poverty rate remains significantly higher than that of other EU countries but has decreased considerably since 2014: by 8.3% according to UNICEF. The AROPE has decreased by 11.1% according to Eurostat data - from 43.3% in 2015 to 32.2% in 2022.

In 2015, the proportion of children in Bulgaria living in severe material and social deprivation was 36.8%, but this rate declined significantly to 18.7% in 2022. However, this rate is still substantially higher than the EU average of around 8.4% (in 2021).

The UNICEF report links the decrease of children living in poverty to economic growth at a national level and the overall improvement of macroeconomic indicators. Still, the organisation recommends introducing more social protection actions explicitly aimed at children and their families and guaranteeing access to educational services, especially for children from minorities.

Older people form another vulnerable group at significant risk of poverty or social exclusion. According to data from the National Statistical Institute (NSI), 24% of the population in Bulgaria is aged 65 years or more.³⁴⁹ In 2022, 45.5% of older adults were at risk of poverty or social exclusion. No significant changes have taken place since 2014 with this rate remaining high throughout the whole evaluation reference period.

In Bulgaria, the percentage of the **Roma** population is among the highest in the European Union, and they continue to face numerous challenges.³⁵⁰ The concentration of this vulnerable ethnic group in distinct neighbourhoods leads to social exclusion, educational and spatial segregation, and substandard housing and sanitation conditions.³⁵¹ 71.1% of the Roma population is at risk of poverty, and 24.1% of the Roma live in households where at least one of the family members has gone to bed hungry at least once a month due to lack of money for food. **Roma children** are particularly affected by poverty, with 77.2 % of them living at risk of poverty and material deprivation.

Another large group at risk of poverty are **homeless people**. In recent years, the number of homeless adults in the country has been increasing, and one of the leading causes of homelessness is undoubtedly poverty.³⁵² The available data from the National Network for the Children and National Statistical Institute is based solely on those who have passed through temporary accommodation centres and shelters, but this far underreports the actual number of homeless people. In 2011, there were 1 370 registrations for homeless people in Bulgaria; in 2022, the number of registered people was 4 664. An individual approach was applied to each specific case, as a result of which 3 840 persons were offered the use of social services, health services, food, accommodation in social/municipal housing, financial support, referral to the Labour Office, etc.³⁵³

Across EU Member States, Bulgaria has the highest share of **people with disabilities and severe limitations** at risk of poverty and social exclusion.³⁵⁴ Almost half of those with severe limitations (43.3%) and a slightly

³⁴⁷ Eurostat (2024c). *Persons at risk of poverty or social exclusion by age and sex*. Available at: https://ec.europa.eu/eurostat/databrowser/view/ilc_peps01n_custom_10333508/default/table?lang=en

³⁴⁸ UNICEF (2023). *More than 1 in 5 children live in poverty in 40 of the world's richest countries*. Available at: <https://www.unicef.org/bulgaria/en/press-releases/more-1-5-children-live-poverty-40-worlds-richest-countries>

³⁴⁹ National Statistical Institute (2023). *Structure of the population by place of residence, sex ratio and age coefficients of age dependence* (“Структура на населението по местоживее, полово съотношение и възрасто коефициенти на възрастова зависимост”). Available at: <https://www.nsi.bg/bg/content/2991/структура-на-населението-по-местоживее-полово-съотношение-и-възrastовни-коефициенти-на-възрастова-зависимост>

³⁵⁰ European Parliament (2023). *Romani people in the EU*. Available at: https://multimedia.europarl.europa.eu/en/package/romani-people-in-eu_20901

³⁵¹ Tomova, Ilona, Stoytchev, Lubomir (2022). *Thematic report on Roma. Program: Local Development, Poverty Reduction and Enhanced Inclusion of Vulnerable Groups 2014-2020*. Available at: https://www.noveleca.bg/wp-content/uploads/2022/10/Tematichen-doklad-za-romite_BG.pdf

³⁵² National Network for the Children (2015). *Homeless In More* („Бездомни в повече“). Available at: <https://nmd.bg/bezdomni-v-povetche/>

³⁵³ Petrova, Reni (2023). *4,600 people were registered as homeless in 2022, 3,800 were offered help from ASP. Offnews*. Available at: <https://offnews.bg/obshtestvo/4600-dushi-sa-registrirani-kato-bezdomni-prez-2022-g-na-3800-e-predl-793829.html>

³⁵⁴ Eurostat (2022). *Disability: higher risk of poverty or social exclusion*. Available at: <https://ec.europa.eu/eurostat/web/products-eurostat-news/w/DDN-20221214-2>

lower proportion of those with less severe limitations (39.6%) are at risk of poverty.³⁵⁵ The main factor determining the risk of poverty among people with disabilities is age. Another important factor is gender, as more women with disabilities (45.5%) are at risk of poverty than men (33.2%). Single-person households with people with disabilities are three times (75.1%) more likely to be affected by poverty than households with two to four people.³⁵⁶

Table A. 44 – Socio-economic context in Bulgaria

Bulgaria	2014	2015	2016	2017	2018	2019	2020	2021	2022	Trend
1. At-risk-of-poverty or social exclusion rate (AROPE) Total		43,3	41,0	38,0	33,0	33,2	33,5	31,7	32,2	
2. AROPE Children		47,5	47,9	42,4	33,2	35,6	36,2	32,8	33,9	
3. Severe material and social deprivation rate (SMSD)		36,8	33,5	30,0	22,3	22,1	22,1	19,1	18,7	
4. Severe material deprivation rate (SMD)		33,1	5,8	31,9	30,0	20,9	20,9	19,4	0,0	
5. Inability to afford a meal with meat, chicken, fish (or vegetarian equivalent) every second day		39,5	36,8	34,6	31,7	31,4	27,6	25,9	22,4	
6. Impact of social transfers (other than pensions) on poverty reduction % reduction of AROPE		20,2	22,5	17,9	19,9	25,4	23,7	20,4	29,8	
7. Housing cost overburden		12,9	14,8	20,7	18,9	17,9	16,0	14,4	11,6	
8. Self-reported unmet need for medical care % of population 16+		5,6	4,7	2,8	2,1	1,9	1,4	1,4	1,0	
9. Households with very low work intensity		11,5	11,5	11,1	9,0	9,2	8,4	8,4	8,6	
11. Population in the EU could not afford unexpected financial expenses		49,6	53,4	54,2	53,2	32,1	36,5	43,5	36,4	
13. Share of total population having neither a bath, nor a shower in their dwelling		12,5	11,6	11,2	10,4	9,4	7,9	7,4		
14. No indoor flushing		12,5	11,6	11,2	10,4	9,4	7,9	7,4		
17. Persons who cannot afford a telephone		3,8	3,1	2,8	2,7	2,5	2,2	2,1		
18. Persons who cannot afford to replace worn-out clothes		42,4	39,6	35,4	32,9	32,3	28,8	28,3	27,1	
20. Persons who cannot afford to get-together with friends or family (relatives) for a drink or meal at least once a month		29,8	24,9	23,0	19,6	20,7	18,1	17,3	14,9	
21. Persons who cannot afford internet connection for personal use at home		19,3	15,7	14,5	12,6	10,7	10,6	10,1	8,6	
22. In-work risk of poverty		8,1	6,7	10,2	8,3	8,6	7,8	8,4	8,9	
23. Long-term unemployment		7,4	6,1	5,0	3,9	3,6	2,9	2,7	2,6	
25. Employment rate		60,2	62,1	62,6	66,0	66,8	69,2	67,6	68,1	
26. Children (aged less than 18) living in households with very low work intensity		14,1	14,9	13,8	10,6	11,3	10,7	10,6	10,6	
27. At-risk-of-poverty rate for children		25,4	31,9	29,2	26,6	27,5	28,3	24,2	25,9	
28. Severe material and social deprivation rate (SMSD) for children		41,7	40,2	35,8	20,5	22,8	24,8	20,0	19,2	

Source: Eurostat

2. Reconstructing the intervention logic

The intervention logic of FEAD in Bulgaria is visually presented in Figure A. 66 to provide an overall understanding of the way the FEAD's objectives were translated in the Bulgarian national context and how they address the needs outlined above. The logic also presents the intended outputs, results, and impact of the programme in Bulgaria. FEAD's main objective for all EU countries in 2014-2020 was to reduce the number of people at risk of poverty and social exclusion by at least 20 million. The overall objective of FEAD was to stimulate social cohesion in the EU by contributing to eliminating the most severe forms of poverty in the Union. The Fund alleviated those forms of extreme poverty that contribute most to social exclusion, such as food insecurity, homelessness and child poverty.

From this general objective, the **specific objective** was derived, with the support of the Fund, to support national programmes that provide non-financial assistance to the most vulnerable persons. For the socio-economic context of Bulgaria, this overall objective remained identical on a national level, expanded by the following four specific objectives:

- Reducing the number of children aged 0-18 living in poverty;
- Reducing the number of people aged 65 and above living in poverty;
- Reducing the number of unemployed aged 18-64 living in poverty;
- Reducing the number of employed aged 18-64 living in poverty.

The FEAD Regulation (EC) № 223/2014 allowed each Member State to choose whether to provide food and/or basic material assistance under Operational Programme (OP I) I or social inclusion activities under Operational Programme II. Bulgaria chose to implement OP I. The concrete operations defined by the Managing Authority in Bulgaria and approved by the Commission included the distribution of individual packages with food products, provision of warm meals through municipality canteens, offering of

³⁵⁵ Eurostat (2023c). *Living conditions in Europe - poverty and social exclusion*. Available at: https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Living_conditions_in_Europe_-_poverty_and_social_exclusion&oldid=584082

³⁵⁶ Tomova, Ilona, Stoytchev, Lubomir (2022). *Thematic report on Roma*.

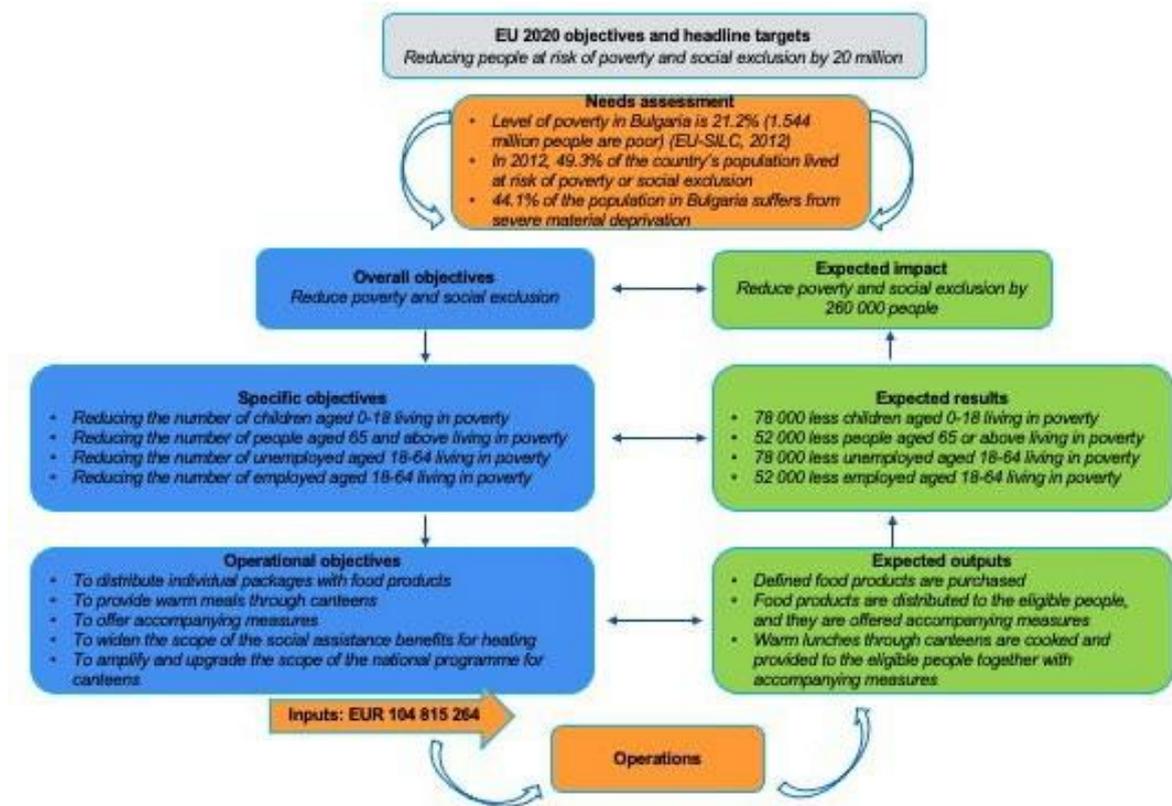
accompanying measures and amplifying and extending the scope of the national programme for creating and maintaining municipality canteens.

The Managing Authority expected various outputs, the most significant being purchasing the defined food products, distributing these food products to the eligible people, and cooking and providing warm lunches through the canteens to the eligible people. Providing accompanying measures is another cluster of expected outputs that depend on the recipient's circumstances and needs. Logically, the expected results correspond to the set specific objectives and are defined in a quantifiable manner as pictured in the diagram, with the groups of people living in poverty targeted: children, people aged 65 and above, unemployed and employed.

The expected impact for the past period was to reduce the number of people in poverty and social exclusion by 260 000.

The intervention logic of FEAD in Bulgaria reflected the observed needs and trends in the country in 2014: children represented about a quarter of all the target recipients of the food package support. People aged 65 or over were the other significant group targeted by the actions for distributing food packages and warm lunches. In contrast, the main target groups for selected accompanying measures were unemployed persons and employed people living in poverty.

Figure A. 66 – Intervention logic of FEAD in Bulgaria as per 2014



Source: Adapted from Operational Programme for Food 2014-2020 in Bulgaria as prepared in 2014.

2.1. National policy framework

The Operational Programme for Food and Basic Material Assistance in Bulgaria, funded by FEAD for 2014-2020, was approved by the European Commission on the 5th of May 2014.³⁵⁷ The programme was developed per FEAD requirements. It is a strategic document that served as a framework for using financial resources, co-financed by the Fund and the national budget, within the programme period 2014-2020 and covered the entire country's territory.

³⁵⁷ Agency for Social Assistance (2014). Operational Programme Under the Fund for European Aid to the Most Deprived 2014 – 2020. Available at :<https://asp.government.bg/bg/operativna-programa-za-hrani/operativna-programa-za-hrani-2014-2020/>

FEAD in Bulgaria **widened the effective scope of the social assistance benefits and social services for vulnerable groups granted under the national legislation** by aiming to reach significantly more people than before 2014, to prolong the operability of the canteens all year round instead of only during the winter months and to create new canteens in many municipalities. Social benefits are resources which supplement or substitute one's income up to an amount sufficient to meet the basic necessities of life or to meet incidental needs of the beneficiary persons and families. Community-based social services provided in specialised institutions were aimed at supporting individuals in their daily activities and improving their social inclusion.

For example, in the Municipality of Plovdiv, since the launch of FEAD in 2014, the number of canteens expanded to 11, thus covering 6 regions in and around Plovdiv.³⁵⁸ That allowed the municipality's administration to increase the number of people they could cater for and extend the partnering network on a local level. Furthermore, all of the interviewed partnering organisations pointed out that FEAD benefits the most vulnerable people and the local municipalities that are always short on budget.³⁵⁹

2.2. Objectives and target groups

The programme contributes to achieving the **national goal of reducing the number of people living in poverty by 260,000 persons by 2020**, in line with the objectives of the Europe 2020 strategy. In fulfilment of this objective, the programme targets persons living in the highest degree of poverty and social isolation. **Four specific sub-goals** were formed under the national goal:

- reduction of the number of children aged 0-18 months living in poverty by 78 000;
- reduction of the number of persons aged 65 and over living in poverty by 52 000;
- reduction of the number of unemployed people aged 18-64, living in poverty, by 78 000;
- reduction of the number of employed persons aged 18-64 living in poverty by 52 000.

The **mechanism for identifying the most vulnerable people** is based on national legislation's criteria for access to social assistance included in the Law on Social Assistance and the Regulations for the Implementation of the Law on Social Assistance. Most social benefits in Bulgaria are governed by the rules for implementing this law, with the exception of targeted heating allowance, which are governed by an ordinance of the Minister of Labor and Social Policy, Personal Assistance for persons with disabilities, or child benefits.³⁶⁰ As a result, the primary target group is very broadly defined and encompasses various sub-groups of individuals and families that are eligible for social assistance. Assistance under the programme is provided to the following persons:

- Individuals and families who have received assistance under Regulation No. RD-07-5 of 2008 governing the conditions and procedure for granting targeted heating allowances;
- Uninsured persons living alone with their children, assisted under the Family Allowances for Children Act; and persons living alone, receiving minimum pensions (for retirement, disability, social, and inheritance), wandering and homeless children and persons;
- Based on the established individual level of material deprivation, individuals and families impacted by disasters and accidents due to force majeure circumstances are eligible for lump-sum assistance under the Social Assistance Act.

The secondary target group is made of the following persons: individuals and families who, due to lack of income or low income, are unable to meet their basic life needs, including and persons and families with low incomes who have been denied social assistance, as well as persons and families who have received one-time assistance pursuant to Art. 16 of the Regulations for the Implementation of the Law on Social Assistance to satisfy incidental needs; persons and/or groups of persons with low incomes, using social services according to the Regulations for the Implementation of the Law on Social Assistance; and persons from vulnerable groups - citizens of third countries (as per the additional provisions of the Act on Asylum and Refugees).³⁶¹

³⁵⁸ Interview with a representative of implementing organisation, in Bulgaria, Sofia, conducted in August, 2023.

³⁵⁹ Interviews with representatives of implementing organisations, in Bulgaria, Sofia, conducted in August and September, 2023.

³⁶⁰ Law on Social Assistance (2023). Available at: <https://lex.bg/laws/ldoc/2134405633>

³⁶¹ Regulation No. Rd-07-1 of April 4, 2016 on the Procedure and conditions for determining the target groups under the Operational Programme for Food and/or Basic Material Assistance, co-financed by the Fund For European Aid to the Most Deprived [Lex.bg](https://lex.bg) - [Закони, правилници, конституция, кодекси, държавен вестник, правилници по прилагане](https://lex.bg)

Effectively, covered by the programme are single people, people with permanently reduced working capacity, people over 65 years old, children (including orphans), single parents of children up to 18 years old, children with permanent disabilities, single parents caring for a child up to 3 years old, children placed in a family of relatives or a foster family under Article 26 of the Child Protection Act.

Moreover, FEAD was adequately adapted to assist Ukrainians fleeing Russian military aggression and those affected by COVID-19 and the energy crisis.³⁶² During the COVID-19 outbreak, additional FEAD funding was made available and used to extend warm lunch service to **a broader group of people in need**, including people from at-risk populations of infection:

- people in difficulty due to the deteriorating economic situation in the country;
- people who, due to their age or disability, are at higher risk of infection;
- people placed in quarantine without income or with low income below the poverty line who have no relatives to support them;
- people subject to social assistance, for whom the need for additional support has been identified and in the conditions of an emergency epidemic, cannot meet their basic living needs.

Following the expansion of the scope of the programme, the following groups were covered: families that are disproportionately affected by COVID-19, seniors over 65 who live alone, people with low income or income below the poverty line who are required to remain in quarantine, people who are ill or have had contact with COVID-19, and elderly users of the ESF's operation "Patronage care for the elderly and persons with disabilities".

The scope of targeted support provided under FEAD was expanded in 2014-2020 to include financial assistance for heating in the winter months. Usually, this is a type of financial mechanism funded within the national budget, but it was assessed that more people need such support, and it was therefore included in the scope of FEAD. Financial support for heating was granted after an assessment of income, financial status, property rights, health, age and marital status for each case. The majority of the recipients of this financial assistance were persons living alone, persons with permanently reduced working capacity; persons over 65 years; families with children, incl. orphans; single parents of children under 18; families with children with permanent disabilities; a parent caring for a child up to the age of 3; and children placed in a family of relatives and friends or a foster family.

With the start of **Russia's war of aggression against Ukraine**, the programme's scope was further expanded to include those most negatively impacted by it, such as migrants, including minors, who are Ukrainian nationals protected by temporary protection.³⁶³

2.3. Implemented operations and accompanying measures

The analysis of the country's poverty level and the groups at risk of poverty led the Bulgarian Managing Authority to decide that FEAD funds in Bulgaria should be used for food assistance as the primary material deprivation. The following types of activities were implemented under the programme:

- Purchase of food products.

³⁶² Agency for Social Assistance (2021). *Annual Report for 2020 for the Implementation of the Operational Program for Food And/Or Basic Material Support Fund for European Assistance to the Most Vulnerable Persons in Bulgaria /Summary/* ("Годишен доклад за 2020 г. за изпълнението на Оперативна програма за Храни и/или основно материално подпомагане на Фонд за европейско подпомагане на най-нуждаещите се лица в България (Резюме)"). Available at: <https://asp.government.bg/bg/operativna-programa-za-hrani/operativna-programa-za-hrani-2014-2020/>

³⁶³ Agency for Social Assistance (2022). *Annual Report for 2021 for the Implementation of the Operational Program for Food And/Or Basic Material Support Fund for European Assistance to the Most Vulnerable Persons in Bulgaria /Summary/* ("Годишен доклад за 2021 г. за изпълнението на Оперативна програма за Храни и/или основно материално подпомагане на Фонд за европейско подпомагане на най-нуждаещите се лица в България (Резюме)"). Available at: <https://asp.government.bg/bg/operativna-programa-za-hrani/operativna-programa-za-hrani-2014-2020/>

- Provision of individual food packages; accompanying measures include budgeting advice, referral to other social services (some of them delivered with ESF funding), assistance with educational and healthcare services, and additional material assistance based on the specific needs of individual cases. In addition, for people with mobility issues, the partnering organisations delivered food to their homes.
- Provision of hot lunches. In parallel with the provision of hot lunch, the primary commitment of the partner organisations was to support the end recipients by providing additional support for finding opportunities for future integration through concrete activities to overcome social exclusion and reduce poverty.
- With the amendment of the Guide for Partner Organisations under Operation 3.1, activities aimed at environmental protection and the green and digital transition were included as part of the types of accompanying measures provided under the operation. These measures aimed to raise people's awareness that their actions can change the course of events and limit climate change through more efficient use of resources and conservation of nature in the context of unprecedented changes in the global climate and their detrimental impact on wildlife and people's quality of life.
- Technical assistance: support of the Managing Authority for the successful execution of the programme through support, planning, performance monitoring, control and assessment of the programme and its promotion, including the contribution of the funds and increasing the administrative capacity of the managing authority and the beneficiaries.³⁶⁴

After the COVID-19 pandemic and Russia's war of aggression against Ukraine, additional resources were secured to help those most affected through the implementation of the following additional activities and operations:

- **Warm Lunch at Home in Emergency 2020:** New activities include identifying those in greatest need and delivering a warm lunch to their homes. The MA adapted the delivery of warm lunches and individual food packages to end recipients' homes, developing guidelines for partner organisations regarding the implementation of the activities under the two operations. This enabled FEAD' to reach all those in need during COVID-19 measures. The adapted operation also included new accompanying measures - for example, COVID-19 information materials, personal hygiene materials, and the provision of necessary clothing. Furthermore, under this operation, healthcare workers organised in mobile groups monitored the health status of some of the social services' end recipients.
- **Distribution of food to individuals and families that were most affected by the COVID-19 pandemic.** The operation was modified to ensure delivery of individual food packages to the beneficiaries' homes during the pandemic, as well as to include several accompanying measures. More concretely, in addition to the usual accompanying measures an emphasis was placed on additional forms of support related to the prevention of socially significant diseases, including limiting the spread of COVID-19. COVID-19 infection prevention leaflets were developed and distributed, including "Protecting yourself and others from COVID-19," "Protecting your health when travelling during the COVID-19 epidemic," and "How to deal with stress during the COVID-19 epidemic." Blood pressure monitors and electronic scales were used to check the weight during the provision of the accompanying measures to determine the presence of risk factors endangering individual health. Interactive information methods were used to reach a more significant part of the target groups. An animated film titled "Clean and Healthy" was shown at food parcel distribution points, introducing everyone to the importance of personal and household hygiene, disease prevention measures, the use of personal protective equipment, and so on. Individual and telephone consultations on the subject were also conducted.
- **Purchase of personal protective equipment and disinfectants (new activity).**
- **Provision of vouchers for food and essential goods for displaced persons from Ukraine (new operation)** - food, clothing (including for children), school supplies, hygiene materials, and other necessities were purchasable with the voucher. The voucher was of one-time use per person from the target group, including children, with some exceptions based on individual circumstances. In justified cases, individuals might also have received an additional voucher provided of the following conditions applied: there were unallocated vouchers, and individuals were unable to meet their basic life needs and their integration was difficult and/or impossible. Vouchers were valid for two months from the date of issuance. Accompanying measures included coaching and workshops, mainly to improve integration in education or the labour market.

³⁶⁴ Agency for Social Assistance (2023a). *List of the operations* ("Списък на операциите"). Available at: <https://asp.government.bg/bg/operativna-programa-za-hrani/operativna-programa-za-hrani-2014-2020/spisak-na-operatsiite/>

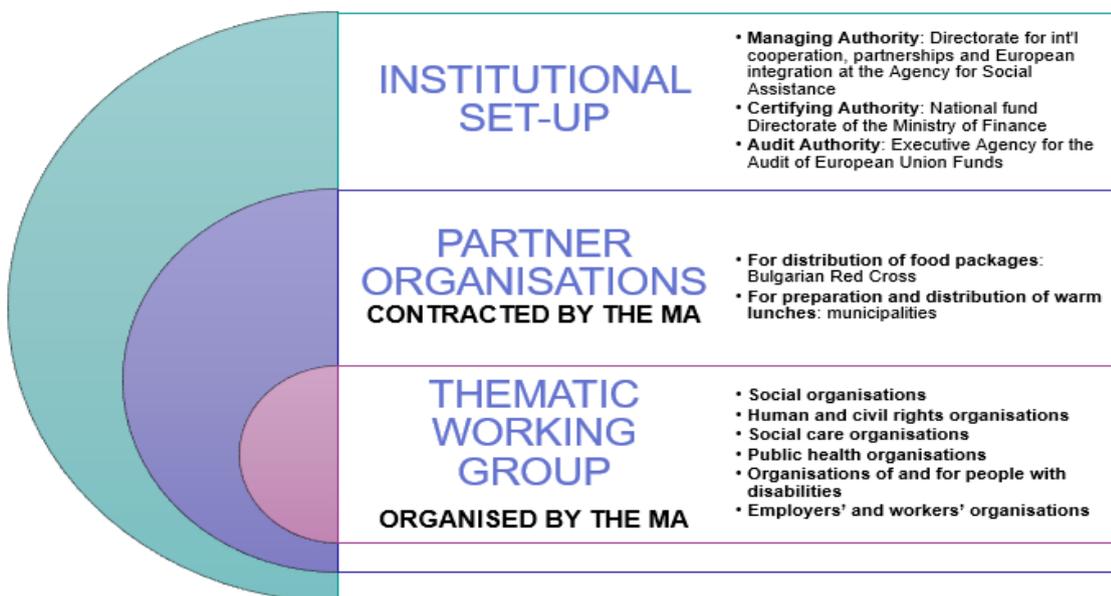
2.4. FEAD governance and delivery system

FEAD's governance and delivery system in Bulgaria consisted of the Managing Authority, the Certifying Authority and the Audit Authority.³⁶⁵

The functions of **the Managing Authority** of the Operational Programme co-funded by the FEAD were performed by the Directorate for international cooperation, partnerships and European integration of the Agency for Social Assistance at the Ministry of Labour and Social Policy.

National Fund Directorate of the Ministry of Finance performed the role of **the Certifying Authority**. The Executive Agency for the Audit of European Union Funds presented **the Audit Authority**, and it was responsible for carrying out audits on the proper functioning of the management and control system of the operational programme, as well as for carrying out audits on an appropriate sample of operations based on declared expenditure. The body to which the EC made payments was the National Fund Directorate, Ministry of Finance.

Figure A. 67 – Groupings of key stakeholders involved in FEAD delivery



As evident from Figure A. 67, the Managing Authority was supported by several partner organisations within the separate operations. **The partner organisations for distributing individual packages with food products** had to be a public legal body or a non-profit organisation actively pursuing its objectives for at least 2 years. They had to demonstrate experience in the distribution of basic material assistance in-kind and/or proven experience in food distribution to the population. Among the most critical requirements that the partner organisations had to meet was to demonstrate appropriate capacity (technical, administrative and financial) organisational work processes, storage facilities secured, capacity for management of public funds, as well as the ability to ensure full territorial coverage of the Republic of Bulgaria, individually or in association with other partner organisations. The **Bulgarian Red Cross** was the most experienced organisation in Bulgaria that covered all essential requirements and was selected to distribute the individual food packages.

Distribution of warm lunches was undertaken by **municipalities on the territory of Bulgaria** that have appropriate facilities and equipment for food preparation (or alternatively, municipalities with contracts with third-party companies for preparation and/or delivery of ready-made food upon prior request for the needs of social service) and the distribution of food as well as the appropriate capacity—technical, administrative and financial capacity, organisational work processes, storage facilities secured. The partners under this operation were also required to demonstrate the proper capacity to distribute warm meals to the end users' homes or to wandering and homeless people on the territory of all settlements within the municipality.

³⁶⁵ Agency for Social Assistance (2014). *Operational Programme Under the Fund for European Aid to the Most Deprived 2014 – 2020*.

Apart from the partner organisations and the participants in the institutional set-up, various stakeholders (regional, local and other public competent bodies and non-governmental organisations) were involved in developing the operational programme. They were organised in a **thematic working group** responsible for drafting the new operational programme. In total, there were **35 stakeholder representatives** from the following sectors:

- Social organisations (organisations operating in the area of minority ethnic groups and immigrants' integration; organisations working in the area of gender equality and non-discrimination; organisations operating in the area of social inclusion; organisations operating in the area of youth) (Commission for Protection against Discrimination; Social Fondation "Indi-Roma 97");
- Organisations operating in the area of human and civil rights and freedoms (National Network for the Children; Association National Centre for Refugees);
- Organisations operating in the area of social care (Social Protection Fund, Bulgarian Food Bank);
- Organisations operating in the area of public health (Ministry of Health, Bulgarian Food Safety Agency);
- Regional structures, organisations of and for people with disabilities, representative employers' and workers' organisations (Agency for People with Disabilities; Fondation SOS Entrepreneurs; National Association of People with Acquired Disabilities; Confederation of Independent Trade Unions in Bulgaria).

3. Key findings on the implementation of FEAD

3.1. To what extent was FEAD support successful – or not – and why?

Overall achievement of FEAD objectives [*criterion: effectiveness*]

Overall, there is no doubt that the implementation of FEAD in Bulgaria for 2014-2020 achieved its goal to alleviate material deprivation, especially that was the case for at least 78 000 children and 52 000 people aged 65 or over. According to the last reporting period for FEAD 2014-2020 (2021), the **food packages operation reached 459 039 people from the primary target group**, including members of their families, and **22 600 people from the secondary target group**, including members of their families.

24.45% of all recipients were children up to 15 years old, and 31.26% were people aged 65 or above. 215 806 of the above-mentioned supported persons were provided with individual and/or group consultations under the accompanying measures, with the **total number of consultations amounting to 588 323**. The total number of persons who received a hot lunch in 2021 was 71 805, of whom 61.56% were people aged 65 or above. **The most significant aspect of the programme was its flexibility to meet the arising needs** as they come and the availability of the managing authority to lead and support the partner organisations throughout the changes, COVID-19 and the Russia's war of aggression against Ukraine being the most substantial determinants for the modifications of FEAD.

All forms of poverty and social exclusion need alleviation, and at the same time, the personal circumstances of people are often incomparable. Hence, the MA of FEAD in Bulgaria faced the challenge of introducing selection criteria that were elaborate enough to differentiate the people experiencing the worst forms of poverty and social exclusion. Although the income criterion remained the main eligibility criterion when applicants for social services and benefits were considered, **the local units of the Agency for Social Assistance (ASA) were given the prerogative to consider applications based on unique personal circumstances** (for example, income of the person and/or their family, their property status; marital status; the state of health; work and study employment; the age; other ascertained circumstances). This approach contributed towards the improved ability of ASA to support people in various ways by providing them food and the most appropriate accompanying measures.

The primary operations funded by the programme would not allow ASA or their partners to improve the living conditions of the most deprived people directly. Nevertheless, **accompanying measures contributed to positive changes for the most deprived indirectly**. For example, people were given advice on how to apply for available social services and benefits such as targeted heating allowance in the winter or the national programme "Supported by an assistant". This specialised social service includes daily hourly support for up to 4 hours a day, every working day, in a home environment. Consumers are provided with social services to meet their daily needs for self-care, mobility, relocation, communication, household activities, organisation of everyday life and participation in public life.

The MA reported that in 2022 alone, people living in poverty or social exclusion received 279 996 individual social services and benefits. As a result of the allocated social services and benefits, 13 040 concrete results were reported that ultimately contributed towards supporting the most deprived persons to improve their living conditions and overall wellbeing. In 2021, ASA conducted a satisfaction survey among the recipients of social services and benefits, and it was reported that **93% of them were satisfied with the quantity of the food packages and 94% with the contents of the packages**. 98% of the recipients were satisfied with the organisation for distribution of the food packages. As per the accompanying measures, 89% of the recipients of such measures reported their positive outcomes and impact.

According to interviews with partner organisations, **the individual contact between representatives of their organisations (municipality employees, volunteers, NGO officials) and target groups was the key factor that significantly impacted people's wellbeing**. Most of the recipients of food packages were older people living alone with minimal to no regular human contact. Receiving a food package and the accompanying measures allowed them to interact with another person and break the pattern of social isolation. Although this is not captured in the annual reports of ASA, and FEAD monitoring data, interview data clearly shows that it is the work of the partner organisations on site that contributed to developing and fostering support structures for alleviating poverty and social exclusion in Bulgaria. Several of the partner organisations shared that local people rely on and trust their representatives because these are people they know, and with whom they have built reliable relationships over time. Moreover, local representatives are able to identify new people in need, to determine their actual needs and to then bring these to the attention of ASA to provide further support according to each person's unique circumstances.

Reach of target groups [criterion: effectiveness]

According to the Operational Programme under the Fund For European Aid to the Most Deprived 2014 - 2020 support is allocated to operations available to people who comply to the criteria for access to social assistance defined in national legislation (the selection is based on their income and accompanying/specific personal circumstances). The programme thus reached **broad groups of people living in poverty**: children, persons aged 65 and over, unemployed and employed persons. Within the grouping of unemployed people also fall single parents with no social insurance (especially of children up to 3 years old) and eligible for financial support as per the provisions of the Family Child Benefit Act. Other groups that are mentioned as having been reached by FEAD operations in the annual reports of ASA, but were not differentiated within the four sub-target groups are:

- parents who take care of a child with special needs and/or disabilities;
- persons with permanently reduced working capacity;
- children who live in foster care, with relatives or with friends;
- wandering and homeless children and adults;
- persons and families accidentally injured by accidents, natural disasters, or other force majeure circumstances; they would usually qualify for temporary support as per the essence of the accident and its impact on their household and income;
- persons who have received fixed financial aid for heating.

The interviewed partner organisations identified **the most prominent group as per the above-listed sub-goals to be people older than 65 years**. It should be noted that after the last legislative changes (Ordinance № ПД-07-1 from 4.04.2016) to the eligibility criteria, access to social services and benefits not only affects a particular individual but their entire family. This means that a family of 2+ people would receive a bigger food package than a recipient living alone with no immediate relatives in the household.

FEAD operations in Bulgaria were launched in the first half of 2015.

Table A. 45 below presents all FEAD operations in the country and the numbers of persons reached, as well as the shares by target group. In 2015 and 2022, Operation 2 activities were not delivered.³⁶⁶ The Annual Report for 2018 for the Implementation of the Operational Program for Food And/Or Basic Material Support Fund for European Assistance to the Most Vulnerable Persons in Bulgaria does not include any statistical information about the recipient groups' split for Operation 2 as in the previous annual reports, which is why information for this year is missing in the table below.³⁶⁷ Neither the annual report nor the interaction with the managing authority during the evaluation process has revealed why the statistical data sequence breaks.

Generally, the **number of female recipients of the support funded by FEAD is slightly higher than that of male recipients**. Likely reasons for this are that women in Bulgaria continue to be the primary caregivers in the family, which usually makes them eligible for social support services and benefits. Women also have a longer lifespan than men. The proportion of older people among the recipients of the support measures is also understandable considering the ageing population of Bulgaria and their low income (pensions, disability pensions/compensation, etc.).

³⁶⁶ Agency for Social Assistance (2016). *Annual Report for 2015 for the Implementation of the Operational Program for Food And/Or Basic Material Support Fund for European Assistance to the Most Vulnerable Persons in Bulgaria /Summary/* ("Годишен доклад за 2015 г. за изпълнението на Оперативна програма за Храни и/или основно материално подпомагане на Фонд за европейско подпомагане на най-нуждаещите се лица в България (Резюме)"). Available at: <https://asp.government.bg/bg/operativna-programa-za-hrani/operativna-programa-za-hrani-2014-2020/>

³⁶⁷ Agency for Social Assistance (2019). *Annual Report for 2018 for the Implementation of the Operational Program for Food And/Or Basic Material Support Fund for European Assistance to the Most Vulnerable Persons in Bulgaria /Summary/* ("Годишен доклад за 2018 г. за изпълнението на Оперативна програма за Храни и/или основно материално подпомагане на Фонд за европейско подпомагане на най-нуждаещите се лица в България (Резюме)"). Available at: <https://asp.government.bg/bg/operativna-programa-za-hrani/operativna-programa-za-hrani-2014-2020/>

Table A. 45 – Statistics of target groups reached via FEAD operations in Bulgaria

Year (Operation)	Total No. of persons who received the service*	Women (%)	People aged 65+ (%)	Children up to 15 y/o (%)	Migrants, persons with different nationality, minorities (incl. Roma) (%)	Roma persons only (%)	Persons with disabilities (%)	Wandering and homeless persons (No.)
2015 (Operation 3 – Warm lunch)	6,536.00	55%	33%	8.6%	35%	15%	24%	No info
2016 (Operation 2 – Food packages)	267,314.00	66.22%	38.07%	1.71%	18.57%	No info	7.6%	No info
2016 (Operation 3 – Warm lunch)	8,291.00	54%	33%	8.5%	36%	14%	23%	114
2017 (Operation 2 – Food packages)	316,747.00*	68.10%	32.31%	1.97%	14.72%	No info	12.18%	850
2017 (Operation 3 – Warm lunch)	42,300.00*	58%*	48%*	4%**	34.3%*	No info	23%**	259**
2019 (Operation 2 – Food packages)	452,046.00*	57.34%	23.69%	28.25%	7.35%	No info	27.41%	0.001%
2019 (Operation 3 – Warm lunch)	65,036.00*	60.6%*	58.8%**	2.3%**	21.5%*	10.5%**	21.1%**	49**

Year (Operation)	Total No. of persons who received the service*	Women (%)	People aged 65+ (%)	Children up to 15 y/o (%)	Migrants, persons with different nationality, minorities (incl. Roma) (%)	Roma persons only (%)	Persons with disabilities (%)	Wandering and homeless persons (No.)
2020 (Operation 2 – Food packages)	488,712.00*	58.06%	33.27%	22.42%	6.04%	No info	31.11%	0.004%
2020 (Operation 3 – Warm lunch)	39,973.00	59.4%**	60.1%**	2.8%**	12.1%*	9.7%**	22.5%**	18**
2021 (Operation 2 – Food packages)	481,639.00*	59%	31.26%	25.45%	5.8%	No info	29.99%	0.01%
2021 (Operation 3 – Warm lunch)	71,805.00	59.23%	61.56%	2.18%	12.37%	9.51%	22.83%	0.12%
2022 (Operation 3 – Warm lunch)	68,107.00	56.26%**	55.33%**	3.79%**	12.16%**	7.46%**	18.90%**	0.19%*

Source: Agency for Social Assistance, Republic of Bulgaria.

*Please note that the quoted statistics refer to the total number of persons who received the service, including all previous and new service recipients.

**Please note that the statistics at times refer only to the newly included recipients of the service and do not consider the percentage distribution among all recipients.

The overall text of the programme does not include any particular guidelines for the providers of social services on reaching the most vulnerable groups that fall within the programme's scope. As long as the applicants for social support services and benefits meet the eligibility criteria per the national legislative framework, they are catered for – either by receiving food products and/or getting access to the warm lunch service. However, the additional flexibility that local branches of the ASA got in 2016 through the legal changes of the Social Assistance Act in determining the eligibility of the applicants for social services as per their unique circumstances allowed them to reach out more effectively than before to the most vulnerable people and overall, it made the FEAD programme more inclusive. No findings from the interview data suggest

such occurrences or trends, which de facto can be viewed as information supporting the observation that FEAD in Bulgaria does reach the most vulnerable groups.

Adjustments to FEAD to address new challenges [*criterion: effectiveness*]

Considering the state of emergency in Bulgaria that started in March 2020 and the subsequent implementation of measures to reduce the risk of infection and spread of COVID-19, **ASA changed the way warm lunches and individual packages of food products were provided to the end recipients to allow transportation to their homes instead of using canteens and going to collection points.**³⁶⁸ This helped FEAD support to reach all those in need while following the anti-epidemic measures put in place.

The financial allocation under the FEAD OP 2014-2020 was modified under the REACT-EU mechanism³⁶⁹. **An additional resource of EUR 19 940 383 / BGN 39 000 000 was allocated to FEAD, which aimed at providing the service of warm lunch to more people as an identified significant measure for the citizens most affected and vulnerable by the pandemic.** In the period April and June 2020, 73 036 persons, including family members, were distributed 1 404 921 tons of basic food products as part of the measures taken to support socially weak persons and families.

The undistributed food packages with a total weight of 137.93 tons were provided in the period from January to February 2021 to 9 089 individuals and family members from **the additional target groups**:

- high-risk groups of infection with COVID-19 were included as a priority, including dependent persons over 65 years of age, persons with various diseases, migrants and users of social services and specialised institutions;
- families with children, with no or low income (income of a family member below the poverty line, current at the time of distribution - BGN 369), who were unable to meet their basic life needs and had been refused targeted support with heating aid during the 2021/2022 heating season;
- families in a difficult financial situation, for which the Administrative Board has been notified by the "Trust for a Social Alternative" Foundation - mainly from the Roma community;
- persons with low income, using social services by the Law on Social Services;
- persons from vulnerable groups - citizens of third countries within the meaning of § 1, item 17 of add. provisions of the Law on Asylum and Refugees (the group includes refugees from the Middle East);
- persons and families who accidentally suffered from the heavy rains that caused flooding in the Smolyan and Blagoevgrad regions during the distribution of packages.

In addition to the accompanying measures usually provided, **in 2020, an emphasis was placed on preventing socially significant diseases, including limiting the spread of COVID-19.** Leaflets on the prevention of infection with COVID-19 were developed and distributed. During the provision of the accompanying measures, blood pressure measuring devices and electronic scales were used to check the weight of the users to establish the presence of risk factors threatening the health status of the persons. To reach a wider part of the target groups, interactive information methods were used.

The provision of warm lunches in 2021 was made through the acceptance of funding applications announced on 30.11.2020 under the procedure for the direct provision of non-grant financial assistance "**3.1 - Warm lunch in the conditions of the COVID-19 pandemic**". The operation was carried out by the rules for operations of type 3 according to PMS No. 37 of 23.02.2015 for determining the terms and conditions for implementing FEAD for 2014 - 2020. Eligible target groups were people without income or with income below the poverty line, who were unable to provide for their basic life needs, did not have relatives to support them, and the risk of infection or the adverse course of the infection from COVID-19 was higher for them. The target of 3.1 was set at 50 000. **By the end of the last reporting period, municipalities and districts of municipalities provided warm lunches to 68 107 persons from the target groups thus exceeding the target.**

³⁶⁸ Agency for Social Assistance (2022). *Annual Report for 2021 for the Implementation of the Operational Program for Food And/Or Basic Material Support Fund for European Assistance to the Most Vulnerable Persons in Bulgaria /Summary/* ("Годишен доклад за 2021 г. за изпълнението на Оперативна програма за Храни и/или основно материално подпомагане на Фонд за европейско подпомагане на най-нуждаещите се лица в България (Резюме)"). Available at: <https://asp.government.bg/bg/operativna-programa-za-hrani/operativna-programa-za-hrani-2014-2020/>

³⁶⁹ By Decision of the Council of Ministers /RMS/ No. 573/14.08.2020, amended by No. 847 of 23.11.2020 and RMS No. 892 of 04.12.2020,

An additional EUR 18.6 million was allocated for the programme under the REACT-EU mechanism for 2022, which ensured the extension of the measures to provide the warm lunch service until 30.06.2022 and for the new support measure to Ukrainians fleeing Russian military aggression, with the status of temporary protection granted, who entered the country after 24.02.2022³⁷⁰.

Table A. 46 – REACT-EU funds allocated to Bulgaria

	EU funding for FEAD (EUR)	REACT-EU funds allocated (EUR)	Total funding (EUR)	Share of REACT-EU compared to 2014-2020 EU funding
Bulgaria (*)	104,815,264	38,564,594	143,379,858	37%
EU28	3,811,370,399	686,059,308	4,497,429,707	18%

Source: <https://cohesiondata.ec.europa.eu/2014-2020-Finances/ESIF-2014-2020-EU-payments-daily-update-/gayr-92qh/data>

On September 29, 2022, Order No. ПД01-1872/September 29, 2022, was issued to provide non-reimbursed financial assistance with a beneficiary - the Social Assistance Agency, through its territorial divisions. **Target groups were persons, including children, granted temporary protection status.³⁷¹ Priority vouchers were provided for the needs of children and persons who are their parents, guardians, or persons where the children are accommodated with on a temporary basis under the Child Protection Act.**

The budget was BGN 4 400 000 (the equivalent of EUR 2 249 752), and the value of 1 voucher was BGN 100 (equalling to approx. EUR 51). Food products, clothes, shoes, children's food, children's clothes, school supplies, hygiene materials and other first-class products could be purchased against the provided voucher necessity of the store network in the country with an explicit ban on the purchase of medicinal products, tobacco products, wine, spirits, beer. The voucher was provided once per person from the target group, including children. In justified cases, individuals might have also received an additional voucher provided in the presence of the following cumulative conditions:

- There were unallocated vouchers.
- The individuals were unable to meet their basic life needs.
- Their integration was challenging and/or impossible.

In addition to the provision of vouchers, persons from the target groups also received accompanying support, such as individual counselling and/or provision of information on how to access social assistance and services, specific support for people with disabilities and children, legal assistance, assistance for inclusion in the labour market and other forms of social integration.

Horizontal principles of FEAD [*criterion: effectiveness*]

The MA's monitoring activities showed ³⁷²that the **horizontal principles were applied through all activities of FEAD in Bulgaria**. Additional checking was done to ensure thorough application of all horizontal principles as part of the verification procedures. Furthermore, ASA did not receive a single appeal or signal for cases of breaching the FEAD's horizontal principles, further confirming that horizontal principles were achieved from the point of view of all stakeholders. Moreover, the partnership within the programme grew to such an extent that the MA and partner organisations continue to work collaboratively regularly to seek feedback and improve their processes, so that they are in line with FEAD's horizontal principles.

³⁷⁰ Decision of the Council of Ministers No. 850 of 07.12.2021,

³⁷¹ In implementation of the Implementing Decision of the Council of the European Union /EU/ 2022/382 of March 4, 2022, to establish the existence of a mass influx of Ukrainians fleeing Russian military aggression in the sense of Article 5 of Directive 2001/55/EC and for the introduction of temporary protection, who entered the country after 24.02.2022.

³⁷² Evident from the annual reports of ASA for the implementation of FEAD.

To ensure the quality and safety of food products, each partner organisation that provides the warm lunch service owns or uses appropriate equipment for preparing food and carrying out the feeding process under Art. 12 of the Food Law. Moreover, to avoid food waste, all partner organisations have developed internal control mechanisms and protocols for handling undistributed hot lunch to ensure that it reaches the most vulnerable people and does not go bad/unused.

Regarding the principle of **equal opportunities**, the mechanism for determining the target groups under the operational programme strictly follows the national legislation in Bulgaria, which guarantees compliance with gender equality and non-discrimination principles.

When determining the users under Operation 3. (Provision of warm meal), **avoiding discrimination and ensuring equal opportunities** to participate in the projects are strictly observed regardless of gender, age, physical disabilities, ethnicity or religious characteristics. During the preparation of the hot lunch, an opportunity was provided to structure a varied and nutritious menu corresponding to the ethnic characteristics of the regions of implementation of each contract and to consider the taste and religious restrictions that the consumers express. The planning and provision of accompanying measures were also based on the identified specific needs of each user. This prevented any cases of discrimination based on sex, racial or ethnic origin, religion or belief, disability, age or sexual orientation. The support provided to users was done in a sensitive and non-intrusive way, with respect and understanding of users' age, physical, mental, psychological and ethnic differences.

Success and failure factors [*criterion: effectiveness*]

Success factors

The MA considers one of the main supporting factors for the effectiveness of FEAD operations in Bulgaria to be **the investment of time and staff capacity to educate the municipalities** and share good practices to motivate partner organisations to benefit from FEAD's activities in Bulgaria on a local level. As a **result**, FEAD-funded activities took place in most municipalities in Bulgaria (over 200 out of 265 in total).

Several of the municipalities claimed that with the support of the MA, they **accumulated experience in delivering the services within the FEAD programme**, making their provision successful. It was assessed as positive that the programme was regularly implemented over the course of seven years, thus, allowing them to provide a continuous service to people in need of support without gaps in time.

Another key enabling factor was that the MA maintained **regular communication with the partner organisations** and remained open, approachable, and flexible in adverse and daily situations, addressing any issues that appeared throughout the programme's implementation in the period 2014-2020.

Another crucial facilitating factor was **the improvement of the legal framework** governing the programme's implementation. Decree No.37 of the Council of Ministers in 2015, followed by an ordinance, defined the target audiences eligible for the programme's services, including as many people as possible and allowing the selection to be based on the person's individual circumstances. This way, the Managing Authority succeeded in including those who were in greatest need and in a very vulnerable position. The partner organisations interviewed held the view that the MA's regional units - responsible for revising the applications for receiving food support and assessing each application based on the person's circumstances – are among the most efficient institutions in the country.

Hindering factors

It is clear that the greatest hindering factor for all stakeholders in FEAD-funded operations was the COVID-19 pandemic. For the MA, the pandemic and the subsequently introduced measures to restrict the spread of the virus in the first months of 2020 posed specific difficulties for managing the programme because they had to introduce non-physical procedures for an extensive circle of partners quickly. However, **this obstacle was overcome by re-signing the contracts**, and the overall effect of the Fund's activities in the observed programming period (2014-2020) remained positive. In May 2020, the sociological agency "Alpha Research" published the results of a study on social measures aimed at helping the most vulnerable people during the period of state of emergency due to the coronavirus spread. It showed that respectively 72% and 69% of the interviewed people identified the assistance with food packages and the provision of warm lunches as some of the most important measures to help those most affected by the COVID-19 crisis.³⁷³ This effect of the measures amplified significantly the importance of the programme and the role of the MA with their partners in delivering the programme's operations.

³⁷³ BNT News (2020). Alpha Research: *1/4 of all Bulgarians are at risk of losing their income* ("Алфа Рисърч": 1/4 от българите са в риск от загуба на доходи"). Available at: <https://bntnews.bg/news/alfa-risarch-1-4-ot-balgarite-sa-v-risk-ot-zaguba-na-dohodi-1052485news.html>

One of the stakeholders approached for an interview challenged the effectiveness of the programme to provide the target groups with a balanced diet in terms of the persons who received food packages (leaving aside the recipients of the warm lunch service).³⁷⁴ According to the stakeholder, among the **factors that hindered the programme's effectiveness** were the irregularity of the deliveries of food packages to eligible people, the delivery of the same type of food in large quantities (e.g., 10 kg of sugar in one go), the lack of variety of the food delivered to the people (predominantly carbohydrates with very little protein-rich food), the lack of differentiation if this was food aimed at feeding an older person or a family with many little children, the vast food waste and the fact that only one partner was responsible for delivering food packages in the country's entire territory, whereas in other EU countries the practice was to have multiple organisations delivering in different regions of the country. In Bulgaria, the split of the service of providing food packages among several organisations was seen as inapplicable due to the concerns that social tension among the targeted audiences may arise in case of delay of delivery in some regions.

Another important hindering factor were the COVID-19-related economic processes, which impacted the type and quantity of food products that went into the food packages. Since 2020, a significant increase in the price of sunflower oil, sugar, and other key products had been observed not only in Bulgaria and the EU but worldwide. This led to some reluctance among the deliverers to stock certain products, including oil and sugar, because the preferred price quoted in the tender by the MA was far too low. This negatively impacted the end recipients because they did not receive essential products for a long time while the MA was trying to negotiate the necessary food products at a reasonable price. Furthermore, delaying the public tendering and procurement procedures generated additional expenses for the partner organisations because had to pay rent for empty storage sites for longer periods of time.

Assessing **socio-economic impact** at the micro- and macro-economic levels is challenging because the intended results consist of supporting more people rather than calculating the changes in their income and the plausible economic effects. Distributing food packages and providing warm meals alone may not directly alleviate poverty or immediately improve financial circumstances. However, meaningful support through food assistance, combined with broader social interventions, plays a crucial role in enhancing the economic stability of vulnerable groups. The accompanying measures are likely to bring some socio-economic impacts, but there is no available statistical information to demonstrate such a trend. Nevertheless, the statistics included in Table A. 44 indicate some positive trends for decreasing the number of people in Bulgaria who live in extreme poverty. Still, the programme itself does not operate with socio-economic indicators that indicate micro- and macro-economic level changes in Bulgaria as a result of the effectiveness of the programme.

The number of people who were eligible and benefitted from the social service of provision of warm lunches has increased, especially after the new group of Ukrainian migrants was included in the programme's target groups. From 1 January 2021 to 30 September 2022, 223 municipalities participated in FEAD's funded operation for warm lunches and catered for 62 483 people. Moreover, in the same period, the accompanying measures to provide warm lunches were focused on environmental protection, green transition, and digital transformation.

Overall cost-effectiveness of FEAD operations [*criterion: efficiency*]

It is essential to note that FEAD effectively contributed to achieving the national goal of reducing the number of people living in poverty by 260 000 people, in line with the objectives of the Europe 2020 strategy. Respectively, in the programming period, FEAD was also aimed at persons living in the highest degree of poverty and social isolation. The successful partnership with the municipalities created the conditions for an increasing number of people to receive a warm lunch, including a soup, a main course and a bread.

Identifying trends in the cost-effectiveness of FEAD operations and categorising one type of activity as more cost-effective than another is challenging in the case of Bulgaria due to the unavailability of appropriate indicators collected and publicly shared by the MA. In general, **it has not been recognised as a priority by the Managing Authority to observe the direct and indirect benefits on recipients of social services or to compare the cost-effectiveness of the different operations** delivered in Bulgaria. The standing point of the MA is that the cost per unit of the various measures of social assistance is fixed, and that unit goes to a single individual, which makes subsequent calculations irrelevant.

Support under FEAD complemented and built on national measures to expand the effective reach of the national social assistance programmes by reducing food costs for the end recipients and redirecting the savings to other vital purposes. A large part of the individuals and families from the primary target group for

³⁷⁴ Interview with a representative of food non-governmental organisation, in Bulgaria, Sofia, conducted in August 2023.

support with warm lunches also received monthly support aimed to satisfy their basic life needs, when this was impossible through their work and the property they own. In 2022, for example, 19 620 cases of individuals and families received the above mentioned financial monthly support. The value of the assistance for a person over 65 years, who lives alone and has no income, was EUR 53.85 / BGN 105.

Furthermore, during the implementation of the activities under Operation "3.1 - Warm lunches in the conditions of the COVID-19 pandemic", usually one person is fed 5 days a week /working days/ or on average for a month - 21 days. The spending per person per day was EUR 1.38 /2.70 BGN or in total for a month of EUR 28.98 / BGN 56.70. From 01.03.2022 the daily spending for a warm lunch for one person increased to EUR 1.48 / BGN 2.90, which equals EUR 31.08 / BGN 60.90 per month. In 2022, 68 107 people in need were supported with the warm lunch service. **Taking into account the type of support - the daily provision of warm lunch, it significantly eased both the everyday life of the users and the funds that would have been allocated for the service's provision. Furthermore, in the context of the soaring upward inflation in 2020-2022, a person would have struggled to afford a warm lunch for BGN 2.9 and definitely would have been far from having a balanced diet.**

On several occasions, the partner organisations of FEAD commented on cost-effectiveness regarding their financial situation. They made reference to the very low cost per unit and the unforeseen increase of the inflation rate in the period 2021-2023, meaning that often the financial resources made available to the municipalities from the FEAD budget to deliver social assistance measures were insufficient. The municipalities shared that they had to allocate funding from the municipality's budget to provide warm lunches or transport the food to the recipients' houses because the allocated budget was insufficient to cover the actual price of all products and petrol expenses. The expenses for accompanying measures were easier to foresee and manage because these did not depend on that many external factors compared to the preparation of warm lunches. **In this sense, one can argue that the cost-effectiveness of measures under Operation OP I for providing warm lunches is less cost-effective for the providers than the provision of accompanying measures due to the unforeseen costs that were regularly incurred in the former.** On the other hand, from the recipient's perspective, getting a warm lunch would be more cost-effective than receiving a voucher because the purchasing power of the voucher would have diminished over time due to the increasing prices of essential products.

The cost-effectiveness of the operation for providing food packages is also viewed as potentially low. Although centralised public tender procedures were used for acquiring food products, claims were made that the price discounts were lower than expected.³⁷⁵ In addition, the practice to deliver large quantities of food that would be impossible to consume until the expiry date by a single individual (for example, 10 kg of sugar) additionally decreased the cost-effectiveness of providing food packages.

The cost-effectiveness of the programme can be discussed in the context of the outcome of the accompanying measures, where the effect is measured by the MA cumulatively for all operations and all target groups. Operations are cost-effective if they generate effective final results through the engagement of the target audiences with accompanying measures such as consulting/referral to programmes and projects financed by the ESF for social services, qualification, employment and other measures; inclusion in various projects of the 2014-2020 Operational Programme Development of Human Resources (OPDHR); complex social services of various types, qualification courses and/or ensuring employment and promotion of the awareness of the opportunities that are provided by the social services units. For example, in 2022, 19 666 items were accounted by the MA as providing accompanying measures to improve qualification and employment of end-recipients of social services, and 442 of them engaged further with the available measures (290 individuals became participants in the programme Patronage Care+ and 146 individuals got employed in other projects).³⁷⁶ However, there is no systemised and publicly accessible data about the number of people who improved their income to the point that they were no longer considered within the target audiences' scope.

The MA and their partners identified **the constraints of the budget, the inflation rate, and the associated costs that come with the delivery of the operations of FEAD as the main deterrents to better cost-effectiveness** of FEAD's operations in Bulgaria. However, all were explicit that the cost-effectiveness and added value of any of the measures is higher for older people who live alone and those who do not have any

³⁷⁵ Interview with a representative of food non-governmental organisation, in Bulgaria, Sofia, conducted in August 2023.

³⁷⁶ Agency for Social Assistance (2023b). *Annual Report for 2022 for the Implementation of the Operational Program for Food And/Or Basic Material Support Fund for European Assistance to the Most Vulnerable Persons in Bulgaria /Summary/* ("Годишен доклад за 2022 г. за изпълнението на Оперативна програма за Храни и/или основно материално подпомагане на Фонд за европейско подпомагане на най-нуждаещите се лица в България (Резюме)"). Available at: <https://asp.government.bg/bg/operativna-programa-za-hrani/operativna-programa-za-hrani-2014-2020/>

income due to illness, disability, or other unusual personal circumstances than for any of the other target groups. One of the programme's partners added that informing the target audiences about the provided services financed by the European Social Fund /ESF/ and the newly created ESF + fund (social inclusion, education and skills, employment) was among the factors that contributed to the higher cost-effectiveness of FEAD. Still, qualitative or quantitative information has not proved this statement which remains somehow subjective.

Administrative burden of monitoring and reporting requirements [*criterion: efficiency*]

FEAD's monitoring and reporting requirements posed an administrative burden on the organisations involved in designing, managing and delivering the programme in Bulgaria. The major issue the MA and some partner organisations indicated was monitoring the indicators for products used in preparing the warm lunches because they had to calculate the number of products per group used to prepare each recipe.

The only additional administrative requirement introduced by ASA, in addition to what was initially required by FEAD (so-called, 'gold-plating'), was information regarding the types of accompanying measures provided by the partner organisations and local units of ASA, as well as specific results achieved. Given the significance of the accompanying measures provided, the importance of the results achieved and the aim of supporting the work of the experts providing accompanying measures, the following were developed by the Managing Authority and applied:

- Methodological guidance on reporting and provision of accompanying measures, and
- Reference on the provided accompanying measures and the results achieved.

Some of the partner organisations viewed the tendering procedures and their eligibility criteria introduced by the MA as too stringent to the extent that it prevented several organisations specialising in food distribution from applying for any of the tenders.

The MA did not introduce an individual registry for every recipient of social service. Often the recipients of food needed support to fill in the information themselves or had to have someone else do it for them. This added administrative pressure to the municipalities' staff and based on the feedback from the local authorities, the MA dropped off the practice of signing the individual registries daily. A new procedure that required a signature by the recipient only once a week and that was agreed with the municipalities, was introduced. The final reporting was also assessed as burdensome.³⁷⁷

The **quantification of time that delivery organisations spent on administrative requirements** was challenging because it differed from month to month and among partner organisations depending on the territorial scope they covered for deliveries and provision of warm lunches/food packages. Among the various administrative activities, the following ones were identified as the most administratively burdensome:

- Procedures for awarding public contracts: the procedure is carried out once the project activities start, but it usually lasts 2-3 months. It takes 4-5 hours per month to prepare the documents, plan the amount of food, conduct the procedure, conclude the contracts, and report what was achieved to the MA.
- The obligation to offer accompanying measures: accompanying measures require almost constant work. In the municipalities, they are almost constantly creating new brochures on various relevant topics. The development and printing of brochures take time, as well as the design of the brochure so that the subjects are presented in a suitable form. The municipalities would often conduct individual consultations with the project service recipients to ensure that the brochure is suitable for the intended recipients. The average number of hours per month is no less than 10 hours.
- Monitoring and reporting requirements: on average monthly, 4 to 5 hours for the partner organisations that provide warm lunches and 8 hours per day for at least 15 working days during the designated reporting period for the partner organisation that distributes the food packages (the Bulgarian Red Cross). Summarising information for 300,000 people across the country is very labour-intensive.
- Communication/publicity requirements: the teams implementing communication activities as part of FEAD usually spend no less than 5-10 hours per month.
- Evaluation requirements: processing the feedback from beneficiaries received in the format of questionnaires takes a lot of time, especially because many of the eligible people experience difficulties in reading, writing, and understanding the questions in the survey. This activity's reporting would typically take

³⁷⁷ Interview with a representative of partner organisation, in Bulgaria, Sofia, conducted in August 2023.

more time because sensitive information from recipients was collected, which needed to be processed in a way that protected the dignity of FEAD end recipients and avoided their stigmatisation.

Simplification measures [*criterion: efficiency*]

The Managing Authority (MA) – the Agency for Social Assistance (ASA) as part of the Ministry of Labour and Social Policy – embraced the implementation of flat rates as a simplification approach to reduce the administrative expenses for management and participation in FEAD and ultimately to reduce the occurrence of financial errors. ASA shared that **the use of flat rate indeed partially decreased their financial workload and accelerated to a certain extent the payment procedures** to the municipalities participating in the operation to provide warm lunches. The ultimate effect of introducing more straightforward funding rules was increasing the willingness of more municipalities to join in FEAD-funded actions, which has led to the increased number of end recipients – approx. 30 000 people received access to various social services as part of the FEAD operations that had not been engaged before.

In Bulgaria, **indirect delivery of FEAD was implemented through vouchers that were made available only to persons, including children, from Ukraine**, who were granted temporary protection status. Priority vouchers were provided for the needs of children and the persons who are their parents, guardians, custodians or persons with whom children are placed under the Child Protection Act. Nevertheless, **the practical experience with the voucher operation was minimal, and the partner organisations have yet to assess its effects to simplify administrative requirements**. It facilitated the actual distribution of the service to the eligible recipients. Still, it needs to be clarified how this will be audited and that, potentially, can cause certain inconveniences for the MA and the partners.

According to the MA, the **cost-effectiveness of FEAD operations can be improved in terms of decreasing the administrative burden by introducing changes in the monitoring of the programme and not so much in FEAD's financial management**. It was suggested that a significant difference at a national level would be observed if the detailed monitoring of food products used to prepare the warm lunch servings was removed. Another suggestion made by the MA and widely supported by the partnering organisations was to simplify the signing procedures that now require the recipients to sign on their individual protocol daily. This is highly challenging for older people, those who are illiterate, and people with disadvantages.

Coherence of FEAD with other interventions [*criterion: coherence*]

The measures co-financed by FEAD, as well as those co-financed by the ESF, were coherent and complementary, and the differences in their operations' specifics ensured that overlaps and double funding did not happen. FEAD's initiatives primarily target individuals experiencing severe material deprivation, offering essential support through the provision of food products and warm meals. This demographic often comprises people who are too detached from the labour market to benefit from the social inclusion measures provided by the European Social Fund (ESF). Through part of the provided accompanying measures, the end recipients of FEAD measures were informed about the services offered through ESF funding, available qualification training schemes, employment opportunities and the prospects under the newly created ESF+ fund. **The support from both the FEAD and the ESF is aimed primarily at the high-risk groups of society, which is also a prerequisite for maximising the effect of the accompanying measures under the FEAD to achieve the goals of the ESF**.

Complementarity between FEAD and the activities within the "Social Protection Fund" was achieved through the national social management system by expanding the network of canteens. The operational programme provided resources to the municipalities as part of the local measures to tackle poverty by ensuring the service of warm lunches.

In 2022, the "Social Protection Fund" financed 28 public canteens in the country, and for comparison, according to MA, municipality-managed canteens were financed under 223 projects co-funded by FEAD. The "Social Protection Fund" also provided funds for the reconstruction and modernisation of the existing material base of the municipal home social patronages and canteens, where the warm lunches most often were prepared (the lunches funded by FEAD). In 2022, 35 municipal projects included actions for repairs and provision of new equipment for kitchens, and 24 projects provided the service of warm lunches with funding under Operation Type 3 of FEAD.

3.2. Is FEAD still relevant?

Relevance to target groups [*criterion: relevance*]

The design of FEAD in Bulgaria was simplified for much of the programming period. From 2015 to 2019 included, the measures funded by FEAD aimed to support the target groups in three ways – by providing funding for the purchase and distribution of food packages, by providing funding to the municipalities for the

warm lunches service, and by providing resources to the partnering organisations to enable them to deliver a variety of accompanying measures. In 2020, the programme expanded to include more vulnerable people due to the unforeseen spread of the coronavirus, but in principle, the operations funded by the programme remained the same. In 2022, the programme expanded once again to accommodate the needs of the Ukrainians fleeing Russian military aggression. The migrants who were granted the status of temporary protection in Bulgaria were eligible to receive vouchers to buy basic products, mainly aimed at the needs of their children and older people.

The primary and additional target groups of FEAD include such a wide range of people that it would be superficial and subjective if one claims that the design of the operational programme was adequate to address all needs to the same extent. **The programme actually reached, in practice, all vulnerable groups, but the relevance to the groups of people in need varied because their circumstances were different.** The interviewed partner organisations were explicit that the programme's relevance is the greatest for the largest group of recipients of FEAD's, that is, the people aged 65 or above. A significant part of these people live alone and either will not or cannot cook for themselves every day so that they maintain a balanced diet, which is essential for them considering their health at this point in life. Even if the target groups could prepare their own food, they would never be able to have a decent meal for BGN 2.70 a day based on the current prices of food products in supermarkets.

In terms of the relevance of the food distributed, to ensure a balanced and quality meal, the MA required the warm lunches to be prepared according to the Collections of recipes for public catering establishments, approved by the Bulgarian legislation in the field of nutrition, also under the requirements of Regulation 852/2004 and the Food Act. In the cases of using adapted recipes, the MA imposed a condition that they were prepared by a nutrition expert/technologist following the national standards and norms for nutrition and the requirement to contribute to a balanced diet. In some cases, the canteens were able to adapt the menu as per the religious preferences and customs of the residents to avoid food waste and to ensure that people are respected for their religious beliefs, avoiding cases of discrimination and even segregation. It was pointed out, though, that rarely can the canteens cater for people with specific diets (due to medical conditions), allergies, etc. Also, the food was the same for all people catered by a single canteen regardless of their age, which was seen as inappropriate because little children need a different composition of nutrients as compared to the needs of people aged 65 or above.

Similar was the appropriateness of the service of food packages provision – this was highly relevant to all people who did not have the budget to purchase enough food. Still, the variety of the products in the packages and their appropriateness as per their health needs was speculative at times (they certainly did not need 10 kg of sugar in a single delivery). Often, the end recipients commented they would enjoy receiving more dairy products and a greater variety of meat, fresh fruit, and veggies. This fresh produce is naturally very challenging to deliver and store, while dairy and meat must be transported and stored by following specific legal requirements, which the Bulgarian Red Cross could not satisfy (for example, for dairy products, they will need vans with freezers and also storage with freezers).

Lastly, the variety of the accompanying measures was so vast to meet the needs of the target groups year by year that **the relevance of the programme was greatly improved** over time. Namely, because of the accompanying measures that ensured an individualised approach to every single user of the programme's operations, the MA was able to collect and share some great success stories of people who were first users of the programme's services and later became self-sustainable citizens who were successful at meeting their needs and providing for their families.

Relevance of FEAD now and in the future [*criterion: relevance*]

The programme will continue to be important in Bulgaria because the level of poverty is unlikely to change soon based on the ongoing political and economic processes in the country. None of the interviewed partner organisations nor the MA expressed the view that the relevance of FEAD will diminish due to new economic, social, or political trends, and especially for Bulgaria being among the poorest countries in the EU. Instead, the interviewed organisations highlighted **the need for maintaining the service of warm lunches provision** because if discontinued, even for a short period of time, thousands of people are likely to face starvation not just due to the lack of adequate financial resources but because they are physically unable to shop food or cook for themselves.

It is also essential that the transportation of food to the recipients' homes remains as a service for at least those people who live too far away from the canteen/collection points to be able to go every day, where there is a lack of reliable public transport, and for people who are unable to move from their homes/beds (due to different disabilities and illnesses).

In addition, **the demographic crisis in Bulgaria will likely increase the number of people living alone and needing the whole spectrum of social support activities.**

Based on the discussion in the previous sub-section, the following needs have been identified as relevant and some of them will be included in the 2021-2027 programming period:

- the food packages to include a broader variety of food whenever possible and essential hygienic products;
- provision of food that caters for various dietary requirements;
- provision of food that is adequate for the needs of infants and little children up to 3 years old;
- provision of products for newborns.

3.3. Did FEAD make a difference and to whom?

EU added value [*criterion: EU added value*]

Volume effects: The added value of the EU programme to the Bulgarian institutions' efforts to manage poverty and social exclusion is undeniable and evident. In the first place, **the service of provision of food packages would not have existed if the programme was not available for implementation in Bulgaria with the respective financial resources.** With the programme's financial resources, the Bulgarian Red Cross successfully manages between 300-315 collection points in all 265 municipalities in Bulgaria. The organisation was supported by hundreds of volunteers who participated in the food packages' distribution to the target audiences and the provision of part of the accompanying measures based on individual circumstances. Moreover, the Bulgarian Red Cross acted as a mediator, and their volunteers collected valuable feedback from the target audiences that was shared with the MA to introduce changes to the programme and make it as practical and helpful as possible.

FEAD provided additional resources to the existing action to provide warm lunches by expanding the service beyond the winter period and making it an all-year-round service available to many more users than before 2014. Also, new canteens were created with funding available through FEAD to support the municipalities' efforts to expand the service nationwide. In 2015, there were 111 canteens in 86 municipalities in Bulgaria.³⁷⁸ Only one year later, the number of municipalities involved in the programme increased to 204 and 236 canteens, covering more than 70% of the country's territory.³⁷⁹ The number of users also increased, from 8291 in 2015 to 28 670 in 2016.

In addition to the provision of food services, the **target audiences received information about accompanying measures aimed at reducing social exclusion.** Some of the most significant accompanying measures throughout the period with tangible impact and results were:

- counselling/referral for social assistance;
- assistance for the use of health and educational services;
- support provided as per the individual needs and problems of the target audiences (provision of clothing, securing employment, issuing an identity document);
- assistance for accessing for heating allowance in the winter months.

Scope effects: The MA remained resilient throughout the programming period and initiated **multiple changes to the programme to ensure that FEAD would reach new groups and harder-to-reach groups or groups that had previously been outside the scope of national mechanisms.** New target groups were added in 2020 and 2022 in relation to the coronavirus pandemic and Russia's war of aggression against Ukraine. Furthermore, the operation

³⁷⁸ Agency for Social Assistance (2016). *Annual Report for 2015 for the Implementation of the Operational Program for Food And/Or Basic Material Support Fund for European Assistance to the Most Vulnerable Persons in Bulgaria /Summary/* ("Годишен доклад за 2015 г. за изпълнението на Оперативна програма за Храни и/или основно материално подпомагане на Фонд за европейско подпомагане на най-нуждаещите се лица в България (Резюме)"). Available at: <https://asp.government.bg/bg/operativna-programa-za-hrani/operativna-programa-za-hrani-2014-2020/>

³⁷⁹ Agency for Social Assistance (2017). *Annual Report for 2016 for the Implementation of the Operational Program for Food And/Or Basic Material Support Fund for European Assistance to the Most Vulnerable Persons in Bulgaria /Summary/* ("Годишен доклад за 2016 г. за изпълнението на Оперативна програма за Храни и/или основно материално подпомагане на Фонд за европейско подпомагане на най-нуждаещите се лица в България (Резюме)"). Available at: <https://asp.government.bg/bg/operativna-programa-za-hrani/operativna-programa-za-hrani-2014-2020/>

for providing food packages has two target audiences – primary and secondary, with the sole purpose of avoiding food waste and optimising the distribution of food as per the personal circumstances of people at risk of extreme poverty. The programme also opened up to provide larger food packages for families with children and to offer warm lunches for entire families (leaving behind the practice of serving only to eligible persons, which was an erroneous practice of dividing families).

Role effects: Regarding innovation driven by FEAD-funded operations, there was a case in one of the regions where people with special needs were included in preparing warm lunches. This way, they were socially engaged with the support of the most vulnerable people, and they were allowed to get proper work experience and learn new skills. An example of upscaling actions is the suggestion by several municipalities that the warm lunches service be extended to include kids' food for infants (10 months old) and little children (up to 3 years old).

Process effects: The processes established in the programme transpired as accommodating for all partner organisations. **They expanded the effects of the activities and created an environment where the organisations truly worked in partnership and towards a common goal** instead of operating governed only by the hierarchical differentiation between a managing authority and contractors. The influencing role of the MA was substantial, and that is reflected in the increasing number of municipalities participating in the programme over the programming period. The municipalities improved their working based on FEAD and shared good practices while collaborating in their attempts to reach out to everyone in need. The provision of the operations became personalised in a way that the MA, Bulgarian Red Cross, and the municipalities knew the people they served - who are living alone, who do not have any relatives and have difficulties travelling, who will need the food delivered to their home, who needs additional support provided from the national schemes, etc. In addition, in many municipalities, the mayors volunteered for the Bulgarian Red Cross. One of the interviewees shared: “The collaborative practice between our municipality and the managing authority has been tremendous and exemplary.”³⁸⁰

Overall, the **main results of FEAD** for the period 2014-2020 were the following ones:

- successfully reached out to as many people as possible and expanded the target audiences by at least three new groups (people affected by the coronavirus pandemic, Ukrainian migrants, and a secondary target group of people falling outside of the ASA social services selection criteria);
- included actions as per the individual needs of the end-users (transportation of the warm lunches to the recipient's home), making the services individualised and customised and demonstrating care and attention to everyone's needs and personal circumstances;
- expanding the partner organisations network by attracting many new municipalities to the operation for warm lunches provision;
- providing a broad range of accompanying measures to the primary operations that made the programme's actions cost-effective and increased their socio-economic impact;
- strengthening the working relations in the programme, led and supported by the Agency for Social Assistance.

There is no doubt among the partner organisations and the MA that **the most significant added value of FEAD support was for the people aged 65 or older**, especially those who live alone, who got the chance to receive warm lunches all year round. Furthermore, the service has been going on incessantly since 2015 and expanded to almost all regions (municipalities) in Bulgaria, which would not have been possible without FEAD's financial support.

Visibility [*visibility*]

The general public and end recipients were fully aware that the support came from FEAD and the EU. There were info boards at all canteens where warm lunch was served, as well as at the venues for collecting the food packages. ASA ensured that the EU's visuals appeared on all documents and materials that were distributed.

The partner organisations were very flexible on the methods for popularising the programme. They used a **variety of communication measures**, such as putting up information tables/boards on public sites (post offices, for example), at collection points, office spaces, creating Viber groups, websites, social media pages, etc. The Bulgarian Red Cross also spread information about the programme through the videos they made and through leaflets.

³⁸⁰ Interview with a representative of implementing organisation, in Bulgaria, Plovdiv, conducted in August 2023.

Furthermore, according to a study by Alpha Research (not funded by ASA), during the coronavirus epidemic in 2020-2021, the activities funded by FEAD and the EU were the most recognisable by the general public.

4. Good practices

The **accompanying measures** provided under FEAD's main operations are many actions delivered either by the local units of ASA, the municipalities or other partnering organisations such as NGOs and small businesses. The indicators show clearly that the impact of the accompanying measures is tangible, often measured by units. The most important effects, though, are intangible and cannot be assessed by quantitative indicators – these are the effects that a single serving of warm lunch brings to each recipient.

ASA launched the short video “Warm Lunch for the Soul”, which describes the experiences of some of the most vulnerable people in Bulgaria and how the warm lunch service has changed their lives beyond the pure fact that this keeps them fed and away from starving.³⁸¹ The **warm lunch service has a significant social element that allows the representatives from partnering organisations to engage with people and observe their health daily**. For older people who live alone, the warm lunch service is a chance to socialise and communicate with someone, even if that is for a few minutes a day if the food is delivered to the recipient's home. For others, the canteen is where they meet with other people. There are several cases of people who were not only recipients of the warm lunch service, but they became part of the staff working at the canteen, which changed their lives for the better.³⁸² The feeling of being engaged in a meaningful service for the people in the community is something that numbers cannot measure. One concrete success story is of V.S., who spent 13 years in solitude without enjoying life. With the municipality's and local volunteers' support, V.S. started going to the local canteen to have her lunch every day. A few months later, V.S. was encouraged to join the team of people cooking the lunches. She said: "I genuinely enjoy being among new people and knowing their fates." Since the municipality is paying her to work as a chef in the canteen (which comes on top of her pension wage), she manages to cover her expenses for electricity and medical needs. V.S. also shared that the warm lunch service is more than food, it gives her security and peace.

Members of the partner organisations responsible for delivering the food to the recipients' homes shared that they managed to help in other ways different from simply socialising. Often, these people do little chores for the older people who struggle to leave their homes, like handing in paperwork for them or buying them medical products. There were extreme cases when the partner organisations saved people from domestic abuse and violence, provided them with a house to live in, or helped them receive educational and special needs services in local centres.

All these examples highlight that bringing someone a warm lunch is much more for almost every recipient living in extreme poverty and exceptional circumstances. The service has an undisputedly positive impact on the end recipients of the programme by helping them make the first steps towards overcoming poverty and social exclusion. Despite this, especially among recipients of individual packages with food products, there is still an insufficient appreciation for more meaningful involvement in social and economic life through their participation in activation measures such as prequalification and educational courses, which could improve their chances of finding a job, with recipients primarily seeking opportunities for other types of social assistance.

5. Conclusions and lessons learned

When the **effectiveness** of FEAD is reviewed, the most significant aspect of the programme is **its flexibility to meet the rising needs of the most vulnerable people in Bulgaria** and the willingness of the Managing Authority to lead and support the partner organisations throughout the changes, COVID-19 and Russia's war of aggression against Ukraine being the most substantial determinants for the modifications of FEAD. In March 2020, ASA firmly demonstrated its resilience and flexible approaches and swiftly changed how warm lunches and individual packages of food products were provided to the end recipients to allow transportation to their homes instead of using canteens and going to collection points. Among other success factors driven by the MA that contributed to FEAD's effectiveness in Bulgaria was **developing municipalities staff knowledge and capacity to work with the most vulnerable people in the country, maintaining regular communication with the partner organisations, improving the legal framework, and utilising additionally available**

³⁸¹ Ministry of Labour and Social Policy (2020). *Warm Soup for the Soul* („Топъл обяд за душата “). Available at: [Топъл обяд за душата](#)

financial resources in the most needed action areas, overcoming thus the multiple hindering factors that appeared along the implementation of the programme in 2014-2020.

It is crucial to highlight that **the programme in Bulgaria did not differentiate specific target groups to work with**. Instead, the programme grouped the eligible recipients into four specific national sub-goals: children in the age range 0-18 living in poverty; persons aged 65 and over living in poverty; unemployed in the age range 18-64, living in poverty; and employed persons in the age range 18-64 living in poverty. The interviewed partner organisations identified the most prominent group to be people older than 65 years. Although the income criterion remained the main one when applicants for social services and benefits were considered, **the local units of the Agency for Social Assistance were given the prerogative to consider applications based on unique personal circumstances**.

FEAD's efficiency transpired mainly through its operations' overall cost-effectiveness, which meant operating with very low costs per unit. The unforeseen inflation in the period 2021-2023 made **FEAD budget insufficient to cover the actual price of all products and petrol expenses** and the municipalities had to allocate funding from the municipality's budget to provide warm lunches or transport the food to the recipients' houses. Regardless, **the accompanying measures of the programme generated cost-effective final results** through the engagement of the target audiences in ESF projects for complex social services of multiple types, qualification courses and/or ensuring employment and promotion of the awareness of the opportunities that are provided by the social services units.

According to the MA of FEAD in Bulgaria, the cost-effectiveness of FEAD operations can be improved by decreasing the administrative burden by **simplifying the monitoring of the programme**. It was suggested that a significant difference at a national level would be observed if the detailed monitoring of food products used to prepare the warm lunch servings was removed. ASA shared that the use of flat rate indeed partially decreased their financial workload and accelerated to a certain extent the payment procedures to the municipalities participating in the operation to provide warm lunches. **The ultimate effect of introducing more straightforward funding rules was the attraction of more municipalities to join in FEAD-funded actions**, which led to the increased number of end recipients – approx. 30 000 people received access to various social services as part of the FEAD operations that had not been engaged before.

As FEAD did not exist in isolation, the MA had to ensure that the programme was **coherent** and complimentary to other programmes and operations aimed primarily at the high-risk groups of society, avoiding double funding. Through part of the provided accompanying measures, the end recipients of FEAD measures were informed about the services offered through ESF funding, available qualification training schemes, employment opportunities and the prospects under the newly created ESF+ fund. Complementarity between FEAD and the activities within the “Social Protection Fund” was achieved through the national social management system by expanding the network of canteens. For example, in 2022, the “Social Protection Fund” financed 28 public canteens in the country, and for comparison, according to MA, municipality-managed canteens were financed under 223 projects co-funded by FEAD. The “Social Protection Fund” also provided funds for the reconstruction and modernisation of the existing material base of the municipal home social patronages and canteen, where the warm lunches most often were prepared (the lunches funded by FEAD).

In terms of **relevance**, the primary and additional target groups of FEAD included such a wide range of people that it would be superficial and subjective if one claims that the design of the operational programme was adequate to address all needs to the same extent. **In practice, the programme reached all vulnerable groups, but the relevance to the groups of people in need varied because their circumstances were different**. The interviewed partner organisations were explicit that the programme's applicability was the greatest for the largest group of FEAD recipients, the people aged 65 or above. Many of these people live alone and either will not or cannot cook for themselves daily to maintain a balanced diet, which is essential for them considering their health at this point in life. Even if the target groups could prepare their own food, they would never be able to have a decent meal for BGN 2.70 a day based on the current prices of food products in supermarkets.

Similar was the relevance of the service of food packages provision – this was highly relevant to all people who did not have the budget to purchase enough food. Still, the variety of the products in the packages and their appropriateness as per their health needs was speculative at times (they certainly did not need 10 kg of sugar in a single delivery). Often, the end recipients commented they would enjoy receiving more dairy products and a greater variety of meat, fresh fruit, and veggies.

In addition, the variety of the accompanying measures was so vast to meet the needs of the target groups year by year that the relevance of the programme was greatly improved. Because the **accompanying measures ensured an individualised approach to every single user of the programme's operations**, the MA was able to collect and share some great success stories of people who were first users of the programme's services

and later became self-sustainable citizens who were successful at meeting their needs and providing for their families.

The programme will continue to be important in Bulgaria because the poverty level is unlikely to change based on the ongoing political and economic processes in Bulgaria. None of the interviewed partner organisations nor the Managing Authority expressed the view that the relevance of FEAD will diminish due to new economic, social, or political trends, especially since Bulgaria is among the poorest countries in the EU. Instead, the interviewed organisations highlighted **the need for maintaining the service of warm lunches provision** because if discontinued, even for a short period, thousands of people are likely to face starvation not just due to the lack of adequate financial resources but because they are physically unable to shop food or cook for themselves.

The added value of the EU programme to the Bulgarian institutions' efforts to manage poverty and social exclusion is undeniable and evident. In the first place, the service of provision of food packages would not have existed if the programme was not available for implementation in Bulgaria with the respective financial resources. FEAD provided additional resources needed to expand the service of warm lunches beyond the winter period and made it an all-year-round service available to many more users than before 2014. Also, new canteens were created with funding available through FEAD to support the municipalities' efforts to expand the service nationwide. In 2015, there were 111 canteens in 86 municipalities in Bulgaria. Only one year later, the number of municipalities involved in the programme increased to 204 and 236 canteens, covering more than 70% of the country's territory.

The MA remained resilient throughout the programming period and initiated multiple changes to the programme to ensure that FEAD would reach new groups and harder-to-reach groups or groups before that had been left outside the scope of the national mechanisms. Likewise, the processes established in the programme transpired as accommodating for all partner organisations, expanding thus the effects of the activities and creating an environment where the organisations truly worked in partnership and towards a common goal. The influencing role of the MA was substantial, and that is reflected in the increasing number of municipalities participating in the programme over the programming period. One of the interviewees shared: "The collaborative practice between our municipality and the managing authority has been tremendous and exemplary."

When the **visibility** of the measures is concerned, it was assessed that the general public and end recipients were fully aware that the support came from FEAD and the EU. There were info boards at all canteens where warm lunch was served and at the venues for collecting the food packages. ASA ensured that the EU's visuals appeared on all distributed documents and materials, and the partner organisations created Viber groups, websites, social media pages, videos, etc.

Appendices

Appendix 1: Methodology

The methodology applied for building a case study to support the ex-post evaluation of the 2014-2020 Fund for European Aid to the Most Deprived (FEAD) in Bulgaria was driven by the overall aim to gain deeper insight into FEAD-related activities, target groups, and achievements. Assessing the following aspects of the programme aimed to provide various in-depth insights of FEAD's implementation:

- The effectiveness of FEAD support in actually reaching the most vulnerable groups, including information on specific target groups reached/not reached and why; and the relevance of the support to these groups and their evolving needs;
- Evidence of the impact of FEAD support and activities on the target groups, on the broader socio-economic context in your country including unintended impacts (such as increased capacity/expertise of organisations involved in FEAD);
- The effectiveness of FEAD in mitigating the COVID-19 pandemic effects including specific actions taken in response to the COVID-19 pandemic at national/regional/local levels, supported by FEAD through the CRII and CRII+ initiatives and the influence of CRII and CRII+ initiatives on policy programming and funding;
- The efficiency of FEAD and factors influencing this. Case studies are particularly important in gathering quantitative evidence (estimates/averages) of the amount of time spent on administrative activities as a result of management and control system requirements. An assessment on whether simplification measures (e.g. the use of flat rates, use of vouchers and other simplification measures) had an impact on efficiency is also key;

- Synergies/overlaps between FEAD and national actions and policies for poverty alleviation and social inclusion;
- The relevance of FEAD in light of crises during the programming period including the COVID-19 pandemic, the Russia's war of aggression against Ukraine and in light of emerging and future socio-economic trends.

The data needed for developing the case study was collected via a desk research (using a variety of resources, such as official programme documents, annual reports, report of other experts and academics working on social inclusion in Bulgaria, videos, media posts, financial and statistical data of national and EU character), interviews with the Managing Authority and several of its main partner organisations, and additional follow-up consultations with the Agency for Social Assistance and its partners involved in the on-the-ground delivery of FEAD, including civil society organisations and public bodies operating at a more local level with end recipients.

Table A. 47 – Evaluation framework

Evaluation criteria	Main research questions
Effectiveness	<p>To what extent has FEAD support contributed to achieving the objectives set in Article 3 of Regulation (EU) No 223/2014?</p> <p>Which factors, whether unintended or not, facilitated or hindered the effectiveness of FEAD operations (in terms of implementation and results)?</p> <p>Were there unintended results that have occurred, and which hindered progress or facilitated it?</p> <p>What socio-economic impacts can be identified from FEAD support, both at micro-economic and, if possible, at macro-economic level?</p>
Efficiency	<p>What types of activities and for which target group were the most/least cost-effective? Why?</p> <p>Are there any examples of good practices implemented to improve the efficiency of FEAD operations?</p> <p>Which are the factors that influenced the efficiency of FEAD? Rank these factors by order of importance and justify your ranking.</p> <p>To what extent were the elements of Management and Control System (MCS) requirements in FEAD set appropriately to minimise the administrative burden? Did they allow effective and efficient implementation? Did those elements protect the dignity of FEAD end recipients while avoiding stigmatisation?</p> <p>To what extent can FEAD processes be simplified at the national level? And at EU level?</p>
Coherence	<p>To what extent were FEAD operations coherent with other interventions? How have complementarity and synergies been ensured?</p>
Relevance	<p>How relevant was the support to the needs of the most deprived?</p>
EU added value	<p>Overall, what and how significant has been the added value of FEAD support in producing beneficial effects that would otherwise not have taken place? This question is addressed by assessing volume, scope, role and process effects.</p> <p>Were there attempts in MS to quantify and assess the impact of FEAD support?</p> <p>What are the key results of FEAD support that made a difference?</p> <p>To which group(s) of stakeholders did FEAD make a tangible difference?</p>
Visibility	<p>To what extent are the general public and end recipients aware that support comes from FEAD and the EU?</p>

Although the methodology's data collection includes a wide representativeness of sampling to inform the case study, the limitations of the work done come from the lack of interviews or surveys with the end recipients of FEAD. To manage this limitation, the case study used at least two videos where views of the end recipients were presented.

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Appendix 3: FEAD indicators

Table A. 48 – Input indicators for the implementation of FEAD in Bulgaria in 2014-2022

Indicator	Total amount of eligible public expenditure approved in the documents setting out the conditions for support of operations (EUR)	Total amount of eligible public expenditure incurred by beneficiaries and paid in implementing operations (EUR)	Total amount of eligible public expenditure declared to the Commission (EUR)	Implementation rate (expenditure declared as share of allocated budget)
2014-2022	161 884 756,00	159 622 013,00	51 897 126,00	94%

Source: SFC Database 2014

*Please note that there was no expenditure in 2014.

Table A. 49 – Common output indicators for Bulgaria, 2015-2022

Output indicators on food support distributed	2015	2016	2017	2018	2019	2020	2021	2022
Quantity of fruits and vegetables (tonnes)	97	983	4 839	6 715	4 775	4 367	4 455	2 881
Quantity of meat, eggs, fish, seafood (tonnes)	85	253	2 394	2 750	2 459	1 803	2 116	1 897
Quantity of flour, bread, potatoes, rice and other starchy products (tonnes)	189	3 411	12 727	8 954	6 971	4 685	5 530	4 218
Quantity of sugar (tonnes)	1	15	2 850	1 179	29	865	897	37
Quantity of milk products (tonnes)	35	116	530	779	881	428	754	846
Quantity of fats, oil (tonnes)	12	33	217	1 233	1 307	1 136	280	341
Quantity of convenience food, other foodstuff (not falling in abovementioned)	23	95	217	227	229	124	204	236

Output indicators on food support distributed	2015	2016	2017	2018	2019	2020	2021	2022
categories) (tonnes)								
Total quantity of food support distributed (tonnes)	442	4 907	23 774	21 837	16 651	13 408	14 236	10 457
Proportion of FEAD co-financed food products in the total volume of food distributed by the partner organisations *%(100	100	100	100	100	100	100	100

Source: Agency for Social Assistance, Republic of Bulgaria.

*Please note that there was no expenditure in 2014.

Table A. 50 – Number of FEAD participants, in Bulgaria in 2015-2022, per year

Result indicators on food support distributed	2015	2016	2017	2018	2019	2020	2021	2022
Total number of persons receiving food support	6 536	512 929	677 708	539 983	465 965	494 127	553 444	14 828
Number of children aged 15 years or below	562	138 643	179 725	138 078	128 038	109 744	124 152	562
Number of persons aged 65 years or above	2 094	109 680	146 973	128 497	115 296	165 871	194 757	8 204
Number of women	3 559	281 686	369 832	300 670	267 659	286 936	326 692	8 342
Number of migrants, participants with a foreign background, minorities (including marginalised communities such as the Roma)	2 268	65 868	109 334	48 403	36 232	30 684	43 645	2 911
Number of persons with disabilities	1 537	94 510	84 006	133 469	126 868	153 271	160 857	2 803
Number of homeless	101	569	1 191	191	55	36	134	28

Source: Agency for Social Assistance, Republic of Bulgaria.

*Please note that there was no expenditure in 201

X.3 Denmark

1. Context and background

Denmark, known for its high standard of living, strong welfare system, and a well-functioning economy, has **exhibited economic resilience in the face of the global uncertainties** over the reference period. Despite challenges such as Brexit, COVID-19 and international trade tensions, Denmark maintained a stable economic trajectory and a high employment rate.

During the reference period 2013-2022, **Denmark managed to keep poverty levels relatively low** when compared to other EU Member States. Poverty indicators, such as the AROPE rate, have been below the EU average of 21.6 % (2022), showcasing Denmark's commitment to social equality. In 2015, the AROPE rate was at 18.6 % and fell to 17.1 % in 2022. AROPE children also fell from 15.9 % to 13.4 % over the same period. The severe material deprivation rate fell from 3.2 % to 2.4 % between 2014 and 2020. Food insecurity saw a slight increase in the percentage of residents who are unable to afford a meal with meat, chicken, or fish every second day rising from 1.7 % in 2014 to 2.2 % in 2022. The self-reported unmet need for medical care has fluctuated between 1 % and 2.1 % in the period.

The economic disruptions and health crisis have exacerbated vulnerabilities, leading to concerns about potential increases in poverty and homelessness. However, the **Danish government quickly implemented relief measures**, including income support, rent subsidies, and eviction moratoriums, to mitigate the pandemic's impact for vulnerable residents (Ministry of the Interior and Health of Denmark, 2020).

As illustrated in the above sections and in the data in Table A. 51, Denmark provides a high degree of security for its citizens. However, it is worth noting that **vulnerable migrants may find it harder to access this security**. Partner organisations report that these individuals face obstacles when entering the labour market and applying for social transfers and services. As such, there is a demand for guidance regarding their rights, legislation, and clarification regarding available options.

Table A. 51 – Socio-economic context in Denmark

Denmark	2014	2015	2016	2017	2018	2019	2020	2021	2022	Trend
1. At-risk-of-poverty or social exclusion rate (AROPE) Total		18,6	17,5	17,8	17,5	17,3	16,8	17,3	17,1	
2. AROPE Children		15,9	13,8	15,1	15,0	14,2	13,8	14,4	13,4	
3. Severe material and social deprivation rate (SMSD)		3,2	2,6	3,6	3,5	3,8	3,5	3,1	3,2	
4 Severe material deprivation rate (SMD)	3,2	5,8	2,6	3,1	3,4	2,6	2,4			
5.Inability to afford a meal with meat, chicken, fish (or vegetarian equivalent) every second day	1,7	1,7	1,6	2,1	1,5	2,2	2,3	2,0	2,2	
6. Impact of social transfers (other than pensions) on poverty reduction % reduction of AROPE	55,0	52,7	52,2	51,0	47,3	47,3	52,4	53,9	50,4	
7. Housing cost overburden	15,6	15,1	15,1	15,7	14,7	15,6	14,1	15,5	14,7	
8 Self-reported unmet need for medical care % of population 16+	1,4	1,3	1,3	1,0	1,3	1,8	1,7	1,3	2,1	
9. Households with very low work intensity		11,9	11,1	10,5	10,0	9,5	9,1	9,7	8,8	
11. Population in the EU could not afford unexpected financial expenses	28,5	26,5	24,5	25,1	25,2	22,9	22,7	19,5	20,2	
13. Share of total population having neither a bath, nor a shower in their dwelling	2,2	2,2	2,4	2,0	1,9	1,8	2,1			
14. No indoor flushing	2,2	2,2	2,4	2,0	1,9	1,8	2,1			
17. Persons who cannot afford a telephone	0,0	0,0	0,0	0,0	0,0	0,0	0,0			
18. Persons who cannot afford to replace worn-out clothes	6,2	7,4	6,3	6,9	6,8	7,0	7,0	6,9	7,6	
20. Persons who cannot afford to get-together with friends or family (relatives) for a drink or meal at least once a month	3,2	4,0	4,5	3,7	3,3	3,9	3,6	3,5	3,9	
21. Persons who cannot afford internet connection for personal use at home	1,0	1,5	1,1	0,6	0,6	0,7	0,7	0,7	0,5	
22. In-work risk of poverty	3,5	4,0	3,2	3,7	4,3	4,2	4,3	3,6	2,8	
23. Long-term unemployment	1,7	1,6	1,2	1,2	1,0	0,8	0,9	1,0	0,5	
25. Employment rate	71,1	72,0	72,7	73,2	74,1	75,0	74,4	75,5	76,8	
26. Children (aged less than 18) living in households with very low work intensity		7,3	6,5	6,6	7,2	5,0	5,8	5,7	4,6	
27. At-risk-of-poverty rate for children		10,4	9,4	10,0	11,0	10,3	10,0	9,6	10,1	
28. Severe material and social deprivation rate (SMSD) for children		3,4	2,4	5,2	4,9	5,1	4,7	3,3	2,8	

Source: Eurostat.

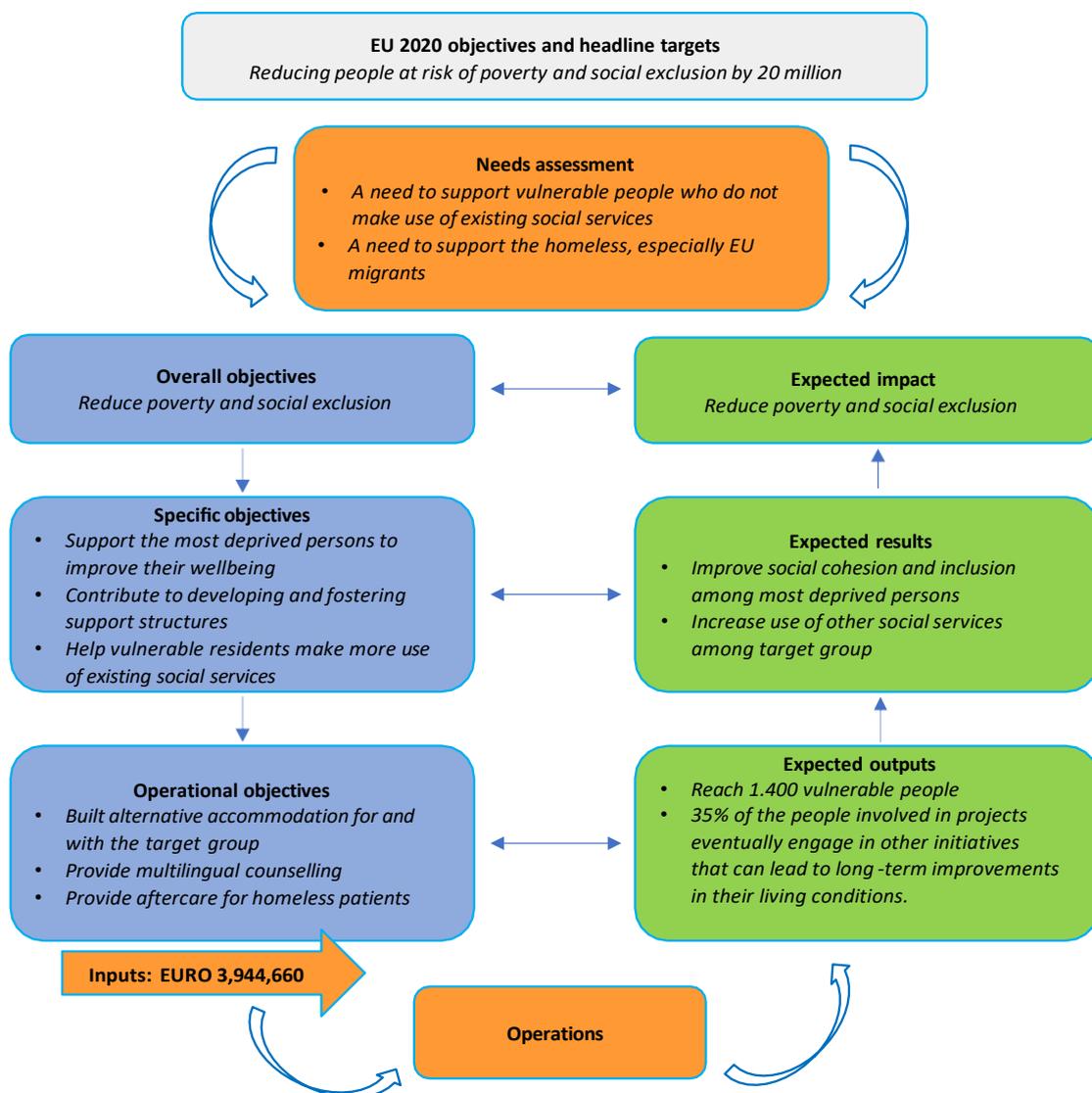
2. Reconstructing the intervention logic

In Denmark, the funds have been disbursed through two application pools in 2016 and 2019 respectively. NGOs received support for outreach activities that help the most vulnerable to achieve a more stable and secure life. **A total of four operations were funded, namely, Project Homeless Vulnerable Migrants in**

Copenhagen, Project UDENFOR, Care Centre Svalegangen and Project Step-for-step back to work. The activities of the FEAD supported operations were selected based on identified gaps in national efforts at the time concerning the socially vulnerable.

Figure A. 68, illustrating the intervention logic of FEAD in Denmark, encapsulates the essential elements of the FEAD- supported operations in Denmark. **There is a need to support vulnerable people in Denmark, especially those who are homeless, EU migrants, and who do not make use of existing social services.** To fulfil the need to support this group, a range of objectives have been selected such as improving their wellbeing, developing support structures, and helping make social services more accessible to them. A total of EUR 3,944,660 has been allocated towards the overall objective of reducing poverty and social exclusion. The output measurements are expected to be the **reaching of 1,400 vulnerable people within the identified target group** and that **35% of them engage in other national initiatives that can lead to long-term improvements in their life situation.**

Figure A. 68 – Intervention logic of FEAD in Denmark



Source: adapted from FEAD mid-term evaluation.

2.1. National policy framework

The purpose of FEAD is in line with the national policy strategy in Denmark. In 2017, the government published an **action plan against homelessness** that involved a range of legislative changes making it easier

to allocate or establish housing as well as making the building of affordable housing easier. Further to this, the government's area of focus is to expand efficient efforts through strengthening homelessness prevention and a range of rehabilitation efforts (Ministry of Children and Social Affairs, 2017).

Denmark has a **strong social welfare safety net**, meaning that citizens receive social benefits if they lose their job or suffer from long-term illness. There is also municipal support in place if citizens are unable to find housing, however, criteria for this service varies from municipality to municipality. Social benefits are also subject to certain criteria, e.g. an EU citizen must have worked a certain number of hours and a certain length of time in Denmark to be able to receive social benefits. This means certain groups fall through this safety net, especially EU migrants who may not meet these criteria. Thus, the purpose of FEAD aligns well with supporting the most deprived persons in Denmark.

The national evaluation and interviewees for this case study all expressed that the **FEAD-funded operations reached the vulnerable people national efforts were unable to and, as such, have complemented each other well**. This is supported by the fact that all the **operations** received national funding to continue the activities after FEAD support ended.

2.2. Objectives and target groups

2.2.1. Overall and specific objectives

The overall objective of the FEAD-supported operations was to reduce poverty and social exclusion among the most vulnerable homeless residents in Denmark, as illustrated in Figure A. 68. This was to be achieved by supplementing current initiatives for poverty alleviation and social integration and by reaching target groups that were difficult to reach through existing activities.

One of the **specific objectives of the FEAD-supported operations in Denmark was to promote the participation of the target group in other social services, and consequently, establish a connection between the various existing services that can provide meaningful, lasting improvements to their life**. The activities under the FEAD- supported **operations** can thus be considered successful if they contributed to more vulnerable people engaging with existing social services such as treatment, housing, employment, support, etc.

Other **specific objectives for the FEAD-supported operations included supporting the most deprived persons to improve their wellbeing and contributing to developing and fostering support structures**. This was achieved through the expected outputs as illustrated in Figure A. 68. The expected outputs of reaching 1,400 vulnerable people and that 35% of them engage with other national initiatives were the outputs that supported the expected results of improving social cohesion including among the most deprived, as well as an increased use of social services, which would lead to the eventual expected impact reducing poverty and social exclusion.

There were no changes to the overall or specific objectives over the course of the reference period.

2.2.1.1. Target groups

The outreach activities of the FEAD-supported **operations** aimed to attract **the most socially vulnerable residents in Denmark**. This group primarily consisted of **homeless people with complex challenges** such as homelessness combined with substance abuse, unemployment, mental illness, somatic illness, and a lack of contact with friends and family. 95.5% of the reached target group were **migrants, minorities or had a foreign background**. In this way, the target group was **severely socially vulnerable people with a legal right to reside but often without the right to social benefits**, as described previously, in Denmark.

For one of the four **operations**, Care Centre Svalegangen, the specific target group was **vulnerable people who were recovering from or preparing for hospitalisation**. This specific target group was chosen because of the high rate of readmission to hospitals and the fact that the existing public services were not able to address this challenge.

The rationale for selecting this specific target group is that the group did not make sufficient use of existing social services and therefore did not receive the support that the group needed. This was largely due to a lack

of awareness among the target group and a language barrier in that the majority of the target group does not speak Danish, and in some cases, does not speak English either. This target group includes EU migrants for whom social services are less accessible.

There was no change in the target group over the course of the project period.

2.3. Implemented operations

Activities differed depending on the project as summarised below:

Project Homeless Vulnerable Migrants in Copenhagen

The project was aimed at the group of homeless migrants who were unregistered in Denmark and therefore did not have a CPR-number (social security number), and thus, had a limited access to social services. **The project offered homeless migrants with legal residence in Denmark sheltered accommodation with professional staff, multilingual counselling, and an effort to create better access to health services for the target group.** The counselling primarily consisted of legal support and counselling on individuals' possibilities in Denmark. Through the mentioned project activity, the goal was to provide support and that participants would be better equipped to make decisions for their own situation.

The project had its own goal of reaching 600 participants yearly but managed to reach 480 yearly on average – a total of 2,641 vulnerable people from 2016 to 2021. This project was not solely funded by FEAD, hence, why the goal of 600 participants yearly exceeds the goal specific to FEAD. Determining how many residents were reached directly because of FEAD funding vs. other funding has not been possible.

Project UDENFOR (Outside)

This project was split between the cities of Copenhagen and Aarhus. In Copenhagen, homeless people were contacted and offered lockers for personal belongings, support, and community-building activities. **The activities were centred around bringing the homeless closer to the job market and to become more integrated in society.** The goal of these activities was to provide vulnerable homeless people with special support to become more connected to general society as well as to improve living conditions for the group.

In Aarhus, **vulnerable people were offered to become part of a working community.** This was either in **Café UDENFOR** or in a **workshop** where some of the participants could design and build their own mobile home. The aim was to create sustainable communities, strong social relationships, and alternative forms of housing.

The project aimed to reach 90 vulnerable people over the project period, but the project managed to reach 82 in Copenhagen and 80 in Aarhus, thus exceeding the overall target.

Omsorgscenteret Svalegangen (Care Centre Svalegangen)

The project was aimed at vulnerable homeless people with a need for care, rehabilitation, or support after emergency hospitalisation for somatic or mental illness. Homeless vulnerable people often suffer from multiple illnesses and often ignore symptoms or avoid seeking care before it becomes urgent. **This project established a care centre** for this specific target group. **The care centre offered stays of up to two weeks and activities followed three phases: 1) somatic care and restitution, 2) counselling, compassionate support and community, and 3) psychosocial aftercare.** The care centre consists of five beds and offers stays of up to two weeks followed by psychosocial aftercare. The purpose of the project was to cover participants' basic needs, to secure participants in a safe environment and for participants to receive social support and the time to rehabilitate as well as to reflect on their life situation.

Over the project period 2019 to 2021, 65 unique residents were enrolled at the care centre. The goal was to enrol 70 residents annually, however, due to start up difficulties caused by COVID-19 and a lack of willingness from the municipality to find a physical location for the care centre, this goal was not reached. These start up difficulties are described in more detail in section 3.1.

Project Step-for-step back to work

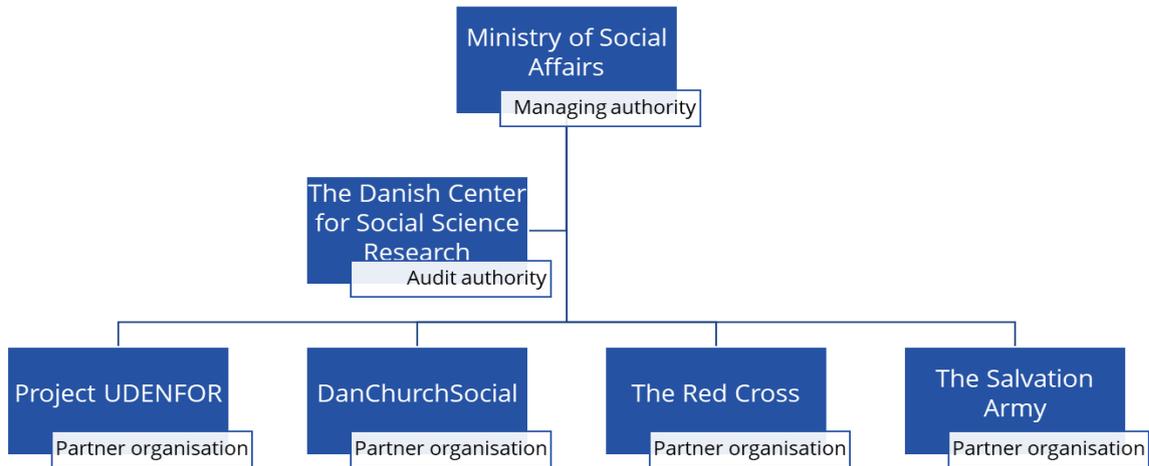
The aim of this project was to help the most vulnerable people who do not use existing social services to lead more stable, healthy, and secure lives as well as to make better use of existing services and to improve their chances of entering the labour market. The target group typically had substance abuse problems, mental illness, poor health status, severe loneliness, and/or a lack of connection to the job market. The vulnerable were helped via three steps: **1) establish good contact with the most vulnerable homeless people with a starting point in a shelter, 2) motivate them to receive counselling, information on hygiene, attendance at the weekly health clinic, and be given the opportunity to change clothes and break isolation through**

mutual support, and 3) select a specific group of participants for a rehabilitation programme consisting of, for example, courses and counselling to help them enter the labour market.

The original goal was to enrol 80 participants annually in their 10-week rehabilitation programme. The project managed to enrol a total of 158 participants, which is the equivalent of about 63 participants annually. As such, the project did not reach the initial goal, which was primarily due to COVID-19 making it difficult to recruit participants as many in the target group returned to their home country.

2.4. FEAD governance and delivery system

Figure A. 69 – Stakeholders involved in FEAD delivery in Denmark



The Managing Authority, in this case the Danish authority of social services, the Ministry of Social Affairs, was responsible for submitting the call for tender, selecting the successful applicants, and releasing the funds to the successful applicants. Furthermore, they were responsible for the national evaluation of the selected **operations**. This was subcontracted to the audit authority, namely, the Danish Centre for Social Science Research.

Project UDENFOR was responsible for the delivery of the project of the same name. DanChurchSocial was responsible for the delivery of Project Homeless Vulnerable Migrants in Copenhagen, The Red Cross was responsible for delivery of Care Centre Svalegangen, and the Salvation Army was responsible for Project Step-for-step back to work.

The four partner organisations collaborated with public authorities, foundations, and other relevant partners to make the **operations** a success.

As a part of this study, we interviewed staff from the Managing Authority, the National Evaluation Project Manager from the Audit Authority, and managers from two partner organisations (Annex 1).

3. Key findings on the implementation of FEAD

3.1. To what extent was FEAD support successful – or not – and why?

Overall achievement of FEAD objectives [criterion: effectiveness]

According to all interviewees and the national evaluation, FEAD-supported activities in Denmark have been **overall very successful in reaching, supporting, and integrating the most vulnerable people into society, and hereby reducing the number of people at risk of poverty**. This is evidenced by the fact that all participants in the operations were part of the target group with a total of 3,031 participants, which exceeds the initial goal by an additional 1,431 participants. However, it is important to note that this number of participants was not reached strictly as a result of FEAD funding, but the operations also received funding elsewhere. The overall success of FEAD-supported operations is also evidenced by the high percentage of success rate for establishing contact to other existing social services ranging from 62% to 96% as illustrated in Table A. 52. Examples of this are bridging the gap between the Region and the municipality in the case of

Care Centre Svalegangen or helping participants obtain a social security number in the case of Project Homeless vulnerable migrants in Copenhagen. Furthermore, all operations complement national efforts and policies on social inclusion and poverty eradication as it addresses groups left behind by national efforts. Thus, the overall objective of reducing poverty and social exclusion was met.

Table A. 52 – Number of unique participants and estimated success rate for building bridges to existing social services

Project	Number of unique participants	Est. success rate % for building bridges to existing social services
Project Homeless vulnerable migrants in Copenhagen	2,641	96
Project UDENFOR (Outside)	61	75
Care Centre Svalegangen	65	78
Project Step-for-Step back to work	158	62

Source: adapted from national evaluation.

Based on both the national evaluation and interviews, **the hallmark of these operations was their ability to help vulnerable residents fulfil their basic human needs, thereby providing a solid foundation for positive life changes and long-term, sustainable solutions** (examples provided below). All operations succeeded in giving vulnerable people an experience of dignity, which makes them receptive to advice and support and creates empowerment.

All partner organisations have extensive experience of working with the socially vulnerable and have identified the most vulnerable based on their experience with and observation of the groups that are unreachable by existing social services. **The partner organisations managed to meet the target group at eye level, help them where they have needs and where society has failed to meet those needs.** This is clear from both the evaluation and interviews conducted.

All four operations demonstrated the ability to create meaningful and lasting change in the lives of those at the very edges of society in different ways. There are examples where vulnerable people improved their health; left abuse; left homelessness; made good social connections; reconnected with family and friends, and reduced loneliness; and entered the labour market. For example, Care Centre Svalegangen helped more vulnerable people to receive treatment and avoid re-admission to hospital. Project Outside helped vulnerable people out of homelessness, while supporting social relationships and reducing loneliness. Project Step-for-Step back to work helped vulnerable people into work, and Project Homeless Vulnerable Migrants in Copenhagen helped residents take up other opportunities that can help the target group make lasting improvements to their lives.

Reach of target groups [criterion: effectiveness]

The national evaluation demonstrates that **the operations have excelled in reaching their defined target groups as all participants were part of the defined target groups.** The operations collectively reached over 3,000 unique individuals, however, some of the operations also received funding elsewhere which contributed to this number. Determining how many were reached as a direct result of FEAD funds has not been possible. As such, the operations have surpassed the initial target of reaching 1,400 individuals but with the support of separate funding.

According to the national evaluation **Project Homeless Vulnerable Migrants in Copenhagen** has been in contact with 480 residents yearly, which is lower than the intended goal of 600 per year. However, the COVID-19 epidemic presented a challenge in reaching the target group due to many returning home and reduced staff capacity due to national restrictions. All participants were legal migrants and consisted of mainly adults in the age group 15-65 years. Women were a small percentage of the group ranging between 11-14 %

over the project period. Around 8 % of participants stated that they suffered from mental illness and 1% stated they suffered from a disability. There is also a clear distinction between two different types of participants with one being resourceful and with a high chance of getting into the job market if they can overcome administrative barriers, while the other group has serious challenges such as mental illness and is unlikely to enter the job market. All in all, the project **succeeded in attracting the relevant target group**.

For **Project UDEFOR**, with the target group of homeless in Copenhagen and Aarhus, it had a total of 162 residents participate in the programme. The goal was 90 programme participants, meaning the project has far exceeded expectations. The project has also had contact with many other residents in the target group, but not closely enough to warrant documentation. All participants have been homeless with at least half suffering from a mental illness. For Copenhagen, all participants were migrants, while in Aarhus, migrants only made up about 9 % of participants. Overall, the characteristics of the originally intended target group are consistent with the target group that has participated in Project UDEFOR. Consequently, the project has **succeeded in attracting the relevant target group**.

The target group for **Care Centre Svalegangen** was vulnerable homeless persons in the South Denmark Region, requiring care, restitution, and support after hospitalisation with somatic or mental illness. Over the project period 2019-2021, the centre had 65 unique residents enrolled, which is lower than the original goal of 70 residents per year. The project faced severe challenges in recruiting participants during the COVID-19 pandemic as there were fewer patients in the target group, and the target group generally stayed away from hospitals. All participants were homeless and legally residing in Denmark. Around 74 % of participants stated they had a disability and 49 % stated they suffered from mental illness. 3 % were migrants and 25 % were women. According to interviewees and the national evaluation, the project was **successful in reaching the relevant target group**.

Project Step-for-step back to work was aimed at poor, homeless migrants from other EU countries, who could be helped into the job market. The target group speaks some English or Danish and is less burdened by illness or addiction. The original goal was to enrol 80 residents per year in the 10-week programme. The project averaged around 63 residents per year, meaning it did not reach the initial goal due to challenges in recruiting participants because of COVID-19. All participants were homeless migrants. Of the 97 participants from the period 1st July – 31st December 2021, 56 % had a mental illness and 11 % had a disability. As per the feedback from interviewees and the findings of the national evaluation, the project is deemed to have **effectively reached its target group**.

It is noted that the **FEAD requirements hindered the inclusion of illegal migrants, but interviewees express that there are no groups they believe have not been addressed**. However, **more funding** would enable them to reach even more vulnerable people. It is also noted that there is an **overrepresentation of men** among the target group, which explains why the number of female participants is low. **Most participants resided in urban areas** as 3 out of 4 **operations** were in Copenhagen or Aarhus, the two largest cities in Denmark. The fourth project, Care Centre Svalegangen, was in Middelfart Municipality, which is a more rural area.

Adjustments to FEAD to address new challenges [criterion: effectiveness]

In response to new challenges, especially those stemming from the COVID-19 pandemic, several operations made ongoing adjustments and adaptations to ensure the recruitment of their target groups. For instance, Project Step-by-step back to work shifted from a fixed intake structure to continuous intake to accommodate fluctuations in the target group caused by border closures during the pandemic. The impact of COVID-19 meant that less migrants were arriving in Denmark and that the most resourceful homeless EU migrants already in Denmark returned to their home country. Similarly, Care Centre Svalegangen experienced postponement due to COVID-19, resulting in a shorter project period and an adjusted target for enrolments.

Despite these challenges, Care Centre Svalegangen persevered, successfully establishing the centre, and securing new funding. The impact of COVID-19 was significant, prompting substantial adaptations in project operations, including limitations on group gatherings and adjustments to cater to the evolving composition of the target group. While some homeless individuals returned to their home countries, the most

vulnerable remained, necessitating tailored adaptations.

Project UDENFOR was not impacted by COVID-19 because the project period 2016 to 2019 was prior to the pandemic.

CRII+, REACT EU and CARE were not relevant for the **operations** in Denmark as they had already been implemented, completed or were in final stages at the time.

The adjustments, driven by external factors such as the pandemic, have been acknowledged as effective and proactive by both the national evaluation and the interviewees, ensuring the continued success of the **operations**.

Horizontal principles of FEAD [*criterion: effectiveness*]

The operations demonstrate a commitment to the horizontal principles of FEAD, contributing to their overall effectiveness.

Partnership principle

The **operations** actively engage in forming partnerships with each other and with existing social services as evidenced by data in the national evaluation. This collaborative and holistic approach has been acknowledged as a key strength, fostering a sense of unity and shared purpose. The importance of this partnership principle has also been underscored in the national evaluation of FEAD **operations**.

Gender equality

While there is no direct focus on gender within these **operations**, they have made a conscious effort to reflect the gender distribution of particularly vulnerable individuals. As the target group primarily consists of men, the **operations** have naturally reached more men.

Preventing discrimination

Though discrimination is not a primary focus, the **operations** have placed an emphasis on treating vulnerable people with respect and challenging discriminatory practices wherever they occur between vulnerable people. By reaching a group that might otherwise be overlooked, such as Roma or Romanian homeless people, these initiatives have indirectly combated discrimination against particularly vulnerable residents by reaching them where existing social services have not been able to.

Respecting the dignity of the most deprived persons

The organisations responsible for the **operations** have a wealth of experience in working with vulnerable people. The national evaluation highlights the success of these **operations** in establishing relationships, providing a sense of security, and building trust among vulnerable individuals. This approach is rooted in treating them with respect, ensuring that nothing is imposed without consent, maintaining anonymity, and refraining from setting demands or using a condescending tone. The **operations** effectively meet vulnerable individuals at eye level, acknowledging their unique needs and preserving their dignity.

Facilitating and hindering factors [*criterion: effectiveness*]

In evaluating the effectiveness of FEAD supported **operations** in Denmark, several key factors emerged, influencing both their implementation and their resulting outcomes. These factors encompass elements that facilitated progress, as well as those that presented challenges or unintended consequences.

Success factors

A **holistic approach** that extends across sectors and involves various stakeholders has proven to be essential. Many of the most vulnerable individuals contend with multiple challenges, including social, economic, and health-related issues. A comprehensive approach, coupled with **cross-sectoral collaboration**, has proven effective in addressing these multifaceted challenges. This also meant that the **operations** fostered **good relationships with municipalities, regions, and other organisations**. This also gave cause to **unintentional knowledge transfer**, which had a broader, positive impact.

Time is a critical element in successfully reaching the target group. Time is especially critical for building relationships, creating a safe space for change, and consistently following through on initiatives. Time is indispensable when working with particularly vulnerable individuals, as it allows for the establishment of trust and paves the way for meaningful progress. For Care Centre Svalegangen, the relatively short enrolment period of two weeks has been a strength because it allowed social care workers to work intensively on quickly finding sustainable solutions for participants and building bridges to other social services. However, in Project Step-for-step back to work, the allocated time of 10 weeks is deemed insufficient because the wait from national services can sometimes be up to 6 weeks and because it takes time to build relationships with the target group that often feels distrustful of social services.

Failure factors and challenges

Despite the successes, challenges have arisen that hindered the effectiveness of FEAD-supported **operations**. **Finding suitable physical locations** proved to be a significant hurdle. Municipal concerns about the potential influx of homeless individuals from other areas due to new initiatives made securing locations more complex. This challenge was overcome through extensive dialogue by partner organisations. Interviewees expressed that the concerns of municipalities that eventually agreed to housing operations were unwarranted as the target group tended to return to their 'home' municipality.

The **COVID-19 pandemic** posed an additional barrier, particularly in reaching and influencing the target group as desired. Some vulnerable people are believed to have returned to their home countries due to the pandemic, making it challenging for some activities to reach and assist this group. This challenge resulted in a failure to reach the goal of participants in three out of four **operations**, however, the **operations** combined and with the addition of external funding exceeded the overall goal of reaching 1,400 people by an additional 1,600.

Interviewees point out that **tracking and registering the target group** was difficult, and thus, **obtaining data on them** was challenging. The assessment of the proportion of citizens who participate in other operations after they have participated in a FEAD-supported **operations** is thus an estimate.

The target group can be a complex group to help as they face a range of different challenges that can have a negative impact on a project outcome. For example, at the beginning of Project UDENFOR, there were incidents where one vulnerable participant attracted drug dealers to the area, where they were building houses, which posed a significant challenge. This issue was resolved through cooperation with the police, highlighting the need for proactive problem-solving to mitigate negative consequences.

Socio-economic impacts

While socio-economic impacts have not been quantitatively measured, qualitative assessments highlight **several positive socio-economic effects at both micro and macro levels**. In Care Centre Svalegangen, efforts to prevent residents from re-entering the healthcare system after being discharged resulted in cost savings and improved well-being.

On a microeconomic scale, **Project UDENFOR** led to 6 out of 162 **people no longer being homeless and taking steps toward greater self-sufficiency**. Individuals gained increased self-confidence and self-esteem, often with the aspiration of re-establishing relationships with family members and securing employment. At a macroeconomic level, the project had a broader societal impact. It reduced the economic burden associated with residents who were in frequent contact with healthcare services and the police.

The success of various activities led to the decision to continue all four initiatives. For example, Care Centre Svalegangen secured funding for the next four years, with potential plans to expand to two additional locations. Several vulnerable participants in the project showed improvements during their stay. **Some overcame addiction, others re-established contact with family members, and a few even secured jobs with help from staff.**

Overall cost-effectiveness of FEAD operations [*criterion: efficiency*]

According to the national evaluation, there was a **reasonable balance between costs and results** as indicated by positive participant responses. Overall, there were more participants in the **operations** than expected and led to between 62 % and 96 % of participants utilising other national social services.

The interviewees also acknowledge the **overall cost-effectiveness of the operations**. However, no specific financial calculations exist to compare different types of activities. The interviewees find it challenging to quantitatively assess the cost-effectiveness of this type of project and struggle with qualitative assessment. Nevertheless, they believe that the FEAD-supported **operations** effectively assisted the target group, and that overall, the costs are considered reasonable compared to similar **operations**, particularly in comparison with the perceived value of the **operations** to the vulnerable and society in general.

The **complexity of the issue contributes to the difficulty in assessment**, according to one interviewee. It is challenging, and thus expensive to reach the target group, but the target group also represents a large societal cost if not helped. While direct calculation of cost-effectiveness is not feasible, it is possible to highlight factors that positively and negatively impacted it.

A common experience among the **operations** was that **FEAD funds alone were insufficient, but crucial, in launching the operations**. Importantly, **FEAD support made it easier to secure additional funding**,

leading to indirect returns on investment. For instance, Care Centre Svalegangen received furniture donations from a company, which would not have been possible without FEAD assistance.

The **engagement of volunteers significantly enhanced efficiency.** FEAD funds not only provided a location but created opportunities for volunteers to contribute to **operations**. This implies that every hour a volunteer spends on a project can be directly attributed to FEAD, increasing cost-effectiveness, to the extent that volunteers can feasibly be involved in specific **operations**. Care Centre Svalegangen also highlights the positive impact of cooperation with local authorities. Furthermore, being independent of the public system has, according to interviewees, improved cost-effectiveness, as the vulnerable homeless population tends to trust non-profit organisations more than the public sector due to fewer demanding requirements.

Administrative requirements such as monitoring are identified as the **main factor reducing cost-effectiveness**, as further elaborated below.

Administrative burden of monitoring and reporting requirements [criterion: efficiency]

In terms of the administrative burden, it is **not possible to report a quantitative number of hours spent on administration** as partner organisations have not tracked this monthly.

The National Board, responsible for the administration of the fund, reported hours spent only up to the financed amount, but they do estimate, that they **spent at least twice the allocated hours (on administration)**. Overall, there is a consensus that the **FEAD funds have been administratively burdensome** among partner organisations. They generally cannot point to specific issues that lead to it being burdensome. Instead, they highlight the sheer scope and magnitude of administration as the problem. Given the above, an attempt to retrieve quantitative estimates of the time usage would result in imprecise estimates, as the partner organisations would have to guess how much time they spent on a project they finished years ago. At the same time, the interviews indicated, that partner organisations felt the administrative burdens were high. Asking them to estimate this would therefore likely be seen as yet another administrative burden. The estimate would therefore not be very informative, and cause partners further burdens.

An interviewee from a partner organisation describes the administrative burdens as so severe that they would probably not apply for this type of funding again under similar conditions. The interviewee highlights the cooperation with the Ministry of Social Affairs as the major issue. The **co-operation with the Ministry of Social Affairs posed significant administrative challenges in the project**. The main reasons for this were a perceived lack of political support and prioritisation, resulting in delays in fund distribution. Moreover, the frequent turnover of personnel in the Ministry, including short-term contracts, exacerbated the situation. Another factor was the absence of a well-defined reporting plan initially, which led to multiple changes and duplication of reporting efforts. The project organisation has several years of experience with similar operations, including those funded by the EU, and has never experienced a project as administratively burdensome as this one.

A manager from a partner organisation describes in an interview, that they felt they were met with **distrust from the EU institutions and highlighted the audit-requirements as excessive**. They report being subject to several audits despite having an external continuous audit in place. Partner organisations also express that the requirements were too standardised for reporting. Thus, for some **operations**, it was impossible or infeasible to meet the data requirements. An example of this, where the managerial authority requested and the EU Commission did end up giving some flexibility, was the registration of vulnerable people with disabilities and mental illness as this proved difficult.

In conclusion, partner organisation interviewees expressed a considerable perception of **unnecessary administrative burdens in the operations**. One interviewee highlighted expansive reporting requirements from the EU level, resource-intensive tasks, and a lack of adequate funding. Another interviewee highlighted challenges in the management of **operations** by the Ministry of Social Affairs.

Simplification measures [criterion: efficiency]

The interviewees suggested several changes to simplify administrative requirements and reduce the administrative burden. One interviewee proposed **considering the relevance and feasibility of obtaining specific data for each project rather than imposing uniform registration practices for all operations**. For instance, it may be unrealistic and impractical to register residents at a shelter where they only stay for one night. In these cases, it might be more relevant to gather information on the number of contact points, thus, easing the burden. Conversely, in **operations** involving long-term support and trust-building with individual participants, it would be more realistic and relevant to register the individuals themselves. Tailoring documentation requirements to the type of project could therefore reduce unnecessary administrative burdens

and make the data more relevant.

Another interviewee noted that the high level of financial control implemented is based on the assessment of corruption in other EU countries. As the level of corruption is low in Denmark, **financial control could be relaxed when an external audit is in place.**

Lastly, one interviewee suggests that **having direct contact with one European MA instead of a national MA would reduce complexity in administration.** They suggest that FEAD funds and management of the **operations** should be managed directly by FEAD with partner organisations leading the **operations**, rather than involving a national ministry in the process. This would allow for a uniform monitoring practice and reduce the number of stakeholders that partner organisations need to report to, thus, easing the administrative burden.

Coherence of FEAD with other interventions [*criterion: coherence*]

Assessing the extent to which FEAD operations in Denmark align with and complement national policies for poverty alleviation and social inclusion reveals a picture of cohesiveness and partnership. These observations are underscored by the focus on internal and external harmonisation.

One of the striking aspects of FEAD-supported operations in Denmark is their commitment to creating coherence for the target group. This alignment is achieved through a holistic and multifaceted effort that addresses the diverse needs of the most deprived individuals. Moreover, it extends across initiatives by bridging connections to existing social services, thereby ensuring that the initiatives are well-integrated.

The operations have proven instrumental in reaching target groups that were previously unreachable by existing social services. The FEAD-supported operations have effectively filled intervention gaps in the national landscape. The ability to identify and address marginalised populations demonstrates the success of FEAD in complementing and augmenting ongoing efforts for poverty alleviation and social inclusion in Denmark.

One significant indicator of the complementarity and success of FEAD-supported operations is the continued national funding that these operations have received after FEAD support has concluded. Authorities in Denmark recognise the value and impact of these initiatives and have chosen to provide sustained financial support. This demonstrates a high level of complementarity with national strategies and a desire to build upon the successes achieved through FEAD funding.

Collaboration has played a pivotal role in enhancing the complementarity of FEAD-supported operations with national and regional policies. The synergy between the operations and national efforts has been bolstered by good collaboration. This partnership extends beyond project boundaries, contributing to the creation of a more unified approach to address poverty and social inclusion challenges. Such collaboration has garnered support from authorities for the continuation of successful initiatives.

One prominent illustration of the coherence between FEAD support and national policies is the role of Care Centre Svalegangen. It significantly complements existing initiatives by acting as an intermediary between regional and municipal efforts. The presence of the Red Cross in this transition supplements the work of public organisations, ensuring a more seamless and coordinated support system for vulnerable individuals. For Project Udenfor, the focus on helping vulnerable people access housing and secure a home aligns with the "Housing First" strategy, which has been implemented in Denmark since 2009 (Egede-Jensen, 2021). By reaching a target group that other initiatives may not reach, FEAD demonstrates its coherence with broader homelessness alleviation policies, filling a critical void in social inclusion efforts.

Denmark does not participate in the Asylum, Migration and Integration Fund (AMIF). The European Social Fund (2014-2020) did fund initiatives in Denmark; however, activities were not focused on the most vulnerable people in society like those who are homeless. Instead, ESF 2014-2020 supported initiatives related to employment, education, and social inclusion. It aimed to improve the employability of the workforce, enhance education and training opportunities, and reduce social disparities. As such, there was no overlap with other EU-funded activities within this specific social area.

3.2. Is FEAD still relevant?

Relevance to target groups [*criterion: relevance*]

In Denmark, FEAD support has been effective in targeting the most deprived residents. The operations have **consistently reached relevant groups** as evidenced by data from the national evaluation, ensuring that people in dire need receive the assistance they require. Interviewees indicate that the operations' design aligns with the needs of the most deprived, with no specific group left unaddressed. This demonstrates the relevance of the selected target groups for FEAD support in Denmark.

The operations have been **especially relevant for EU migrants** due to several reasons. Firstly, there is little

national incentive to help this group as there is a concern that it will attract more vulnerable EU migrants.

Secondly, this group does not have national security numbers (CPR-numbers), which prevents them from receiving assistance from existing social services. Applying for a CPR number may be challenging for this target group as they may not be resourceful enough and are unable to overcome a language barrier. In Project Step-for-step back to work, counselling activities supported them in their integration into Denmark, which is the support they may not otherwise have received.

The support provided through FEAD in Denmark has proven to be highly appropriate in addressing the needs of the most deprived. The operations have demonstrated an understanding of the unique needs and challenges faced by this group. The initiatives are tailored to meet these needs effectively. This underscores the suitability and adequacy of the support measures offered by FEAD in Denmark.

Relevance of FEAD now and in the future [*criterion: relevance*]

There is some **concern among interviewees about what will happen to some of the groups supported by FEAD**, especially for Project Homeless Vulnerable Migrants in Copenhagen, whose target group was **homeless EU migrants**. This indicates that this is a group of vulnerable residents for whom there remains a relevant need for support in Denmark now and in the future.

While FEAD has consistently addressed the needs of the most deprived, new challenges have emerged due to external factors. For instance, the increasing **inflow of refugees is a trend that could impact the relevance of FEAD support in the future**. These emerging needs pose challenges in terms of securing the necessary funds to implement initiatives that can effectively respond to them. **The FEAD design in Denmark may need to adapt to these evolving circumstances to maintain its relevance.**

It is important to acknowledge the collective action problem among EU countries when addressing the most deprived residents. Since these individuals often place a significant financial burden on society, there may be limited financial incentives for EU Member States to provide assistance. This is where EU funding plays a crucial role and bridges the gap. The EU's contribution ensures that aid organisations that are familiar with the target group's needs can continue to address these challenges.

3.3. Did FEAD make a difference and to whom?

EU added value [*criterion: EU added value*]

Volume, scope, role, and process effects

The FEAD program has played a pivotal role in providing additional resources to boost existing efforts in Denmark. It has acted as a vital source of funding, contributing to a collective effort to assist the most deprived residents. As a result, the number of participants and organisations benefiting from actions and policies targeting poverty and social inclusion has significantly increased.

In comparison to existing actions, **FEAD has extended its reach to new and harder-to-reach groups in Denmark.** By facilitating opportunities for support and implementing specific actions, it has **broadened the scope of initiatives tackling poverty and social inclusion**. These expanded policy areas have been instrumental in ensuring that FEAD's impact extends to a more comprehensive spectrum of individuals and communities.

FEAD operations in Denmark have **supported innovative actions and played a role in mainstreaming local and regional innovations at the national level.** By financing activities that were previously unknown or underutilised, FEAD has driven innovation in the field. Initiatives such as empowering vulnerable residents to build their own homes have demonstrated new and effective ways to address their needs. These innovations have proven to be sustainable and have continued even after FEAD support ended.

The FEAD-supported operations have initiated sustainable changes in cooperation with administrations and various entities in Denmark. It has fostered integration between different policy systems, such as social assistance and training, and has empowered the actors involved in the operations. This transformative process has enhanced the overall effectiveness of actions and policies designed to alleviate poverty and promote social inclusion. **Process effects have not only improved cooperation and integration between policy systems but have also empowered the actors involved.** FEAD has fostered an environment in which vulnerable citizens are treated as the experts in their own lives, allowing them to design, build, and furnish their homes, promoting self-esteem and a more meaningful life.

Based on this case study, it is evaluated that the **most substantial impact of FEAD support in Denmark has been its role in providing additional resources, and significantly increasing the number of residents engaging with existing social services.** It is not the source of funding that is important for the target group. However, the EU is seen as crucial to the establishment of this type of project and therefore also to the value

created by the operations. These operations succeeded in extending support to new and more challenging groups, such as EU migrants, which underscores the tangible difference FEAD has made in the lives of the most deprived in Denmark. This is further validated by the fact that all four operations have received national funding since FEAD support ended.

Visibility [visibility]

In Denmark, the general public and end recipients are generally not highly aware of the funding sources of support programs like FEAD. The target group, particularly the most deprived, are primarily concerned with receiving assistance for their basic needs rather than the origin of the funding.

Interviewees highlight that both the **public and the recipient group have limited awareness of FEAD as an EU fund.** Some efforts have been made to increase awareness, such as putting up posters with information about the funding source, specifically mentioning that the project is funded by FEAD. This indicates that there are attempts to inform both the public and end recipients about the source of funding. For instance, in talks provided by partner organisation, FEAD is explicitly mentioned as the funding source. Interviewees also say that if the topic of funding comes up with participants, FEAD is explicitly mentioned.

The visibility of FEAD is primarily influenced by the mode of communication and information dissemination within support programs, such as the placement of posters and explicit mentions during discussions related to funding sources. However, the overall evaluation is that there is limited visibility of FEAD in Denmark.

4. Good practices

This section presents two good practices implemented in Denmark under the FEAD programme. These practices have been selected based on their relevance to the general and specific objectives of the FEAD programme. Furthermore, they are deemed good practices in accordance with EU principles. The narratives are built on evidence from various actors involved, including Managing Authorities (MAs), partner organisations (POs), and individual beneficiaries.

Empowering the target group to improved self-sufficiency

Project Step-by-step back to work aligns with the general objective of FEAD, which aims to reduce poverty and social exclusion among the most vulnerable populations. This project's focus is on poor, homeless migrants from other EU countries, and to help them integrate into the job market, thereby enhancing their overall well-being. The success of this project is reflected in its ability to help vulnerable individuals achieve economic self-sufficiency. By providing a holistic approach that combines counselling, accommodation, access to health care, job market integration, and a resocialisation programme, it has empowered participants to rebuild their lives and obtain employment. This is considered good practice in relation to the effectiveness criteria because it illustrates the achievement of the overall and specific objectives as well as the ability to reach the target group at eye level in a way that existing social services have been unable to.

Building bridges between existing social structures and national authorities

Care Centre Svalegangen, with its unique focus on homeless persons recovering after hospitalisation, significantly contributes to the specific objectives of the FEAD programme. One of these objectives is to promote the integration of the most deprived into existing social services, and thus, effectively build bridges between support structures that enhance their well-being.

This project has been highly successful in bridging the gap between the target group, hospitals, municipalities, and other social services. In accordance with the coherence principle, Care Centre Svalegangen ensures a smooth transition between the regional health authorities and the local authorities by serving as an intermediary. The project comprises three essential phases: somatic care and restitution, counselling and compassionate support, and psychosocial aftercare. This seamless transition from medical care to comprehensive support allows residents to access social services, fostering their reintegration into society and ensures a high level of coherence between different stakeholders. The significance of Care Centre Svalegangen is further emphasised by its ability to secure continued national funding, signifying its lasting impact on Denmark's social services landscape.

5. Conclusions and lessons learned

Effectiveness and coherence

The FEAD-supported operations in Denmark have demonstrated success in **fulfilling the programme's objectives**, specifically pertaining to supporting the social inclusion of the most vulnerable individuals. These operations have exceeded expectations, **reaching a significant number of individuals**, and have shown a profound commitment to **improving the lives of those on the fringes of society**.

The ability of all operations to **bridge gaps and build partnerships** with existing social services, as evident in their national evaluations and interviews, is a testament to their effectiveness and cohesiveness. They have successfully reached the target groups and **facilitated a transition for many residents into other national initiatives**, thereby promoting social inclusion, economic self-sufficiency, and overall well-being.

The operations have shown **commitment to the horizontal principles of FEAD**, including partnerships, gender equality, prevention of discrimination, and respecting the dignity of the most deprived persons. By reaching out to those who might otherwise be overlooked, they have **indirectly combated discrimination** against vulnerable citizens.

Key success factors include the element of time and a holistic approach that involves cross-sectoral collaboration. These factors have contributed to building trust and creating meaningful change and are elements to be considered in similar operations. **Challenges, such as securing physical locations and the impact of the COVID-19 pandemic, have been addressed with effective adjustments, ensuring the continued success of the operations.** Moreover, while socio-economic impacts have not been quantitatively measured, qualitative assessments reveal positive outcomes at both micro and macro levels. These initiatives have improved well-being, while also reducing the economic burden on healthcare and law enforcement services. As such, their **impact extends beyond service provision, creating meaningful and lasting change in the lives of some of the most vulnerable individuals, aligning with the core values and principles of the FEAD programme.**

Efficiency and simplification

The evaluation of FEAD operations in Denmark reveals a **mixed landscape of cost-effectiveness and administrative efficiency**. While the operations have proven their effectiveness in assisting the target groups and facilitating access to national social services, the assessment of their cost-effectiveness presents some challenges due to the complexity of the issues at hand. In terms of cost-effectiveness, the lack of specific financial calculations makes it difficult to quantitatively compare different project types. Interviewees find it challenging to assess cost-effectiveness, primarily due to the unique and multifaceted needs of the target groups. However, it is widely acknowledged that FEAD-supported operations have effectively assisted the target groups, and the costs are generally considered reasonable in comparison to similar initiatives. One interviewee highlights the complexity of the issue, stating that reaching the target group can be challenging and expensive, but the societal cost of not aiding this vulnerable population is far greater. The impact of FEAD funding extends beyond the financial support, as it often acts as a catalyst for securing additional funding and resources, resulting in indirect returns on investment.

Volunteer engagement is another factor that enhanced the efficiency of the operations. By involving volunteers, FEAD operations could attribute their time directly to the programme, thereby increasing cost-effectiveness. The cooperation with local authorities and independence from the public system has also improved cost-effectiveness, as some vulnerable homeless populations tend to trust non-profit organisations more than the public sector.

Despite the overall efficiency, the **monitoring and reporting requirements have posed an administrative burden to the operations**. While quantitative data on the hours spent on administration is not available, the interviewee from the partner organisations underlines that the FEAD funds have been administratively burdensome. The magnitude of administrative requirements, standardisation issues, and excessive audit demands have posed challenges to these operations. Simplification measures are suggested by interviewees to reduce this administrative burden. Tailoring documentation requirements to the type of project, considering the low level of corruption in Denmark, and allowing direct contact with FEAD are all proposed as ways to ease the complexity of administration.

Relevance

The initiatives supported by FEAD have shown a keen understanding of the unique challenges and requirements of the target groups, ensuring that those in dire need receive the assistance they require. One of the most remarkable achievements is the programme's efficacy in assisting EU migrants, a group that faces distinct challenges as these individuals often lack the means to access assistance from existing social services.

If funding for the operations did not continue, some groups, such as homeless EU migrants in Copenhagen, may according to partner organisations struggle to receive help from other organisations or utilise social services. It highlights the ongoing necessity to support this vulnerable demographic in Denmark, both now and in the future. External factors, like the increasing flow of refugees, introduce new challenges that could impact the relevance of FEAD support in the future.

Recognising the collective action problem among EU countries when addressing the most deprived residents is crucial. The financial burden placed on society by these individuals may limit the financial incentives for EU Member States to provide assistance. EU funding, such as FEAD, plays a pivotal role in bridging this gap, ensuring that non-profit organisations familiar with the target group's needs can continue to address these challenges effectively.

EU added value and visibility

The FEAD programme has brought significant EU added value to Denmark's efforts to combat poverty and enhance social inclusion. Across multiple dimensions, including volume, scope, role, and process effects, FEAD has played a pivotal role in providing additional resources and support to both existing and emerging initiatives. As a funding source, FEAD has increased the number of participants and organisations involved in actions and policies targeting poverty and social inclusion. Furthermore, FEAD has extended its reach to new and harder-to-reach groups, effectively broadening the scope of initiatives aimed at tackling poverty and social inclusion and ensuring a comprehensive spectrum of individuals and communities.

FEAD-supported operations in Denmark have also **spurred innovation** in the field. Initiatives like empowering vulnerable residents to build their own homes have demonstrated new and effective ways to tackle the challenges of poverty and social exclusion. Importantly, these innovations have proven to be sustainable, continuing even after FEAD support ended.

One of the most transformative effects of FEAD support has been the **enhancement of cooperation and integration between existing social services.** This transformative process has empowered the actors involved in the operations, fostering an environment in which vulnerable people are treated as experts of their own lives. This approach promotes self-esteem and a more meaningful life for those affected.

Despite **challenges related to the visibility of FEAD in Denmark**, such as limited awareness among the public and end recipients, steps were taken to enhance visibility, such as the placement of posters and explicit mentions of FEAD during discussions about funding sources.

Summary

The FEAD-supported operations in Denmark have proven **highly effective** in achieving their objectives, reaching a significant number of individuals on the fringes of society, and leaving no specific target group unaddressed. However, it is important to note that there are still many within the target group that have not been reached, for example, in other geographical areas of Denmark.

The operations have **successfully bridged gaps and built partnerships with existing social services, promoting social inclusion, economic self-sufficiency, and overall well-being.** The operations have demonstrated a keen understanding of the unique challenges of target groups with a particular focus on assisting EU migrants, who face distinct challenges, and succeeded in promoting self-esteem among the vulnerable.

The **future relevance of FEAD support is believed to remain high** among interviewees, especially for groups like homeless EU migrants. Recognising the collective action problem among EU countries, FEAD played a crucial role in bridging the gap and ensuring aid organisations could effectively address the challenges of the most deprived residents. The **EU-added value of FEAD support in Denmark has been substantial**, extending resources, broadening the scope of initiatives, fostering innovation, and enhancing cooperation between existing social services.

It is estimated that the **operations have created high value compared to the costs.** However, there is

consensus among both the Managing Authority and partner organisations that the operations have been **administratively burdensome**.

Overall, FEAD has made a meaningful and lasting impact in Denmark, aligning with the core values, objectives, and principles of the FEAD programme.

Appendices

Appendix 1: Methodology

This case study is based on the national assessment of the FEAD programme in Denmark, along with desk research and four interviews: one interview with two employees from the Danish Authority of Social Services, one interview with the project manager for the evaluation of the FEAD programme in Denmark who is also an expert in the field of vulnerable citizens, and two interviews with managers from two distinct partner organisations.

It is a great advantage that we could rely on the comprehensive Danish evaluation of the FEAD programme for this assessment, and then add insights from desk research and four new interviews to our understanding.

The FEAD-funded project ended over a year ago in 2021. It was difficult for those being interviewed to recall specifics, such as the amount of time spent on administrative tasks during the project. As a result, it is not feasible to produce meaningful estimations on the administrative tasks.

Appendix 2: References

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Appendix 3: FEAD indicators

Table A. 53 – Input indicators for the implementation of FEAD in Denmark in 2014-2022

Indicator	Total amount of eligible public expenditure approved in the documents setting out the conditions for support of operations (EUR)	Total amount of eligible public expenditure incurred by beneficiaries and paid in implementing operations (EUR)	Total amount of eligible public expenditure declared to the Commission (EUR)
2014-2022	3 834 938.15	3 632 110.48	3 259 697.43

Source: SFC 2014 database.

Table A. 54 – FEAD participants in Denmark in 2016-2021

Indicator	2016	2017	2018	2019	2020	2021
Total number of persons receiving social inclusion assistance	474	484	454	757	277	570
Number of children aged 15 years or below	23	10	31	19	3	7
Number of persons aged 65 years or above	68	60	82	121	40	105
Number of women	68	60	82	121	40	105
Number of migrants, participants with a foreign background, minorities (including marginalised communities such as Roma)	474	484	382	757	265	523
Number of persons with disabilities	2	49	72	29	106	142
Number of homeless	474	484	454	757	277	570

Source: SFC 2014 database.

*Please note that there was no expenditure in 2014, 2015 and 2022.

X.4 Germany

6. Context and background

Germany's long-term unemployment rate is notably low compared to the EU average (1% in 2022, versus the 2.4% EU average). Similarly, the country's at-risk-of-poverty or social exclusion rate (AROPE) was 20.9% in 2022, slightly below the EU-27 average of 21.6%. The rate declined steadily between 2015 and 2019. However, the impact of the COVID-19 pandemic contributed to an increase of the AROPE in 2020 and it has since not returned to pre-COVID-19 levels. The rate of children at risk is on the rise since 2020.

Other indicators, however, do not paint as bleak a picture. Social transfers (e.g. unemployment benefits, housing allowances) have a strong impact on mitigating poverty in Germany, reducing the AROPE by 35.7% on average³⁸³. The importance of these transfers was especially pronounced in 2021 and 2022, when the social transfers reduced the AROPE by more than 40%, alleviating the negative impacts of the COVID-19 pandemic.

However, not all people residing in Germany have knowledge of or access to social benefits. These groups are specifically vulnerable to being at risk of poverty and social exclusion. Among these are EU citizens, who relocated to Germany, but have not found employment, to which many social benefits, such as social insurance, are tied. Another group, partially overlapping with the former, are homeless persons or those at risk of becoming homeless.

Table A. 55 – Socio-economic context in Germany

Germany	2014	2015	2016	2017	2018	2019	2020	2021	2022	Trend	
1. At-risk-of-poverty or social exclusion rate (AROPE) Total			20.0	19.8	18.8	18.5	17.3	20.4	21.0	20.9	
2. AROPE Children			19.8	20.6	18.6	17.6	15.5	22.1	23.9	24.1	
3. Severe material and social deprivation rate (SMSD)			5.7	4.7	3.7	3.4	3.0	4.4	4.3	6.1	
4. Severe material deprivation rate (SMD)	5.0	5.8	3.7	3.4	3.1	2.6	5.6	0.0	0.0		
5. Inability to afford a meal with meat, chicken, fish (or vegetarian equivalent) every second day	7.5	7.1	6.5	7.0	6.4	5.3	12.7	10.5	11.4		
6. Impact of social transfers (other than pensions) on poverty reduction % reduction of AROPE	33.2	33.5	34.8	33.2	33.3	36.2	34.6	40.3	42.1		
7. Housing cost overburden	15.9	15.6	15.8	14.5	14.2	13.9	9.0	11.0	11.8		
8. Self-reported unmet need for medical care % of population 16+	1.6	0.5	0.3	0.3	0.2	0.3	0.1	0.1	0.3		
9. Households with very low work intensity		9.5	9.4	8.7	8.0	7.6	8.3	9.5	9.7		
11. Population in the EU could not afford unexpected financial expenses	32.6	30.4	30.0	29.3	28.1	26.0	37.6	32.3	33.5		
13. Share of total population having neither a bath, nor a shower in their dwelling	0.0	0.0	0.0	0.0	0.0	0.0	0.0				
14. No indoor flushing	0.0	0.0	0.0	0.0	0.0	0.0	0.0				
17. Persons who cannot afford a telephone	0.3	0.2		0.2	0.1		0.0				
18. Persons who cannot afford to replace worn-out clothes	5.6	5.1	4.7	4.5	3.8	3.6	4.9	5.4	6.8		
20. Persons who cannot afford to get-together with friends or family (relatives) for a drink or meal at least once a month	14.3	12.7	7.3	6.8	6.3	6.2	6.4	5.9	7.6		
21. Persons who cannot afford internet connection for personal use at home	4.5	3.9	3.3	3.0	2.7	2.3	1.8	2.2	2.6		
22. In-work risk of poverty	7.5	7.1	6.5	6.6	6.3	5.7	6.5	6.7	5.3		
23. Long-term unemployment	2.2	2.0	1.7	1.5	1.4	1.2	1.1	1.2	1.0		
25. Employment rate	72.8	73.0	73.7	74.3	74.9	75.7	74.4	75.6	76.9		
26. Children (aged less than 18) living in households with very low work intensity		6.9	8.2	6.8	6.0	5.1	9.4	10.8	10.8		
27. At-risk-of-poverty rate for children		14.6	15.4	15.2	14.5	12.1	15.4	16.4	14.8		
28. Severe material and social deprivation rate (SMSD) for children		6.7	6.2	4.3	3.8	3.3	5.9	5.5	8.4		

Source: Eurostat.

7. Reconstructing the intervention logic

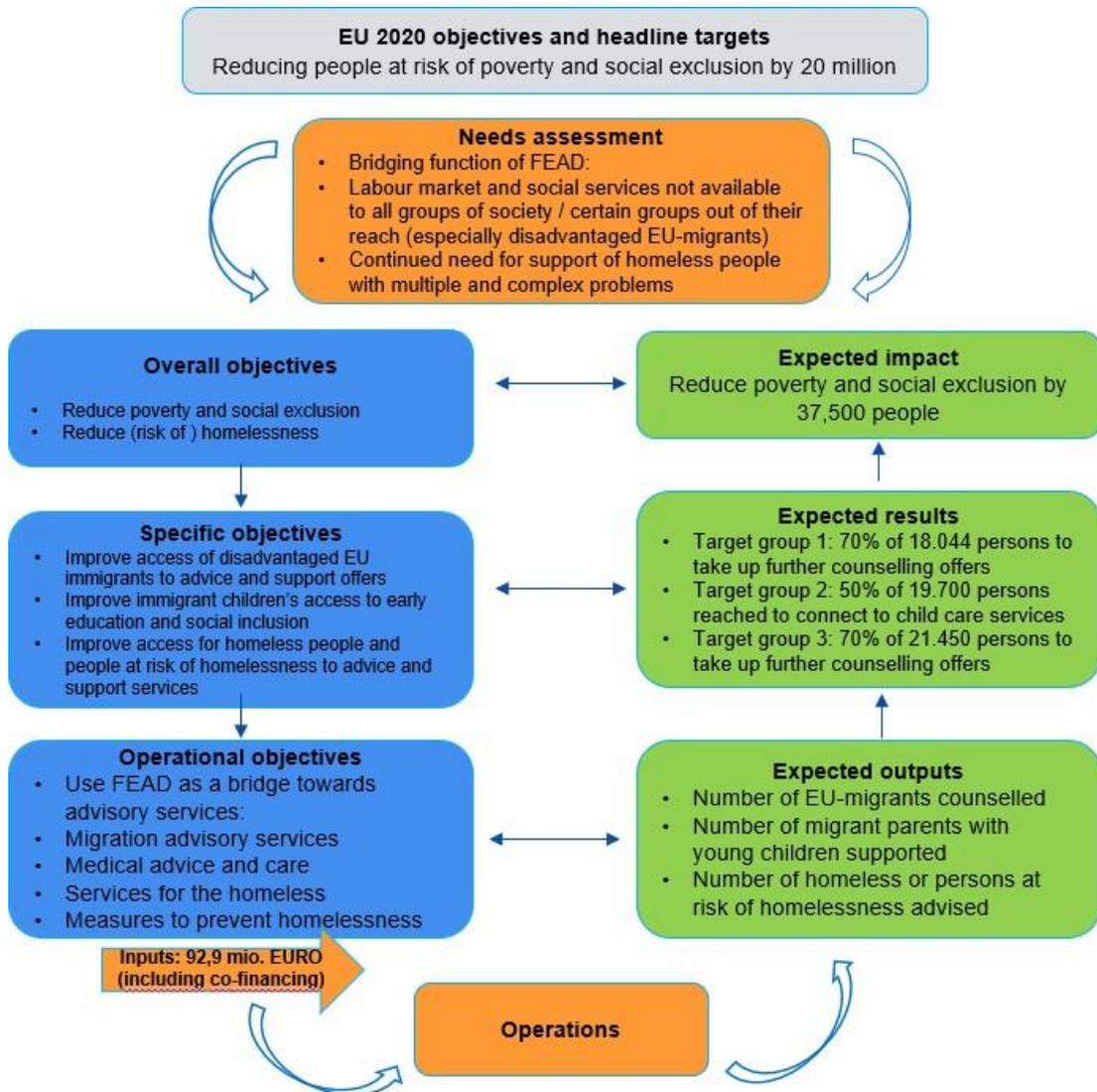
This section provides an overview of FEAD in Germany. It describes the intervention logic of the programme, the national policy framework, FEAD objectives and target groups, and the governance and delivery systems.

Figure A. 70 illustrates Germany's strategy for utilizing FEAD funds to address poverty and social exclusion. The distinctive possibilities for actions under OP II enabled stakeholders

³⁸³ Reduction in percentage of the risk of poverty rate, due to social transfers (calculated comparing at-risk-of poverty rates before social transfers with those after transfers; pensions are not considered as social transfers in these calculations). The indicator is based on the EU-SILC (statistics on income, social inclusion and living conditions).

to approach target groups which could not previously be targeted through national programmes. Germany's programme focuses on newly arrived EU citizens and their children, supporting them to access early childhood education, as well as homeless people to improve their access to counselling and support measures. These groups face significant barriers to integrate into the regular labour market. The primary objective of FEAD was to act as a bridge between these target groups and already existing services, which they were either unaware of or unable to access without additional support.

Figure A. 70 – Intervention logic of FEAD in Germany



Source: adapted from FEAD mid-term evaluation

7.1. National policy framework

FEAD was embedded into the national social policy framework with the aim to bridge the gap between hard-to-reach target groups and existing services. It also offered services to people otherwise outside of the social security net. The coherence of FEAD with other interventions was guaranteed through strictly formulated eligibility criteria, especially regarding potential overlaps with the European Social Fund (ESF). The target groups chosen were those left out of many other types of social services, e.g. those linked to employment and social insurance. Synergies were ensured through close cooperation of all stakeholders in the FEAD monitoring committee [EHAP Begleitausschuss].

In addressing homelessness, German law mandates municipalities to provide emergency housing. As a result, FEAD funded operations therefore only focused on bridging the gap toward housing services by supplementing them.

The FEAD budget was relatively small compared to Germany's broader social policy expenditures. Nevertheless, there was an unmet need for additional support to the specific target groups selected.

7.2. Objectives and target groups

FEAD in Germany had the objective to function as a bridge between the most disadvantaged groups and existing public services at the communal, regional, or federal level through low threshold³⁸⁴ counselling services. FEAD operations focused on target groups that are among the most disadvantaged people in Germany with little to no realistic prospects of integration into the regular labour market. Previously, social inclusion measures supported by EU funds focussed on facilitating employment access for disadvantaged groups within the framework of the ESF. The general objective of the FEAD OP was therefore to provide these previously overlooked groups access to local or regional support services in order to improve their acute living situation and the conditions for their social inclusion. Focusing on these specific groups was supported by prior research and statistical data.³⁸⁵

The specific objectives of FEAD concentrated on the following disadvantaged groups:

- Newly arrived disadvantaged EU citizens (objective 1, later objective A)
- Newly immigrated parents with children in kindergarten up to seven years old (objective 2, later objective A)
- Homeless people and those at risk of homelessness (objective 3, later objective B)

Under objective A, the target group's motives for relocating to Germany include poverty and a lack of social security, combined with social and economic exclusion in their countries of origin. This is accompanied by the hope of improving their living conditions in Germany and achieving a self-determined life in the medium to long term.

Due to the multiple and complex challenges faced by FEAD target groups, these individuals live under particularly stressful conditions. They often do not have a living space or live in extremely cramped conditions in overcrowded apartments and houses with serious defects. Insufficient or missing language skills, combined with a lack of educational and professional qualifications, further limit their access to the regular labour market and increase their dependence on irregular, often exploitative, employment. For women, especially Roma women, there are additional gender-related disadvantages, including a high degree of dependence on other family members.

In addition to housing issues, the situation of homeless people and those at risk of homelessness is often characterised by other individual limitations such as addiction, disabilities, psychological problems and acute illnesses. This can lead to existing support services not reaching them, as they find themselves unable to seek help. Many homeless individuals feel disconnected from society and lack the motivation to actively engage with social integration programs.

Statistical data suggests that men are more frequently affected by homelessness than women. However, the proportion of women among the homeless has increased in recent years. Women tend to be underrepresented in the homeless assistance system because they are more likely to experience "hidden homelessness" - i.e. (temporary) accommodation with relatives or acquaintances without tenancy protection. Homeless women are also at higher risk of exposure to violence.

The increase in homelessness is structural, caused primarily by rising rents and a shrinking supply of small apartments within a low-price segment. Multiple personal impairments of the homeless also reduce their chances of finding suitable and adequate accommodation (in addition to the problems mentioned above, financial problems such as debt, coupled with a low level of education and qualifications).

EU migrants and homeless individuals, or those at risk of homelessness, often experience discrimination, which not only limits their chances of social participation, but also blocks or severely restricts access to regular support offerings. Rejection and prejudice increase their social exclusion and lead them to turn away from help and by doing so slide further into poverty. To provide meaningful support that enables pathways to social integration, both these individuals and the municipalities require additional assistance, which is facilitated through FEAD. FEAD represents a bridge between the most disadvantaged groups and the

³⁸⁴ Low-threshold services aim at making help easily accessible, especially to people who are not able to request help from services associated with certain barriers such as language proficiency, relocation etc.

³⁸⁵ Evaluation and Monitoring report for FEAD in Germany 2020

municipalities' regular assistance systems and supports communication between advisory services and those seeking advice, through low-barrier outreach and interculturally sensitive advice and mediation.

According to FEAD monitoring data, the largest proportion of particularly disadvantaged newly immigrated EU citizens who made use of FEAD advisory services came from Romania (38%) and Bulgaria (33%). This was followed by 'advice seekers' (as they were called) from Poland (8%), Greece, Italy and Spain (2-3% each). An additional 7% of those seeking advice through FEAD came from 22 other European countries, each contributing less than 2% of the total.³⁸⁶

7.3. Implemented operations

Germany opted to fund operations under OP II, by organising two calls, or 'funding rounds'. The first one was open from 2015-2018 and the second one from 2019 to 2020. The total financial volume was approximately EUR 93 million, of which 85% were EU funds, 10% federal and 5% participating organisations' own funds. REACT-EU funds were not used.

FEAD supported 84 projects in the first funding round from December 2015 to December 2018 and 67 projects in the second funding round, from January 2019 to December 2020, with a project implementation allowed until the end of 2023.³⁸⁷

In order to be eligible for funding, beneficiary organisations had to form cooperation alliances.

Operations were carried out by numerous regional stakeholders from civil society, religious organisations, youth work, social work, public service providers, municipalities and districts. Individual projects received a total funding (including EU, national funding and own contribution) in between EUR 211 000 and EUR 1 000 000. The average costs by output-unit (i.e. the total cost for each person receiving counselling) reported for the first round of funding (2016-2018) ranged between EUR 182 and EUR 489, with an average of EUR 267.³⁸⁸ Accompanying measures were not foreseen for OP II.

Germany exceeded its target of reaching 18 044 counselled immigrants in the first year of the programme, which has further increased in subsequent years to a cumulative total of over 112 thousand immigrants. Other output targets were also met, for instance on immigrants with children in kindergarten, which were reached in 2020. The target for counselled homeless persons was reached in 2018 and further increased since to a cumulative total of over 35 thousand.

The focus of projects was often broad (providing general counselling services) and, in some cases, very specific (e.g. promoting health care for homeless persons). Examples of projects that operated in both project periods include:

- Outreach contact work and specialist agency work to secure housing in the Breisgau-Hochschwarzwald district
- Contact point for disadvantaged European Roma and non-Roma
- Comprehensive advice for newly immigrated families from Eastern Europe and their Children in Cologne (ZuBeFa)
- Promoting social coexistence in Bremerhaven
- Arriving in Wedding
- European Family Integraton in Neukölln
- AHA! FEAD-advice in Reinickendorf
- Advice centre Theodora: counselling for prostitutes, fighting poverty, fostering participation
- 'Frost protection guardian angel 2.0' – Health promotion and Counselling for Homeless persons
- FAWOS – Special Office for Securing Housing
- GIVE – Health – Integration – Diversity - Empowerment

³⁸⁶ FEAD Evaluation and Monitoring Report 2020

³⁸⁷ FEAD Evaluation and Monitoring Report 2020, p. 166

³⁸⁸ FEAD Evaluation and Monitoring Report 2020, pp. 166-171

- Help before loss of housing
- ‘Human dignity – living and housing’
- Stabilize Köln >> outreach street work and help in navigating

7.4. FEAD governance and delivery system

The Federal Ministry of Labour and Social Affairs acted as FEAD’s Managing Authority (Unit VI_{Gr}u EF2 ESF-Programme Implementation, FEAD Managing Authority), and another administrative unit also acted as the certifying body (Unit VI_b4). There was also a separate auditing authority (Auditing Authority ESF, EGF and FEAD). Payments by the EU Commission were made to the Federal Treasury Halle.

Representatives of the central municipal associations (German Association of Cities, German Association of Districts, German Association of Cities and Municipalities), the institutions of independent welfare (The Federal Association of Independent Welfare Services (BAGFW), Federal Working Group on Homelessness Aid, National Poverty Conference) as well as the German Association for Public and Private Welfare and the Federal States were continuously involved in the preparation of the FEAD OP. The stakeholders were involved in identifying the two support priorities and in deriving the three individual objectives and specifying the content of FEAD funding. For example, following the intervention of several actors, the circle of possible recipient institutions was expanded to include migrant organisations.³⁸⁹

Several Federal Ministries which were affected in terms of content, and the Commissioner for Migration, Refugees and Integration were also closely involved in the planning and implementation of the FEAD funding.

The Federal Office of Administration, a federal service agency, was tasked with administering FEAD. During the programming period, they were replaced by the German pension insurance ‘Knappschaft-Bahn-See’ (KBS). This agency was responsible for tasks such as handling payments to partner organisations and checking their invoices in return.

In order to be eligible for funding, interested parties needed to form a ‘cooperation alliance’ [Kooperationsverbund]. Partners could be municipalities and independent welfare organisations, or other non-profit organisations. Municipalities had to be part of a cooperation, though not necessarily as an applicant or beneficiary. As soon as there were financial transactions between the partners, they formed a ‘project alliance’.³⁹⁰ Initially, it was anticipated that the financial interconnection of partners would lead to a more intensive cooperation in project alliances, leading to positive financial outcomes for all parties involved. However, evidence does not support this hypothesis. According to the evaluation and monitoring report, there was even slightly more cooperation among members of cooperation alliances, thus without financial interconnection.³⁹¹

8. Key findings on the implementation of FEAD

8.1. To what extent was FEAD support successful – or not – and why?

Overall achievement of FEAD objectives [*criterion: effectiveness*]

FEAD, though limited in size relative to the total German population and social policies, has **made a difference to the most deprived groups**, by supporting their social integration through bridging the gap between the target group and existing advisory services. The programme targeted groups previously not properly reached by social policies. The specific objective of *contributing to the development and fostering of support structures for alleviating poverty and social exclusion in Member States*, has thus been achieved. The target values set for outputs and results were over-achieved, although, as there was no experience in working with the specific target group of EU-migrants, they had been under-estimated in the beginning.³⁹²

By bridging the gap between the target group and existing services, it was assumed that this would lead to the target group receiving additional financial or material support to alleviate poverty and material deprivation in

³⁸⁹ FEAD OP Germany

³⁹⁰ BMAS, 2015

³⁹¹ FEAD Evaluation and Monitoring Report 2020, p. 67

³⁹² SFC 2014 Database

the long run. It is also expected that, by becoming more familiar with public institutions, the target group would be better equipped to participate in society, through increased interaction with social services, participation in early childhood education, and through the offer of additional opportunities for social interaction. Table A. 56 shows the target values in relation to the cumulated output and result indicators over the course of the programming period. **All targets have been over-achieved by a large margin**, particularly in the case of adult EU migrants who received advice, with a success rate of over 600%. The objectives set regarding the proportion of people successfully redirected or accompanied to at least one other advice or support offer were also achieved.

However, according to interviewees, **the targets and objectives show limitations, as they were set at a relatively low level** concerning the successful redirecting to at least one advice or support offer. Furthermore, if a person came back to the same project with a different request, this could not be counted as an additional result. Stakeholders interviewed reported that they had no means to establish a monitoring system to follow-up on the effectiveness of the offers to which they directed their clients. One interviewee described this problem as follows: *‘I could refer a pregnant woman to a pregnancy counselling service. She would attend the appointment there, and in the documentation system it would sound like ‘successful social integration’, and it could be, but it could also be that she went there but many questions remained unanswered, so the indicators for success are deceptive. Still – they are a very useful instrument.’*

From interviews with stakeholders interacting with newly arrived migrants and their children, there is evidence that **especially the long-term accompanying of children and their parents to early childhood education has proven to be very successful**. In many cases, the offer through FEAD projects was highly appreciated by the service providers the target group was redirected to, with reports that it very positively affects their work with the target group. Moreover, several interviewed stakeholders state that in many individual cases the counselling was indeed successful.

Table A. 56 – Achievement of programme-specific targets (output and result indicators) in Germany in 2014-2022

Specific output indicator	Target	Number of people reached	% of target	Number of people successfully redirected or accompanied to other services	Share of people successfully redirected or accompanied to other services	Initial Target share
Number of adult EU migrants advised	18,044	112,408	623%	98,874	88%	70
Number of supported parents of migrant children of kindergarten age	19,700	31,414	159%	28,266	90%	50
Number of supported migrant children of kindergarten age	19,700	25,177	128%	22,152	88%	50
Number of homeless people and at risk of	21,450	36,236	169%	29,843	82%	70

homelessness advised						
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Source: own calculations based on SFC 2014 data

Reach of target groups [criterion: effectiveness]

FEAD in Germany has effectively reached the most vulnerable groups it set out to reach newly arrived EU-migrants This includes a significant number of individuals from minority communities, such as Roma and Sinti, who migrated to the country in search of work and support services. In total, the programme reached 112,408 adult EU migrants, 31,414 parents of migrant children, 25,177 migrant children and 36,236 homeless persons or persons at risk of homelessness. Notably, the proportion of women among those supported within the homeless population was higher than their overall representation in homelessness statistics.³⁹³

FEAD operations were specifically developed to serve groups otherwise left out or not reached by existing support structures. The **projects combined various ways of contacting the target group**. They set up fixed contact points and consultation hours in their own rooms or at local social institutions and initiatives. They raised awareness of their services through events, media outreach, and direct engagement activities, locating the target groups in their communities—on the streets, at common meeting places, or at their accommodations (e.g., among homeless individuals or newly arrived EU citizens, many of whom belong to the Roma minority). For homeless people, outreach work was the primary means of providing advice and support. **The FEAD advice centres quickly became known among newly immigrated EU citizens through word of mouth, resulting in a decreased relevance of outreach work over the course of the programme**. Even institutions of the regular assistance system referred the target groups to FEAD funded advice centres, so that their counselling could be better prepared, structured and conversations supported through translation and mediation, which underlines the importance of FEAD as a bridge to regular help services.³⁹⁴

Adjustments to FEAD to address new challenges [criterion: effectiveness]

REACT-EU funds were not used for FEAD in Germany, as many projects had already been budgeted and started before 2020, the second call for proposals had already been closed and thus could not make use of the additional funds. Projects that required additional support could be supported within the framework of FEAD and there appeared to be no significant demand for additional funding beyond this³⁹⁵.

The Managing Authority planned a mid-term evaluation for the first round of projects (2015-2018), in order to be able to adapt and facilitate the second round (2019-2023). The main changes implemented from 2019 onward, based on the evaluation findings, included:

- **Restructuring Specific Objectives:** The counselling for newly immigrated adults and advice for newly immigrated parents and their children (SO 1 and 2) were merged, simplifying the consulting process significantly.
- **Lump-Sum Definition for Workshops:** A lump sum was established for partner organisations wishing to plan anti-discrimination workshops, a service that approximately 25 out of the 67 projects in the second round utilized.
- **Accompaniment for Advice Seekers:** The definition of funded activities was expanded to include accompanying individuals seeking advice to appointments. This allowed for children and their parents to receive support for up to six months, enabling projects to document their actual efforts in providing assistance while also supporting integration into early childhood education or daycare facilities.
- **Advice on Returning to Home Countries:** Projects were given the option to provide advice for those wishing to return to their home countries, clarifying this as a possible alternative after consultation with the European Commission.
- **Inclusion of Women in Poverty-Induced Prostitution:** It was clarified that women in poverty-induced prostitution could be included in the target group, allowing for continued support and advice for these individuals.

³⁹³ Annual Implementation Report 2022

³⁹⁴ FEAD Evaluation and Monitoring Report 2020

³⁹⁵ Stakeholder interviews

Both in the FEAD Evaluation and Monitoring Report³⁹⁶ and interviews indicated that in the **early years of the programming period, there were severe difficulties in working with the federal agency in charge of administering FEAD** (Federal Office of Administration). In the framework of an initiative to support deindustrialisation in affected areas in East-Germany, a change in responsibilities to a new agency (Knappschaft Bahn-See) took place within the programming period, whose work was highly appreciated by interviewees.

Horizontal principles of FEAD [*criterion: effectiveness*]

FEAD in Germany focused in particular on the horizontal principles of gender equality and preventing discrimination.

Men and women were evaluated based on their support needs. In particular, the funding priority “Addressing, advising and informing particularly disadvantaged newly immigrated EU citizens and their children about early education and social care offers” was intended to reach and address mothers through the target group of children. In practical implementation, the **projects attempted to offer women and men advice and support depending on their needs**. Among the homeless, supported women made up a share of between 25% and 40%, which is above the registered share of women in homelessness assistance statistics.³⁹⁷

Prejudices and stereotypes towards the target groups, especially newly immigrated EU citizens, were discussed intensively in the monitoring committee. The Hildegard Lagrenne Foundation for the education and inclusion of Roma and Sinti in Germany offered to develop on-site workshops to raise awareness among public administration staff and other organisations in dealing with these target groups. 15 anti-discrimination workshops were implemented in 2017 and 2018. These workshops were evaluated in order to develop a viable concept for the second round of funding, which could then be implemented by all interested FEAD project providers.³⁹⁸ As a result, in the second round, all participating partner organisations had the option to schedule workshops either with the previous trainer or with similar providers through a designated lump-sum budget..

The workshops revealed that **most projects were confronted with antigypsyism as a special form of racism**. In the workshop, the history and functions of racism in general and antigypsyism specifically, were explained in detail, as a way to recognize the social tendency to stereotype people with a Roma background as outsiders. The workshops tried to make people reflect on their own stereotypes and prejudices towards certain groups and to show strategies how to counteract these. Many participants exhibited a noticeable change in perspective during the workshops. In 2019, A brief report was prepared that led to the development of a guide for partner organisations to prepare and organise anti-discrimination workshops and intercultural training. The guide was intended to support partner organisations in the preparation of these workshops, and focused on defining target groups, developing goals, reflecting on a balance of informative and interactive modules and selecting suitable trainers.

While public administration staff were identified as a specific target group for these workshops, their representation was notably low, with most participants being from civil society organisations, schools, youth work, or social services. Other horizontal principles were addressed at a basic level, i.e. taken into consideration during the planning of initiatives, but lacking specific measures. Overall, the evaluation report mentions the need to further develop concepts and minimum standards to be applied for the implementation of horizontal principles.

Success and failure factors [*criterion: effectiveness*]

One of the **key success factors mentioned by most interviewees was the forming of cooperation alliances or project alliances**, which fostered communication and increased the positive impact of projects through synergies and combined efforts. Also networking events were perceived as helping to successfully implement FEAD operations.

Regarding the implementation of operations, **FEAD funding was perceived by many partner organisations as a ‘luxury’**, giving the opportunity for very low-threshold³⁹⁹, direct and long-lasting contact with the target group - a type of support that had not previously been funded by any other source.

³⁹⁶ FEAD Evaluation and Monitoring Report2020

³⁹⁷ Annual Implementation Report 2022

³⁹⁸ Interview and Annual Implementation Report 2022

³⁹⁹ Low-threshold services aim at making help easily accessible, especially to people who are not able to request help from services associated with certain barriers such as language proficiency, relocation etc.

For the target group of children, the **long-term accompaniment to early childhood education programmes was seen as highly successful**. This success was reflected in the high rate of 88% of individuals who were successfully redirected or accompanied to other services, compared to the initial target of 50%.

In one project, **the combination of FEAD advice with labour market-focused measures** was identified as a key success factor. However, other projects reported difficulties in implementing this combination, as job search counselling had not been foreseen as part of the sessions. Federal authorities had discussed this issue extensively. With the inclusion of FEAD into the ESF+ for the following programming period, combining these measures does not pose a problem anymore.

For many initiatives the **restrictions posed by the COVID-19 pandemic hindered the progress of their projects**, at a time when some of the groups became even more vulnerable (e.g. homeless), as many participants either left the country, or could not be reached due to the closure of facilities. This issue was successfully addressed by changing outreach activities, e.g. phone-calls instead of personal visits, or ‘window counselling’ activities in other cases.⁴⁰⁰ These measures ensured high take-up rates throughout 2020 for all target groups except children, where a small decline in participation occurred.⁴⁰¹

Overall cost-effectiveness of FEAD operations [*criterion: efficiency*]

In the national evaluation carried out in 2020, figures for the first round of operations were taken into consideration for comparing costs occurred with potential savings. The cost-benefit analysis describes the targeted and actual direct costs of the programme, its possible indirect costs as well as relieving effects on the support system. FEAD had a funding volume of around EUR 92 million. The majority of the resources were used in the first round of funding.

In the **first round of funding, 84 projects worth EUR 255,000 to EUR 1 million were approved for funding**, with projects that dealt exclusively with the target group of objective 3 (homeless or people at risk of homelessness) incurring significantly lower costs compared to projects targeting objectives 1 and 2 (EU migrants and their children). In the **second round of funding, 67 projects received funding ranging from EUR 211,000 to almost EUR 1 million**. In both rounds, the average funding for projects that pursued more than one objective was not necessarily higher than that of projects only addressing a single objective. The project volume mainly depended on the number of direct staff positions created.

Determining the indirect costs or relieving effects of complex social policy interventions, such as FEAD, is associated with numerous challenges. For this reason, the evaluation report used information gathered from project examples to give approximate effects. **Almost all the institutions interviewed indicated that they were able to reduce expenses thanks to the support provided by FEAD projects at the local level.** Institutions with a focus on advisory services, in particular, reported relief through the FEAD intervention. It was not possible, however, to specify where these savings were reflected in monetary terms, in part due to the funding structure of most services being characterised by plurality. One interviewee stated: *‘[The question] revolves around determining whether advising and accompanying individuals living in poverty and exclusion, and ensuring they have reasonable accommodation, is cost-effective for municipalities.’⁴⁰² While there are no clear figures available, there is a prevailing assumption that this approach is more cost-effective. For instance, cities like Dortmund express this sentiment, even though it may not be empirically proven.’*

When asked about their take on cost-effectiveness, another interviewee stated that *‘the fundamental question here is whether providing municipal shelters and relief services results in tangible cost savings. There is a desire for this to be the case, not only from a humanitarian perspective but also because every municipality aims to enhance the quality of life for its residents, ensure their material well-being, and facilitate access to employment opportunities. While there is consensus at a moral and societal level, the cost-efficiency aspect remains an open question that warrants further investigation.’*

All interviewed partner organisations reported that the **funds were primarily used to cover the costs of project staff working directly with advice seekers, which was considered efficient**. In many cases, administrative staff were funded through federal or the organisations’ own resources, while the EU contribution could be used for those directly working with the target group. For example, a project in Saxony (in the East of Germany): *‘was able to pay 25% of a position for administration, [...] there was the regular budget for supporting tasks, plus 5% of own funds as ‘overhead’ as a regional association, which was very good for organisations, [also] the cost distribution [of] 10% Federal budget, [85% EU budget] worked well.*

⁴⁰⁰ Stakeholder interviews

⁴⁰¹ SFC Database 2014

⁴⁰² The argument being that homelessness as such is a burden on any municipality, mainly from an ethical point of view that cannot be expressed in a specific amount of money, but even including actual costs like additional cleaning expenses.

[...] And it reached the people concerned 1:1 via the staff who were purely available for this kind of social work, they had nothing to do with administration.'

Administrative burden of monitoring and reporting requirements *[criterion: efficiency]*

The **perceived administrative burden of monitoring and reporting requirements differed among stakeholders**. While some found it very burdensome, others didn't report any problems, and even praised elements such as a lump sum for administrative tasks, which *'brought calmness to the project, to know that this was just a fixed amount'*. One interviewee underlined that a certain level of administrative effort is unavoidable. The Managing Authority tried their best to offer support, including workshops for expressions of interest and submitting applications. Additionally, the administrative agency responsible for FEAD (KBS) was highlighted in a positive light for its willingness to support partner organisations.

Originally, a **highly detailed itemised billing approach was used, which will be replaced (under ESF+) by a more streamlined and consolidated method in order to simplify the work for partner organisations**, allowing for easier cost structuring and billing processes.

One interviewee representing a small provider receiving with FEAD their first ever EU funding suggested that **administration would have been easier if they had previously collected experience in working with ESF funds or would be a larger organisation**. According to them *'the administrative part was already very high, it was very time-consuming to create expense receipts, and alternative offers had to be obtained even for small amounts. Documentation of the cases, which is defined as success, was an annoying additional effort, because the wording used internally was different. It was challenging from our point of view, but given that we had no practice with it, larger organisations certainly have more routine.'*

Some interviewees expressed criticism of FEAD's documentation system, particularly the need for an electronic version of paper questionnaires. However, there was general agreement among all beneficiaries that providing some form of proof was necessary. The evaluation report mentions the need to simplify and standardise the monitoring questionnaire to assist easier data evaluation. These specific monitoring requirements were set at a national level and can thus be interpreted as a form of gold-plating. At EU-level, it is required to provide a 'system to record data on individual participants', without further specifying the methods.

Regarding time necessary for administrative tasks, **many projects reported that they had one staff member who dedicated 25% of their working time (approximately 10 hours a week) to administrative tasks related to FEAD**.

Simplification measures *[criterion: efficiency]*

After a mid-term evaluation, the **FEAD objectives 1 and 2 were merged in order to facilitate advisory support in practice**.

The **system of invoicing is being simplified for the next programming period under ESF+**. Suggestions for simplification were also made in the evaluation report. They include simplifying and standardising the monitoring questionnaire to make it easier to evaluate data.

Coherence of FEAD with other interventions *[criterion: coherence]*

Coherence of FEAD with other interventions was guaranteed through strictly formulated eligibility criteria, especially regarding potential overlaps with the European Social Fund (ESF). The target groups chosen were those left out of many other types of social services, e.g. those linked to employment and social insurance. Synergies were ensured through close cooperation of all stakeholders in the FEAD monitoring committee [EHAP Begleitausschuss].

Regarding the work with the target group of homelessness, **one interviewee working with homeless people, reported problems regarding coherence**. According to German Law, municipalities are obliged to assist people in need of housing. However, municipalities are often overwhelmed with this task, so that the right to be assisted in many cases has to be fought for in court. Therefore, many municipalities were glad about the services offered through FEAD covering this gap.

8.2. Is FEAD still relevant?

Relevance to target groups [*criterion: relevance*]

By managing the overall FEAD budget through two consecutive calls for proposals (each for projects with a maximum length of 3 years) and by funding numerous different operations carried out by local stakeholders who were close to the target groups, in cooperation alliances with municipalities, **the chosen operations were very relevant to the needs of the most deprived.**

The target groups were carefully chosen through extensive research and data analysis. However, in practice, **it was considered a limitation that support was only offered to those not seeking employment and regarding children, only to those of kindergarten age.** In the evaluation report published in 2020 it was suggested to extend the target group of children to those older than seven years of age, especially school children, in order to accompany their start in compulsory schools, and to include job seekers, so that they would also be able to receive advice and support.⁴⁰³ As the recommendations were only formulated at the end of the FEAD programming period, changes were not implemented then. However, in the funding guidelines for Ehap+ (the continuation of FEAD as a strand of the current ESF+), the target groups are now broader, including children under 18 years of age⁴⁰⁴.

In order to guarantee a holistic approach, **evaluation outcomes show that German language courses would be necessary for the target groups,** in order to enable transition from poverty alleviation towards employment promotion, which would also include the possibility to be counselled about job opportunities (e.g. provided through other strands of ESF/ESF+).

For certain target groups, **the evaluation report also recommended offering material supplies,** such as the distribution of small quantities of food, clothing, public transport tickets or condoms for people working in prostitution. In the second proposal period, this was already partially taken aboard through including a flat rate for remaining costs.

Relevance of FEAD now and in the future [*criterion: relevance*]

FEAD made a difference to a large number of people belonging to the target groups. Nevertheless, since the target group of newly arrived EU-migrants is a very mobile one, with new people arriving in Germany each year, there is definitely a constant and ongoing demand for the services offered under FEAD.

Even though the housing cost burden has slightly decreased between 2019 and 2022, **there is still much pressure on the housing market in Germany,** especially in densely populated areas in the south and west of Germany. Therefore, even though FEAD operations were often successful in preventing homelessness or redirecting to other competent services, the group of people at risk of homelessness or homeless has not significantly diminished in recent years.

EU added value [*criterion: EU added value*]

There is **substantial evidence that FEAD had long-lasting effects, which would not have been produced were it not for EU level intervention.** Many interviewees underlined the importance of FEAD funding to launch their projects, allowing them to showcase the added value for society, especially for target groups for which it is more difficult to receive national or regional funding.

In many instances, projects were able to secure full or partial financing from alternative sources after FEAD funding ended, e.g., securing funding from their municipalities or regions instead. According to the national evaluation carried out in 2020, of the 79 projects examined, 21 had been successful in continuing the work initiated through FEAD funding. In 10 of these cases, former FEAD financed staff members were completely financed by municipalities. In 10 other cases, the FEAD projects were able to ensure that some aspects of their work continued to receive financial support from municipalities. In one case, it was also possible to persuade four municipalities in a district to take over personnel for the continuation of FEAD's advisory approach. For example, in Saxony: *'the city really saw this [support for homeless persons] as an urgent need and created 2-3 staff positions for this work after only 3 years.'*

In many places, **cooperation between municipalities and welfare institutions or other independent or non-profit social work organisations has led to working relationships being established or existing**

⁴⁰³ FEAD Evaluation and monitoring report 2020, p.11

⁴⁰⁴ Funding guidelines for Ehap+ under ESF+: <https://www.bundesanzeiger.de/pub/de/amtlicher-teil?3>

forms of cooperation being intensified. All stakeholders interviewed for this case study agreed that the requirement to cooperate strengthened cooperation. Various municipalities integrated the low- barrier, outreach and multi-lingual advisory approaches into their strategies to combat poverty. As a result, their offer was significantly improved - a more intensive support structure was created, which in some cases also had a more comprehensive and sustainable effect than the sole provision of emergency care. Many interviewees also reported how they profited by exchanging with representatives of other projects at national network meetings.

- **Volume effects:** FEAD provided additional resources in terms of staff available for outreach activities, multilingual advice, accompaniment of members of the target group to services, and prevention instead of only ‘emergency’ work. By redirecting a large number of persons to existing services, it contributed to an overall increase of take-up within the target group.
- **Scope effects:** Through specific outreach activities, FEAD in Germany reached groups that are otherwise hard to reach, such as homeless persons and newly arrived EU-citizens who are not eligible for other types of support. FEAD also provided more opportunities of support, and developed policy areas, for example regarding the cooperation of stakeholders in the field of prevention of homelessness.
- **Role effects:** In many cases, FEAD operations have supported innovative actions which had previously not found adequate funding. Some of the initiatives have also been mainstreamed to the local/regional level (e.g. the prevention of homelessness).
- **Process effects:** Process effects, specifically regarding the cooperation among all relevant stakeholders, were reported by all interviewees and mentioned in the evaluation and monitoring report. The importance of networking with stakeholders through cooperation alliances as well as regionally and nationally through the FEAD network meetings was perceived as added value.

FEAD also made a substantial difference to the target group. One interviewee praised that through FEAD the ‘advice seekers’ profited from an overall increase in their wellbeing, getting the chance to create a better life for themselves.

Visibility

According to interviewees, **FEAD was well known among the partner organisations and municipal/regional stakeholders.** FEAD logos were used for printed materials, and posters were displayed in various centres. However, this level of visibility did not extend to the target groups with the same intensity. The consensus seems to be that the **end recipients of support measures are probably less aware and also less interested in the origin of the funding for their counselling.** In some cases, e.g. outreach work with homeless people, using the FEAD logo was perceived as counterproductive to the cause, as the target group was approached through street workers from organisations well-known to them, where the use of the FEAD logo seemed to potentially create mistrust among potential participants. Consequently, it was primarily used in communications with other stakeholders.

9. Good practices

A good practice example in the field of homelessness is the prevention project ‘**Special Office Housing Security**’ (Fachstelle Wohnungssicherung). In this project, help was offered to a very specific target group: people at risk of homelessness in the participating municipalities in the southern State of Baden-Württemberg. The municipalities themselves were limited regarding funding. There had not been any help for the target group of persons at risk of homelessness, and his project marked the first concerted effort to address this issue in the region.

The project focused (and still focuses) on people who are at risk of losing their homes, often in exceptional circumstances, and provides the immediate and concrete support they need. The service provided had several components:

- Informing individuals about the procedures following the termination of a tenancy and identifying potential points for intervention.
- Assisting individuals in improving their financial situation, such as redirecting advice seekers to debt counsellors. A significant proportion of those seeking help did not receive social benefits even though they would have been eligible and needed assistance with the application process.

- Helping individuals to find new accommodation. In cases where eviction could not be prevented (e.g. in cases when rental contracts were terminated because the owners needed the property for their personal use⁴⁰⁵), the programme aimed to give individuals additional time to find a new place to live.
- Linking clients with further support services to achieve its goals.

Hindering factors were:

- the overall situation on the housing market and difficulties in approaching the target group: the general housing shortage in the Stuttgart metropolitan area, which made it very difficult to find new housing for participants.
- There was also a high proportion of rental contract terminations for personal use.
- Furthermore, in the beginning of the project period, there was little or no awareness of the project's existence among the target group. As a result, it has been a constant task to promote the service and make it as accessible as possible. Regular advertising was done through municipal websites, a lot of networking and rather unconventional methods, such as approaching day-care centres (where single mothers are overrepresented among the target group), and cooperating with local social workers.
- Decentralised consultation hours in local town halls were established to increase the accessibility of the services. This approach became difficult to uphold during times of COVID-19 restrictions.

Despite these difficulties, the programme consistently achieved a (self-reported) 80% success rate, meaning 8 of 10 persons supported by the office can either keep their accommodation or are successfully supported in finding a new permanent accommodation. This confirms the project's effectiveness for those at risk of homelessness. For the target group, the project has played, and continues to play, an important role: some of the municipalities involved in the initial project continue to provide support after the funding period, still with a high success rate of around 80% in achieving positive outcomes. People were either supported to find new housing, or (at an equal rate) supported in keeping their current accommodation. The approach to focus on helping people keep their current housing, instead of offering emergency relief was novel and proved to be very efficient. According to the stakeholder interviewed, evidence suggests that it is easier to find new accommodation while still residing in a permanent location than in a temporary one.

Another success factor was the social component of the project: the interviewee described that people often remain in a 'state of shock' after receiving the devastating news that they are at risk of becoming homeless, rendering them unable to take action. Personal support provided through the project helps individuals to mitigate this shock, enabling them to take proactive steps and thereby increasing their self-efficacy.

Conclusions and lessons learned

FEAD in Germany proved successful in reaching its overall goals through the implementation of more than 100 projects and overachieving all set targets. Though its budget was comparatively small, it made funding for innovative social inclusion projects possible, which in many cases continued to be impactful, even after FEAD funding ran out.

Effectiveness: FEAD in Germany was effective in reaching the target group. Through a mid-term evaluation, the lessons learned early in the programming period could already feed into the second round of projects. The initial set targets were reached and in the case of objective 1, over-achieved already before the end of the second round of financing.

Efficiency: Overall, interviewees reported efficient use of resources, which were thoroughly audited.

Coherence: FEAD was very coherent with other national and EU-funded initiatives, bridging the gap between the target group and existing services.

Relevance: FEAD operations were highly relevant to the target group, as evidenced by the strong demand for advisory services and the substantial overachievement of all result indicators. The results of the evaluation also confirm the relevance of the programme in fighting poverty.

⁴⁰⁵ In Germany, legislation is very protective of renters, thus termination of contracts can only occur under certain circumstances such as failure to pay rent, one of the rare exceptions being 'need for personal use by the owner', in which case the owner needs the apartment in order to secure housing for themselves or close relatives.

EU-added value and visibility: FEAD was able to add value especially through its scope, role and process effects. It played an important role in piloting projects involving target groups otherwise left out, and subsequently paved the way for steady regional/national level support.

Challenges reported were problems in managing the financing of projects by the previous agency in charge, which led to delayed payments and hindered the work of privately financed partner organisations. Both the evaluation and monitoring report⁴⁰⁶ and conducted interviews indicated that in the early years of the programming period, there were severe difficulties in working with the intermediary agency in charge of FEAD administration, which posed a risk to the efficient usage of funds, especially for smaller organisations, as they had trouble pre-financing their staff expenditures. However, the work of the new agency has been highly appreciated by interviewees.

Additionally, the relatively short duration of projects and the gaps in financing between the first and the second period, posed challenges. In cases where projects were extended, this – combined with overall staff shortage in many social services – made it difficult to recruit and retain qualified staff.

Lessons learned through the evaluation of FEAD concern the structuring of the programme goals, the co-financing of FEAD, eligible funding items, and monitoring. Recommendations include the expansion of the target groups, especially to include school children and job seekers, and the extension of services offered, which could additionally include material support. Regarding financing, the current share of 5% co-funding was deemed adequate in order to enable as many partner organisations as possible, especially smaller civil society organisations, to participate in the programme. Furthermore, the target groups should be empowered to achieve greater independence, with a guiding principle focused on strengthening self-help and the empowerment of migrants, homeless individuals, and those at risk of homelessness. While working with the target group of EU migrants, it became essential for the partner organisations, to define counselling standards and achieve a certain level of knowledge in dealing with the target group adequately.

⁴⁰⁶ FEAD Evaluation and monitoring report 2020

Appendices

Appendix 1: Methodology

The case study is based on desk research and seven in depth-interviews conducted between October and December 2023, with representatives of the Managing Authority, members of the monitoring committee and partner organisations in different regional States. The interview sample is balanced regarding the objectives targeted: some of the partner organisations focused more on objectives 1 and 2 (later A), some specifically on objective 3 (later B), and some addressed all of them. The sample is also geographically balanced: one partner organisation was in the south of Germany, one in the east, one in the north, and one in the most-densely populated area in the west. Thus, the sample can be considered representative, although it is limited in that not all states and a relatively small percentage of the overall number of projects could be covered. All interviews were held online via Microsoft Teams which allowed for flexibility and increased accessibility. Findings from the interviews were then triangulated with the results of the desk research.

Appendix 2: References

- BMAS [Federal Ministry of Labour and Social Affairs] (2020). *Europäischer Hilfsfonds für die am stärksten benachteiligten Personen (EHAP)*⁴⁰⁷
- BMAS, (2015): *FAQ zur Richtlinie zur Umsetzung des Europäischen Hilfsfonds für die am stärksten benachteiligten Personen (EHAP)*
- SFC 2014, data extracted in December 2023, own calculation
- *Interview with a representative of the national Managing Authority (Ministry of Labour) in Germany, conducted in October 2023*
- *Interview with a representative of an implementing organisation in Sachsen, conducted in October 2023*
- *Interview with a representative of an implementing organisation in North-Rhine Westphalia, conducted in October 2023*
- *Interview with a representative of an implementing organisation in Baden-Wurttemberg, conducted in October 2023*
- *Interview with a representative of a training organisation, conducted in November 2023*
- *Interview with a representative of a member of the FEAD monitoring committee in Berlin, conducted in December 2023*
- *Interview with a representative of Hildegard-Lagrenne-Foundation, conducted in December 2023*
- Walter, Gerd et. al (2020). *Abschlussbericht Monitoring und Evaluation des Europäischen Hilfsfonds für die am stärksten benachteiligten Personen (EHAP). SÖSTRA/IAW/defacto, Berlin/Tübingen/Schlierbach* [Evaluation and Monitoring report for FEAD in Germany]

Appendix 3: FEAD indicators

Table A. 57 – Input indicators for the implementation of FEAD in Germany in 2014-2022

Indicator	Total amount of eligible public expenditure approved in the documents setting out the conditions for support of operations (EUR)	Total amount of eligible public expenditure incurred by beneficiaries and paid in implementing operations (EUR)	Total amount of eligible public expenditure declared to the Commission (EUR)
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⁴⁰⁷ Link: <https://www.bmas.de/DE/Europa-und-die-Welt/Europaeische-Fonds/Europaeischer-Hilfsfonds/europaeischer-hilfsfonds.html>

2015-2022	107 769 727.00	94 116 105.00	81 584 631.95
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Source: SFC 2014 database as of Oct. 2024, Annual implementation report version 2022. Please note that there was no expenditure in 2014.

Table A. 58 – Number of FEAD participants Germany in 2014-2022, per year

Indicator	Total	2015	2016	2017	2018	2019	2020	2021	2022
Total number of persons receiving social inclusion assistance	199 308	31	35 286	45 105	37 062	27 742	28 168	16 787	9 127
Number of children aged 15 years or below	25 403	4	3 275	5 100	4 084	4 437	4 275	2 626	1 602
Number of persons aged 65 years or above	2 559	0	429	580	480	435	420	157	58
Number of women	98 047	14	16 877	21 762	18 232	13 691	14 223	8 446	4 802
Number of migrants, ... ⁴⁰⁸	162 566	30	29 390	37 540	31 575	21 336	21 605	13 811	7 279
Number of persons with disabilities	4 685	3	904	1 104	858	695	641	316	164
Number of homeless	44 335	2	7 501	8 462	6 508	5 919	8 170	6 392	1 381

Source: SFC 2014 database. Please note that there were no participations in 2014.

⁴⁰⁸ Including participants with a foreign background minority (including marginalised communities such as the Roma)

Table A. 59 – Number of FEAD participants advised and supported in Germany in 2014-2022 (overall target and actual numbers per year)

Indicator	Target	2015	2016	2017	2018	2019	2020	2021	2022
Number of adult EU migrants advised	18 044	20	21 988	25 912	21 811	12 657	18 536	7 341	4 143
Number of supported parents of migrant children of kindergarten age	19 700	7	3648	5538	4541	5379	6140	3871	2290
Number of supported migrant children of kindergarten age	19 700	4	3117	5040	4076	4437	4275	2626	1602
Number of homeless people and at risk of homelessness advised	21 450	0	6377	8550	6634	5269	5365	2949	1092

Source: SFC 2014 database. Please note that there were no participations in 2014

X.5 Greece

10. Context and background

Poverty and social exclusion in Greece have been consistently above the EU average, throughout the period of implementation of FEAD (2013-2022). At the beginning of the period, Greece was coming out of a recession that affected not only the poor but also the non-poor⁴⁰⁹. The crisis had resulted in a higher number of people being at risk of poverty and social exclusion, and one of the highest declines in disposable income and social inequality rates in the EU⁴¹⁰. Against this context, **Greece has generally experienced an improvement in its socio-economic indicators related to poverty and social exclusion, from 2013 to 2022.**

The main poverty and social exclusion indicator, AROPE, which measures the share of persons who are either at risk of poverty, or severely materially and socially deprived or living in a household with a very low work intensity⁴¹¹, has declined significantly from 2015 to 2022 (Table A. 55). However, more than 26% of the Greek population are still at risk of poverty and social exclusion, remaining above the EU average of 21.6%. The situation is worse for children, with 28.2% in 2022 being at risk of poverty and social exclusion.

The non-monetary component of the AROPE indicator, notably severe material deprivation, which shows an enforced lack of necessary and desirable items to lead an adequate life, has declined since 2013. However, for the last three years leading up to 2020 (the last year for which there is available data), it has remained more or less stagnant at the relatively high rate of around 16.5%, considerably above the EU27 average of 6.7%. When looking at specific target groups⁴¹², **women experience more severe material and social deprivation⁴¹³ than men** (14.6% for women compared to 13.1% for men in 2022), while children (less than 17 years old) are the target group that is worst off, with a rate of 15.5% in 2022.

Looking at specific components of material deprivation, a relevant one for FEAD is the inability to face unexpected financial expenses. This affected more than 50% of the Greek population between 2014 and 2018; it has since dropped but still remained at 44% in 2022, markedly above the EU27 average of 32%. The groups that suffer more from this type of material deprivation are single persons with dependent children (an increase from 59% in 2014 to 64% in 2022) and elderly people (an increase from 47% in 2014 to 66% in 2022). The rates for these groups, therefore, are not only very high but have worsened with time.

Another component of material deprivation that is very relevant for FEAD is the inability to afford a meal with meat, chicken, fish (or vegetarian equivalent) every second day. This indicator has been declining since 2013, with an exception in 2020 where it increased, possibly due to COVID-19. It has however declined since then to 10% in 2022 (Table A. 55). According to a survey of the Greek Statistical Office⁴¹⁴, 32.2% of the poor households have declared the incapacity to afford a meal with meat, chicken, fish (or vegetarian equivalent) every second day, while the respective percentage of the non-poor households amounts to 4.9%. **In terms of more specific target groups, households with dependent children have consistently been the target group with the greatest difficulty to afford a healthy meal**, followed by single persons with

⁴⁰⁹ FEAD OP

⁴¹⁰ Eurostat SILC database

⁴¹¹ [Glossary: At risk of poverty or social exclusion \(AROPE\) - Statistics Explained](#)

⁴¹² Source ELSTAT (Greek Statistical Office) <https://www.statistics.gr/documents/20181/bfdac782-5df9-7a23-54d2-7a471b70e73b>

⁴¹³ Since 2019, the severe material and social deprivation (SMSD) rate has replaced the severe material deprivation (SMD) rate.

⁴¹⁴ <https://www.statistics.gr/documents/20181/bfdac782-5df9-7a23-54d2-7a471b70e73bsin>

dependent children (Figure A. 71 – Percentage of people facing inability to afford a meal with meat, chicken, fish (or vegetarian equivalent) every second day). Although the trend has been declining since 2013 for these two groups, at the end of the reference period (2022) the rates were higher than the EU27 average for households with dependent children (8.6% in the EU27 and 10.7% in Greece). At the same time, the situation for elderly people has worsened significantly, with increasing shares of people aged 65 years or over experiencing the inability to afford a meal, culminating at 18% in 2022 (compared to 8.7% in 2013), well above the EU27 average of 11.8%.

Further data from the survey of the Greek Statistical Office⁴¹⁵ shows that 50.7% of the poor households are confronted with payment arrears⁴¹⁶ regarding utility bills for electricity, water, natural gas, etc., whereas the respective share for non-poor households is estimated at 30.1%.

In conclusion, according to the socio-economic data for Greece, the main indicators that suggest serious food and/or material deprivation concern the overall at risk of poverty and social inclusion rate (28% in 2022), especially for children (28.2% in 2022), the inability to face unexpected financial expenses (44% in 2022), the housing cost overburden rate (27% in 2022), the persons at risk of monetary poverty (19% in 2022) and the inability to afford a meal with protein every second day (10% in 2022).

Table A. 60 – Socio-economic context in Greece

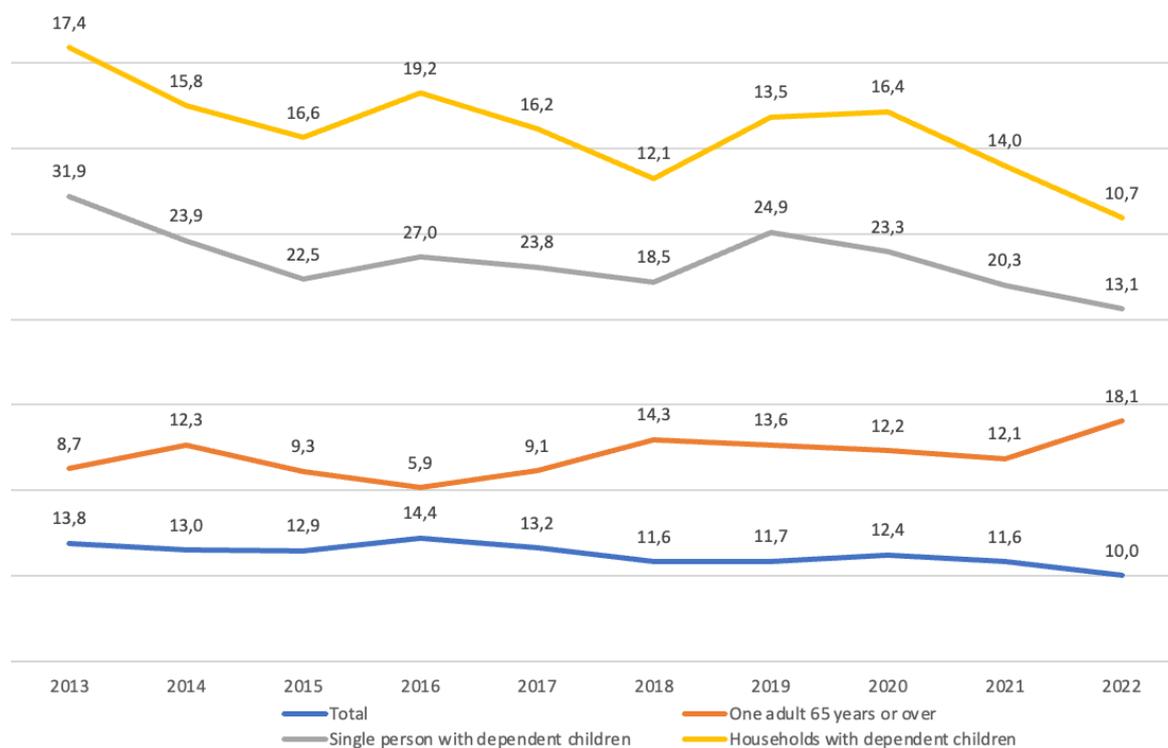
Greece	2014	2015	2016	2017	2018	2019	2020	2021	2022	Trend
1. At-risk-of-poverty or social exclusion rate (AROPE) Total		32.4	32.6	32.2	30.3	29.0	27.4	28.3	26.3	
2. AROPE Children		37.2	36.6	36.5	33.6	30.5	30.2	31.6	28.2	
3. Severe material and social deprivation rate (SMSD)		17.6	18.4	18.3	16.1	15.8	14.9	13.9	13.9	
4. Severe material deprivation rate (SMD)	21.5	5.8	22.4	21.1	16.7	16.2	16.6	0.0	0.0	
5. Inability to afford a meal with meat, chicken, fish (or vegetarian equivalent) every second day	13.0	12.9	14.4	13.2	11.6	11.7	12.4	11.6	10.0	
6. Impact of social transfers (other than pensions) on poverty reduction % reduction of AROPE	15.0	16.1	15.9	15.8	20.3	22.8	24.7	20.7	20.3	
7. Housing cost overburden	44.9	45.5	40.5	39.6	39.5	36.2	33.3	28.8	26.7	
8. Self-reported unmet need for medical care % of population 16+	10.9	12.3	13.1	10.0	8.8	8.1	6.5	6.4	9.0	
9. Households with very low work intensity		15.3	15.7	14.3	13.6	12.7	11.8	12.1	9.5	
11. Population in the EU could not afford unexpected financial expenses	51.8	53.4	53.6	52.7	50.4	47.8	50.7	46.3	43.6	
13. Share of total population having neither a bath, nor a shower in their dwelling	0.7	0.5	0.4	0.5	0.5	0.5	0.2			
14. No indoor flushing	0.7	0.5	0.4	0.5	0.5	0.5	0.2			
17. Persons who cannot afford a telephone	0.8	0.7	0.5	0.6	0.3	0.2	0.1			
18. Persons who cannot afford to replace worn-out clothes	1.3	1.8	3.9	3.8	3.8	3.9	4.3	4.5	5.3	
20. Persons who cannot afford to get-together with friends or family (relatives) for a drink or meal at least once a month	20.7	18.5	18.9	21.0	21.2	17.3	13.1	12.3	11.7	
21. Persons who cannot afford internet connection for personal use at home	10.8	10.1	8.2	5.5	5.1	5.4	4.0	2.3	1.4	
22. In-work risk of poverty	11.9	11.6	12.2	11.2	9.5	9.1	9.0	10.5	9.9	
23. Long-term unemployment	17.5	16.4	15.4	14.3	12.5	11.3	10.5	9.2	7.7	
25. Employment rate	49.2	50.7	51.8	53.2	54.5	56.1	53.7	57.2	60.7	
26. Children (aged less than 18) living in households with very low work intensity		10.6	10.8	9.5	9.0	7.9	7.7	7.5	4.7	
27. At-risk-of-poverty rate for children		26.6	26.3	24.5	22.7	21.1	20.9	23.7	22.4	
28. Severe material and social deprivation rate (SMSD) for children		23.9	24.2	23.8	19.9	18.2	19.0	16.1	15.5	

Source: Eurostat.

⁴¹⁵ <https://www.statistics.gr/documents/20181/bfdac782-5df9-7a23-54d2-7a471b70e73b>

⁴¹⁶ Defined as arrears in the past 12 months, that is, people were unable to pay on time (as scheduled) the utility bills (water, electricity, natural gas, heating, etc.) for the main dwelling.

Figure A. 71 – Percentage of people facing inability to afford a meal with meat, chicken, fish (or vegetarian equivalent) every second day

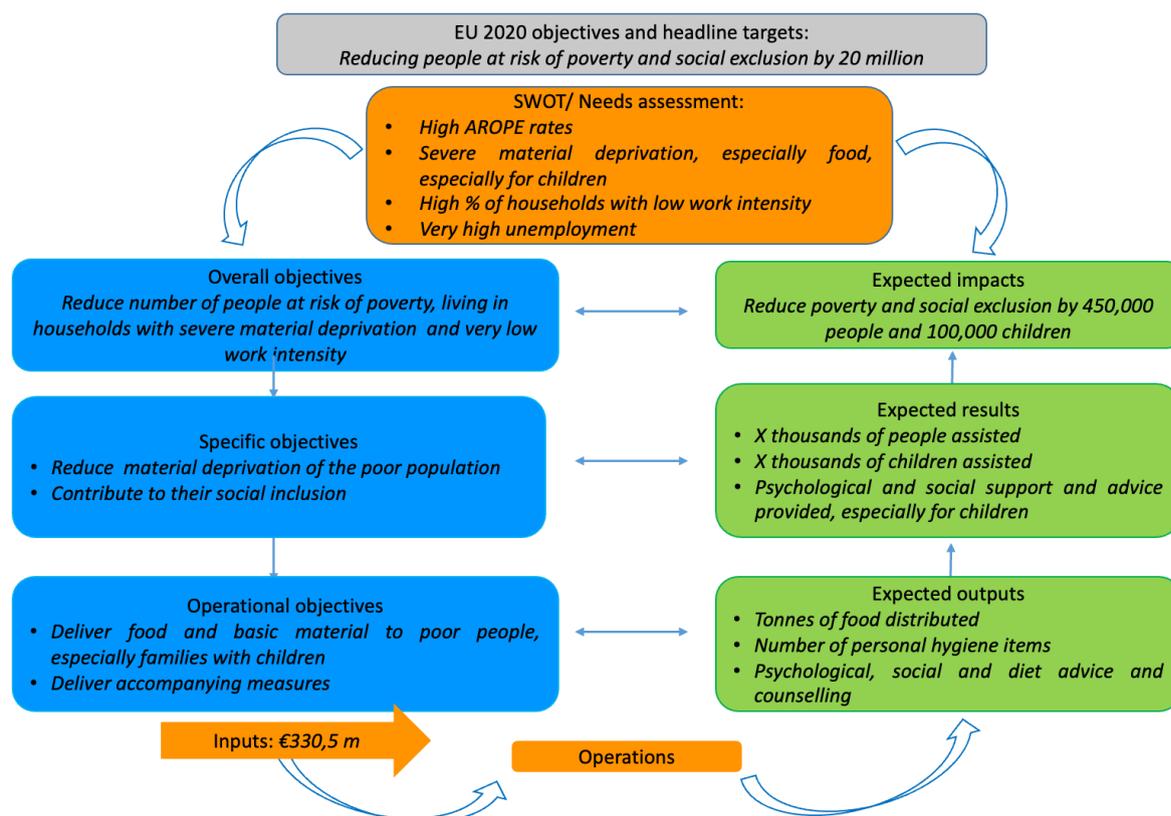


Source: Eurostat, EU-SILC survey [ILC_MDES03__custom_7420371]

11. Reconstructing the intervention logic

FEAD in Greece was introduced in a context of severe food deprivation which led it to focus on **the distribution of food to people with the lowest income levels**. Its aims were to contribute to the national objective of reducing the number of people at risk of poverty and/or facing material deprivation and/or living in households with no working member by 450,000 and by 100,000 children by 2020.

Figure A. 72 – Intervention logic of FEAD in Greece



Source: adapted from FEAD mid-term evaluation

11.1. National policy framework

FEAD was introduced in Greece in 2014 in a context of increasing poverty and social exclusion as a consequence of the crisis and austerity that followed. At the time, there was an ESF supported programme for Social Structures for the Alleviation of Poverty, implemented by partnerships of NGOs and local authorities. There was also a social system for social housing. There was no other national programme or policy for the provision of material assistance.

In 2017, the Guaranteed Minimum Income (GMI) programme was introduced. It offers an unconditional guarantee ensured by the government where all citizens have enough income to meet their basic needs without a work requirement. Beneficiaries of the GMI programme are single-person households, multi-person households and the homeless, access to which is based on certain income and property criteria⁴¹⁷. Since the introduction of the GMI programme, FEAD is implemented in parallel to maximise the effects and provide a holistic approach to addressing poverty and material deprivation. FEAD end recipients are those benefiting from the GMI programme. In this way, **FEAD boosts the support already provided as guaranteed minimum income and is consistent with this national programme.**

There are also a number of local level structures in Greece that contribute to combating poverty and social exclusion, established by NGOs and the Church of Greece, as well as local authorities. They include social markets offering food to the most deprived and operated by local authorities, NGOs and the Church and in some cases in cooperation with social enterprises; social canteens, operated by local authorities, NGOs and the Church; social residences for short-term accommodation offering also food; social welfare centres (for disabled, children, etc.); other special structures operated by NGOs (e.g. food banks, ‘We Can’ initiative, etc.). These structures are supported on one hand by private donations and, on the other hand, by the State through the previous Food Distribution Programme for the Most Deprived People.

⁴¹⁷ Income criteria range from 1,200-euro semi-annual income for a single person household to 3,000 euro for a household consisting of four adult members or two adults and four minor members or a single parent family with five minor members.

11.2. Objectives and target groups

The **overall aim** of the FEAD programme in Greece was to provide food and basic material assistance to the most deprived households. Specific objectives comprised:

- To reduce material deprivation of the poor population, notably the recipients of Guaranteed Minimum Income.
- To contribute to their social inclusion through psychological and social support.

The **operational objectives**, i.e. those related to the specific activities that take place were:

- To deliver food and basic material to poor people, especially families with children.
- To deliver accompanying measures related to psychological and social support and advice on a balanced and healthy diet.

When it was introduced, FEAD addressed the most deprived people⁴¹⁸, especially low-income families with children (with an emphasis on single parent and large families), as well as homeless people. However, when the Guaranteed Minimum Income programme was introduced in Greece in 2017, the target groups became more focused on those who are beneficiaries of the Guaranteed Minimum Income according to the following criteria:

- being settled in Greece.
- having a social security number.
- being beneficiaries of the Guaranteed Minimum Income.
- having chosen during their registration at the GMI that they also wish to become beneficiaries of FEAD.

The registration of the end recipients was done through the Guaranteed Minimum Income platform and was activated one month after registration. By setting the GMI as the key precondition for receiving assistance, the FEAD programme responded to the needs of all deprived people who obtain the GMI. According to statistics of the Managing Authority, an average of 200,000 households and 400,000 people participated in the programme each month.

For the accompanying measures, however, FEAD reached specific groups, such as people over 60 (offering psychological support and capacity-building for using computers for example), children of all ages, people from the Roma ethnic minority through health and nutritional advice, and homeless people through psychological support.

11.3. Implemented operations and accompanying measures

FEAD in Greece was implemented through **two types of operations as well as accompanying measures**. The operations comprised food assistance and basic material provision, notably:

- Food assistance comprises a) food packages including fresh produce (meat, poultry, dairy), fresh vegetables and fruit, dry produce (including baby food), and b) hot meals (rations) to deprived people.

⁴¹⁸ 'Most deprived' as defined in Article 2 (2) of Regulation (EU) 223/2014. 'Most deprived' means natural persons, whether individuals, families, households or groups composed of such persons, whose need for assistance has been established according to the objective criteria set by the national competent authorities in consultation with relevant stakeholders, while avoiding conflicts of interest, or defined by the partner organisations and which are approved by those national competent authorities and which may include elements that allow the targeting of the most deprived persons in certain geographical areas.

- Basic material provision includes household cleaning items, personal hygiene items, baby and children's items, school items, and personal protection items in response to COVID-19.

The accompanying measures aimed to address social exclusion and the social needs of deprived people in a more active and sustainable way. They included:

- Social tutoring;
- Dietary advice;
- Counselling/psychological support for adults and children;
- Individual consulting on accounting issues;
- Creative workshops for children and adults;
- Educational seminars and counselling days.

The **OP placed significant importance on the provision of accompanying measures for children** facing material deprivation and poverty. Some of the types of measures that were implemented include: psychological support to both children and their families, dietary advice, socialisation services (e.g. access to sports activities, spaces for play, meetings and events), cultural and creative play activities (e.g. theatre performances and theatre workshops for children), educational and recreational activities such as excursions.

11.4. FEAD governance and delivery system

The Managing Authority (MA) for FEAD in Greece in 2014-2020 was the National Institute of Labour and Human Resources. The Certifying Authority (CA) was the Paying Authority of Community Support Framework for Structural and Cohesion Funds, within the Ministry of Development and Competitiveness. The Audit authority was the Financial Control Committee.

In 2022, following a government decree, the tasks of the MA were transferred from the Institute of Labour and Human Resources to the Organisation of Welfare Benefits and Social Solidarity. This has become the MA for the management of three programmes, notably FEAD, the 'Housing and Work for the Homeless' and the 'Coverage' programmes. In the future, these three programmes aim, through a variety of actions, at the continuous support of the most deprived citizens, for ensuring their dignified living, as well as their full social reintegration.

The MA had overall responsibility for the delivery of FEAD. It was responsible for programming and evaluation, monitoring and management of operations, on-the-spot checks and organisation and support of the programme. At the operational level, **FEAD was implemented through 57 partnership organisations throughout Greece for the delivery of all measures** (food and material support and accompanying measures). The partnership organisations were selected at the beginning of the programme and were composed of a variety of partners from the public and third sector. Partners included *inter alia*: local and regional authorities, development organisations, local parishes/churches, NGOs, etc. The lead partner was always a public authority, local or regional (i.e. municipality or prefecture). At the end of the programming period, there were 600 distribution points in the municipalities and regions throughout Greece that ensured that food support was delivered to approximately half a million people in need.

The **delivery of FEAD food and basic material support took place via two processes**. The first one was a central purchase process, where the MA was responsible for central purchases of food and other materials via public procurement. It then distributed the food to the lead partner of each partnership who in turn ensures the delivery to end recipients through the network of partners. The second delivery process concerned decentralised purchases, where the lead partner of each partnership was responsible for the purchase of food and material through public procurement processes. It then ensured the delivery to end recipients through its network of partners. During the first years of FEAD, delivery took place via a combination of these two processes (centralised and decentralised purchases). The aim was to gradually prepare partnership organisations for carrying out the purchases themselves. The programme was implemented via the central purchase process during 2015 and 2016. In 2017-2019, there was a combination of the two with a gradual increase of decentralised purchases. At the end of the programming period, FEAD operated only via decentralised purchases, therefore the partnership organisations bore the main responsibility for purchasing and distributing food and basic material support to end recipients.

Accompanying measures were delivered since the beginning of the programme only in a decentralised manner. Each partnership decided the type of accompanying measures to implement depending on the profile and needs of their end recipients.

12. Key findings on the implementation of FEAD

12.1. To what extent was FEAD support successful – or not – and why?

Overall achievement of FEAD objectives [criterion: effectiveness]

FEAD has brought positive results in terms of covering food and material needs and complementing this with accompanying measures. It has addressed people facing severe food deprivation, especially due to the timing of its introduction, notably following the 2012 economic crisis in Greece which created an unprecedented situation of poverty and social exclusion.

According to the MA, **all assistance offered was substantial for end recipients as FEAD was a totally new programme** and everything was done from zero. This form of non-financial assistance contributed to the alleviation of extreme poverty. Partner organisations confirmed that the main contribution of FEAD's assistance is 'relief' to people suffering from poverty. By receiving FEAD non-financial support, they were able to save some money and cover other needs (e.g. 'since I have food covered, I can buy shoes for my children'⁴¹⁹).

The **success of FEAD activities in providing non-financial support is evident in the very high absorption rate** (85% or more in attendance rates according to partner organisations). Despite a slow start in some areas where end recipients felt mistrust and did not attend the deliveries, with time they learned they can benefit, and attendance rates increased substantially. There were no gaps in the delivery process and all processes flowed well, even during COVID-19. The effectiveness of the food and material assistance is also evident in the numbers achieved. According to the Annual Implementation Reports (AIRs) of the programme, the following results were achieved by 2022:

- 71,842 tonnes of food aid were distributed;
- 16,067,696 meals were distributed, partially or fully financed by the OP;
- 4,444,751 of food packages were distributed, partially or fully financed by the OP;
- 2,190,897 of people received food support;
- 1,789,570 people received basic material assistance.

Based on the results of the structured survey (AIR 2022), half of the end recipients (47%) are satisfied or very satisfied with FEAD, while only 19% are not satisfied. At the same time, 9 out of 10 participants in the accompanying measures of counselling consider the provision of counselling very or fairly useful. Evidence from partner organisations also suggests that they reached the peak of their learning curve on how to organise the deliveries and can now more successfully deliver food through more direct contact with end recipients and avoiding long queues ('people expect with excitement their delivery every month'⁴²⁰).

Although there is an almost unanimous agreement amongst programme stakeholders⁴²¹ on the success of the food and material support, **opinions about the effectiveness of accompanying measures are mixed**. On one hand, there is an overarching recognition of their importance as complementary measures to food and material assistance to ensure that integrated support is offered to deprived people. There are numerous examples of efforts to offer accompanying measures that help end recipients in their social inclusion process. On the other hand, in some areas⁴²², accompanying measures were not very effective as few people took part. Some of the

⁴¹⁹ Information received during a focus group organised online, in November 2023, from a representative of a FEAD partner organisation

⁴²⁰ Information received during a focus group organised online, in November 2023, from a representative of a FEAD partner organisation.

⁴²¹ Consulted during interviews and focus group.

⁴²² Based on individual interviews with partner organisations and a focus group with representatives of 13 partner organisations.

reasons include lack of staff or lack of competent staff to offer specialised services such as psychological support, lack of interest of some municipalities to offer accompanying measures or lack of interest of end recipients if they already receive support via other channels (e.g. the case of Roma in one municipality). At the same time, the use of volunteers which were in some cases used to address the lack of resources was not always effective as volunteers expected something in return, which contradicts the principles of volunteering.

In conclusion, the novelty of FEAD (no other programme offering such type of food and material support in a structured manner), its timing (i.e. at the time of the economic crisis in Greece) and its combination of food and material assistance with accompanying measures, have contributed to some of the specific objectives of FEAD. In particular, **the programme managed to alleviate some of the worst forms of poverty and social exclusion and to support the most deprived persons to improve their wellbeing.**

Reach of target groups [criterion: effectiveness]

FEAD was designed in Greece to contribute to the national objective of reducing the number of people at risk of poverty and/or facing material deprivation and/or living in households with no working members.

It addressed **all people who were beneficiaries of the Guaranteed Minimum Income (GMI) programme.** Therefore, it did not differentiate between target groups, since everyone who benefits from the minimum guaranteed income was eligible for FEAD support. Ongoing monitoring of activities confirms that the support reached these target groups, which included Roma, single parent families, and single persons⁴²³. As data is collected for specific target groups⁴²⁴, it can be observed that, by 2022, the programme reached 2,190,897 people, of which:

- 23% were children at risk of poverty;
- 52% were women;
- 29% were less than 25 years old, 59% were between 25 and 64 years and 12% were 65 years or over;
- 5% were migrants;
- 2% were participants with disabilities; and
- 2% were homeless.

For the accompanying measures, other groups were also reached, e.g. psychological support and capacity-building (e.g. in using computers) for people over 60, activities for children of all ages, health and nutritional advice to Roma, psychological support to homeless people.

However, it is not certain that all people who are registered as recipients of the GMI were aware of the possibility of receiving FEAD support. One factor that helped people become aware and apply also for FEAD support was the existence of community centres, especially in small areas, where they know all the residents and can help reach those in need⁴²⁵.

At the same time, **it is clear that not all people requesting FEAD food and material assistance attended the delivery points.** Reasons for this included lack of confidence, fear of stigmatisation especially if they must queue for a long time or simply inability to travel due to long distances, lack of means of transport or some form of disability⁴²⁶. This was overcome by introducing flexibility in the delivery which was reorganised and adapted to the individual situations of end recipients, so they did not all have to go to the delivery location at the same time. Furthermore, home delivery, which was introduced during the COVID-19 pandemic, has become a permanent option for people who cannot travel (e.g. if they are ill, old, do not have a car, cannot afford public transport).

Finally, there is a recurring issue that hinders the capacity of FEAD to reach all deprived people, notably the requirement for beneficiaries to be recipients of the GMI⁴²⁷. This implies that **some deprived people are left out just because they do not qualify for the GMI** and this, in some cases, can be a difference of a few euros.

⁴²³ Interviews with MA and partner organisations.

⁴²⁴ Annual Implementation Report 2022.

⁴²⁵ Interviews with partner organisations.

⁴²⁶ Interviews with MA and partner organisations.

⁴²⁷ This issue has come up consistently in interviews with the MA and partner organisations as well as the focus group.

It is suggested⁴²⁸ that social research to determine the most relevant target groups is carried out by local authorities or social services to increase the effectiveness in ensuring that all deprived people are reached by FEAD.

In conclusion, given the regulatory boundaries of FEAD in Greece, i.e. that beneficiaries can only be the recipients of GMI, it has reached this target group effectively, especially due to its flexible delivery procedures. However, **there is potential to reach even more deprived people if a different approach is used to identify them, such as social research.**

Adjustments to FEAD to address new challenges [*criterion: effectiveness*]

The main challenge during the implementation of FEAD in Greece was the COVID-19 pandemic. This crisis initially caused some delays in the delivery of the programme. However, **obstacles were overcome as there was an immediate response to the COVID-19 challenges.** The MA introduced changes that were taken up by partner organisations in the way measures were delivered. Specifically, a 'Home Support' model was adopted with door-to-door distribution of food and material assistance. Another option was 'drive-through' where the end recipients proceeded to the delivery points in their own vehicles and the parcels were placed in their vehicle, without direct contact with the staff. A third option was delivery at distribution centres by personal appointments. Accompanying measures were also delivered during the COVID-19 pandemic in an online manner where possible.

These measures were very effective and successful⁴²⁹. Indeed, it is surprising to note that, during COVID-19, there were more deliveries and greater efficiency. All those involved adapted quickly to the new situation (loading and unloading trucks and cars, home deliveries, different management of products).

Home delivery in particular, proved to be very effective for target groups who could not travel to the delivery locations (e.g. old people, people who live in remote mountain areas, which condition the capacity of people to move around, or even people who do not have a car or cannot afford public transport). Consequently, this delivery method continued even after the COVID-19 pandemic.

In conclusion, **programme stakeholders reacted quickly to the COVID-19 challenges and adopted new ways of working, notably new delivery models**, such as Home Support, whose effectiveness and relevance for some target groups resulted in maintaining this delivery option available still today.

Horizontal principles of FEAD [*criterion: effectiveness*]

Reducing food waste was ensured in Greece by choosing the type of food products in order to contribute to the balanced diet of the end recipients and careful management of food waste. In some cases, left-over food was sent to social supermarkets. However, the main approach adopted to reduce food waste was the close monitoring of deliveries and consistent outreach to end recipients (mainly through direct phone contact) so as to ensure a limited amount of non-delivered food.

The programme has placed special emphasis on **respecting the dignity of the most deprived persons** by scheduling deliveries in a way that avoids people queuing and feeling exposed. In addition, the new delivery modalities adopted to respond to COVID-19, notably drive-through and home delivery, have proved to contribute also to this horizontal aspect as people can receive assistance without having to be seen by others. At the same time, accompanying measures were also designed to this end, by focusing on psychological support and cultural and recreational activities that help build self-confidence and promote the feeling of dignity for end recipients.

Non-discrimination based on sex, race or ethnic origin, religion or belief, disability, age or sexual orientation is considered to be inherent in that all recipients of the GMI are eligible for support, without any distinctions.

Gender equality is taken into account in the various stages of the preparation of distributions - planning, implementation, monitoring and evaluation.

Success and failure factors [*criterion: effectiveness*]

There are numerous factors that have facilitated the effectiveness of FEAD operations in Greece⁴³⁰:

- **The composition and quality of partner organisations.** The combination of local and regional authorities and other local actors helped build strong teams that worked well together to reach deprived people. What proved particularly effective was when the lead partner was a regional authority, and members of the partnership included all municipalities of the region. There is evidence of good cooperation at various

⁴²⁸ Partner organisations in interviews and focus groups.

⁴²⁹ Overarching finding in AIRs, interviews and focus group.

⁴³⁰ Evidence mainly from the focus group and interviews with partner organizations.

levels (between the MA and partner organisations, between partner organisations and between members in partner organisations).

- **The commitment of the members of partnership organisations.** There is a general recognition that members of partner organisations (i.e. organisations working with partner organisations such as churches, community centres, etc.) were dedicated to the FEAD objective to alleviate poverty and social exclusion and worked hard to this end. Particularly effective was the participation of community centres in small areas as they know all the residents and can help reach those in need. Capacity building of members also contributed to a better understanding of the philosophy and technicalities of FEAD.
- **The flexibility of implementation.** The main factor was the flexibility with which delivery was reorganised and adapted to the individual situation of end recipients, so they did not all have to go to the delivery location at the same time (e.g. scheduled deliveries by appointment, home support and drive-through options).
- **The robust monitoring of deliveries.** Every delivery entailed a careful review of the number of food products, their quantity, type and quality to ensure the relevant items are delivered to each end recipient. The use of the electronic tablets at delivery points speeded up the process and allowed a quick check and update of the number of end recipients who had received their food package and of the stock levels in storage/warehouses.
- **The visibility and outreach strategy.** There was good visibility of the programme through for instance, press conferences, press releases, presence in local media to inform about the programme and the needs it addresses. This contributed to better reaching the end recipients most in need.
- **The quality of the supplier organisations.** When food suppliers were selected based on strict quality criteria, there were benefits such as guaranteed product quality and faster delivery times. Careful selection of suppliers who delivered on time also contributed to reaching people in remote areas in good time.
- **Frequent updates of needs identification.** The needs of end recipients changed over time, especially in view of external events such as the pandemic or other natural catastrophes. In some areas, there was bottom-up research to assess the changing needs of end recipients.
- **Accompanying measures tailored to the needs of end recipients.** There are various examples where the needs of end recipients were taken into account to provide tailored psychological support (there is even evidence of prevention of suicides thanks to targeted psychological support), activities for children, social tutoring to students (extra-curricular support offered for free), regional observatories for social cohesion, dietary advice adapted to the specificities of specific groups (e.g. Roma minorities who lack dietary habits), online advisory courses for people with access to IT, legal advice to people who lack the means to carry out basic legal processes (e.g. people who need a divorce but have no money to pay a lawyer), etc.
- **The type of partners delivering accompanying measures contributed to their effectiveness.** When partners have the skills required for the delivery of certain accompanying measures, their implementation is more effective. For instance, in one region in Greece, the involvement of three universities having contacts with enterprises (for practices) enabled the implementation of social research and professional mentoring to end recipients as a means to help them enter the labour market.

There is also evidence of unintended results for the partner organisations. Building experience with a programme that was unique for Greece, they improved their management and organisational skills for the provision of support to the most deprived. They also improved their adaptation capacity to external circumstances, such as COVID-19, and have managed, thanks also to extensions of deadlines, to achieve the objectives of the programme.

At the same time, the following factors were found by partner organisations⁴³¹ to hinder the effective implementation of FEAD:

- **Insufficient staff or insufficient competences of social services staff.** This had an impact in some cases on the delivery of accompanying measures that required more specialised skills and experience.

⁴³¹ Evidence mainly from the focus group and interviews with partner organizations.

- **Lack of incentives for partnership organisations to participate in the programme.** Some partnership organisations stressed that the burden of implementing the measures did not justify the additional effort required. More incentives for partnership organisations may be needed, such as paying for overtime.
- **Difficulties related to suppliers.** These include rivalry amongst suppliers for participation in the programme, delays in the provision of goods. However, these difficulties have been overcome with time and experience.
- **Remoteness.** Greece has many islands, some of which are small and difficult to reach, therefore the delivery of FEAD there has been rather challenging. For instance, some islands are not connected even if they are close to each other, and connections must take place via the mainland port of Piraeus, implying delays. There is a cost-benefit issue when, for instance, a small island has one end recipient, and it is difficult to reach by boat. A third issue is the lack of municipal staff on certain islands for delivering FEAD support. Furthermore, due to the size of municipal structures on some islands, it was difficult to find storage spaces and for this reason they relied on direct, on-the-spot deliveries by paying private transport companies. Finally, decentralised purchases that work well on the mainland could not work on the islands for the reasons listed above (distances, transport, lack of staff).
- **Lack of volunteering culture in Greece.** While in other Member States the role of volunteers was instrumental for the delivery of FEAD support, in Greece volunteers expect some kind of reward, which is contradictory with the principles of volunteering. It was therefore difficult to rely on them for addressing gaps in the lack of staff.
- **Linking FEAD support with the GMI.** There are two issues identified. First, updates to the GMI are not automatically communicated to FEAD authorities and some end recipients may wait for up to two months to have their situation revised for receiving FEAD support. Second, and more critical for the effectiveness of support, were the implications for people who are on the borderline, i.e. they do not qualify for GMI for a few euros and therefore do not qualify for FEAD support, although their poverty situation may justify the relevance for support.

In conclusion, in view of the numerous facilitating and hindering factors for the effective delivery of FEAD, it is important to capitalise on what worked well, such as the structure and typology of partnership organisations, the monitoring mechanisms and outreach strategies or the provision of accompanying measures targeted at identified needs. At the same time, the hindering factors should inform the design of future support, especially ensuring that all those in need can receive quality and timely assistance, based on objective criteria that do not leave anyone out.

Overall cost-effectiveness of FEAD operations [*criterion: efficiency*]

The most cost-effective type of operation was the **provision of food support** as this was the type of operation in Greece where the bulk of the funding went. Given that food deprivation has been identified as the most important component of material deprivation in Greece, food support addressed the primary needs of end recipients.

The second most effective measures were the **accompanying measures** which cover secondary needs and are very important for social inclusion through activities that included for instance psychological support, legal advice, recreational and cultural activities for children and families, etc. The experience of partners who provided psychological, social, and other support suggests that accompanying measures were effective in enabling target groups to move towards social inclusion, especially for deprived children and their families. Despite their high relevance, their effectiveness is low, given the very small budget allocation to these measures (1% of the total FEAD budget for Greece)⁴³².

The cost-effectiveness of FEAD in Greece mainly improved as a result of **changes in the way deliveries took place**. More specifically, drive-through deliveries, although set up due to COVID-19, became very cost-effective. People drove through, showed their National Insurance Number, got a paper with what they are supposed to receive, then moved to the next point, opened their car boot, put in the food/material assistance and left.

Another factor that contributed to cost-effectiveness was the **change in the duration of delivery**: initially all deliveries took place in 2-3 days, later they lasted 1-2 weeks. End recipients received a message with the date, time and location as well as the list of items they would receive, then they turned up on the designated date and location and obtained the assistance. This proved to be more cost-effective. For the partner organisations, this implied more delivery days, but for the end recipients it was less time consuming.

⁴³² Source: Operational Programme, December 2013.

Greece has not used vouchers. Their use was recommended during the mid-term evaluation of the programme with the rationale that they would allow the purchase of fresh food directly in supermarkets and thus better cover the nutritional needs of end-recipients; while allowing them to ration their purchases according to daily needs and transport capacities (e.g. they would not have to carry 12 kilos in one go). The MA proposed vouchers for the new period as they consider them relevant for people who live far and cannot travel or for whom travelling entails extra cost⁴³³.

However, partner organisations have a different opinion. As the programme evolved and changes in the delivery as described above were introduced, there were no queues anymore and end recipients received what they needed in every delivery. As such, partnership organisations do not consider the vouchers relevant, especially in an economic context of inflation. Vouchers have a fixed value and end recipients would lose purchasing power as prices go up due to inflation⁴³⁴.

In conclusion, **FEAD is considered cost-effective** for two main reasons: for assigning the bulk of support to food assistance which is the prime need of end recipients and for the flexibility entailed in the delivery processes which have been streamlined to become more efficient. There are inconclusive findings on vouchers, with the MA considering they can resolve the travel burden for some people, and the partner organisations considering them inappropriate in an inflationary economic context.

Administrative burden of monitoring and reporting requirements [*criterion: efficiency*]

Administrative procedures are generally considered time consuming, but this is a feature in all co-funded programmes. The most burdensome administrative activity was the procurement procedures due to Greek legislation. It can take up to 6 months from the publication date until the award date. It is considered unnecessary to have such long procurement times, which could be reduced to half (3 months)⁴³⁵.

A survey to partner organisations showed that administrative requirements were of medium difficulty (64%) or high difficulty (25%), especially due to lack of staff, notably specialised/competent staff. Other reasons were the lengthy public procurement procedures, the national legislative requirements, and the involvement of many different departments and actors.

Flat rates are considered very useful for administrative aspects, especially for the deliveries, but it is suggested to set them at 7% instead of 5%⁴³⁶.

Partner organisations cannot quantify the administrative burden. Lead partners spent a lot of time on checks (how much has been received, how much it costs, monitor what is happening, monitor the warehouses, the accompanying measures, etc.). Often there was only 1-1.5 persons (not full-time) in the municipality dealing with FEAD tasks, and who was also present in all food deliveries to end recipients ('I open and close all deliveries').

There is an example⁴³⁷ where administrative procedures worked well, with no delays, even though FEAD procedures were very heavy. The reason administrative procedures worked well was because they hired a sub-contractor, paid by the 5% flat rate of administrative costs reserved by the partner organisation to cover the costs related to recruitment/contracts for the implementation of distribution. This meant there were 5-8 people helping the person responsible for implementation in the municipality who would have been alone otherwise.

In conclusion, **the main administrative burden stems from the public procurement procedures.** Otherwise, there does not seem to be an important concern about administrative burden, with partner organisations not being able to quantify the time spent on different activities. Generally, there seems to be a small number of staff dealing with FEAD at the lead partner organisations.

⁴³³ Interviews with the MA.

⁴³⁴ Information received during a focus group organised online, in November 2023, from representatives of FEAD partner organisations.

⁴³⁵ Interviews to the MA.

⁴³⁶ Interviews to the MA

⁴³⁷ Partner organization from Xanthi.

Simplification measures [*criterion: efficiency*]

The main simplification has been the streamlining of delivery procedures, notably the drive-through deliveries and the scheduled deliveries, both described above under overall cost-effectiveness. This experience can be used to drive the design of future delivery schemes.

Although vouchers were not used, they are proposed as a simplification measure by the MA for the future, but not recognised as relevant by partner organisations in an unstable economic context.

Coherence of FEAD with other interventions [*criterion: coherence*]

FEAD was coherent and implemented in parallel with the national programme for the Guaranteed Minimum Income to maximise the effects and provide a holistic approach to addressing poverty issues. Accompanying measures were also coherent with the Child Guarantee Programme. Several FEAD partnership organisations, such as the Municipality of Athens, together with the Network for the Rights of the Child, the Region of Western Greece, etc., implemented targeted actions for children from preschool age to the last grades of school. Actions included for instance, visual psychotherapy through crafts, theatrical interactive games, sports events, social tutoring, psychological support for teenagers, etc.

FEAD also cooperated with the national ‘Help at Home’ Programme to carry out home distributions to elderly people, people with disabilities, as well as people living in hard-to-reach areas, even if they were not registered as recipients of FEAD support.

There was external coherence of FEAD with the ESF. Complementarity with ESF actions regarding potential synergies with FEAD was carried out in two ways:

- The Special Service for Coordination and Monitoring of ESF actions monitored ESF operations to identify potential complementarities with FEAD.
- The National Coordination Authority of ESIF monitored FEAD activities to ensure maximum complementarity with ESF interventions. The aim was to achieve maximum complementarity with ESF interventions (especially with TO9) as well as avoiding double funding.

Complementarity between the two Funds was also ensured as they informed each other’s end recipients, e.g. FEAD end recipients received information on further support they can get from the ESF, while the ESF informed its beneficiaries about the food support that was available through FEAD. There are some good practice examples from partner organisations including the following:

- A Helpdesk in the Region of Central Macedonia directed end recipients to other types of support, including ESF.
- The group of professionals involved in the delivery of accompanying measures in the Kavala partner organisation (psychologist, physical trainer, social workers, etc.) referred end recipients to the ESF.

There is also some ‘bad’ practice to learn from, notably in the partner organisation of Kozani where there was low awareness in the municipality of the importance of activities supported by FEAD for the reduction of poverty and social exclusion. This limited the coherence with other policies. The overall perception of the MA and partner organisations⁴³⁸ was that the ESF is the main Fund for social inclusion while FEAD had a complementary character covering basic food and material needs and emergency situations.

In conclusion, FEAD in Greece was designed as a complement to other initiatives, mainly national and local initiatives, but also as a complement to ESF.

12.2. Is FEAD still relevant?

Relevance to target groups [*criterion: relevance*]

FEAD operations were relevant, not only because of their nature (food and material assistance to deprived people) but also because they were implemented through cooperation with community centres who informed, helped and activated/mobilised the community and especially those who need support. Although the absolute amount offered by FEAD was very small per person per month, it addressed most types of deprived people and their material needs. By complementing other programmes (e.g. the national Help at Home’ Programme,

⁴³⁸ Evidence from interviews with the MA and partner organizations.

the Guaranteed Minimum Income programme, the ESF) it offered a holistic approach to addressing poverty and social exclusion.

Furthermore, **FEAD was relevant for the target groups it covered**, i.e. the recipients of GMI, and no new target groups emerged from recent crises such as the COVID-19 pandemic or Russia's war of aggression against Ukraine. As noted above, support was however adapted to the changing needs of end recipients over time.

There were some drawbacks, however. FEAD was designed to reach deprived people who obtained the guaranteed minimum income. Although FEAD was relevant for the needs of GMI recipients as it aimed to alleviate the worst forms of poverty and social exclusion, **there were some groups who were left out**. This limits FEAD's relevance to address all needs in Greece or the poverty line may need to be re-established. Examples of deprived people who were left out include:

- People who miss the eligibility for the guaranteed minimum income for a few points only, but who have important material deprivation needs (e.g. elderly people, families).
- Pensioners with low pension levels. Although many are poor, they often do not gather the required points to qualify for the GMI.

Some partner organisations found a way around the limitations of the GMI. They allowed end recipients to take non-delivered food and in turn distribute it to other families they knew were in need.

In addition, there is a lot of tax evasion in Greece, so there were people who did not really need the support but managed to qualify by presenting very low incomes to the tax authorities.

FEAD operations could also become more flexible in view of changing situations, in terms of who and how FEAD offers assistance. Examples include:

- Including more flexible measures to address unforeseen situations and needs. One example was that of a mother whose husband left her and therefore, became a single mother but, as they did not have a divorce, she could not claim support as a single mother. If there was some flexibility, the support could be adapted to such legally complicated cases⁴³⁹.
- Some people need legal support, but FEAD cannot pay a lawyer. Social workers are paid by the municipality, but lawyers are private so, although access to social workers is possible, legal advice needed to be offered by volunteers where they exist or by public staff if they had the relevant skills.

In conclusion, FEAD was a unique programme for addressing the needs of severely deprived people in Greece. However, its design limited some deprived people from accessing FEAD assistance, and there were also some situations where more flexibility would have allowed more targeted assistance.

Relevance of FEAD now and in the future [*criterion: relevance*]

Overall, the FEAD programme, in terms of objectives, design and delivery mechanisms, was very relevant in Greece and also in the future. It was a very popular programme, with deprived people actively seeking it out. Partner organisations consider that, if it were to stop, there would be a lot of reactions and target groups would feel abandoned. FEAD is even more important now than before due to the economic crisis and consequent increase in prices of products in supermarkets.

There are however some recommendations to make the programme even more relevant in the future:⁴⁴⁰

- **A more integrated approach.** FEAD support is relevant as long as it complements other support for people at risk of exclusion. For instance, end recipients of working age (e.g. the long-term unemployed) should at the same time acquire new skills to be able to enter the labour market. This implies that potentially more budget should be allocated to accompanying measures so they can be more effective.
- **More emphasis on psychological and social support**, also in coherence with ESF+. Accompanying measures can become 'social cohesion measures' offering non-material assistance. FEAD should be able to support in a holistic manner people who are deprived and at the same time cannot easily access social services, by combining food and psychological and social support.
- **More local cooperation** with actors who are closer to potential beneficiaries (such as local associations and NGOs), so that it can reach all potential beneficiaries, even those who cannot travel.

⁴³⁹ Interview with a partner organisation.

⁴⁴⁰ Interviews and focus group with partner organizations.

More social research to identify the needs of deprived people. This can complement the GMI requirement to ensure that FEAD reaches also deprived people who are left out of the GMI.

- **More physical meetings between partner organisations** so they get to know each other, exchange experiences and learning from each other's good practice.
- **More information and awareness raising to partner organisations** on the availability of other types of support / other programmes so they can use them in a complementary manner to FEAD.
- **More organised approach to reducing food waste** by re-directing leftover food to social canteens or to food banks or by establishing cooperation agreements with supermarkets to distribute left over food to poor people with the use of volunteers.

In conclusion, FEAD and its objectives, design and delivery model are still relevant for the future, but some improvements could be made to make it a more integrated support programme, to better reach all potential beneficiaries and to improve the knowledge and capacities of partner organisations.

12.3. Did FEAD make a difference and to whom?

EU added value [criterion: EU added value]

The novelty is FEAD itself and not the target groups and their needs. **FEAD has been instrumental in addressing the needs of deprived people**; if it were to stop, people would feel abandoned. People at risk of poverty and social exclusion facing material deprivation were not offered material assistance before in the way FEAD offered it (structured, systematised, organised). There is therefore a **volume effect by providing assistance that was not available before**.

FEAD enabled the development of efficient procedures for material support to deprived people. It is innovative as a mechanism. Many partner organisations achieved very good organisation of deliveries in a very small period of time leading to no queues, no waiting time as beneficiaries pass by a buffet table, pick up their products are then accompanied to their car. The identification of end recipients with tablets at the delivery points was another innovation. Logistics were smooth, all the supply chain worked smoothly, e.g. trucks arrived on time for products to be downloaded from the trucks, stored in fridges if needed and then picked up by end recipients. This is therefore evidence of **scope effects by introducing new ways for reaching deprived people**.

The partner organisation principle of the FEAD delivery model obliged partners to cooperate and as a result they got to know each other, come closer and cooperate efficiently. There was excellent cooperation amongst partners who are municipal and regional authorities. There was cooperation not only within but also between partner organisations, facilitated by the National Coordination Network which conducted meetings of partner organisations, where they could collaborate and exchange on various issues they faced, ranging from how to obtain the food supplies to how to best deliver them and various other technical issues where they supported each other. Partner organisations did not know what delivery meant at the beginning, FEAD was a totally new tool for them, but by now everyone is up to speed. This is evidence of **process effects by bringing about changes in the way administrations and other entities** (social cooperatives, social services, associations, NGOs, church organisations, etc.) cooperate.

Visibility [visibility]

At the beginning of the programme, there was low awareness of the existence of FEAD, with most people thinking that support was funded by the organisation that delivered it. **At the end of the programming period, most people knew about FEAD** thanks to press releases, posters in delivery locations, communication campaigns and presence in social media (last two years). There were however differences in views between partner organisations⁴⁴¹. Some considered that communication campaigns including banners, press releases, advertisements increased the visibility of the programme and its understanding amongst the general public and end recipients. Others, on the contrary, considered that people were not very aware; they knew that the funding comes from the EU, but do not understand the co-financing element, nor how the programme works.

⁴⁴¹ Interviews and focus group with partner organizations.

The MA organised a survey which was sent to the mobile telephones of end recipients (a sample of 20,000 people) which further contributed to their awareness. Older people are the only group who were less aware as they do not access social media or surveys on their mobiles.

A factor that contributed in some cases to improve the knowledge of end recipients about FEAD was the **personal relationship developed between the partner organisation and end recipients**. Where social services of local authorities were involved, they managed to increase visibility due to their closeness to target groups.

In conclusion, although there has been significant progress since the beginning of the programme in making it known to the general public and to end recipients through various communication channels, there were cases where people are less aware. Proximity to target groups was a factor that contributed to visibility of the programme.

13. Good practices

The delivery model in the region of Central Macedonia □ reducing delivery times

The Region of Central Macedonia approached the beneficiaries in the following ways: the regional authority invited them each time through personalised SMS and phone calls to reach the delivery points or to participate in an activity (accompanying measures); they also made announcements in the local press on social media as well as placing posters in squares and bus stops. To address the COVID-19 challenges, they relied on good cooperation and unity of all involved in the programme and implemented home deliveries as well as a psychosocial support call centre. To reduce delivery times, they established as a condition to suppliers that all products should be delivered packed in boxes with the communication identity of the programme. The aim was to safeguard that no mistakes were made and to reduce the burden on the staff involved in the delivery. In this way, they distributed the same products horizontally to all beneficiaries, defending the principle of equality and transparency, and established in their methodology the priority system that is used in banks. There was a system where a sequential priority number was issued per end recipient so that food deliveries were made in order and end recipients are served according to the order of arrival at the delivery point without any discrimination.

The online application system of the Ministry of Labour, Social Security and Social Solidarity □ reaching difficult to reach people

The Ministry of Labour, Social Security and Social Solidarity decided to introduce an online application system for accessing FEAD assistance, to ensure that individuals did not need to travel long distances to reach designated offices to apply for support services. In this way, it became easier to identify and reach end recipients living in remote areas, which was very relevant in a country with a geographically challenging environment (mountains and many islands, many of which are difficult to reach).

The first step was a major information campaign, launched by the MA together with municipalities and regional authorities (the partner organisations). The campaign was designed to inform the public about how to participate in FEAD food assistance and when the application period would be launched.

A second step was to address the issue of reaching people who were not digitally literate. Therefore, in order to support potential end recipients who did not have access to the internet, local hotspots were created in each municipality for about one month, with trained personnel available to support applicants throughout the application period.

Based on this online information system, a list of end recipients was produced including detailed data on age, sex, origin and the composition of the applicant's household, which was transmitted to partner organisations. In this way, they were able to use this information to tailor their accompanying measures and organise food distribution to address the needs of the end recipients and their household.

The Explorers of the Mind project in the region of Achaia □ impact on social integration of children

The operation provided greater opportunities for social integration of children in mid-childhood (aged 10-12) and young adolescents (aged 13-14). Through a play-based learning approach and the provision of a number

of activities designed to stimulate multi-sensory learning, the project sought to encourage children's autonomy and cultivate their emotional development and social skills. Through their exposure to the activities, children began to explore their emotions, learnt to cooperate, developed their means of expression and ultimately improved their self-esteem, developed positive resilience, improved their communication skills and cultivated a sense of social responsibility.

We Strengthen Together in the region of Western Greece □ directing end recipients to relevant social services

'We Strengthen Together' was implemented in the framework of accompanying measures. It is a telephone line that provides individualised psychological and social support to end recipients of the FEAD-funded operation to build mental resilience during the COVID-19 crisis. It was implemented in synergy with the online platform www.menoumedytikiellada.gr (living in Western Greece). Callers to the telephone line were informed about the online platform available to the general public but specially targeted at vulnerable groups (e.g. elderly, depressed people, children with autism, patients with chronic diseases). In total, 1,800 end recipients of FEAD support were directed from the support line towards specialised services, such as public social services or local/national NGOs. Both the telephone support line and the online platform reduced the social stigma associated with COVID-19, supported by the fact that these services were open to all and not just to vulnerable people. Another important added value of the online platform was the increased knowledge of end recipients' needs. Daily conversations with experienced telephone agents allowed for links to be created between callers' needs and local public services and NGOs.

14. Conclusions and lessons learned

Effectiveness

FEAD has been an innovative programme in Greece offering food and material support in a structured manner at a time when Greece was hit hard by the economic crisis which started in late 2009, following the financial crisis of 2007-2008. The combination of food and material assistance with accompanying measures, contributed to alleviate some of the worst forms of poverty and social exclusion and to support the most deprived persons to improve their wellbeing.

FEAD managed to reach the target groups it was designed to address, notably the beneficiaries of the Guaranteed Minimum Income scheme. The flexible delivery procedures enabled this target group to effectively obtain food, material assistance as well as access a variety of accompanying measures (including psychological support, dietary advice, recreational, education and cultural activities, especially for children and their families). However, the requirement for end recipients to be beneficiaries of the GMI had some limitations, as it left out some people who did not qualify for it but who have severe material deprivation needs.

The programme stakeholders (MA and partner organisations) demonstrated a high degree of flexibility to adjust to external challenges such as COVID-19. The reorganisation of deliveries through new modalities such as the 'Home Support', the 'drive-through' or online accompanying measures' support, proved to be very popular and effective in reaching target groups. They resulted also in more efficient implementation by reducing waiting times and queues and managed to reach people in remote areas or with difficulties to travel to the delivery points (e.g. mountainous areas with limited access, old people, disabled, people who cannot afford to pay for transport, etc.). There was also a psychological effect on end recipients as they felt that their dignity was respected by not having to queue for food. Therefore, the new delivery modalities remained in place even after the COVID-19 crisis.

Horizontal principles were respected, distinguishing in particular the respect to the dignity of deprived people as a result of reduced waiting times, avoiding queues and tightly scheduled deliveries.

Efficiency

Generally, FEAD can be considered cost-effective especially due to the streamlining of its delivery procedures. Vouchers have not been used in Greece and, although the MA considers them an efficient tool to use in the future, partner organisations consider they are not relevant in an inflationary context. The administrative burden was principally focused on the length of procurement procedures. Otherwise, partner organisations could not estimate the administrative burden involved in their tasks for delivering FEAD. Overall, though, administrative burden was not a major concern for partner organisations, although resources were scarce, and staff often worked overtime to complete their tasks.

Coherence

FEAD in Greece complemented other local and national initiatives, such as the national GMI programme, the Child Guarantee programme or the 'Help at Home' programme. It was also coherent with the ESF, having structures that oversee and safeguard this coherence.

Relevance

FEAD was a unique and very relevant programme for addressing the needs of severely deprived people in Greece. However, its design could be improved to allow those who do not qualify for the GMI to be considered. Some flexibility could also be introduced to ensure that FEAD is better suited to the needs of end recipients. For instance, more flexibility in the choice of accompanying measures, allowing for adaptations to address unforeseen situations and needs or enhance partners with the necessary skills for offering accompanying measures to end recipients (e.g. through capacity building, selection of staff and/or volunteers with the required skills).

For the future, FEAD and its objectives, design and delivery model are still relevant, but some improvements could be made to make it a more integrated support programme, to better reach all potential beneficiaries and to improve the knowledge and capacities of partner organisations. In relation to measures offered to end recipients, a more holistic approach could be considered, combining material assistance and psychological and social support through 'social cohesion' measures. In relation to the partner organisations, capitalisation on their effective collaboration could include more meetings and exchanges of experiences and good practice and more information on the availability of other types of support that could complement FEAD.

EU added value

FEAD produced a volume effect by providing assistance that was not available before. It produced a scope effect by introducing new ways for reaching deprived people. Finally, it also generated process effects by bringing about changes in the way administrations and other entities (social cooperatives, social services, associations, NGOs, church organisations, etc.) cooperate.

There was significant progress since the beginning of the programme in increasing its visibility to the general public and to end recipients through various communication channels. However, there were cases where people are less aware. Proximity to target groups was a factor that contributed to visibility of the programme.

Lessons learned

The structure and typology of partnership organisations (collaboration of local and regional authorities) as well as the dynamics that emerged (close collaboration within and between partnership organisations), the monitoring mechanisms (e.g. the use of tablets at delivery points to track products delivered), outreach strategies (e.g. closeness of social services to target groups to motivate their participation), and the provision of accompanying measures that meet specific needs, are all factors that have contributed to the success of FEAD in Greece.

However, improvements are possible in the future, notably in relation to more inclusive support by extending the range of end recipients beyond the GMI potentially through social surveys to identify all those in need. There are also improvements possible regarding partnership organisations by increasing the number of staff and/or building their skills and promoting the volunteering culture as volunteers can play a key supporting role. In this respect, Greece can learn from the experience of other partnership organisations in the EU where volunteers have been a key factor in delivering assistance to the most deprived.

Appendices

Appendix 1: Methodology

The methodology used for the case study is based on the analysis of data and information from the following sources, to ensure triangulation of findings:

- Desk research of literature related to FEAD in Greece, including the FEAD programme, Annual Implementation Reports (AIR), FEAD surveys carried out in Greece, documentation on the programme from the Greek FEAD website and other relevant literature related to FEAD in Greece.
- Use of statistical data for setting the context, using as main sources the Eurostat Survey on Living and Working Conditions and the Greek Statistical Office (ELSTAT). Statistical data was also extracted from the AIRs to analyse the achievements of the programme.
- Interviews with Managing Authority representatives as well as with representatives of partner organisations.

- A focus group with 23 participants from 13 partner organisations, representing one fourth of the partner organisations in Greece. It was carried out online on 13 November 2023.

The only limitation was the difficulty to reach end recipients for obtaining direct information from them. This was principally due to the vulnerability of deprived people, who may interpret an interview as intrusive and stigmatising, but also the difficulty of ensuring representativeness. Therefore, we opted for carrying out only the interviews and focus group with members of partner organisations.

Appendix 2: References

Desk research sources listed alphabetically.

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Primary information collection

- Interviews with three representatives of the national Managing Authority in Greece, conducted during September and October 2023.
- Interviews with representatives of the partner organisations, from the municipalities of Kavala, Kozani and Xanthi and with the Development Organisation of the West Athens regional authority.

Focus group with 23 participants from 13 partner organisations (Arkadia, Thessaloniki West area, Biotia, Ionian Islands, Ioannina, Larissa, Crete, Achaia, Rodopi, Cycladic Islands, Region of Attika (north, central and south area), Fili, Messinia. Conducted online on 13 November 2023.

Table A. 61 – Input indicators for the implementation of FEAD in Greece in 2014-2022

Indicator	Total amount of eligible public expenditure approved in the documents setting out the conditions for support of operations (EUR)	Total amount of eligible public expenditure incurred by beneficiaries and paid in implementing operations (EUR)	Total amount of eligible public expenditure declared to the Commission (EUR)	Implementation rate (expenditure declared as share of allocated budget)
2014-2022	240 895 883.84	253 202 357.49	203 233 613.23	84%

Source: SFC 2014 database.

Table A. 62 – FEAD output indicators in Greece in 2016-2022, per year

Output indicators on food support distributed	2016	2017	2018	2019	2020	2021	2022
Quantity of fruits and vegetables (tonnes)	3 842.77	2 303.87	1 746.09	1 746.68	1 696 83	1 704 88	1 224.20
Quantity of meat, eggs, fish, seafood (tonnes)	1 120.07	1 907.79	1 306.55	1 151.98	1 861.21	2 095.79	1 389.19
Quantity of flour, bread, potatoes, rice and other starchy products (tonnes)	971.22	1 341.81	2 785.06	2 546.05	3 599.08	3 541.60	2 198.57
Quantity of sugar (tonnes)	800.83	454.67	688.41	657.80	1 010.20	778.00	428.21
Quantity of milk products (tonnes)	823.96	710.14	922.32	1 294.65	1 582.02	1 376.30	1 306.65
Quantity of fats, oil (t)	586.45	404.28	628.30	825.90	1 131.29	1 155.34	1 096.50
Quantity of convenience food, other foodstuff (not falling in abovementioned categories) (tonnes)	977.01	1 446.58	1 471.05	1 769.02	2 068.09	1.901.17	1 447.58
Total quantity of food support distributed (t)	9 122.31	8 569.14	9 547.78	10 010.08	12 948.72	12 533.08	9 090.90
Proportion of FEAD co-financed	77.00	98.30	100.00	100.00	99.60	70.18	100.00

Output indicators on food support distributed	2016	2017	2018	2019	2020	2021	2022
food products in the total volume of food distributed by the partner organisations (%)							
Total number of meals distributed partly or totally financed by the OP	225 728	3 177 258	2 900 314	3 234 788	2 582 737	2 594 839	1 352 032
Total number of food packages distributed partly or totally financed by the OP	696 327	527 982	630 318	625 282	733 740	692 171	538 931

Source: SFC 2014 database.

*Please note that there was no expenditure in 2014 and 2015.

Table A. 63 – Number of FEAD participants in Greece in 2016-2022

Result indicators on food support distributed	2016	2017	2018	2019	2020	2021	2022
Total number of persons receiving food support	410 000	243 689	353 320	290 172	293 885	319.238	280 593
Number of children aged 15 years or below	108 155	55 235	88 537	66 363	58 657	62 988	53 800
Number of persons aged 65 years or above	17 957	13 842	19 813	19 991	26 341	30 747	31 639
Number of women	213 566	118 136	184 379	154 505	152 090	165 589	147 600
Number of migrants, participants with a foreign background, minorities (including marginalised communities such as the Roma)	5 000	0	13 293	22 078	23 291	22 640	21 542
Number of persons with disabilities	727	2 796	6 901	7 518	7 480	8 288	8 348

Result indicators on food support distributed	2016	2017	2018	2019	2020	2021	2022
Number of homeless	1 000	3 159	5 115	4 456	4.090	8 433	8 879

Source: SFC 2014 database.

**Please note that there was no expenditure in 2014 and 2015.*

1. Context and background⁴⁴²

Estonia has a mixed social protection and welfare policy, with universal benefits for families with children, contribution-based sickness and unemployment benefits, pensions offering income slightly below the at-risk-of-poverty line⁴⁴³ and social services provided mainly by local governments. Overall expenditure on social protection is among the lowest in the EU (EUR 3 970 per inhabitant in 2020, compared with an EU-27 average of EUR 9 324) (Eurostat 2023).

The Social Welfare Act sets out the social services that should be offered by local governments and the eligibility conditions for services are set by each local government. This arrangement has resulted in unequal accessibility of social services across the country. Food aid delivery is not among the services that local governments are obliged to offer, although this has been used by social workers to help those in most need and to offer primary social assistance, as revealed in the interviews with local government representatives.

Minimum income for the most deprived is a subsistence benefit paid by local governments that covers housing costs and guarantees income up to subsistence level. This subsistence level should meet minimum needs in relation to food, transport, household items, leisure time activities, etc. However, as assessed by the National Audit Office (2023), this benefit is often not sufficient to cover minimum needs.

The at-risk-of-poverty or social exclusion (AROPE)⁴⁴⁴ rate in Estonia was 23.6% in 2015, close to the EU average (24.0%). From 2015 to 2021 the rate remained stable with minor fluctuations, dropping to 22.2% by 2021. However, by 2022 the rate rose again by 3 pp to 25.2% (Eurostat, teprs_lm411). The government Strategy Estonia 2020 aimed to reduce the AROPE rate to 15% by 2020. This aim was not met and the relative poverty rate stayed quite stable over the years of 2014 – 2021.

The AROPE varies considerably within different socio-economic groups.

For older people in Estonia, the AROPE rate is the highest in the EU and the upward trend continued till 2022. In 2015, the AROPE rate for people 65+ was 37.2%, rising to 41.6% in 2021 and 53.1% by 2022. The AROPE rate is notably high among older women, who tend to live considerably longer than men and often find themselves living alone in older age (Statistics Estonia, LES 02). However, the poverty gap is not wide within different groups of older people – the majority are slightly below the at-risk-of-poverty line and do not face severe deprivation.

The AROPE rate for children decreased from 22.2% in 2015 to 16.6% on 2022. The AROPE rate for children was slightly below the average AROPE rate for the population as a whole in 2015 and by 2022 this still decreased whereas the AROPE rate for the overall population grew (Eurostat, teprs_lm411). The highest poverty risk is faced by families with a single parent.

In 2014, unemployed people faced the highest poverty risk of other groups: 54.8% of the unemployed were at risk of poverty. However, by 2020 the at-risk-of-poverty rate for this group had decreased to 43.0% and people aged 65+ became worst hit by poverty (Statistics Estonia, LES 02: poverty and material deprivation rate by year and labour status).

The severe material and social deprivation rate was 3.5% in 2015, and this decreased to 2.3% by 2020 but rose again to 3.3% in 2022 (Eurostat, tespm030). In 2022, the deprivation rate was highest among unemployed people, at a rate of 24.0%: it was 4.4% among employed people and 9.9% among old-age pensioners (Statistics Estonia, LES 02: poverty and deprivation rates: year, employment status, sex and value).

The share of people who could not afford a meal with meat, chicken or fish was 7.5% in 2014 (below the EU-27 average of 9.7%). With food aid, the share decreased by 2.5 pp to 5.0% in 2015 and fluctuated slightly over the next years, settling at 5.4% in 2022.

⁴⁴² The FEAD programming period 2014 – 2020 operations were implemented until the end of 2023. The research was carried out between September and November 2023 when FEAD operations were not yet fully complete.

⁴⁴³ At-risk-of poverty measures low income in comparison to other residents. At-risk-of poverty line is set at 60% of the national median disposable income after social transfers.

⁴⁴⁴ AROPE corresponds to the sum of persons who are either at [risk of poverty](#), or [severely materially and socially deprived](#) or [living in a household with a very low work intensity](#).

The inability to deal with unexpected expenses decreased by 7.8 pp from 39.1% in 2014 to 31.3% in 2022. Although it is not clear whether the most deprived persons also experienced this reduction.

In addition to the AROPE rate, Estonia uses an absolute poverty indicator to measure deprivation. The absolute poverty line is an estimated subsistence minimum calculated on an annual basis. The overall absolute poverty that manifests deprivation has decreased substantially, dropping from 6.3% in 2014 to 3.5% in 2022. Men experience slightly higher absolute poverty rates than women. The absolute poverty rate for children up to the age of 15 decreased from 9.0% to 4.1% and for working-aged people from 7.0% to 4.1% whereas for older people the rate increased by 0.2 pp from 1.3% to 1.5% between 2014 and 2022 (Statistics Estonia, LES 01: poverty and material deprivation by year, age group, indicator and gender).

Table A. 64 – Socio-economic context in Estonia

Estonia	2014	2015	2016	2017	2018	2019	2020	2021	2022	Trend
1. At-risk-of-poverty or social exclusion rate (AROPE) Total		23.6	23.1	23.3	23.6	23.7	22.8	22.2	25.2	
2. AROPE Children		21.5	19.4	18.5	16.9	19.3	17.4	17.2	16.1	
3. Severe material and social deprivation rate (SMSD)		3.5	2.2	4.0	3.1	2.6	2.3	1.9	3.3	
4. Severe material deprivation rate (SMD)	6.2	5.8	4.7	4.1	3.8	3.3	2.7	0.0	0.0	
5. Inability to afford a meal with meat, chicken, fish (or vegetarian equivalent) every second day	7.5	5.0	4.6	5.3	4.4	5.3	5.5	3.5	5.5	
6. Impact of social transfers (other than pensions) on poverty reduction % reduction of AROPE	23.2	22.3	24.9	27.3	26.8	28.2	31.7	30.6	28.1	
7. Housing cost overburden	8.3	6.8	4.9	4.8	4.0	4.4	4.4	4.4	4.9	
8. Self-reported unmet need for medical care % of population 16+	11.3	12.7	15.3	11.8	16.4	15.5	13.0	8.1	9.1	
9. Households with very low work intensity		6.2	5.5	5.4	5.3	5.3	4.8	5.1	5.7	
11. Population in the EU could not afford unexpected financial expenses	39.1	36.7	31.6	36.3	34.7	31.4	30.5	27.1	31.2	
13. Share of total population having neither a bath, nor a shower in their dwelling	8.2	7.3	7.5	7.0	6.6	5.8	5.2			
14. No indoor flushing	8.2	7.3	7.5	7.0	6.6	5.8	5.2			
17. Persons who cannot afford a telephone	0.3	0.2	0.2	0.2	0.1	:	:			
18. Persons who cannot afford to replace worn-out clothes	10.3	7.7	6.8	7.5	6.4	5.6	5.2	4.7	5.9	
20. Persons who cannot afford to get-together with friends or family (relatives) for a drink or meal at least once a month	9.4	5.2	4.0	5.3	4.9	4.3	4.1	3.3	4.2	
21. Persons who cannot afford internet connection for personal use at home	4.3	3.3	2.6	2.7	2.4	2.0	1.6	1.6	2.2	
22. In-work risk of poverty	10.5	8.9	8.6	8.0	7.6	8.6	8.0	7.4	8.3	
23. Long-term unemployment	3.3	2.4	2.2	2.0	1.3	0.9	1.2	1.6	1.3	
25. Employment rate	70.2	72.1	72.4	74.5	75.0	75.5	74.0	74.0	76.4	
26. Children (aged less than 18) living in households with very low work intensity		5.1	3.7	3.9	3.8	3.6	3.1	3.9	3.6	
27. At-risk-of-poverty rate for children		20.0	18.6	16.5	15.2	17.2	15.2	15.5	13.6	
28. Severe material and social deprivation rate (SMSD) for children		2.9	1.6	3.3	2.4	2.1	2.0	1.7	2.6	

Source: Eurostat.

In sum, during the period from 2015-2021 there has been no significant change in overall AROPE rates, however with an increase in 2022; relative poverty among children as well as among unemployed people decreased but it increased considerably among older people. Food aid as a benefit in kind was not able to influence relative poverty rates. Nevertheless, severe material and social deprivation rate and the share of people who could not afford a meal with meat, chicken or fish fell compared to 2014 when food aid was not provided, although it slightly rose during FEAD activities.

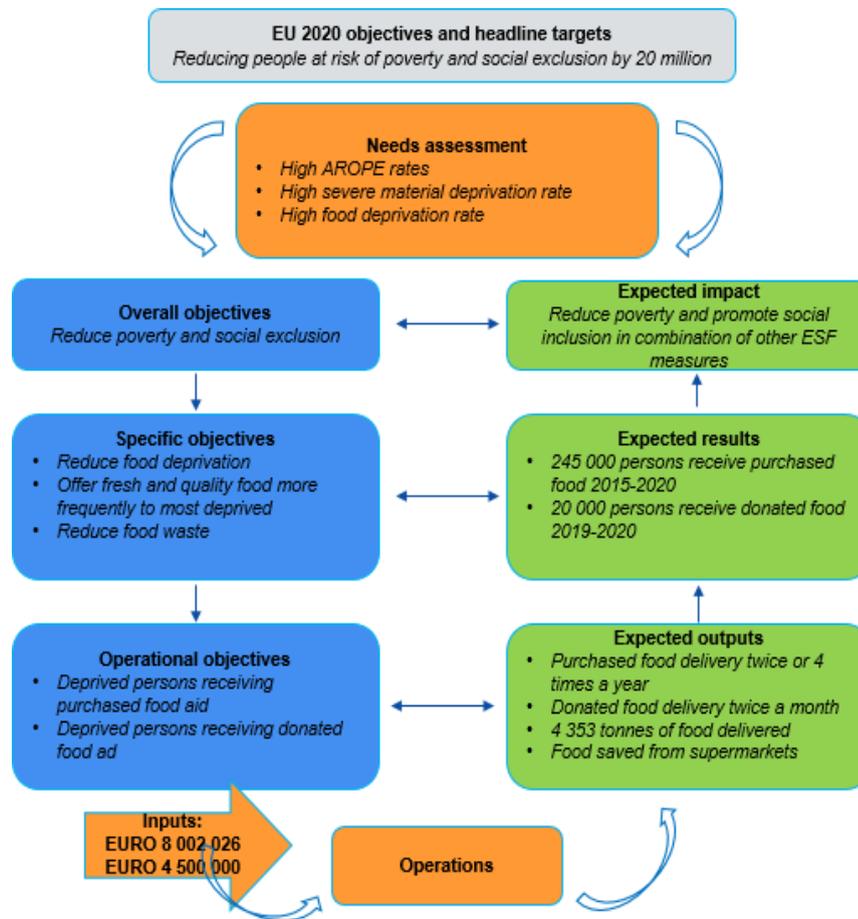
2. Reconstructing the intervention logic

FEAD activities in Estonia were targeted at those on low incomes and households facing absolute poverty and took the form of food aid. Purchased food parcels were delivered to end recipients twice a year, and from 2021 onwards purchased food was delivered quarterly. The eligibility criteria applied for purchased food were strict and uniform – initially only the recipients of subsistence benefit and applicants whose incomes exceeded subsistence levels by 15% qualified for food aid.

Donated food was added to the programme activities from 2019 with less strict eligibility criteria. This also enabled food aid to be delivered to persons assessed by local governments as in need of it and enabled more frequent food delivery.

FEAD activities in Estonia contained no direct actions to promote social inclusion. As argued in the explanatory note of the FEAD programme, the activities were of supportive nature to other ESF programmes that offered activation and services to similar groups (Ministry of Social Affairs 2015, b).

Figure 5: Intervention logic of FEAD in Estonia



Source: adapted from FEAD mid-term evaluation.

2.1. National policy framework

Social security benefits in Estonia cover well-known social risks. When income from work and social security benefits are not enough to enable decent living due to unemployment, low wages, personal circumstances or household composition, a person can apply for subsistence benefit, which is a minimum income scheme. This is granted to the whole household, considering all incomes, housing costs and household composition.

Subsistence benefit consists of housing costs and a subsistence amount. It is provided to a person living alone or to a family whose monthly net income, after the deduction of housing expenses (up to a certain limit), is below the subsistence level.

The subsistence level is based on minimum expenses relating to consumption of foodstuffs, clothing, footwear and other goods and services which satisfy primary needs. The level is fixed for each year by the state budget. Although this is a political decision affected by fiscal considerations, it is stipulated in the Social Welfare Act that each new subsistence level must not be lower than the level in force and that the level should reflect minimum expenses needed to ensure a decent standard of living for those in need. There is no regular indexation of the subsistence level, and it is therefore changed in a discretionary manner.

People receiving subsistence benefit can be regarded as the most deprived. There is no specific approach in relation to gender, or specific groups such as Roma, immigrants, low-wage earners, etc. The subsistence level is the income that is considered necessary for living for one month, including expenses on food, medicines, transport, communications, household items, etc. The main criticism of the subsistence level is its low value, which means that it does not protect people from falling below the absolute poverty line. The national Audit Office has in a report (National Audit Office 2023) indicated that the calculation logic of the benefit should ensure that after paying housing costs, the recipient of the benefit has enough money to allow them to purchase

other essentials for life, such as food, clothing, etc. Further, there are large differences between local authorities in terms of covering the expenditure on housing of a person in need of assistance. In the case of every third application, the limits for housing costs established by local authorities did not cover the actual costs associated with housing.

Equivalence scales 1:0.8:1.2 are applied when calculating the subsistence level for families (see Table A. 65). Children under 18 are given a higher score of 1.2 when applying weights from 2018. The scales applied to children give them 4 times greater weight compared to OECD classical scale of 0.3 (Koppel, et al 2018). Accordingly, families with children have also been more advantaged in receiving food aid. The condition for receiving minimum income is legal residence in the country: persons who are not legal residents have no access to subsistence benefit.

Table A. 65 – Subsistence level 2015-2022

Subsistence line (EUR)	2015	2016	2017	2018	2019	2020	2021	2022*
1 st person	90	130	130	140	150	150	150	200
2 nd person	72	104	104	112	120	120	120	160
Child under 18 years	90	130	130	168	180	180	180	240

* From June 2022.

Source: Ministry of Social Affairs. Data on benefits, subsistence benefit 2001-2022.

Studies suggest that increasing the subsistence level is the most cost-effective way to reduce direct poverty compared to other benefits (Trumm and Kasearu 2011). Policy simulations have concluded that the most cost-effective policy measures to reduce absolute poverty among families with children were changes in the subsistence benefits (Vörk, Paulus, Leppik 2014).

Whereas other social security benefits are granted centrally by social insurance institutions, the subsistence benefit is paid by local governments. All recipients, including household members, are registered in the Social Services and Benefits Registry (STAR).

The social welfare system in Estonia lacks proactivity and deprived people are assumed to make the first move themselves in asking for assistance. In an annual survey of local governments carried out by the Ministry of Finance, the median level of service in social welfare was 3 in a scale of 0 – 9 throughout 2018–2020. The level of service 3 corresponds to fulfilment of 90% of basic assessment criteria. That means that statutory basic services, stipulated in the Social Welfare Act⁴⁴⁵, are offered. Historically there has not been much trust in local governments and distrust, previous bad experiences and pride may prevent people from seeking help. In recent years, however, municipalities have been more proactive in attempting to find people in need through healthcare and social services coordination projects and encouraging residents to report someone in need of help.

In the early years of FEAD, deprived people could not apply for food aid directly. Instead, it was obligatory to apply for and meet the income criteria for subsistence benefit. As argued by the Ministry of Social Affairs, the aim was to encourage people to turn to local governments for social assistance, apply for subsistence benefit and be available for assessment for other social services. Thus, there was an attempt to connect food aid and assessment of the need for social services that deprived people would potentially need. Later, with donated food, people could apply for food aid from local governments and had to pass a needs assessment to be granted this.

As food aid is a benefit-in-kind it does not have a direct impact on people's or households' incomes. Receiving food aid enables people to allocate money not used on food to other items and therefore enables better every day coping as argued by project partners.

⁴⁴⁵ The statutory social services include home service, general care service provided outside home, support person service, care service for adults, personal assistant service, shelter service, safe house service, social transport, social dwelling, debt counselling, childcare service, alternative care service and continued care service.

2.2. Objectives and target groups

The objective of FEAD activities was reducing food deprivation of the neediest persons, supporting their everyday coping by offering food delivery and promoting social inclusion (Ministry of Social Affairs 2015 a).

From 2015-2020 purchased food was delivered twice a year to subsistence benefit recipients. The objective was to deliver food aid to 35 000 persons per year, to 70 000 persons in 2020 with a budget of EUR 8 049 099 (Ministry of Social Affairs 2015 a).

Table A. 66 – The purchased food objective was to reach 245 000 persons by 2020

Objective	2015	2016	2017	2018	2019	2020
Number of persons who received purchased food aid	35 000 persons	70 000 persons	105 000 persons	140 000 persons	175 000 persons	245 000 persons

Source: Ministry of Social Affairs, 2015 a. Cumulative, one person can be reflected in several years.

In 2019, donated food delivery was added to FEAD activities. With these changes the aim was that quality, and varied foodstuffs would be delivered to most deprived people, thus reducing food deprivation and supporting their everyday coping. In both 2019 and 2020, donated food was intended to be distributed to 10 000 recipients (Ministry of Social Affairs 2019).

Table A. 67 – Donated food objective was to reach 20 000 recipients

Objective	2019	2020
Number of persons who received donated food aid	10 000 persons	20 000 persons

Source: Ministry of Social Affairs, 2019. Cumulative, one person can be reflected in several years.

In 2015, the target group for FEAD was subsistence benefit receivers and applicants. Additionally, applicants for subsistence benefit whose incomes exceeded the subsistence level by 15% were eligible for food aid. People who needed help under special circumstances were not included in the target group, as food parcels were delivered only twice a year (Ministry of Social Affairs 2015 a). The only specific target group in addition to subsistence benefit recipients or applicants was homeless people.

With declining numbers of subsistence benefit recipients, the target group for purchased food was expanded in 2017, with people receiving other benefits from local governments that depend on the incomes of recipients. In a survey conducted in 2017, more than one third of respondents found that food aid should be delivered more frequently. During 2017, local governments paid additional subsistence benefit to 11 400 persons to whom delivery of food aid would have been appropriate. Thus, purchased food needed to be supplemented with other measures (Ministry of Social Affairs 2015 a).

The target group for donated food was a person or a household in economic hardship whose need for aid had been assessed by a local government social worker. Re-assessment of aid needed to be carried out every three months. Donated food consisted of donations from private individuals and enterprises and included saved food from retail, production and catering. In practice, food was saved mainly from supermarkets. In addition to easing food deprivation, saved food was intended to have a positive impact on the environment.

Subsistence benefit recipients as the target group of food aid formed 2% of the Estonian population in 2014 (Ministry of Social Affairs). From 2015 to 2021, there was a continuous decline in individuals and households receiving subsistence benefits whereas the number of recipients rose sharply in 2022. By 2021 the 2% figure recorded in 2014 had fallen to 1.2% of the Estonian population but rose to 3.6% in 2022. The increase of benefit recipients in 2022 was mainly due to addition of Ukrainians fleeing Russian military aggression. Also, the increase of subsistence level from June 2022 had an impact on the number of benefit recipients.

Table A. 68 – Subsistence benefit recipients 2015-2022

Subsistence benefit receivers	2015	2016	2017	2018	2019	2020	2021	2022
Number of households	14 604	15 300	14 056	12 226	10 904	10 501	9 806	25 016
Number of persons	26 301	27 990	25 360	20 931	18 719	18 295	16 508	48 731
Children 0-17	8 717	9 587	8 652	6 616	6 042	6 008	5 162	17 168

Source: Ministry of Social Affairs. Data on benefits, subsistence benefit 2001-2022.

In 2020, approximately one-third of subsistence benefit recipients were children and one-third were unemployed. The share of old-age pensioners among subsistence benefit recipients was less than 5%. By 2022, 37% of benefit recipients were children and 28.6% were unemployed. Among families with children two-thirds of benefit recipients were single parent households; slightly more than half of families with children had one child.

The biggest share among households receiving subsistence benefit were households where a member was registered as unemployed. The share of this household type among all households receiving the benefit increased until 2021, whereas the share of households with children decreased.

A specific target group was homeless people, for whom food parcels were designed in a way that food could be consumed on the streets. The parcels were distributed through shelters for homeless people operated by local governments. In 2015, 1 146 homeless people used shelters, of whom 13% were women and 10% were older people (65+ years). By 2020, the number of homeless people who used shelters rose to 1 459 and subsequently decreased to 1 347 in 2022 (Ministry of Social Affairs, H-veeb).

2.3. Implemented operations and accompanying measures

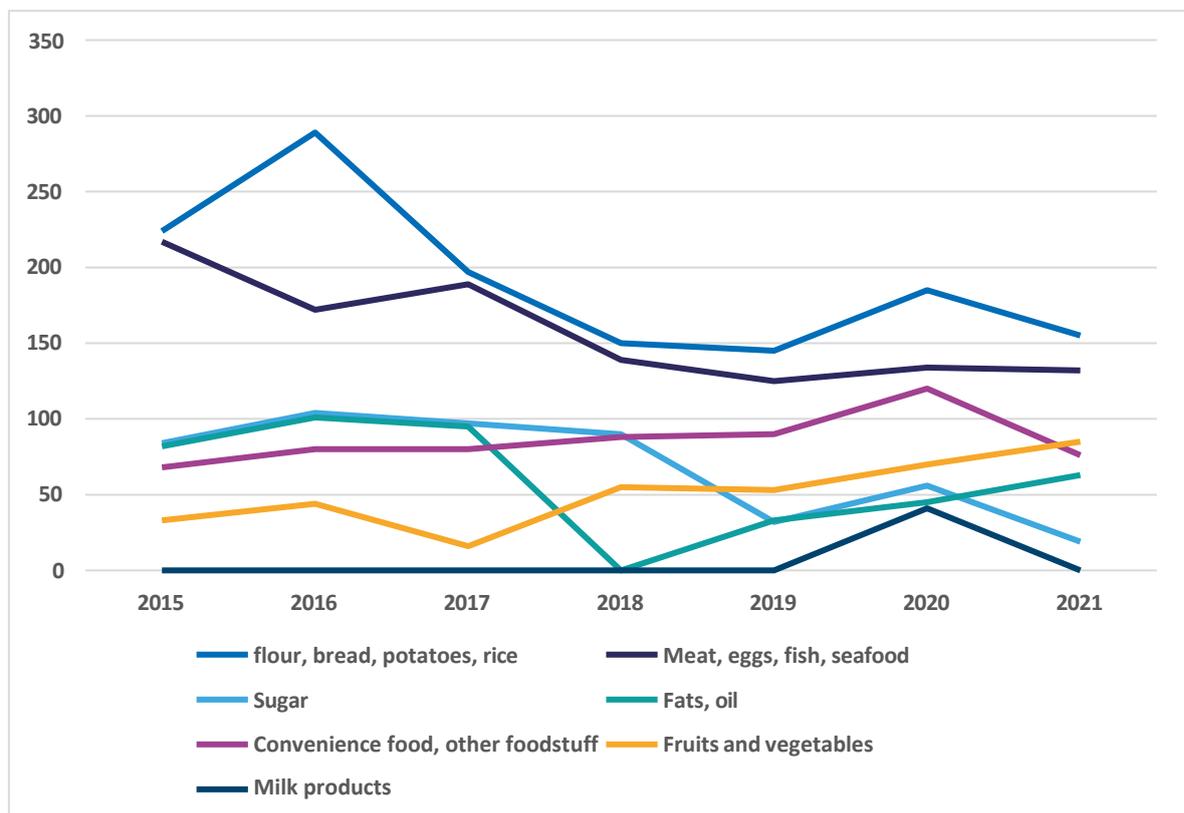
As noted above, the main FEAD activity in Estonia was food delivery. Purchased food was offered from 2015 and in 2019 donated food was added. Under the new programming period 2021-2027, food vouchers replacing purchased food were piloted in two counties from April 2023. From October 2023 purchased food was replaced by food vouchers across the whole country.

Purchased food contained food parcels weighing 8-10 kg that consisted of items that were long-lasting and easily transportable. The parcels included canned meat or fish, high nutrition dry products, oil and fats, dried fruit, chocolate, coffee and tea. Each household member eligible for subsistence benefit received a food parcel - a family of five received five parcels with similar content. A healthy diet principle was followed as far as possible, although fresh foodstuffs could not be included. It was only when donated and saved food were added to the programme that food parcels became more diverse, containing bread, meat, milk products, fruit and vegetables.

Donated food gathered by food banks included donations in cash and in goods from companies and private individuals and saved food that contained foodstuffs about to expire brought from supermarkets at the end of the day. The saved foodstuffs were deep frozen if appropriate, and later delivered to end recipients. The donated food parcel had to weigh at least 3 kg and contain at least three different food groups (vegetables, grain products, milk products, fish or meat, sweets) (Ministry of Social Affairs 2019). The delivery had to take place at least twice a month. In practice, the frequency of donated food deliveries varied – according to local food banks and local governments, it took place weekly in bigger cities such as Tallinn and Tartu but less frequently in smaller cities – once a month when not enough donations were available.

Between 2015-2017 the purchased food parcels contained mainly canned meat or fish, flour and starchy products, sugar, fat and oil, and relatively little dried fruit. In 2020, the food distributed contained more fruit, vegetables and milk products as new product category (see Figure A. 73 below).

Figure A. 73 – Food aid became more varied over time: quantity of food products delivered 2014-2021, tonnes



Source: SFC database 2024-2020.

Accompanying measures

Food packages were accompanied by information sheets about the social services offered by local governments, the labour market services provided by the Unemployment Insurance Fund and information regarding aid organisations operating nearby. The objective of the information sheet was to promote take-up of social and labour market services and thereby increase social inclusion. Thus, the connection was made with other ESF-funded initiatives as many of the social and labour market services, such as social counselling, supported living, childcare, rehabilitation, debt counselling, etc., were provided under EU programmes.

Later the end recipients received a receipts booklet by well-known Estonian chefs along with their food parcel. The booklet contained recipes from products provided in food parcel, nutritional advice and mental help tips.

Local governments also took some initiatives to provide accompanying measures to food aid. Tartu city, in cooperation with a local food bank, provided cooking workshops to help make the best use of food aid. As food aid is not fit for instant consumption but requires cooking skills to make a meal, not all recipients were happy with the contents of the food aid and found it of little use. Cooking workshops therefore provided knowledge and skills on how to make use of the food aid. Unfortunately, according to a consulted social worker, there was not much interest in this initiative. A social worker in Rakvere city argued that food aid was used in smarter ways when social workers provided advice on how to use the foodstuffs.

2.4. FEAD governance and delivery system

The Ministry of Social Affairs, local governments and the Estonian Food Bank as a partner organisation with local food banks were the main actors involved in the activities of the FEAD programme. The delivery systems of purchased and donated food followed different logics.

The Ministry of Social Affairs as the first level intermediate body was responsible for:

- Procuring and purchasing food parcels
- Transporting food parcels to storage
- Ensuring availability of data in a uniform manner
- Coordination of information delivery in cooperation with local governments and partner organisation
- Monitoring the budget, making budget forecasting
- Publicity and communication
- Reporting

The Ministry of Social Affairs was responsible for procuring food parcels that were initially purchased and delivered twice a year and, starting from 2021, four times a year. Two international procurements were carried out during the period. The parcels had to meet the conditions of transportability, healthy eating, and the longevity of products. Every household member eligible for subsistence benefit received a parcel. The Ministry in cooperation with Social Insurance Board provided food banks with the list of recipients of purchased food.

Local governments were not an official partner of FEAD; however, they played a crucial role in implementing the programme. There are 79 local governments in Estonia, varying from approximately 400 000 inhabitants (Tallinn) to 5 000 inhabitants. Local governments obtained lists of individuals who have the right to purchased food from a local food bank. Their primary task was informing the end recipients about their right to receive food aid and communicating with local food banks. Communication with the recipients was carried out by phone, SMS or email. In smaller municipalities with no food bank present, the social workers also delivered food parcels themselves. For donated food, local government's role was different – they conducted the needs assessment for qualifying for food aid and provided food banks with the lists of donated food recipients. The information on donated food aid recipients was subsequently entered into the information system STAR, to which the local food banks were given access.

The partner organisation in FEAD that was found by procurement was the Estonian Food Bank, which began its activities in Estonia in 2010. By the end of 2017 there were 14 local food banks operating in the bigger cities across the country. Currently there are 16 local food banks in operation.

The partner organisation’s tasks included storage and delivery of purchased food to the target group and informing the target group about measures that are aimed at increasing social inclusion, i.e. delivering information sheets. Home delivery was to be guaranteed for people with a disability, long-term illness, or lack of transport facilities. Keeping records of food quantities and end recipients was also one of the tasks of the local food banks.

In the case of donated food, the Estonian Food Bank’s obligations included gathering donations from commercial enterprises and private individuals; making up the food parcels and delivery of food at least twice a month. The local food banks contacted end recipients concerning delivery dates. As the local food banks use volunteers, the management of volunteers was also part of their work operations.

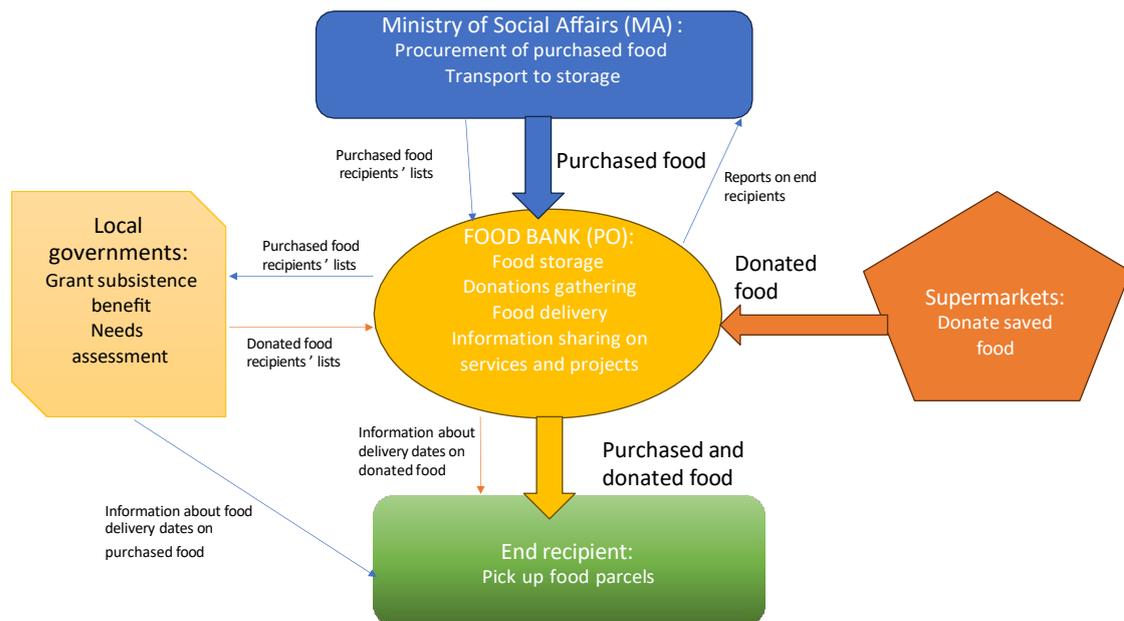
Food storage and food delivery took place on the premises of the local food banks. Any food aid not taken up by the end recipient for 30 days, was delivered further by the partner organisation. In the case of further delivery, families with children or long-term unemployed people were to be preferred.

The role of Managing Authority was divided between the Ministry of Social Affairs and the State Shared Service Centre (SSSC) (Riigi Tugiteenuste Keskus) operating under the Ministry of Finance. SSSC also fulfils the role of certifying authority for EU-funded programmes.

The audit authority for FEAD was the Ministry of Finance. Audits in local food banks were carried out by the Innove Foundation.

An illustration of the stakeholders’ roles is presented in the figure below.

Figure A. 74 – FEAD governance and delivery system followed two separate routes



Source: Expert interviews with FEAD counterparts.

3. Key findings on the implementation of FEAD

3.1. To what extent was FEAD support successful – or not – and why?

Overall achievement of FEAD objectives

The FEAD activities in Estonia were targeted at financially deprived persons and households. Additionally, homeless people received food parcels tailored to their specific situation and needs.

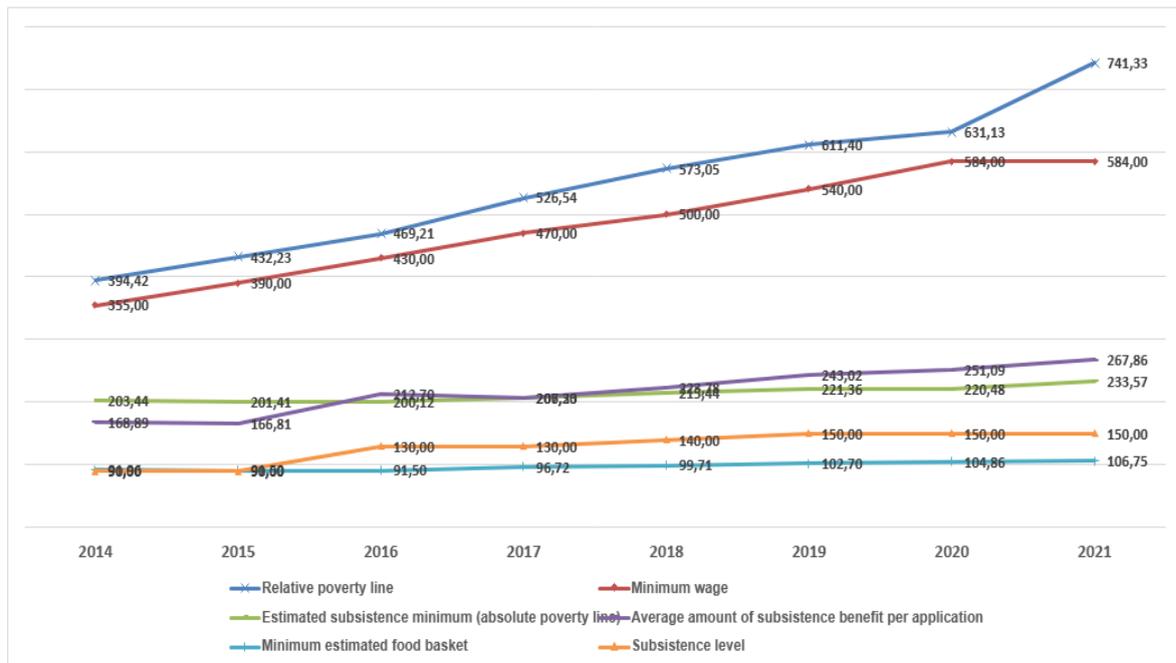
The at-risk-of-poverty and social exclusion rate in Estonia was quite stable, with slight fluctuations, during the FEAD implementation period. After a decline of 0.8 pp by 2020 it experienced a resurgence in 2022 to 25.2%. As no cash benefits were provided within FEAD activities, an impact on poverty reduction could not

be expected. Absolute poverty faced by the target group was revealed by the payment of subsistence benefit. Any additional assistance, including reducing costs on food and other necessities, helped this target group with everyday coping.

For an overview of living standards and incomes of the food aid target group, Figure A. 75 below compares the average subsistence benefit level, relative and absolute poverty (subsistence minimum), and the subsistence level with the price of the minimum estimated food basket. The minimum wage is added to illustrate income standard. Average subsistence benefit (including housing costs) slightly exceeded the absolute poverty line from 2018, whereas before 2018, the subsistence benefit remained under the absolute poverty line.

In 2014 and 2015, the subsistence level was equal to the minimum food basket although the former should also cover other costs of everyday consumption, except for housing. Since 2016 the subsistence level has exceeded the minimum food basket. The amount left to spend on clothes and footwear, household items, transport, communication and leisure activities remained between EUR 34 and EUR 45 per month. According to the calculation methodology of the subsistence minimum, costs of products excluding food and housing were between EUR 35 and EUR 36 per month (Statistics Estonia, LE 27: estimated subsistence minimum per 30 days for one-person household by Indicator and year). Considering the subsistence level, the food aid recipients could theoretically cover their essential costs from 2016 onwards but not in 2014-2015.

Figure A. 75 – Subsistence level exceeded minimum food basket from 2016: poverty indicators, subsistence benefit, subsistence level and minimum food basket



Source: Statistics Estonia, Ministry of Social Affairs.

Although it is clear that the food aid recipients had to operate within an extremely tight budget, the impact of food aid is rather difficult to measure, partly due to alterations in the measurement of deprivation in 2019. Since 2019, the deprivation data is not comparable to earlier periods as the components describing deprivation were changed. The food deprivation component, however, remained the same.

It can be argued that food aid contributed to a reduction in material deprivation, including food deprivation. Between 2014–2018, the material deprivation rate decreased by 5.2 pp, from 15.7% to 9.9%, although it remained higher among people aged 65+, at 11.6%. The severe material deprivation rate fell from 6.2% to 3.8% during the same period, again being slightly higher for older people.

In 2019, 8.7% of children could not afford regular paid leisure time activities, compared with 7.6% of people aged 18-64 and 10.1% of older people. Meeting friends or relatives once a month was not affordable for 4.8% of children and 5.6% of older people. Buying new clothes was least affordable for older people – 11.2% could not afford new clothes. Compared to 2022, the level of deprivation fell in all above-mentioned categories for all groups, indicating that social inclusion had improved within 3 years. (Statistics Estonia, LES 290: household members with deprivation: year, deprivation component, sex and age group).

Data on food deprivation shows that in 2022 5.5% of the population could not afford fish, meat or food with a similar protein level. This type of deprivation was highest among older people, at 7.6 %, and lowest among children under 18, at 3.9%. The share of food deprived women was slightly higher than that of men (women 5.6% and men 5.2%). Compared to 2014, food deprivation decreased by 2.1 pp in all age groups, by 2.1 pp among children and by 2.0 pp among older people. (Statistics Estonia, LES 291: household members with deprivation: year, deprivation component, sex and age group).

Food aid is a benefit-in-kind that enabled the most deprived to save money on food and use this money on other items. Thus, it can be argued that FEAD activities improved the quality of living of end recipients. Overall, giving food aid resulted in reduction of food deprivation and severe material deprivation thus contributing to alleviating the worst forms of poverty and social exclusion.

Reach of target groups

There is no state food aid delivery system apart from FEAD activities in Estonia. Food aid as a social assistance measure was used by local governments before FEAD programme, although not on a unitary and regular basis. Through the FEAD programme, food aid became a regular additional policy measure for local governments.

*'There has always [already before FEAD] been a food package on the table of the social worker. With FEAD food delivery became regular.'*⁴⁴⁶

Before 2014, food aid was funded by the European Agricultural Guarantee Fund (EAGF). However, the open calls did not enable food aid provision on a uniform basis across the country. With FEAD food aid delivery being centralised by the state, the differences in terms of food aid delivery between regions were reduced and the activities enabled food delivery in the more remote corners of the country.

The overall goal was simple and straightforward - to deliver all purchased food to target groups. As estimated by the Estonian Food Bank, the initial delivery accounted for around 90% and follow-up delivery enabled other groups that were initially excluded to receive food aid. As presented in an interview with representatives of the Ministry of Social Affairs, 99% of purchased food reached the target group.

The introduction of donated food in 2019 improved the delivery of food aid in many aspects: frequency, food variety and recipients' self-esteem, and brought into attention the concept of food waste and food saving. Healthy food choices and dietary habits were also highlighted, although the quality issues relating to donated food cannot be overseen.

Food aid delivery in Estonia can be assessed as effective in the sense that it reached the target groups well. The table below shows that during 2015-2021 the number of end recipients of purchased food exceeded the number of subsistence benefit recipients. In 2020, more people received donated food compared to purchased food and the number of donated food recipients considerably exceeded the subsistence benefit recipients. Thus, the expansion of the target group through the addition of donated food was successful. 2022 stood out exceptionally with high number of subsistence benefit receivers and high number of people with migrant background, namely Ukrainians fleeing Russian military aggression, who received both purchased and donated food aid (see Figure A. 76).

Table A. 69 – Food aid was successful in reaching the target groups: the number of food aid recipients and subsistence benefit recipients 2015-2022

Subsistence line (EUR)	2015	2016	2017	2018	2019	2020	2021	2022
Number of subsistence benefit receivers	26 301	27 990	25 360	20 931	18 719	18 295	16 508	48 731
Number of purchased food recipients	26 608	29 516	28 453	22 920	20 872	20 560	24 113	18 532**

⁴⁴⁶ Interview with a representative of Tallinn Welfare and Health Department.

Subsistence line (EUR)	2015	2016	2017	2018	2019	2020	2021	2022
Number of donated food recipients					2 890*	31 365	23 759	20 791**
Number of homeless who received purchased food aid	1 022	1 000	1 000	1 000	1 000	1 000	1 000	1 000

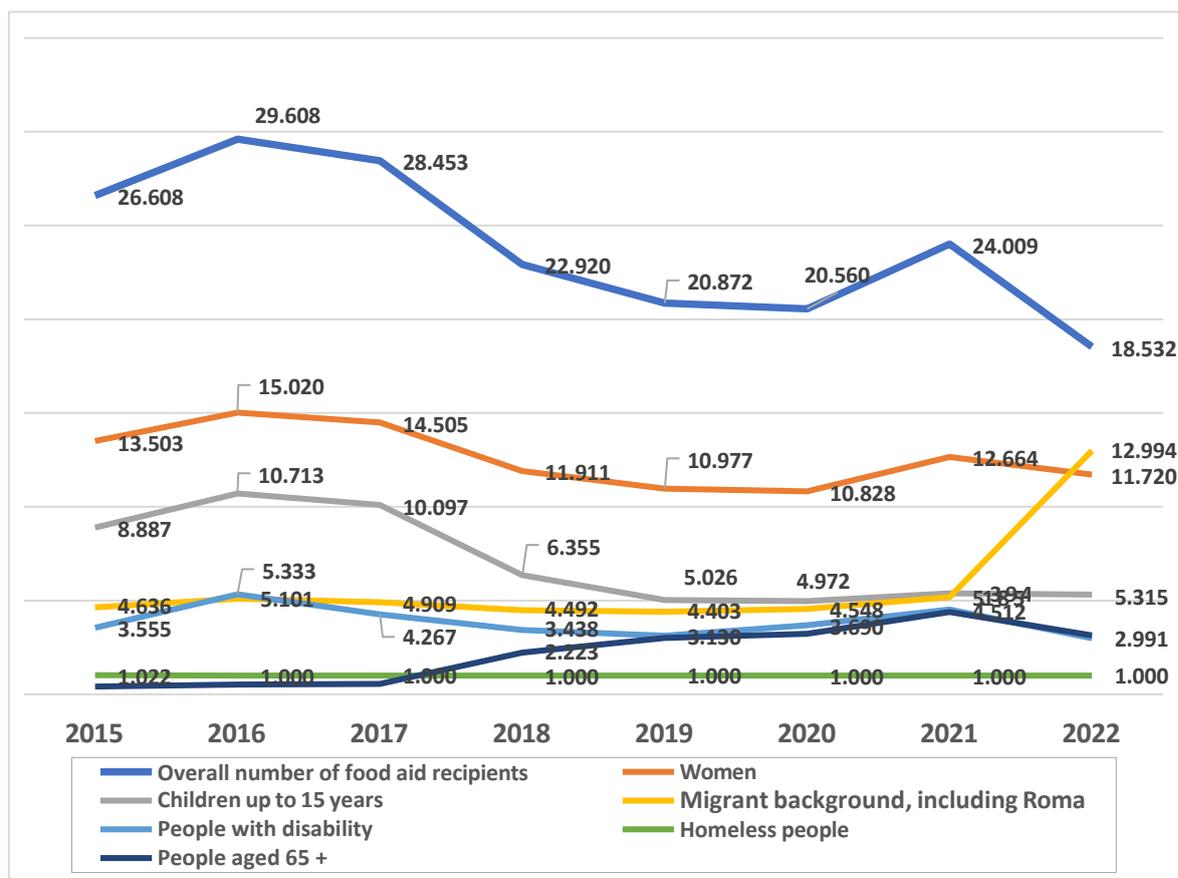
Source: Ministry of Social Affairs. * Figure represents data from October to December. ** Figure represents data of the 1st quarter as the 2022 Q2-Q4 food aid actions were financed solemnly from EE state budget.

Eligibility for purchased food was based purely on financial assessment, with no specific target groups in mind. In the first years, a very small proportion of people aged 65+ qualified for purchased food. People with disabilities formed 13% to 18% of food aid recipients, which exceeds the share of people with disabilities in the population (9.3%). The share of people with a migrant background, including Roma, increased during the period from 17% to 22% in 2020 and upsurged in 2022 with the arrival of Ukrainians fleeing Russian military aggression. The number and share of child recipients decreased considerably from 2018, partly due to a rise in family benefits that lifted families with children above the subsistence level.

In 2017, the target groups were extended to encompass people who did not qualify for subsistence benefit but qualified for other social assistance types of benefits offered by local governments. This resulted in a significant increase in older people among purchased food aid recipients, probably on the account of medication support provided by local governments that gave them right to receive food aid. The share of people aged 65+ which was initially 1.5% of the recipients of food aid, rose to 17% by 2022.

Food aid reached the homeless population rather well. Between 2015-2022, 1 000 food parcels were delivered to homeless people yearly (1 022 in 2015). In 2015, 89% of homeless people who used the service of shelters received purchased food. By 2022, the share decreased to 74% as the number of homeless people increased but the number of parcels delivered remained constant.

Figure A. 76 – Number of purchased food aid recipients decreased between 2016 and 2020 as fewer people received subsistence benefit



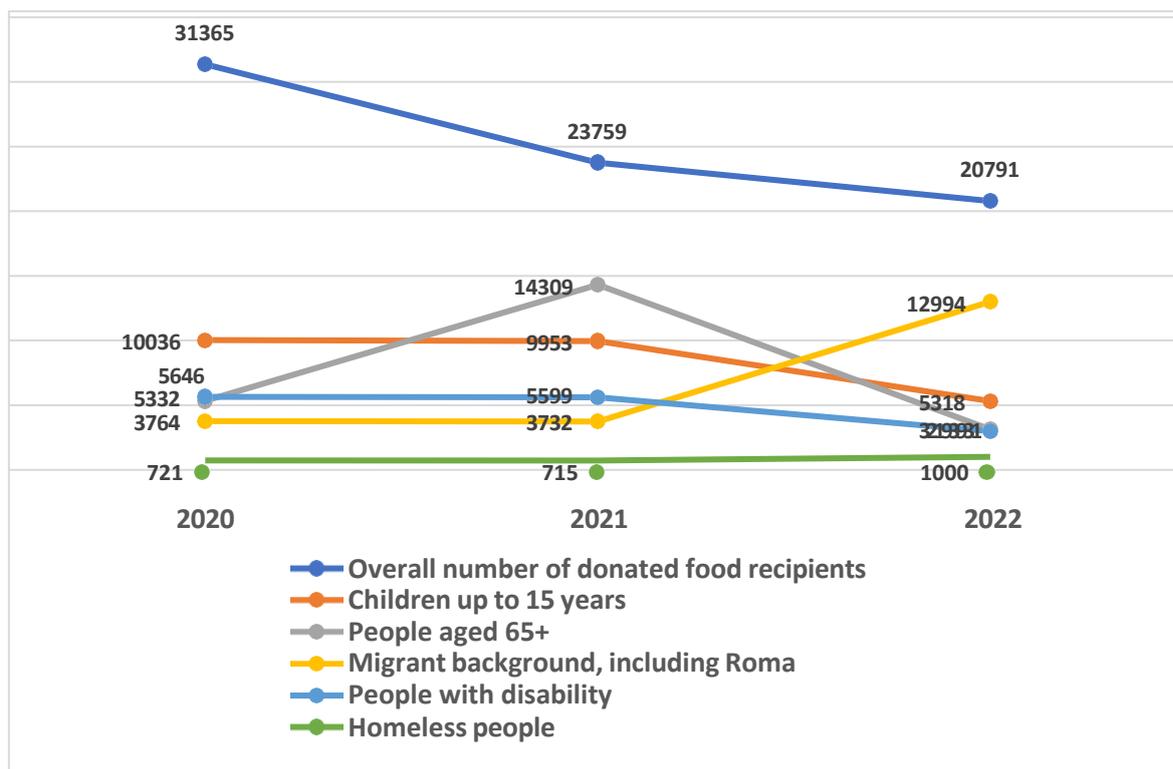
Source: Ministry of Social Affairs. 2022 figure represents data of the 1st quarter as the 2022 Q2-Q4 food aid actions were financed solemnly from EE state budget.

Donated food reached 31 365 recipients in 2020 of whom one-third were children, 46% women, 17% people aged 65+, 8% people with disabilities, and 12% people with a migrant or marginalised background. In 2021 donated food reached 23 759 recipients. The share of older people increased significantly in 2021, whereas the share of children and people with migrant background remained the same (data of the Ministry of Social Affairs). In the first quarter of 2022, more than half of donated food recipients represented people with migrant background, including Ukrainians fleeing Russian military aggression.

In the period 2014 to 2022, FEAD distributed a total of 4 493 tons of food aid including 329 681 food packages, reaching 196 910 persons. Of these, 29% (56 759) were children at risk of poverty, 9% (17 339) were above 65 years of age, 23% (46 268) were migrants, participants with a foreign background or minorities, and 16% (30 916) were people with disabilities.⁴⁴⁷

⁴⁴⁷ SFC2014 Database, AIR 2022 data

Figure A. 77 – The recipients of donated food aid in 2022 were mainly of migrant background



Source: Ministry of Social Affairs. 2022 figure represents data of the 1st quarter as the 2022 Q2-Q4 food aid actions were financed solemnly from EE state budget.

Feedback from end recipients of food aid indicated that the purchased food parcel was assessed as necessary, and 76% of respondents found that food aid had improved their lives (Ministry of Social Affairs 2019).

As a Tartu food bank representative pointed out, food aid was given at the moment when a person was most vulnerable. A high take-up rate, reaching 90-100% in some regions, reflects the demand for food aid, which contributed to everyday coping with life and fighting deprivation.

The frequency of delivery of donated food varied from weekly to monthly, depending on the municipality.⁴⁴⁸ Thus, it can be assumed that there are geographical disparities in accessing donated food aid.

The experts interviewed assessed that some target groups who might have needed food aid remained excluded from FEAD activities. Firstly, purchased food eligibility rules excluded people whose incomes were slightly above the subsistence level. Secondly, the fact that there are people who do not turn to local government for aid may hinder efforts to reach deprived people. As pointed out by a local food bank, older women do not often ask for help and are determined to self-manage their situation. This occurs in bigger cities with more anonymity and less community interaction. Homeless people who do not visit shelters were outside the reach of programme activities. Furthermore, people with poor health who are not able to contact local government or pick up a food parcel due to health conditions need special attention in terms of targeting. Strengthening the community’s role in finding people who do not turn to local governments themselves would help to reach those deprived people who remain hidden.

Adjustments to FEAD to address new challenges

The FEAD programme was not adjusted due to COVID-19 or the energy crises, although the latter increased the number of end recipients considerably. CRII, CRII+ and CARE programmes were not used in FEAD activities in Estonia.

In 2017, the programme was adjusted to expand the target group for purchased food. With falling unemployment, the number of subsistence benefit recipients decreased annually. Thus, the eligibility conditions for food aid were eased. The recipients of income-tested benefits or benefits covering certain costs by local governments were included in the food aid programme. During 2015-2017, a needs-based family benefit was paid to families with children whose income met the income test. With the expansion of the target

⁴⁴⁸ Based on interviews with representatives of local governments.

group, the recipients of needs-based family benefit were also considered as eligible for food aid. This benefit was ceased by the end of 2017 due to low take-up rates and incorporated into subsistence benefit. Thereby, the scale applied to children when calculating subsistence line is higher (1.2) from 2018 onwards. Due to the broadening of the target group, food aid improved its reach to older people.

When 2020 was hit with COVID-19 pandemic, the FEAD programme was not adjusted. The local food banks and local governments had to reorganise their work operations to meet the restrictions on social gatherings. Visiting older people was not allowed and families were no longer able to help their elderly relatives. Home delivery of food parcels was guaranteed to vulnerable groups, and in some regions (i.e., island of Saaremaa) to all recipients. According to the Estonian Food Bank, adjustments to work operations were effective - food delivery was never postponed or late to end recipients as a result of COVID-19.

The COVID-19 crisis forced the food banks to reorganise their work, including applying isolation rules and providing more home delivery. The increased costs due to COVID-19 were not reimbursed to the food banks, which had to operate within the limit of a flat rate cost of 5%.

The energy crisis increased the number of subsistence benefit recipients significantly and consequently those benefiting from food aid. However, the FEAD programme remained unadjusted. REACT-EU funds of EUR 4.5 million were used to pay for donated food and to cope with the increased number of recipients. In spring 2022, Ukrainians fleeing Russian military aggression, having residence permits and thus right to claim subsistence benefit, were included among the recipients of food aid.

Under the new programming period 2021-2027, food vouchers were piloted in two counties (Harjumaa and Raplammaa) from spring 2023. This brought about changes in overall work processes and the actors involved in purchased food delivery. Instead of the Estonian Food Bank, the supermarket chain RIMI became a partner for local governments in distributing quarterly purchased food aid in form of vouchers. Food vouchers of the value of EUR 30 per household member per quarter replaced the quarterly purchased food package. Quarterly vouchers could be used to buy food and basic hygiene items, with the exception of alcohol, lotto, tobacco products and gift cards. From October 2023, food vouchers have been used nationwide.

Horizontal principles of FEAD

The parties involved in FEAD activities argued that the horizontal principles of FEAD, including reducing food waste, respecting the dignity of the most deprived persons and preventing discrimination, were well met.

The concept of saved food brought attention to food waste, attempting to reduce it in the supermarkets. Saved food contributes directly to the goal of reducing wasted food and that can be considered as a significant achievement of the programme.

The dignity of the most deprived persons is hard to measure. Donated food delivery can give end recipients slightly more choice when compared to purchased food parcels, however, the choice was enabled only in places where people picked up the parcels themselves. According to social workers interviewed, food aid was not seen as negative or humiliating. Using food vouchers under the new programming period 2021-2022 adds dignity to deprived persons as their choices, preferences and special needs are met.

Preventing discrimination was achieved by applying the strict criterion of income testing as a pre-condition of receiving purchased food aid. No specific socio-economic group had an advantage in reaching food aid. As children have a higher rating in the subsistence benefit calculation, it can be argued that families with children had better access to food aid compared to other groups. People with special needs had their food aid delivered to their home.

In addition to saving food, an attempt was made to attain well-balanced food options. For that purpose, experts from the Health Development Institution were consulted when assembling purchased food parcels. As much as the pre-conditions of long-lasting and transportable foodstuffs were enabled, healthy choices were preferred, i.e. dark chocolate instead of milk chocolate, buckwheat instead of pasta, etc. Obviously, not all recipients were happy with some of the contents, such as canned meat, that the parcels contained.

FEAD activities were not expected to have an impact on gender equality (Ministry of Social Affairs 2015 a). The income test was applied to all groups in a similar manner. There were slightly more women among subsistence benefit recipients than men. Of all food aid recipients, the share of men and women was equal for purchased food. For donated food, the share of women was 46%.

Success and failure factors

The main success factor of FEAD activities was a good reach of the target group. The partner organisation evaluated that the aid reached the target group well and most recipients came to pick up the parcels. Targeting and direct support facilitated by electronic data use were seen as the factors leading to effectiveness in delivering purchased food to target groups. The pre-determined target groups and the data available on recipients from the STAR information system made the process effective. Informing clients was the key to effective food delivery. However, contacting end recipients was an additional task and this proved to be a challenge for local governments. Despite this challenge, people eligible for food aid were generally knowledgeable about it. The parcels that were not picked up were offered to the next month's subsistence benefit recipients or people assessed by local government to be in need of aid. During the COVID-19 pandemic, local food banks and local governments effectively responded by offering home delivery to groups in need.

While the initial framework proved to be effective, its lack of flexibility resulted in the exclusion of individuals who were not eligible for subsistence benefits, thus preventing them from receiving food aid. However, within a few years, the eligibility conditions were amended to incorporate more discretion. Nevertheless, people with low incomes who did not qualify for subsistence benefit and received no income-tested benefits provided by municipality, may have missed out on food aid.

The inclusion of donated food in 2019 added flexibility and expanded the target group. The local food banks, attuned to the needs of the target groups, were ready to react swiftly to this change, in cooperation with local governments. Of note is that in smaller municipalities social workers have more direct contact with beneficiaries and the community may play a bigger role in noticing people in need, whereas in bigger municipalities deprived people may remain unseen and anonymous.

Giving more discretion power to local governments and linking access to food aid to additional social support offered on the local level on the one hand increased the diversity of end recipients. On the other hand, it might create discrepancies in access to food aid between local governments. The costs on social protection and social inclusion vary between municipalities. Regions with higher unemployment or higher share of older population have less resources available to offer additional means-tested benefits or other type of support to local people. Furthermore, the National Audit Office (2023) raised concerns regarding discrepancies in granting subsistence benefit that hinders equal access to food aid.

The unintended result of FEAD activities relates to gaining a stronger sense of community when food parcels were delivered to end recipients by neighbours or other community members. For Ukrainians fleeing Russian military aggression who became volunteers in a local food bank, this may have helped them to integrate into society.⁴⁴⁹

As evaluated by the Estonian Food Bank, the distinct operational and delivery processes for purchased and donated food hindered the overall efficiency of FEAD activities. While there is an approximate 50% overlap of the recipients of these two separate measures, the eligibility assessment and delivery of purchased and donated food followed a different logic. Furthermore, the data on individual recipients of both types of food aid lacks compatibility.

According to the representative of the Ministry of Social Affairs, the information gathering for recipients of donated food was conducted manually. From September 2023, local governments were mandated to enter data on both types of food aid recipients into the STAR information system, enabling a better overview of individual recipients across both types of food aid in the future.

Overall cost-effectiveness of FEAD operations

The overall budget allocated to FEAD in Estonia was EUR 12 549 099, of which EUR 8 049 099 was allocated to purchased food and EUR 4 500 000 to donated food (Ministry of Social Affairs 2015, c). The budget of EUR 12.5 million was used effectively, with 4 353 tonnes of food delivered to end recipients. EUR 0.3 was allocated per kg of food⁴⁵⁰. Compared to the EU-27 average of EUR 0.8, Estonia performed effectively in food delivery, being amongst the most efficient countries.

The centralised system with a rigid budget promoted cost-effectiveness. The purchased food budget was divided between the Ministry of Social Affairs for purchasing food and transportation of it to storage (EUR 7 699 425) and the Estonian Food Bank for storing and delivery (EUR 379 674)⁴⁵¹. Thus, approximately 95%

⁴⁴⁹ Based on interviews with local governments representatives.

⁴⁵⁰ During the research and drafting period data in 2023 was not available.

⁴⁵¹ The conditions of purchasing and delivery of food aid to the most deprived people. Programme Budget. Ministry of Social Affairs, 2015.

of the purchased food budget was allocated to food (including transport) and 5% to storage and delivery. On the one hand, operating with a flat rate budget for purchased food added to the efficiency of the programme. On the other hand, it did not respond to the changed circumstances brought about by the COVID-19 pandemic, during which more home deliveries took place.

‘Five per cent was meant for our organisation and we had to manage with it.’⁴⁵²

Although effectiveness was achieved due to the flat rate cost of the partner organisation, the rate of 5 % of purchased food aid budget did not cover the actual storage and delivery costs, as argued both by the Ministry of Social Affairs and partner organisation. The rigid budget forced the local food banks to optimise their operations and minimise administrative tasks. For donated food, the partner organisation received a fixed price per kg of donated food delivered from the FEAD budget. This additional funding enabled the Estonian Food Bank to proceed with its activities.

Using social benefits and services data from the STAR made it possible to find and contact end recipients of purchased food easily and swiftly without further assessment of eligibility. The lists of purchased food aid recipients were passed from Social Insurance Board, an implementation institution of Ministry of Social Affairs, to local food banks and local governments, whose task was to inform end recipients. As pointed out by the representatives of the Ministry of Social Affairs this intervention logic made the implementation of purchased food uniform across the whole country, in addition to being efficient and cost-effective.

Despite challenges in informing end recipients by local governments, the recipients were well informed about food aid delivery times and places due to effective cooperation of local governments and the partner organisation. Due to this efficient cooperation, 96% of food was delivered during the main delivery period and the rest of the parcels were delivered during additional delivery times, according to the Ministry of Social Affairs.

Effectiveness was also achieved by the local food banks being based on volunteers’ activities. It was estimated that about 90% of the FEAD activities were carried out by volunteers, which enabled expenditure on employees to be kept down.

Overall, the effectiveness was achieved due to optimal work processes, limited budget, and reliance on volunteer work. As income level was the criterion for receiving food aid and the eligibility criteria were identical for all target groups, no groups can be identified for whom the activities were most effective.

From October 2023, purchased food aid was replaced by food vouchers under the new programming period 2021-2027 as a new ESF+ measure⁴⁵³. According to the social workers, a voucher adds to the simplicity of administration as vouchers are sent by post, although the practices of delivery of vouchers in municipalities vary, and there is no need to pre-inform people about food delivery. On the other hand, fewer products might be available to end recipient as prices in the supermarket are higher than for food purchased through a procurement procedure. The supermarket where the voucher can be used may not be nearby and end recipients may face barriers in accessing the supermarket due to distance or lack of transport. To overcome this problem, orders can be made in an e-shop as argued by the Ministry of Social Affairs. That however requires access to the internet and digital skills and in practice, online purchases have been very few and rare.

Nevertheless, there are positive sides of using vouchers under the new programming period 2021-2027. Food vouchers give more choice and flexibility to the end recipients and also offer more dignity. Compared to a food parcel, a voucher is better suited to people with special dietary needs. Basic hygiene items can be bought using the voucher, whereas food parcels contained no such products. As argued by a social worker, food aid gave a limited range of products, did not cover all products needed for preparing a proper meal and did not consider the specific needs of a family – there was no baby food, for instance, in parcels. The social worker explained that to overcome this, the municipality she represented additionally offered people in deprivation food vouchers that could be consumed in a local supermarket, financed by the municipality. Another social worker noted that purchased food parcels containing similar foodstuffs over time, could have remained unconsumed. Finally, end recipients are pleased with vouchers due to the fact that they offer a broader array of options, as argued by specialists in local governments.

Purchasing large quantities of food has proved to be cost-effective. The choice is between purchasing and delivering cheap but unvaried food parcels versus giving people food vouchers that offer more choice and require less administrative burden. For families, it also comes down to the question of storing several big food parcels at home versus using vouchers in a supermarket on actual need basis.

⁴⁵² Interview with partner organisation representative

⁴⁵³ The separate FEAD programme was discontinued, and the FEAD was added under the ESF+ programme.

Administrative burden of monitoring and reporting requirements

The Ministry of Social Affairs found that FEAD resulted in a substantial administrative burden compared to the volume of the programme.

For the Ministry of Social Affairs, managing FEAD required the workload of approximately one person full-time. The most time-consuming tasks reported were procurement procedures and audit requirements. The procurement procedures for tenders were conducted twice during the period. Further, the partner organisation was found by procurement. The eligibility rules did not prove to be a burden as these were clearly set. Communication activities were also a task assigned to the Ministry of Social Affairs. The Ministry presented annual implementation reports once a year to the State Shared Service Centre and to the European Commission via an electronic portal.

For the partner organisation, the most time-consuming administrative task was reporting. When purchased food reporting was automated for partner organisation, donated food reporting by different target groups requiring manual input was seen as burdensome. Furthermore, Estonian Food Bank as well as local government representatives considered reporting on paper to be unnecessary, believing that there should be better solutions replacing paper. For purchased food, an administrative burden occurred during delivery times i.e., twice to four times a year.

Partner organisation whose focus is not on administrative tasks assessed the share of administrative burden as too large. For the central organisation – Estonian Food Bank - reporting and checking the lists of end recipients took one person working half time. In a local food bank, administrative tasks were assessed to take half the time of one employee during delivery times.

Local municipalities assessed the administrative workload associated with food aid to be rather large. For purchased food, the main burden was linked to checking the contacts and informing end recipients about delivery times. For donated food, most of the burden occurred when creating lists of end recipients to be forwarded to the food bank or entering the relevant data to STAR system. According to a local government which delivered donated food parcels, (instead of local food banks) home delivery took a whole working day of a social worker each week.

For donated food, monitoring reports were provided to the Ministry of Social Affairs by local governments three times a year with detailed data on end recipients.

According to the estimations of social workers the implementation of food vouchers starting from October 2023 under the new programming period 2021-2027 on the one hand reduces administrative activities for local governments, on the other hand implementing the new system gives rise to queries from recipients that local governments have to deal with.

The use of flat rate expenditures for purchased food parcels delivery simplified the process but was seen as insufficient and thus unfair to the partner organisation. Home delivery had to fit into the flat rate amount and the need for home delivery increased considerably during the COVID-19 pandemic.

Simplification measures

The cost-effectiveness in the case of purchased food was achieved by buying large quantities of food with a procurement procedure delivered to pre-defined target groups a few times a year. However, this efficiency came at the expense of the variety of foodstuffs, lack of fresh food, storage costs and inflexible eligibility rules.

The use of food vouchers (instead of purchasing parcels) starting from October 2023 under the new programming period 2021-2027 eases the administrative burden considerably. Using vouchers leaves the Estonian Food Bank as a partner organisation out of the voucher scheme. Tasks such as the purchasing, assembly and storage of food parcels are omitted from the process as well as informing the end recipients about delivery times of food parcels. Personalised vouchers enable many administrative steps to be left out and add to the efficiency of the operations. On the other hand, a lesser amount of food could be obtained for the same amount of money as prices in supermarkets are higher than for food purchased through the procurement procedure.

Donated food offers more flexibility in terms of food variety and target group composition. In the case of donated food, cost-effectiveness is achieved due to the saved food initiative. Gathering donations and saving food requires more labour and therefore, volunteers are used.

As the main contributor to the administrative burden was reporting, it is expected that more efficiency can be achieved by unifying and digitalising reporting. The simplification suggestions provided by those interviewed mainly revolved around the reporting and data collection processes related to recipients.

A preferred solution to reduce the burden of reporting would be the creation of a central portal where data on end recipients can be entered in a unified manner, enabling central data analyses. Therefore, the possibility of using programme resources on IT -development are welcome. The use of food vouchers also needs information system development for smoother implementation and innovation.

Coherence of FEAD with other interventions

Overall, FEAD actions were aligned with the national policy of reducing severe material deprivation, as they supported the most financially deprived, who received additional support with food aid. This helped them to cope with daily life and eased their situation of deprivation.

National policies for poverty alleviation are presented in the Social Welfare Development Plan 2016-2023, with the general objectives being a high employment rate, the reduction of poverty and social inequalities, gender equality and better social inclusion. FEAD activities described under the subsection 'People's economic coping is improved due to adequate and sustainable social protection' contribute to the development plan by reducing food deprivation, supporting the target group's ability to cope with daily life and social inclusion. The objective of the subsection is measured by absolute poverty and severe material deprivation indicators.

The Population Health Development Plan envisions, among other objectives, the provision of a healthy and secure environment for children and the promotion of a healthy lifestyle.

The Development Plan for Children and Families 2012–2020 advanced the development of social services for families' independent coping.

It can be argued that offering families and individuals food aid is coherent with the objectives of the above-mentioned development plans. On the other hand, food aid is a passive measure and requires activating steps to bring about a major change in the lives of deprived people.

In granting subsistence benefits, social workers are also deemed to assess the need for social services. Additionally, the target group is informed about active labour market services and welfare services that are supported by the European Social Fund. FEAD operations were designed as a supportive measure on the assumption that the target group of low-income people is simultaneously the target group for other ESF programme activities. FEAD activities were connected to employment measures such as 'Promoting access to labour market and preventing labour market dropout' and open calls aiming to promote access to, as well as improve the variety and quality of, social services (Ministry of Social Affairs 2015, a). Information on these programmes was conveyed to the target group through the partner organisation. In 2017, approximately 30% of adult food aid recipients participated in one or another ESF programme (Ministry of Social Affairs 2015, a). Data from Statistics Estonia indicated that 39% of end recipients of purchased food participated in other EU funded measures, to the greatest extent in the active labour market services offered nationally by the Estonian Unemployment Insurance Fund. Furthermore, 115 persons received addiction rehabilitation (Ministry of Social Affairs 2020).

As noted by the Ministry of Social Affairs, the food aid programme remained a separate measure, therefore not much integration with local level policies was experienced, nor were new target groups brought into the spotlight. No attempts from local governments to systematically improve social inclusion for the most deprived was determined. However, the local governments held a different view on this. With complex needs assessment that at times included home visits, food aid recipients were granted other necessary services. Although there were no straightforward actions to promote social inclusion, people's needs were considered and addressed. Examples given included offering home services for older people, giving one-off financial help and offering compensation for children's leisure activities. Some food aid recipients became volunteers for the food bank and their social inclusion was enhanced by their volunteer actions.

FEAD activities are in concordance with school lunch subsidies provided nationally by the state. Estonia offers free school meals for all students in grades 1-12 (Toim, Melesk, Kendler and Kletter 2023). The meals are largely covered by state school lunch subsidies, with the remaining cost financed by local authorities (Global Child Nutrition Foundation 2021). Some schools also provide a free-of-charge breakfast and snacks for those in need. Access to free school meals is free for all children and access does not vary between schools.

In childcare and pre-school institutions for children aged 18 months to the compulsory school age of 7 years, a small fee is paid by parents to cover tuition and meal costs. (Toim, Melesk, et al 2023). The fees covered by parents may not exceed 20% of the national minimum wage (Pre-School Childcare Institutions Act). There are reductions or exemptions from the above-mentioned fees available for low-income families (Lang et al 2021).

A soup kitchen, opened daily and provided by local governments, is the last resort in cases of food deprivation for adults, including older people. In bigger cities, soup kitchen services are operated by NGOs. The Salvation Army has assessed that in Tallinn 6 000 persons use the service monthly. Also, the food bank offers warm meals from donated food. In Tartu, people denied food aid due to irresponsible behaviour (mainly alcohol use) were directed to soup kitchens for warm meals.

3.2. Is FEAD still relevant?

Relevance to target groups

According to surveys and the take-up rate, FEAD operations responded well in terms of reaching out to target groups on a large scale. Purchased food provided necessary food items for an extended time although it was not adjusted to people's preferences or dietary needs. Donated food added more foodstuffs and food vouchers implemented from October 2023 under the new programming period 2021-2027 provide a larger variety of food, responding to individual preferences. Donated food and food vouchers under the new programming period 2021-2027 enable basic hygiene items to be added to the packages which are well received by the end recipients.

It was assessed⁴⁵⁴ that FEAD operations responded well to the needs of target groups who had to operate with very limited budgets. The take-up rates of food aid were high, which confirms the accurate targeting and the need for food aid. Follow-up delivery to people who were assessed as in need expanded the target group and enabled faster reactions by local governments to any unexpected circumstances of persons or households.

People who do not turn to local governments for social services by themselves were beyond the reach of FEAD. The FEAD rules following the overall logic of being eligible for the subsistence benefit or other benefits offered by local governments left out people who were extremely marginalised or lacked information or the legal basis for residing in the country. People experiencing temporary unexpected hardships were included in the target group from 2019 on with the donated food programme. The greater discretionary power, however, could lead to bigger discrepancies in access to food aid in different regions.

The food aid target group was increased by Ukrainians fleeing Russian military aggression following Russia's war of aggression against Ukraine in early 2022. Temporary protection gave a right to legal residence and social protection, including granting subsistence benefits and food aid. The condition for receiving the subsistence benefit was registration with a local government, which meant that people residing in state-provided accommodation like hotels, or a ship received catering and were not included among the recipients of food aid.

While the COVID-19 pandemic and the energy crisis did not create any new target groups, the full-scale Russia's war of aggression against Ukraine changed the scene. By 2023, it was assessed by local food bank in Tartu city, that 50% of their food aid recipients were Ukrainians fleeing Russian military aggression.

As assessed by social workers in local governments, food aid continues to be relevant for people in need. Although compared to 2014 the subsistence level has increased and enables the purchase of more products than merely food, the inflation resulting from the energy crisis has again reduced the coping abilities of many people and increased the demand for food aid.

Relevance of FEAD now and in the future

FEAD design in the future could place emphasis on efficiency and cost-effectiveness, or on a more individual approach – the choices, preferences and individual dietary needs of people. In the former case, the purchased food model is appropriate, in the latter case, food vouchers would be more appropriate. In May 2024, the voucher scheme introduced under the new programming period 2021 – 2027 was honoured with the Innovation in Politics Award⁴⁵⁵ for promoting social cohesion as an innovative solution providing people with the freedom and dignity to select the food and necessities they wish to buy. The products most frequently purchased using the voucher included milk products, bread, meat, grains and vegetables.

Donated food that addresses food waste continues to be of importance as it combines the needs of the deprived with more global issues to which food waste contributes.

In 2022, the number of purchased food aid recipients was doubled compared to 2021, reaching 50 560 persons⁴⁵⁶. This can be attributed to high inflation rate that increased the number of subsistence benefit

⁴⁵⁴ Interviews with Ministry of Social Affairs and partner organisation representatives.

⁴⁵⁵ The Innovation in Politics Awards 2024.

⁴⁵⁶ Data of Ministry of Social Affairs, encompassing the Estonian food aid in 2022, including funding from state budget.

recipients as well as arrival of Ukrainians fleeing Russian military aggression. In 2023, the number of food aid recipients was still close to 50 000 persons.

The consequences of Russia's war of aggression against Ukraine had a strong impact on food aid delivery. The number of people in need increased drastically in 2022 with the arrival of approximately 50 000 Ukrainians fleeing Russian military aggression within a short time who were given temporary protection and thus received the right to social assistance on the same basis as legal residents. According to the Estonian Food Bank, there were around 13 000 food aid recipients before and 34 000 after the full-scale Russia's war of aggression against Ukraine started. It can therefore be concluded that international conflicts can increase the number of food aid recipients within a very short time.

Migration creates a variety of cultures and religions among aid recipients. Translation services are needed, and food parcels have to be adjusted to respond to the eating habits and limitations of different cultures.

A rise in unemployment also increases the potential number of food aid receivers, as households with unemployed persons hold the biggest share among subsistence benefit recipients.

According to the Estonian Food Bank, the energy crisis had a significant impact on the availability of donated food. As the crisis made supermarkets optimise their own processes also the tendency of clients to buy more discounted products increased, thus, there was less waste and less saved food available. Moreover, the energy crisis increased the operational costs of local food banks due to increased home deliveries, which was not anticipated in the programme.

Saving food and reducing food waste are on the public agenda and this issue receives significant public attention. The Estonian Food Bank has estimated that more than 80 tonnes of food are wasted in Estonia yearly. Although less saved food is currently available in the supermarkets, the volumes of wasted food are still large and efforts to save food should be continued.

As a global trend, climate change is expected to have an impact on food aid as it can lead to a rise in prices of primary goods and leave less choice in food selection.

3.3. Did FEAD make a difference and to whom?

EU added value

FEAD activities gave local governments an additional and convenient instrument to support deprived people. Purchased food aid ensured a common approach nationally on how to support people of low incomes and those who suffer from deprivation.

The Estonian Food Bank as an organisation underwent a huge development in implementing FEAD and receiving funding from FEAD. According to the Estonian Food Bank, the food aid service was brought to a new level. Local food banks amended and made their work operations more efficient.

FEAD activities boosted the cooperation and partnership between the local food banks and local governments. The cooperation, which was earlier of a random nature, became regular and official.

FEAD did not expand social services or find new target groups in the margins of society but still supported the development of food aid delivery as a social policy instrument.

Reducing food costs instead of direct cash benefits was well-suited for persons or families with low budgeting skills or addictions. On the other hand, the approach can be patronising and gave little room for empowerment and taking responsibility. However, reducing the costs of food for low-income people still gave them more room to manoeuvre with their tight budget and spent on other necessary items.

Research on subsistence benefit recipients has indicated that people and families with low incomes need help and financial counselling to effectively manage their modest budgets and prevent over-indebtedness (Melesk, et al 2022). So far there is no such service available in Estonia as debt counselling is only for indebted persons (Melesk, et al 2022). Deprived people deserve a complex needs assessment, food aid being one instrument in the toolbox of fighting deprivation. As assessed by the Ministry of Social Affairs, food aid has remained a separate measure, and the take-up of other services is still a responsibility of the person him/herself. An attempt to create new ways of thinking and synergies between food aid and social services was intended and to some extent achieved. The local governments were more optimistic about the synergies and complexity of the approach compared to the Ministry of Social Affairs, offering a complex assessment of needs and additional services where appropriate.

Cooperation between the Ministry of Social Affairs and the Ministry of Agriculture (currently the Ministry of Climate) to whose remit food waste falls, improved due to FEAD activities.

Not much innovation was embedded in purchased food delivery, although donated food was seen as more innovative. Donated food that attempts to bring food to deprived persons with the smallest green footprint can be regarded as an innovative approach for fighting food waste. Innovation is further achieved by switching to electronic food vouchers, which has been already carried out under the new programming period 2021-2027.

About 90% of homeless people received food aid in 2015 and later this share decreased, so there is some room for improvement for this extremely marginalised group. The low share of older people among the end recipients of food aid should receive more attention, considering their material deprivation rates.

The provision of food aid had a noticeable impact on subsistence benefit recipients, particularly during 2014-2015, when the subsistence level was almost equal to the minimum food basket. From 2019, donated food that complemented purchased food affected families with children and older people in a positive way, offering timely help and leading to complex needs assessments of deprived people. The need for food aid increased again with the energy crisis, when inflation left little resources for daily consumption, and this was also accompanied by the arrival of Ukrainians fleeing Russian military aggression.

Visibility

There has been some public communication about FEAD activities, including in the media. To make FEAD activities visible to end recipients, all information sheets delivered with food parcels had an EU emblem together with the mentioning of the EU support. The food voucher launch in fall 2023 under the new programming period 2021-2027 was communicated widely and received widespread media attention at national and local newspapers including mentioning the EU support.

The Estonian Food Bank estimated that around half of the recipients were aware of where the support came from. The local social workers revealed that end recipients were rather well aware of the EU support regarding purchased food aid as this was also called European Union food aid in local governments and among end recipients. Donated food was seen as a local initiative and was therefore much less associated with EU funding. Even local governments' representatives were not aware of the EU financing mechanism of donated food delivery.

4. Good practices

Food waste and food loss are an important part of the debate on climate change and the sustainable use of natural resources. According to a study of food waste and food loss (Piirsalu, et al 2022), it was estimated that approximately 167 000 tonnes of food waste are generated each year in Estonia of which 12% occurs in the retail sector - about 58 tonnes of food remain unsold annually. About 12% of unsold food is donated to food banks or similar organisations. The monetary value of food loss in food trade sector was estimated to be EUR 34.6 million yearly.

The impacts of food waste are receiving increasing attention in Estonia, and internationally (Piirsalu, et al 2022). Donated food programme contributes to a decrease in food waste and a reduction in the number of people in deprivation.

Donated food was included in FEAD activities in Estonia from 2019 in addition to purchased food with a more flexible approach to reach target groups and equally important, significantly more frequent food delivery. Donated food consisting of donations and saved food can be regarded as a success story of FEAD activities. Although food banks were rescuing surplus food from supermarkets prior to including donated food in FEAD activities, the distribution was at that time limited to larger cities only.

Donated food is provided by donations from private persons, companies, and supermarkets. The Estonian Food Bank gathers donations from persons on the spot, or with donations machines present in 14 supermarkets all over the country. The machines are suitable for donating long-lasting products that do not require storage at a special temperature. Saved food is gathered from supermarkets in the late hours of the day, containing food with an imminent expiry date. Saved food is delivered within a short period, or deep frozen, if appropriate. Food parcels containing at least three different product types are made up by the local food bank.

Donated food is provided to people who turn to the local government social welfare department and have passed a needs assessment. To receive purchased food aid, persons or households have to meet income criteria set by the local government. However, there is enough flexibility to determine the need for donated food. The donated food granting process, compared to purchased food, is in better concordance with the social welfare provision logic. As needs assessment is part of social workers' everyday routines, this facilitates finding people who need food aid and vice versa, food aid applicants might receive other social services additionally.

Information on food aid is spread by word of mouth in smaller communities, people turn to local governments to receive food aid and are simultaneously assessed for need in respect of other social services.

Donated food also reaches people who do not meet the criteria of receiving subsistence benefits, although with increased prices have a hard time making ends meet. This is particularly true for elderly individuals who are single or couples with low pensions, as well as those facing additional expenses related to medications that are difficult to cover.

Donated food delivery takes place weekly to monthly, depending on the municipality. In bigger cities and nearby local municipalities, there is more donated food available, and therefore the delivery takes place more frequently and the food choice is more varied than in smaller places. According to the Estonian Food Bank, donated food enables recipients to have a say and a choice about the foodstuffs – they can choose between different types of bread, milk products etc. However, in some regions, the contents of food parcels are one-sided and offer no choice.

With food aid, most relief was brought to families with children and older people. Social workers found that food aid assumes that people have cooking skills as purchased food products as well as some frozen donated food products have to be cooked for consumption. They believed that people who can cook were better adjusted to using food aid. Recipients not used to cook sometimes expressed disappointment with the contents of food parcels, and some products were even denied to children.

Donated food and saved food promote green thinking and reduction of food waste. With the energy crisis there is less donated and saved food available. The recommendations by the authors of the survey described above included promoting food donation and supporting food banks as well as increasing motivation to donate food. In 2022, the Food Bank saved 4.3 tonnes of food according to its estimation. There is room to expand food savings to catering establishments, with approximately 11 000 tonnes of wasted food per year (Piirsalu, et al 2022) and provide more fresh food through a faster delivery process.

The donated food programme has improved the cooperation between local governments' social welfare departments and local food banks and brought it to a new level in terms of being able to react quickly and in a timely manner to deprived people's needs, fight food deprivation and to help them to cope better with daily life.

The future of food aid in Estonia rests on food vouchers instead of purchased food parcels, with the former offering choice, being able to respond better to recipient needs and requiring less administrative burden. A combination of food vouchers and donated food enables deprived people to face less food deprivation and a better life.

5. Conclusions and lessons learned

FEAD support in Estonia took the form of food support solely. The implementation of the system was effective and swift. Most deprived people were identified as financially deprived who applied for the minimum income – subsistence benefit in the country. Subsistence benefit is an income-tested aid for individuals and households whose income per household member, including social security benefits, remains below the subsistence level after deducting housing costs.

In sum, FEAD activities in Estonia effectively supported people with very low incomes and in need of social assistance reducing their expenditure on food. The budget of EUR 8 million for purchased food was used effectively, with 4 353 tonnes of purchased food delivered to end recipients. EUR 0.3 was allocated per kg of food. Compared to the EU-27 average of EUR 0.8, Estonia performed effectively in food delivery, being among the most efficient countries. Donated food with a budget of EUR 4.5 million enabled swifter reaction to personal and household circumstances and emerging economic hardships.

The target group of FEAD activities was composed of financially deprived persons and households who had the right to receive the minimum income benefit, forming 2% of the overall population in 2015 and 1.2% in 2020. In 2017, the target group was expanded with other types of social assistance recipients, although financial deprivation remained the basis of assessing the right to food aid.

Two measures - purchased food and donated food - were meant to complement each other. Purchased food parcels were offered initially twice, later four times a year and under the new programming period 2021-2027 are replaced by quarterly food vouchers as from October 2023, which offers many advantages. Donated food was introduced in 2019 to deliver food in smaller quantities and more frequently, with the delivered parcels also serving a food waste-reducing purpose. Initially, the target group of the purchased food aid was narrowly defined, leaving out people whose income was slightly above the subsistence level. However, the conditions were eased and people receiving other types of benefits from local governments were included. That

amendment considerably increased the share of people aged 65+ among recipients. For donated food, the eligibility conditions were still based on financial assessment, but social workers could use more discretion to determine a need for food aid.

When focusing on end recipients, the food aid delivered made a positive impact on their everyday coping with life – less expenditure on food enabled allocating money to other necessities. Food aid from FEAD helped to compensate for the inadequacy of subsistence benefits, especially in the early years of the programme. Limited impact on social inclusion was both anticipated and observed. New target groups, mainly older people, were found with expanding the target group, giving more discretionary power to local governments. Food aid became a policy measure for local governments to swiftly react to the needs of deprived people and also reach deprived people who would otherwise not turn to them. However, the increase in the discretionary power could result in unequal access to food aid and food vouchers under a new programme of individuals residing in various regions. Access to reliable data on the total number of individual recipients of different types of food aid requires enhancement.

The overall social welfare approach foresees that people are responsible for their welfare and should be active in seeking support. Although in bigger cities deprived people can remain unnoticed, the social workers interviewed estimated that all people who needed food aid also received it.

Food aid does not have a direct impact on poverty rates, but it relieves material and food deprivation and helps the most deprived to cope with everyday life. For the future, a choice has been made to switch from the efficiency of purchased food delivery to the flexibility of food vouchers. Donated food that contributes to a decrease in food waste and a reduction of the number of people in deprivation is seen as an important policy measure responding to the difficulties brought by the energy and refugee crises today and possibly their impacts in the future.

Appendices

Appendix 1: Methodology

Research methodology of the Estonian case study consisted of desk research and interviews with organisations involved in FEAD activities: Ministry of Social Affairs, partner organisations.

Explanatory notes to the conditions of FEAD as well as evaluations were used, complemented by statistics on subsistence benefit recipients and number of homeless people by the Ministry of Social Affairs.

In September 2023, four interviews were conducted with the representatives of the Ministry of Social Affairs and the partner organisations: the Estonian Food Bank, Tartu Food Bank and Tallinn Social and Health Department. Interviews took place in Teams, by phone and face-to-face on the premises of the Estonian Food Bank.

Additionally, four interviews were conducted with local government social workers whose tasks include assessing the need for food aid, granting food aid and in one case also delivering food aid. The interviewees were from one bigger city, two medium-sized cities and a small-sized local government without a local food bank. All interviews were conducted in Teams in October 2023. The local governments were geographically diverse but represented good social work practices and showed interest in offering food aid. For instance, there were no examples where complex need assessment of deprived people was not conducted, or initiatives to find people in need were not present. However, the level of social work practices can vary across the country. Also, the small number of interviews does not reveal both the variety of social work practices and availability of donated food across the country, although the differences were visible already from five interviews (including Tallinn).

The number of food aid recipients dealt with by interviewed social workers varied considerably - from ten to hundreds.

The retrospective evaluation period 2014-2020 entailed some limitations, including poor accessibility to initial project documents; persons involved with the project had changed positions and organisations and thereby people interviewed often lacked retrospective knowledge. Many social workers and food bank representatives had no experience with pre-FEAD times and therefore it was hard for them to assess the effects that FEAD brought about.

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Table A. 70 – Input indicators for the implementation of FEAD in Estonia in 2014-2022

Indicator	Total amount of eligible public expenditure approved in the documents setting out the conditions for support of operations (EUR)	Total amount of eligible public expenditure incurred by beneficiaries and paid in implementing operations (EUR)	Total amount of eligible public expenditure declared to the Commission (EUR)	Implementation rate (expenditure declared as share of allocated budget)
2014-2022	76 218 928.00	76 213 374.00	76 213 374.00	100%

Source: SFC database 2014-2020. *Please note that there was no expenditure in 2014.

Table A. 71 – FEAD output indicators in Estonia in 2015-2022, per year

Output indicators on food support distributed	2015	2016	2017	2018	2019	2020	2021	2022
Quantity of fruits and vegetables (tonnes)	33.00	44.00	16.00	55.00	53.00	70.00	85.00	356.00
Quantity of meat, eggs, fish, seafood (tonnes)	217.00	172.00	189.00	139.00	125.00	134.00	132.00	1,108.00
Quantity of flour, bread, potatoes, rice and other starchy products (tonnes)	224.00	289.00	197.00	150.00	145.00	185.00	155.00	1,345.00
Quantity of sugar (tonnes)	84.00	104.00	97.00	90.00	32.00	56.00	19.00	482.00
Quantity of milk products (tonnes)	0.00	0.00	0.00	0.00	0.00	41.00	0.00	41.00
Quantity of fats, oil (tonnes)	82.00	101.00	95.00	0.00	33.00	45.00	63.00	419.00
Quantity of convenience food, other foodstuff (not	68.00	80.00	80.00	88.00	90.00	120.00	76.00	602.00

Output indicators on food support distributed	2015	2016	2017	2018	2019	2020	2021	2022
falling in above-mentioned categories) (tonnes)								

Source: SFC database 2014-2020.

*Please note that there was no expenditure in 2014.

Table A. 72 – Number of FEAD participants in Estonia in 2015-2022

Result indicators on food support distributed	2015	2016	2017	2018	2019	2020	2021	2022
Total number of persons receiving food support	26,608	29,516	28,453	22,920	20,872	26,000	24,009	18,532
Number of children aged 15 years or below	8,887	10,713	10,097	6,355	5,026	4,972	5,394	5,315
Number of persons aged 65 years or above	412	525	551	2,223	2,889	3,219	4,387	3,133
Number of women	13,503	15,020	14,505	11,991	10,977	10,828	12,664	11,720
Number of migrants, participants with a foreign background, minorities (including marginalised communities such as the Roma)	4,636	5,101	4,909	4,492	4,403	4,548	5,185	12,994

Result indicators on food support distributed	2015	2016	2017	2018	2019	2020	2021	2022
Number of persons with disabilities	3,555	5,333	4,267	3,438	3,130	3,690	4,512	2,991
Number of homeless	1,022	1,000	1,000	1,000	1,000	1,000	1,000	1,000

Source: SFC database 2014-2020.

*Please note that there was no expenditure in 2014.

6. Context and background

This section describes the **evolution of certain socio-economic indicators** that are relevant to the FEAD over the evaluation reference period (2013-2022). It starts with an evaluation of the general socio-economic context before delving into the situation of specific FEAD target groups. Table A. 73 below presents Eurostat data on socio-economic indicators in France between 2014 and 2020. It is worth noting that there was a break in series in 2022 for EU-SILC data (i.e., microdata on income, poverty, social exclusion and living conditions). Indeed, in 2022, data started to be collected for the French overseas departments Guadeloupe, Martinique, Guyane and la Réunion. However, this break in series does not apply to employment data, which stems from a different dataset.

In terms of **housing and employment indicators**, Eurostat data shows that the employment rate has steadily increased over the reference period. Indeed, it grew from 64,5% in 2014 to 66,1% in 2018 and 68,1% in 2022. Thus, it seems that the employment rate did not decline with the COVID-19 pandemic that broke out in March 2020. This is in contrast to the rates of long-term unemployment and households with very low work intensity, which seems to have been impacted by the pandemic. Whilst there has been a decrease in long-term unemployment from 2014 (3,1%) to 2020 (1,9%), this trend was reversed in 2021 (2,3%). There has also been a sharp increase in the share of households with very low work intensity as this share grew from 7,1% in 2019 to 9,7% in 2020, culminating at 10,7% in 2021. The share of people declaring that housing is a cost overburden was particularly low in 2018 (4,7%), but it grew after the pandemic until reaching 6,5% in 2022. The French national audit office (Cour des comptes) estimated that 300 000 people were homeless in 2019, which means that homelessness increased by 10% on average each year since 2012⁴⁵⁷. Between 2014 and 2020, the rate of in-work risk of poverty varied between 6,5% (2016) and 5,3% (2020). The greatest variation happened between 2021 (3,3%) and 2022 (5,4%). This sudden change has also been reported in interviews with partner organisations, which alerted to the growing number of ‘working poor’ among FEAD beneficiaries. The cost-of-living crisis has been described as an ongoing challenge that reinforces FEAD’s relevance.

When looking at **financial indicators of poverty for individuals**, it becomes clear that the sharpest increases also took place between 2020 and 2022. However, as explained above, it should be noted that 2022 data includes data collected in four overseas regions, which partly explains the sudden increase in 2022. The share of people unable to afford a meal with meat, chicken, fish (or vegetarian equivalent) every second day rose from 6,3% in 2021 to 9,5% in 2022. There is a similar trend for the share of people who cannot afford to replace worn-out clothes (8,8% in 2021 vs 9,4% in 2022) and the share of people who cannot afford to get together with friends or family (relatives) for a drink or meal at least once a month (4,9% in 2021 vs 6,0% in 2022). Unsurprisingly, the COVID-19 pandemic seems to have impacted the share of self-reported unmet needs for medical care. Indeed, whilst the share of self-reported unmet needs was progressively decreasing from 2,8% in 2014 to 1,2% in 2019, it rose to 2,7% in 2020. In 2022, it reached 3,2%, which is the highest it has been during the evaluation reference period. In sum, many indicators point to a worsening of poverty in the last three years. This has also been reported in interviews with partner organisations.

This recent increase in poverty is reflected in the **overall evolution of the at-risk-of-poverty or social exclusion (AROPE) rate**. Over the reference period, the share of people who are AROPE was at its lowest in 2017 (17,8%) and at its highest in 2022 (21%). There has been a steady increase of AROPE people since 2018, which is illustrated in Figure A. 78 [Figure A. 78 – Evolution of poverty indicators \(2015-2022\)](#). Nonetheless, 2021 was the year for which the contribution of social transfers (other than pensions) to poverty was the greatest with a 46,4% reduction of AROPE that year. Eurostat data shows that the severe material deprivation rate (SMD) was 0% in 2021 and 2022, but this is likely due to missing data. Over the reference period, the severe material and social deprivation rate (SMSD) was at its highest in 2022 (7,5%).

Similarly, the **share of AROPE children** was at its highest in 2022 (27,7%) and at its lowest in 2021 (22,1%). Between 2016 and 2021, this share remained between 23,2 and 23,8%. The SMSD for children was also the highest in 2022 (10,7%), whereas it was relatively low in 2021 (6,9%). Figure A. 79 shows the evolution of specific poverty indicators for children between 2015 and 2022. This increase in poverty indicators for children has been echoed in the interviews with partner organisations. Indeed, partner organisations have

⁴⁵⁷ Cour des comptes (2021). L’hébergement et le logement des personnes sans domicile pendant la crise sanitaire du printemps 2020. Rapport public annuel 2021 – Tome I.

reported a recent increase in the number of children and single parents (especially single mothers) seeking food assistance.

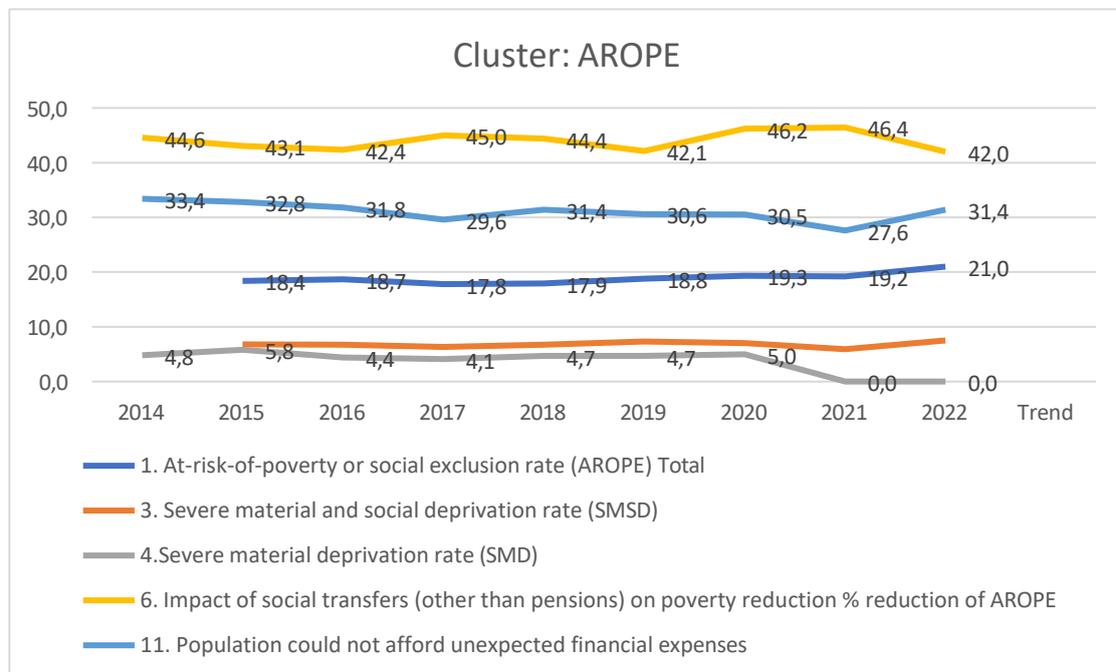
Besides reflecting a worsening of poverty in metropolitan France, the high values reported in 2022 are due to the aforementioned break in series in EU-SILC data collection. Because 2022 data includes additional data collected in Guadeloupe, Martinique, Guyane and la Réunion, values are higher than for previous years. This is accentuated by the fact that these overseas departments are characterised by high levels of poverty. In Guyane for example, the rate of AROPE people was almost 50% in 2022, which is significantly higher than the French average (21%)⁴⁵⁸.

Table A. 73 – Socio-economic context in France

France	2014	2015	2016	2017	2018	2019	2020	2021	2022	Trend
1. At-risk-of-poverty or social exclusion rate (AROPE) Total			18,4	18,7	17,8	17,9	18,8	19,3	19,2	21,0
2. AROPE Children			22,3	23,5	23,2	23,8	23,6	23,4	22,1	27,7
3. Severe material and social deprivation rate (SMSD)			6,8	6,7	6,3	6,7	7,3	7,0	5,9	7,5
4. Severe material deprivation rate (SMD)		4,8	5,8	4,4	4,1	4,7	4,7	5,0	0,0	0,0
5. Inability to afford a meal with meat, chicken, fish (or vegetable)		7,2	7,3	7,4	7,1	6,9	7,5	7,2	6,3	9,5
6. Impact of social transfers (other than pensions) on poverty		44,6	43,1	42,4	45,0	44,4	42,1	46,2	46,4	42,0
7. Housing cost overburden		5,1	5,7	5,2	5,0	4,7	5,5	5,6		6,5
8. Self-reported unmet need for medical care % of population		2,8	1,2	1,3	1,0	1,2	1,2	2,7	2,8	3,2
9. Households with very low work intensity			8,3	7,8	7,7	7,5	7,1	9,7	10,7	9,9
11. Population in the EU could not afford unexpected financial expenses		33,4	32,8	31,8	29,6	31,4	30,6	30,5	27,6	31,4
13. Share of total population having neither a bath, nor a shower		0,5	0,5	0,6	0,6	0,6	0,5	0,5		
14. No indoor flushing		0,5	0,5	0,6	0,6	0,6	0,5	0,5		
17. Persons who cannot afford a telephone		0,1	0,1	0,0	0,0	0,0	0,0			
18. Persons who cannot afford to replace worn-out clothes		9,1	8,5	8,4	7,9	8,3	9,0	8,6	8,8	9,4
20. Persons who cannot afford to get-together with friends or family		6,2	5,3	5,5	5,1	5,3	6,1	6,8	4,9	6,0
21. Persons who cannot afford internet connection for person		2,7	2,1	2,1	1,8	1,8	1,9	1,9	1,5	1,7
22. In-work risk of poverty		6,3	6,0	6,5	5,8	5,9	5,5	5,3	3,3	5,4
23. Long-term unemployment		3,1	3,1	3,1	2,9	2,5	2,3	1,9	2,3	2,0
25. Employment rate		64,5	64,7	65,0	65,6	66,1	66,4	66,1	67,2	68,1
26. Children (aged less than 18) living in households with very low work intensity			7,5	7,6	7,5	7,5	7,1	9,7	11,4	10,7
27. At-risk-of-poverty rate for children			18,7	19,1	19,0	19,9	18,2	19,4	18,5	21,7
28. Severe material and social deprivation rate (SMSD) for children			8,5	9,1	8,6	8,5	9,2	9,3	6,9	10,3

Source: Eurostat.

Figure A. 78 – Evolution of poverty indicators (2015-2022)



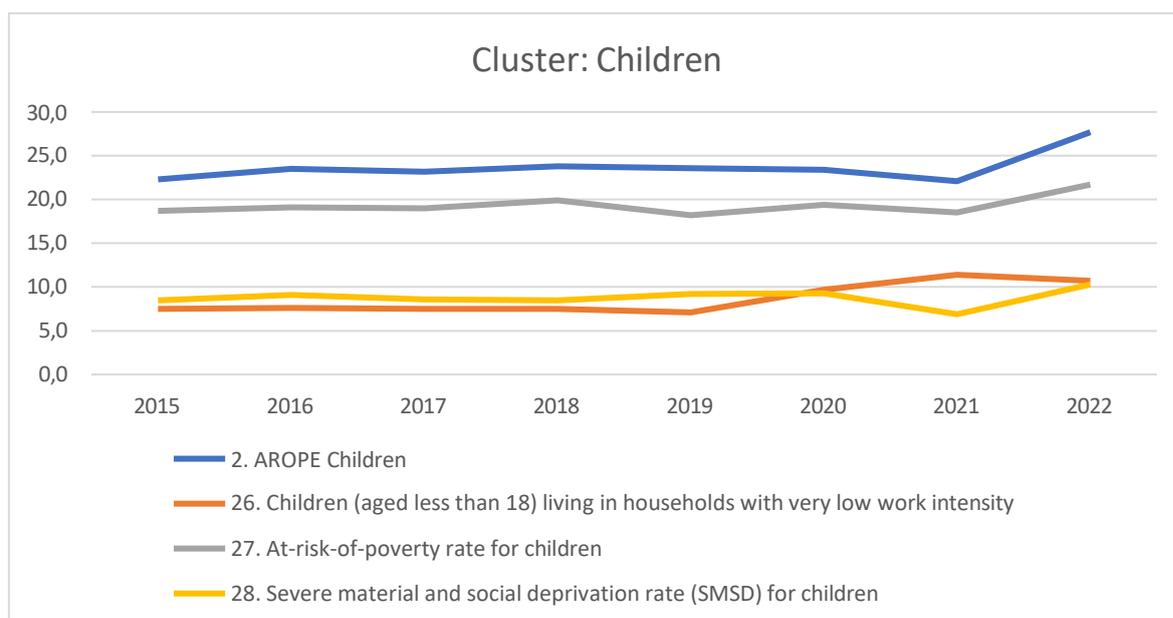
Source: Eurostat.

458

Eurostat SILC data

(https://ec.europa.eu/eurostat/databrowser/view/ilc_peps11n/default/table?lang=en&category=livcon.ilc.ilc_pe.ilc_peps)

Figure A. 79 – Evolution of poverty indicators for children (2015-2022)



Source: Eurostat.

7. Reconstructing the intervention logic

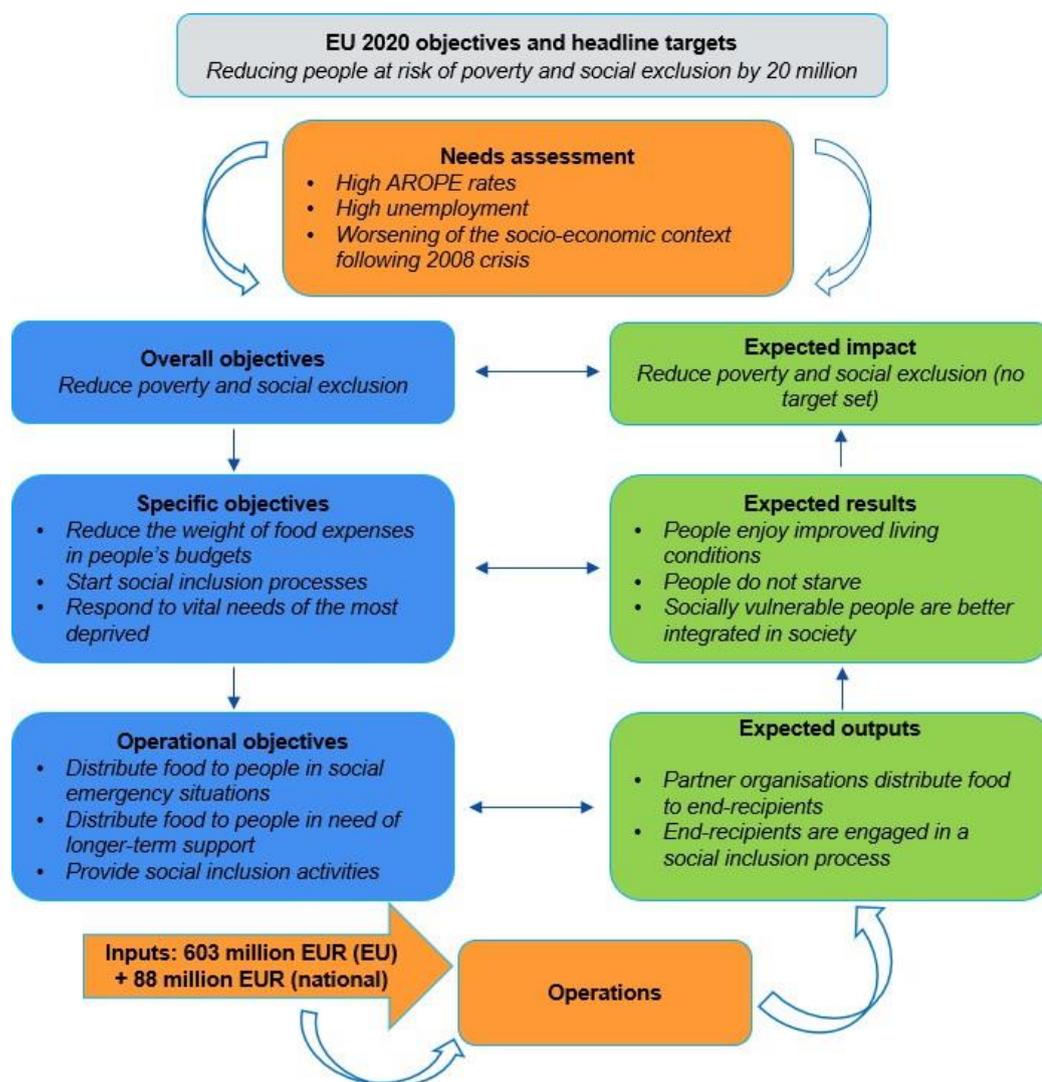
This section provides an **overview of the FEAD in France**. An ex-ante evaluation of the OP was commissioned by the Managing Authority to quality-assure the OP’s preparation and critically assess the OP’s coherence, relevance, and implementation plan. The FEAD OP was largely designed in the continuity of the European Union Food Distribution programme for the Most Deprived Persons (MDP), called “Programme européen d’aide aux plus démunis” (PEAD) in French⁴⁵⁹. The stakeholders interviewed were aware of the continuity between the MDP and the FEAD. This is also reported in a study of the FEAD published in 2018⁴⁶⁰.

The **FEAD OP is based on a ‘diagnosis’ of poverty and food insecurity in France**, which informed the intervention logic presented in Figure A. 80 below. However, the FEAD OP does not set quantitative targets in terms of end recipients or volume of food to be distributed. Annual Implementation Reports present yearly data for relevant indicators including the volume of food distributed and the number of people reached, but these are reported *a posteriori*. No forecasts could be found in strategic and operational documents.

⁴⁵⁹ Balny, Philippe & Pascal, Alexandre & Martin de Lagarde, Olivier (2014). Evaluation ex ante du Programme opérationnel 2014-2020 pour la mise en œuvre du Fonds européen d’aide aux plus démunis (FEAD). The MDP was the EU’s food aid programme preceding the FEAD. It ran from 1987 to 2013 and fell under the Common Agricultural Policy (CAP).

⁴⁶⁰ Alberghini, A. & Brunet, F. & Lehrmann, J. & Petit, C. (2018).

Figure A. 80 – Intervention logic of FEAD in France



Source: adapted from FEAD mid-term evaluation, inputs including EU-REACT.

7.1. National policy framework

Since the MDP's introduction in 1987, **EU support has played a crucial role in France's policy for food aid and poverty alleviation.** Currently, FEAD is a pillar of France's food aid strategy. The Fund has a 'structuring' role in France's policy framework on food aid and social inclusion because of its stability and leverage effect⁴⁶¹. Indeed, unlike other supply sources (e.g., donations and food collections), FEAD resources are guaranteed over time. The budget is set for seven years, which means that partner organisations can plan their operations over the long term. FEAD has been described as a 'pillar' of partner organisations' supply strategy. Moreover, it has a leverage effect on the wider food aid ecosystem in France. Indeed, due to its stability, FEAD attracts complementary initiatives and supply sources.

This sub-section provides an **overview of France's food aid and poverty alleviation strategy** and explains FEAD's role in it.

Although it already existed in practice, **food aid was given an official, legal definition** in 2010⁴⁶². According to law number 2010-874 of the 27 July 2010 on the modernisation of agriculture and fishing, 'the purpose of

⁴⁶¹ Interviews with representatives of FEAD partner organisations in France conducted between July and September 2023.

⁴⁶² Balny, Philippe & Pascal, Alexandre & Martin de Lagarde, Olivier (2014). Evaluation ex ante du Programme opérationnel 2014-2020 pour la mise en œuvre du Fonds européen d'aide aux plus démunis (FEAD).

food aid is to provide food to the most deprived people. This aid is provided both by the European Union and by the State or any other legal entity'. Food aid is **part of a wider policy on food**, notably implemented through the National Food Programme (*Programme national pour alimentation*, PNA). In 2009, stakeholders of the food aid ecosystem decided to sign a 'Charter for developing food aid', which is structured around promoting donations, improving the delivery of food aid, and financing social inclusion initiatives⁴⁶³. Thus, even before the FEAD was introduced, food aid and social inclusion were linked in France's national policy framework. This was confirmed by representatives of partner organisations. French partner organisations all defend a certain vision of food aid as a gateway towards social inclusion. For them, food aid and social inclusion are intrinsically linked. This vision was described by a partner organisation representative as the '*French approach to food aid*' (*aide alimentaire à la française*).

By the time the FEAD was introduced, **France had adopted several food aid, health and social inclusion strategies**, including the Programme National Nutrition Santé (2001), the Programme alimentation-insertion (2003), the Programme National d'Aide Alimentaire (2004), Programme National pour l'Alimentation (2010) and the Programme de lutte contre le gaspillage (2013). In 2014, FEAD replaced the MDP and the Crédits Nationaux destinés aux Epicerie Sociales (CNES) replaced the Programme national d'aide alimentaire. The FEAD's Managing Authority explains that **France has a two-pronged strategy for food aid, which relies on both national and EU funds**. Both the FEAD and national programmes for food aid and social inclusion are managed by the Ministry of Labour, Health and Solidarities. Collaboration within the Ministry ensures that there is no duplication between the FEAD and national programmes⁴⁶⁴. FEAD and national food aid initiatives serve different purposes. Whilst FEAD ensures the supply of basic products, national initiatives allow to complement the food basket of end-recipients with fresh products. The Garot law (2016), which aims to tackle food waste, has contributed to increasing donations from supermarkets and has thus had the effect of complementing FEAD with fresh products⁴⁶⁵. National funds are available under the Crédits Nationaux destinés aux Epicerie Sociales (CNES) to support social solidarity stores ('épicerie sociales et solidaires'), which are not covered by the FEAD as they offer products at a discounted price⁴⁶⁶. **FEAD and national initiatives are thus complementary**.

Stakeholders interviewed agree on the **FEAD's importance in France's national policy on social inclusion and poverty alleviation**. FEAD has been described by partner organisations as a 'basis' that is complemented by other supply sources. FEAD represents between 25-30% of the food distributed in France every year and is the main source of public funding for food aid. In 2021, for example, FEAD represented approximately 28,15% of the food distributed by partner organisations⁴⁶⁷. As explained above, at the level of partner organisations, FEAD has a structuring impact because it allows these organisations to build a solid seven-year sourcing strategy and provides financial stability.

7.2. Objectives and target groups

The FEAD's general objective is to contribute to reducing poverty by alleviating the burden of food in people's budget and starting social inclusion processes⁴⁶⁸. Through food aid, FEAD's specific objectives are to 1) provide foodstuff to the most deprived people, 2) respond to people's vital needs and 3) initiate social inclusion support⁴⁶⁹.

Although some national stakeholders wanted to cover other material needs during the OP's elaboration, France chose to **focus OP I specifically on food aid**⁴⁷⁰. This is because the Managing Authority wished the FEAD to remain in the continuity of the MDP, which was historically linked to the Common Agriculture Policy (CAP)⁴⁷¹.

The **OP was modified four times to respond to the crisis experienced in recent years**⁴⁷². In 2021, the Managing Authority amended the OP to incorporate REACT-EU funds. In 2020 and 2022, the OP was also

⁴⁶³ Balny, P. et al. (2014)

⁴⁶⁴ Interview with representatives of the FEAD Managing Authority in France conducted in September 2023.

⁴⁶⁵ Interview with experts on food aid in France conducted in December 2023.

⁴⁶⁶ Alberghini, A. et al (2018).

⁴⁶⁷ DGCS (2022). Programme opérationnel français FEAD (PO1) 2014-2020. Rapport d'exécution 2021.

⁴⁶⁸ Balny, Philippe & Pascal, Alexandre & Martin de Lagarde, Olivier (2014). Evaluation ex ante du Programme opérationnel 2014-2020 pour la mise en œuvre du Fonds européen d'aide aux plus démunis (FEAD).

⁴⁶⁹ Balny, P. et al. (2014)

⁴⁷⁰ Balny, P. et al. (2014)

⁴⁷¹ Balny, P. et al. (2014)

⁴⁷² Based on the screening tool provided by the research team

modified to make use of the flexibilities under CRII and CRII+, as well as the use of e-vouchers in FEAD's implementation.

France is characterised by a bottom-up approach in selecting **target groups**. The OP distinguishes between **two types of eligible groups: people in emergency situations and people seeking longer-term support**⁴⁷³. For people in emergency situations (e.g., homeless people), the OP guarantees 'unconditional reception'⁴⁷⁴. No proof of eligibility is required in this case. For provision of support beyond emergency situations, partner organisations are free to choose their own eligibility criteria⁴⁷⁵. Nonetheless, the OP gives guidelines on the process to determine eligibility for long-term support⁴⁷⁶. This process has four steps: 1) Tailored reception of potential beneficiary, often with an interview; 2) Appreciation of the support needed based on the person's socio-economic situation; 3) Decision to grant support (acceptation of request for support, volume of food distributed, pace and length of support); 4) Opening of an administrative record for follow-up and sustained support.

The OP does not define specific target groups, but states that: "**Target groups are people in social emergency situations or who are socially and financially dependent**". Due to this general definition, target groups of the FEAD in France are ultimately defined empirically.

7.3. Implemented operations and accompanying measures

In France, FEAD finances the **purchase, storage, and transportation of food and distributes** it via partner organisations to the most deprived people. Specifically, operations implemented are the following⁴⁷⁷:

- Selection of the food based on partner organisations' requests;
- Allocation of a budget to each selected partner organisation to benefit from EU support;
- Assessment of volume and quality of food needs;
- Logistics planning: selection of delivery points, volumes delivered, rhythm and schedule of deliveries;
- Initiation of procurement by the intermediary organisation FranceAgriMer (FAM);
- Selection of offers based on organoleptic, nutritional and economic criteria;
- Awarding of contracts by FAM;
- Delivery of food by suppliers to delivery points (first delivery warehouses) at dates planned;
- Storage and transport of food by partner organisations from first delivery warehouses to other warehouses and/or delivery points.

As explained in the section above, **France decided to exclude basic material assistance** from the scope of the FEAD. This is because stakeholders drafting the OP wanted to ensure continuity with the MDP and focus support on food aid only.

During the 2014-2020 programming period, **FEAD did not finance accompanying measures**⁴⁷⁸. Accompanying measures are offered by partner organisations as part of their routine operations and are financed by national or local funds. This could be explained by the fact that partner organisations already had a history of providing social inclusion support, even before the FEAD. As explained above, the French partner organisations' approach to food aid has always been to link food aid with social inclusion. Besides cooking workshops and nutrition education activities, partner organisations help beneficiaries to become aware of their legal rights ('accès au droit'), provide support with clothing and leisure activities (e.g., holidays) and social inclusion through job counselling. Accompanying measures also cover support with accommodation, school guidance, French language courses and financial inclusion (i.e., access to banking services). Accompanying measures are now financed under ESF+.

⁴⁷³ Balny, Philippe & Pascal, Alexandre & Martin de Lagarde, Olivier (2014). Evaluation ex ante du Programme opérationnel 2014-2020 pour la mise en œuvre du Fonds européen d'aide aux plus démunis (FEAD).

⁴⁷⁴ Balny, P. et al. (2014)

⁴⁷⁵ Balny, P. et al. (2014)

⁴⁷⁶ Balny, P. et al. (2014)

⁴⁷⁷ Balny, P. et al. (2014)

⁴⁷⁸ Based on the screening tool and interviews with representatives of FEAD partner organisations in France conducted between July and September 2023.

7.4. FEAD governance and delivery system⁴⁷⁹

FEAD's **Managing Authority** is the **Directorate General for Social Cohesion of the Ministry of Labour, Health and Solidarities (DGCS)**. The DGCS steers the fund's implementation. It establishes, updates, and safeguards the rules around implementation.

Concretely, the **DGCS lays the groundwork for procurements, establishes agreements, participates in the selection of organisations** that can benefit from the fund and in the **selection of food, oversees the execution and control of food procurement campaigns**, and, if necessary, **intervenes to address difficulties**, unforeseen events, or potential arbitrations.

The DGCS also monitors the budget and creates necessary tools and processes for the certification of expenses to be included in a funding request. As with other EU funds, the DGCS organises governance and collaboration with various FEAD stakeholders, ensures legal monitoring in connection with the European Commission, supervises responses to audits, and establishes an internal control and risk management system, as well as the program's evaluation and monitoring system.

The Ministry of Agriculture's Directorate General for Food (DGAL), which was formerly the Managing Authority of the MDP, still **retains some competences under the FEAD**. The DGAL collaborates with the DGCS in selecting beneficiary organisations and food. The DGAL co-drafts nutritional fact sheets for each product, which are then attached to the tender documents, and manages health crises. The Ministry of Agriculture and Food is also the supervisory ministry of FranceAgriMer, the intermediary organisation that is responsible for procuring the food.

However, in the context of FEAD, **FranceAgriMer (FAM) reports to the DGCS**. FranceAgriMer is an **intermediary organisation, but also a beneficiary organisation** in place of partner organisations to limit financial risks. Partner organisations are considered beneficiaries only for the flat-rate expenses of transportation and storage (up to 5% of the distributed food). FranceAgriMer **manages the procurement of the food to be distributed to partner organisations**. Through supporting documents and factories or warehouse visits, it controls selected suppliers and pays them. FranceAgriMer also visits partner organisations to ensure compliance with the rules for the delivery of FEAD food to end recipients. The intermediary organisation also carries out community certification checks (*contrôles de service fait*, CSF), which are the tools for certifying expenses necessary for any reimbursement requested from the European Commission.

As with the ESF and the ERDF, the **certifying authority for the FEAD is the Directorate General of Public Finances (DGFIP)**. The DGFIP guarantees the reliability of the data declared to the European Commission for payment requests and annual accounts. It checks that the certificates of services rendered (CSF) transmitted by FranceAgriMer conform to the data entered into the computer system. To ensure eligibility of declared expenses, the DGFIP implements, based on a sample of selected CSFs, in-depth risk assessments and quality checks. Once these checks are completed, the certifying authority prepares and submits reimbursement requests and 'annual accounts' to the European Commission, detailing in particular the amount of eligible expenses declared and the financial corrections applied during the past accounting period.

The **Interministerial Commission for the Coordination of Controls (CICC)** has been designated as the **audit authority**, as it already held this role for other European structural funds.

As part of the management of the FEAD, the CICC must:

- Present, at the beginning of the programming period, an audit strategy to the European Commission;
- Conduct audits to ensure the proper functioning of the management and control system of the OP;
- Carry out annual controls on operations, based on a statistical sample that meets international audit standards;
- Provide an opinion on the annual accounts produced by the management and certification authorities.

The CICC thus annually submits to the European Commission a control report and an opinion on the results of the controls and audits conducted during the previous 12-month period ending on June 30 of the relevant year.

In addition, FEAD's delivery on the ground fundamentally relies on volunteers of partner organisations. Volunteers and staff of partner organisations are thus a crucial element of FEAD governance

⁴⁷⁹ Bazin, Arnaud & Bocquet, Eric (2018). RAPPORT D'INFORMATION FAIT au nom de la commission des finances (1) sur le financement de l'aide alimentaire.

and the delivery system. Approximately 200,000 volunteers were involved in delivering food aid in France in 2018. This is valued at approximately 500 million euros.

8. Key findings on the implementation of FEAD

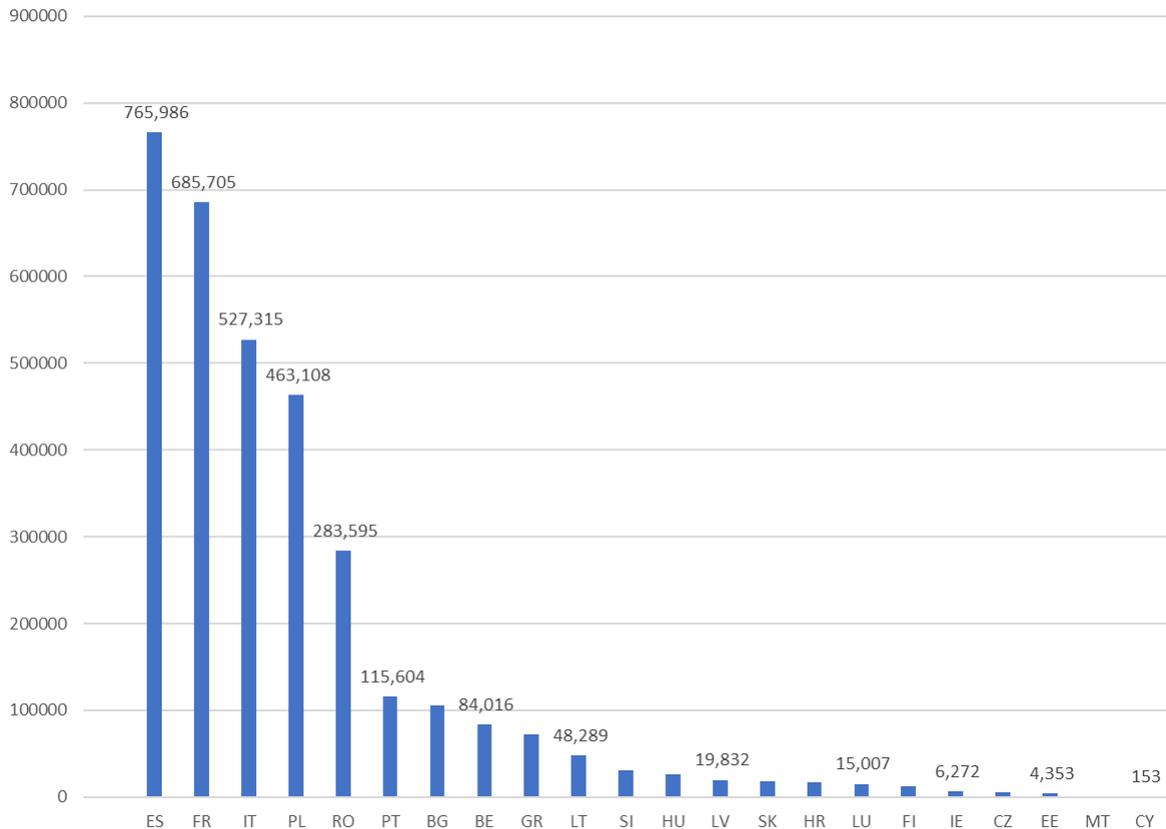
8.1. To what extent was FEAD support successful – or not – and why?

Overall achievement of FEAD objectives [*criterion: effectiveness*]

Based on the evidence stemming from desk research and interviews, it can be deemed that **FEAD general and specific objectives were achieved in France**. All five stakeholders interviewed (i.e., the four partner organisations and the intermediary body) agree that FEAD reached its qualitative targets.

According to the latest annual implementation report available, 83 575.82 tons of food were delivered to partner organisations in 2021⁴⁸⁰. Over the whole implementation period, 685 704,8 tons of food were distributed, which makes France the second country where the most food was distributed under FEAD (see Figure A. 81)⁴⁸¹. Partner organisations interviewed consider that because the food materially reached people in need, the **FEAD’s objective to ‘provide non-financial assistance to the most deprived persons by food assistance and accompanying social inclusion measures’ was well-reached**. As shown in Figure A. 81, France is the EU country with the second highest volume of **food support effectively distributed** (following Spain). The volume of food effectively distributed attests to the reach and impact of FEAD. For interviewees, the sheer fact that the food was distributed is a proof of FEAD’s effectiveness and fulfilment of objectives.

Figure A. 81 – Total quantity of food distributed in tonnes, EU-27, 2014-2022



Source: research team, based on data from the SFC2014 database.

Partner organisations argue that **FEAD contributes to alleviating poverty by reducing the share of money going to food in people’s budgets**. Indeed, food expenses are often an adjustment variable in the ongoing

⁴⁸⁰ DGCS (2022). Programme opérationnel français FEAD (PO1) 2014-2020. Rapport d’exécution 2021.

⁴⁸¹ Based on data provided by the research team

expenditures of households at risk of poverty⁴⁸². For vulnerable people, benefiting from food aid allows readjusting some of the ongoing expenses in favour of expenditure items other than food. However, this does not fundamentally change their standard of living⁴⁸³. According to a structured survey of end-recipients carried out by FORS-Recherche sociale (FORS) which is cited in the annual implementation report for 2021, “food aid partially addresses the needs of those who benefit from it. While the support ensures a food ‘subsistence level’ for some, diversifies the diet, and/or eases the financial burden for others, food insecurity persists for certain households, especially the most dependent ones”⁴⁸⁴. Thus, although stakeholders interviewed unanimously praise FEAD’s effectiveness, findings from the ground nuance this view.

Reach of target groups [*criterion: effectiveness*]

Due to the fact that **France did not define specific target groups, it is difficult to precisely assess their reach**. Thus, this section takes an empirical approach to show which groups of people have benefited from the FEAD the most. These groups of people are *de facto* FEAD target groups. Partner organisations define FEAD target groups as people in a precarious situation i.e., ‘all kinds of poor people’ (*les personnes pauvres dans leur diversité*)⁴⁸⁵.

A 2018 FEAD country fiche for France estimates that 53% of end-recipients were **women**, 35% were **children aged 15 or below**, 16% were **homeless** persons and 4% were **persons aged 65 or above**⁴⁸⁶. This distribution is echoed in qualitative data. The Restos du Coeur reported that approximately 40% of people receiving support are minors, which means that AROPE children are their main target group^{487, 488}. Women are also a prominent target group of FEAD support, as 53% of end-recipients of food aid delivered by the Restos du Coeur are women according to the latest data. Among these, single mothers are a prominent sub-category⁴⁸⁹. The Fédération Française des Banques Alimentaires (FFBA) explained that 90% of people receiving support were under the poverty threshold, and/or lived in social housing and/or were single parents⁴⁹⁰. The structured survey of end-recipients carried out by FORS shows a difference in groups reached in urban vs rural areas. In cities, end-recipients are more often families, individuals in precarious living situations, or foreigners and/or unstable administrative status.

In France, FEAD requirements are not a hindrance in reaching certain target groups. On the contrary, the way that France chose to define eligibility for **FEAD support means that FEAD is a ‘universal’ fund that does not have specific eligibility criteria**⁴⁹¹. For example, 5% of end-recipients of food aid provided by the Secours Populaire Français are homeowners⁴⁹². As per their founding documents, partner organisations provide ‘unconditional reception’ to people in social emergency situations. Consequently, FEAD implementation in France reaches all kinds of people in need. To ensure that all people needing food aid are reached, partner organisations put in place specific outreach initiatives. For example, two partner organisations have reported the use of touring trucks to find people in the most remote areas of the territory.

Adjustments to FEAD to address new challenges [*criterion: effectiveness*]

In France, the **challenges brought about by the pandemic and the cost-of-living crisis have widened the scope of target groups** falling under FEAD support. In 2020, the number of people needing food aid ‘significantly increased’⁴⁹³. Between 2020 and 2021, a partner organisation representative explained that there has been a 22 percent increase in the number of recipients of food aid. Since COVID-19, partner organisations have noticed an increase in the number of young adults (e.g., university students) and ‘working poor’ seeking food aid. During the pandemic, FEAD operations were also impacted by the unavailability of most volunteers

⁴⁸² DGCS (2022). Programme opérationnel français FEAD (PO1) 2014-2020. Rapport d’exécution 2021.

⁴⁸³ DGCS (2022).

⁴⁸⁴ DGCS (2022).

⁴⁸⁵ Interviews with representatives of FEAD partner organisations in France conducted between July and September 2023.

⁴⁸⁶ DG EMPL (2018). FEAD Country fiche for France.

⁴⁸⁷ Interviews with representatives of FEAD partner organisations in France conducted between July and September 2023.

⁴⁸⁸ Les Restaurants du Coeur (2022). Rapport Annuel 2021/2022.

⁴⁸⁹ Interviews with representatives of FEAD partner organisations in France conducted between July and September 2023.

⁴⁹⁰ Interviews with representatives of FEAD partner organisations in France conducted between July and September 2023.

⁴⁹¹ This might be theoretically inaccurate, but it is how a representative of a partner organisation described it during an interview conducted in September 2023.

⁴⁹² Interviews with representatives of FEAD partner organisations in France conducted between July and September 2023.

⁴⁹³ DGCS (2021). Programme opérationnel français FEAD (PO1) 2014-2020. Rapport d'exécution 2020.

to deliver food⁴⁹⁴. To adapt to rules around social distancing, drive-through systems, and home delivery distributions have sometimes been implemented, with a greater number of products per package than in previous years⁴⁹⁵. Food aid experts interviewed have explained that the unavailability of volunteers was overcome by a stronger cooperation and pooling of resources (e.g., volunteers) of partner organisations. This cooperation ensured a flexible and pragmatic approach to food delivery.

The Restos du Coeur explained that the quality of support deteriorated because they had to **stop social inclusion activities (such as counselling) and focus on distributing food packages outdoors**. In contrast to their usual way of distributing food (whereby end recipients can freely choose their food), the Restos du Coeur had to distribute pre-selected food packages during COVID.

The Managing Authority **relaxed its guidelines to adjust to the COVID-19 pandemic**. Whilst rules around free distribution, storage and health safety conditions, and document retention have not been subject to relaxation, guidelines concerning the eligibility of individuals, support measures, European signage, material accounting, as well as the reporting of numerical data, have been subject to tolerance⁴⁹⁶.

REACT-EU funds were added to the FEAD in 2021 (104 million EUR)⁴⁹⁷. In 2020, REACT-EU funds allowed the purchase of an additional 12 types of products⁴⁹⁸. In 2021, a single ‘FEAD-REACT 2021’ procurement was launched⁴⁹⁹. REACT-EU funds have ensured the continuity of food aid from the EU in France⁵⁰⁰. During the pandemic, FEAD’s significance for food aid in France increased because other ways of gathering food (e.g., collections from supermarkets or agricultural donations) became less frequent.

In 2020, **the Managing Authority used flexibilities under the CRII to allow partner organisations to use e-vouchers or cards to distribute food indirectly to end recipients**. Between 2020 and 2021, 2,6 million EUR of the national budget was earmarked for a paper voucher scheme in Mayotte (France’s overseas territory) delivered by the French Red Cross. The General Secretariat for Regional Affairs of the Prefecture of Mayotte (SGAR) was designated as the delegated Managing Authority. However, the DGCS explained that the voucher scheme was challenging in practice. Consequently, expenses for this operation have not been claimed.

All partner organisations interviewed stood **strongly against using e-vouchers or other forms of indirect support**. They argued that e-vouchers jeopardise the universality of FEAD support because it necessitates access to digital infrastructure and excludes some target groups (e.g., people who are not registered with social services). Thus, e-vouchers would exclude some of the most deprived target groups and be counterproductive to the FEAD’s objectives. Partner organisations are also against vouchers because they do not allow for accompanying measures⁵⁰¹ i.e. with vouchers, food aid loses its social dimension.

Horizontal principles of FEAD [*criterion: effectiveness*]

In the FEAD’s delivery in France, the principle of ‘unconditional reception’ is by definition non-discriminatory. **Gender equality and discrimination** are enshrined in most partner organisations’ founding documents⁵⁰². Some partner organisations also put in place specific training (e.g., about interculturality) for volunteers delivering FEAD support⁵⁰³. The fact that most FEAD end recipients are women also demonstrates that the principle of gender equality is implemented in FEAD operations. The principle of non-discrimination and respecting the dignity of the most deprived persons applies not only to the delivery, but also to the procurement of food.

Indeed, when procuring FEAD food, FranceAgriMer ensures that the most deprived have access to a similar quality of food, and that there is **no discrimination** whatsoever e.g., in terms of attractiveness of packaging⁵⁰⁴.

⁴⁹⁴ DGCS (2021) and interviews with representatives of FEAD partner organisations in France conducted between July and September 2023.

⁴⁹⁵ DGCS (2021). Programme opérationnel français FEAD (PO1) 2014-2020. Rapport d’exécution 2020.

⁴⁹⁶ DGCS (2021). Programme opérationnel français FEAD (PO1) 2014-2020. Rapport d’exécution 2020.

⁴⁹⁷ Based on the screening tool provided by the research team

⁴⁹⁸ DGCS (2021). Programme opérationnel français FEAD (PO1) 2014-2020. Rapport d’exécution 2020.

⁴⁹⁹ DGCS (2022). Programme opérationnel français FEAD (PO1) 2014-2020. Rapport d’exécution 2021.

⁵⁰⁰ DGCS (2021). Programme opérationnel français FEAD (PO1) 2014-2020. Rapport d’exécution 2020.

⁵⁰¹ Interviews with representatives of FEAD partner organisations in France conducted between July and September 2023.

⁵⁰² Interviews with representatives of FEAD partner organisations in France conducted between July and September 2023.

⁵⁰³ Interviews with representatives of FEAD partner organisations in France conducted between July and September 2023.

⁵⁰⁴ Interview with a representative of FEAD intermediary organisation in France conducted in September 2023.

FranceAgriMer has detailed procedures in place to ensure the food provided to the most deprived is of a similar quality and attractiveness as those found in supermarkets for the same, mid-range products.

As regards considering environmental impacts, the Managing Authority introduced **ESG requirements** for its procurements. It requested that deliveries be optimised (i.e., that delivery trucks always be full) and that partner organisations return transport pallets⁵⁰⁵. This has proven effective: the return rate of pallets is monitored and prompts partner organisations to return pallets more frequently.

Concerning the **prevention of food waste**, two laws have been passed during the 2014-2020 FEAD programming period: the “Loi Garot” (2016) and the “Loi Egalim” (2018). These laws reinforce the horizontal principle of preventing food waste and complement FEAD operations.

Facilitating and hindering factors [*criterion: effectiveness*]

The **structure of FEAD governance has been praised as a facilitating factor** by most interviewees. Indeed, the four partner organisations authorised to deliver FEAD support are large ‘network heads’, which all have the capacity to manage a significant budgetary envelope. In addition, grouped purchases via FranceAgriMer help to structure and strengthen networks. Otherwise, stakeholders report that it would be complicated to coordinate with each 400 delivery points individually. The partner organisations’ extensive networks ensure that the whole territory is covered, including the most remote ones. This territorial coverage has a positive impact on local communities because it brings into play local authorities and businesses. In remote areas, partner organisations’ activities allow for social cohesion since partner organisations’ premises are often the sole space to create social links. Through taking part to partner organisations’ activities, isolated people benefit from social interactions.

Moreover, **public procurements ‘go back directly into the European economy’**, which could be seen as a positive unintended impact⁵⁰⁶. In terms of the facilitating factors pertaining to the results, the **FEAD’s comprehensive list of products allows end-recipients to enjoy a complete meal**.

Audits and rules around controls have been described as **hindering factors** during interviews. Partner organisations are subject to several layers of controls, including controls already in place as per national law. An interviewee explained that the Managing Authority added an additional layer of control, which prompted discussion. There is a contrast between the fact that the FEAD is mostly delivered by volunteers (with a great turnover rate) and the administrative burden generated by FEAD implementation. This administrative rigour about European funds is difficult to explain when working with the most deprived. In particular, the fact that all entities, regardless of their size and capacity, are subject to the same control procedures (i.e., lack of flexibility) is difficult to understand on the ground. One stakeholder explained that this hindering factor was unexpected, as FranceAgriMer and partner organisations did not initially foresee how different FEAD is from the MDP. The heavier administrative requirements of using European structural funds were not in place during the MDP. A representative of the intermediary organisation FranceAgriMer explained that the staff found it difficult to adapt to these changes, so it is not surprising that volunteers faced difficulties too.

There can sometimes be **external factors** that **hinder** the effectiveness of FEAD operations, such as **climatic events** (e.g., droughts) that delay the supply of a specific product.

Overall cost-effectiveness of FEAD operations [*criterion: efficiency*]

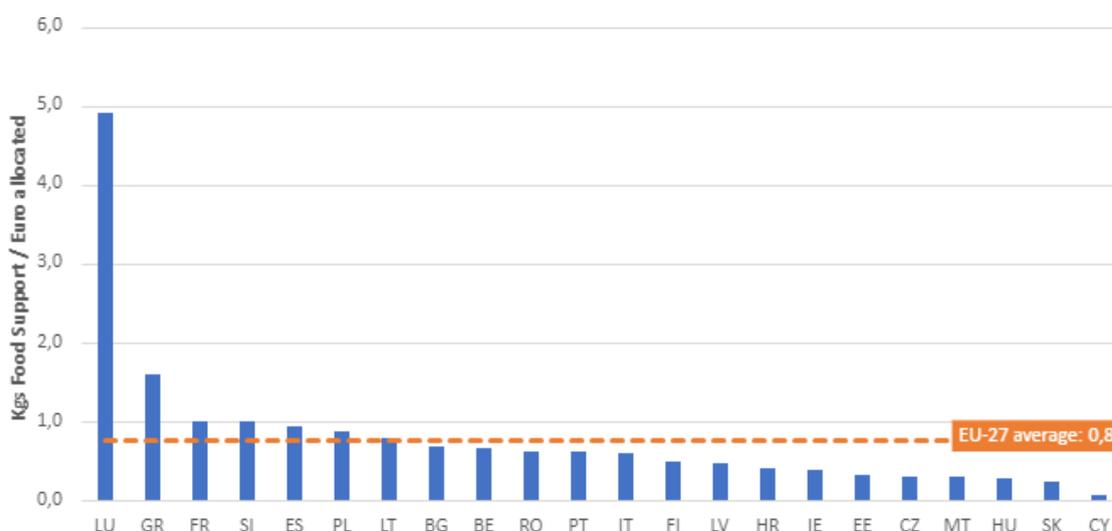
On average, per allocated EUR, France was able to distribute one kilogram of food support, which is higher than the EU average (0,8 kg per Euro, see Figure A. 82)⁵⁰⁷. This makes France the third most cost-effective FEAD OP I country to deliver food support. Simultaneously, FEAD operations are unanimously deemed **cost-effective** by stakeholder interviews.

⁵⁰⁵ Interview with representatives of the FEAD Managing Authority in France conducted in September 2023.

⁵⁰⁶ Interviews with representatives of FEAD partner organisations in France conducted between July and September 2023.

⁵⁰⁷ Based on data provided by research team.

Figure A. 82 – Kgs of food support per allocated EUR



Source: research team, based on data from the SFC 2014 database.

A key factor for FEAD’s cost-effectiveness in France is the fact that the **support is delivered at no cost by volunteers from partner organisations**⁵⁰⁸. Volunteering has a ‘multiplier effect’ because it costs little and has a great impact. A representative from a partner organisation explained: “*For each euro of public money invested, 4-5 euros are delivered on the ground thanks to volunteers*”. Moreover, the fact that the state is responsible for procuring the food facilitates the FEAD’s efficiency. Indeed, having a centralised food purchase system (through FranceAgriMer) allows to purchase in large volumes, and therefore, at attractive prices⁵⁰⁹. Grouped purchase also diminishes the risk of product unavailability thanks to the diversity of suppliers. For example, in case of drought, there will always be a region that is not impacted and FranceAgriMer can choose to rely on this supplier instead of suppliers affected by the drought. This would not be the case if partner organisations had to secure the food themselves locally.

Vouchers may appear cost effective in theory because unlike food, they do not have set expiry dates and do not incur transport costs⁵¹⁰. They may also help to respect the dignity of end-recipients because end-recipients using vouchers can choose the products they would like to receive and are not limited to the pre-defined list of FEAD products. However, **vouchers’ cost effectiveness appears limited in practice because they are difficult to trace**⁵¹¹. The Managing Authority devised procedures to ensure traceability, but in practice, these were not enough. The Managing Authority took anti-fraud measures (e.g., to avoid duplication) but it was difficult to implement these on the ground, as people putting in place the operations were not adequately trained. A representative from a partner organisation argued that vouchers are not cost-effective because the costs to introduce and manage the scheme are higher than the benefits. In addition, the loss of social inclusion activities limits vouchers’ cost effectiveness⁵¹².

Administrative burden of monitoring and reporting requirements [criterion: efficiency]

All stakeholders interviewed reported **challenges with monitoring and reporting requirements**. Partner organisations evoked the **rigidity of rules, which are not adapted to reality**. For example, as regards promotion requirements, the FEAD posters in some FFBA members’ premises were not in the right format or colour. This was noted during inspections. However, it is difficult to comply with such a level of detail when most FFBA do not have stable premises and/or share their premises with other, unrelated organisations.

Delivery notes were most frequently reported as a burdensome element. Notably, the requirement to keep delivery notes on paper appeared counter-productive since all partner organisations use robust digitalised processes.

⁵⁰⁸ Interviews with representatives of FEAD partner organisations in France conducted between July and September 2023.

⁵⁰⁹ Interviews with representatives of FEAD partner organisations in France conducted between July and September 2023.

⁵¹⁰ Interview with representatives of the FEAD Managing Authority in France conducted in September 2023.

⁵¹¹ Interview with representatives of the FEAD Managing Authority in France conducted in September 2023.

⁵¹² Interview with representatives of the FEAD Managing Authority in France conducted in September 2023 and interviews with representatives of FEAD partner organisations in France conducted between July and September 2023.

The back-and-forth to trace delivery notes also appeared unnecessarily burdensome. For example, a representative from a partner organisation explained that they had to return the same delivery note four times to different entities.

The Managing Authority also needs to present a ‘million pieces’ of evidence during **audits**. There are already detailed rules for procurements at the national level. On top of these national rules, there is a second audit round by the European Commission. Even if all is in order, the auditing authority will seek to go further and request more details. This forces the Managing Authority to rewrite procedures and incurs additional work.

Simplification measures [*criterion: efficiency*]

Flat rates are a good idea in theory, but they **do not simplify operations in practice for the Managing Authority**. For example, even though the European Commission does not request Managing Authorities to trace the new flat rates introduced under ESF+, the French Managing Authority still needs to put in place a ‘lightened’ audit trail to comply with these internal procedures. Nonetheless, partner organisations generally appreciate flat rates as these allow for a return on logistics costs (stocking and transports)⁵¹³. Partner organisations welcomed the fact that flat rates have increased from 5% to 7% under ESF+⁵¹⁴.

A yearly review of administrative requirements is taking place between the Managing Authority and partner organisations. As partner organisations have proved able to pass this procedural review, it is suggested that they could be granted a certification valid for ten years. Stakeholders stressed the **need to adopt a risk-based, or sample-based approach to controls instead of aiming to control each component of the system**.

Although the intermediary organisation’s expertise lies in the scientific control of food quality, **administrative requirements and rules sometimes force FranceAgriMer to perform technical inaccuracies**. For example, if FranceAgriMer decided to buy a coffee made up of 50% Arabica beans and 50% Robusta beans, controllers would require that this composition is precisely evidenced. However, it is not technically possible to precisely determine the coffee’s composition. Even if FranceAgriMer chooses a coffee with 100% Arabica beans, it is scientifically impossible to prove that the coffee is 100% made up of Arabica beans (whereas controllers require such a level of detail). In addition, it is impossible for FranceAgriMer to have oversight of each of the 15-25.000 food deliveries per year.

Coherence of FEAD with other interventions [*criterion: coherence*]

Stakeholders interviewed deem **FEAD operations coherent with France’s national policies on food aid and social inclusion**. The fact that food aid schemes financed by national funds are also managed by the FEAD Managing Authority (Ministry of Labour, Health and Solidarities) ensures coherence. Indeed, staff working on FEAD and staff working on national initiatives within the Ministry collaborate to avoid duplication and maximise synergies. As explained in an earlier section, coherence is also reinforced by the fact that the former Managing Authority of the MDP (Ministry of Agriculture) complements the Managing Authority’s work on aspects related to food quality.

As evoked above, two laws have been passed during the 2014-2020 FEAD programming period: the “loi Garot” (2016) and the “loi Egalim” (2018). These **laws prevent food waste and ensure coherence with FEAD horizontal principles**.

A partner organisation representative explained that the **choice of the four FEAD partner organisations is also coherent** because these organisations represent 90% of food aid in France and cover the whole territory.

8.2. Is FEAD still relevant?

Relevance to target groups [*criterion: relevance*]

Due to the principle of ‘unconditional reception’, interviewees think **all target groups needing FEAD support were reached**. The fact that the OP does not specify target groups may allow for gaps in FEAD reach, but this is not backed by evidence. To ensure that all people needing food aid are reached, partner organisations put in place specific outreach initiatives. For example, two partner organisations have reported the use of touring trucks to find people in the most remote areas of the territory.

Nonetheless, partner organisations often reported **a lack of relevance about the choice of FEAD products to be distributed**. Indeed, whilst the Managing Authority seeks to promote healthy eating habits, it is also important to keep a pragmatic approach towards the needs of the most deprived end recipients. For example,

⁵¹³ Interviews with representatives of FEAD partner organisations in France conducted between July and September 2023.

⁵¹⁴ Interviews with representatives of FEAD partner organisations in France conducted between July and September 2023.

partner organisations had to defend the inclusion of ready-made meals in the list of FEAD products to be procured. Indeed, although ready-made meals do not fit nutritional quality criteria, they are often better suited to the living conditions of the most deprived (e.g., precarious housing, squats).

Relevance of FEAD now and in the future [*criterion: relevance*]

A partner organisation representative said: “**The FEAD is indispensable and will keep being relevant during future crises.** It is both a food aid programme but also has the ability to respond to the impact of various crises on precarious groups”. Another partner organisation representative remarked that the envelope allocated to the FEAD throughout the programming period remained the same, whereas the demand for FEAD increased. It was suggested that even more money should be allocated to FEAD due to its relevance in responding to current crises. As evoked above, the pandemic and the cost-of-living crisis have widened the population seeking FEAD support, with a greater number of university students and ‘working poor’ receiving food aid. With fuel costs rising, the share of people’s expenditure going to transport will increase, which means they will have less money to spend on food. All stakeholders interviewed argued that the need for FEAD will increase with the ongoing inflation and are thus advocating for bigger budgets.

8.3. Did FEAD make a difference and to whom?

EU added value [*criterion: EU added value*]

According to a partner organisation representative, the **FEAD had a ‘structuring’ impact on France’s food aid policy due to the weight and stability of the envelope allocated.** Because the FEAD budget is set for seven years, partner organisations have greater visibility over the future and can plan their operations better. This suggests a positive role effect of EU support.

Nonetheless, the Managing Authority did not describe FEAD as having a ‘structuring’ impact on food aid in France but rather views it as complementary to national policies. According to the Fédération Française des Banques Alimentaires (FFBA) the FEAD’s EU added value lies in a **volume effect because 40% of their supply comes from the EU.** This means that EU support allows for a greater volume of food distributed to the most deprived. As evoked above, the EU’s significant support for food aid became evident between 2020-2021 when other sources of supply decreased.

Overall, stakeholders interviewed agree that FEAD products ensure the basis of an end-recipient’s meal. This basis is complemented by other products (e.g., fresh food) that are sourced elsewhere. All stakeholders interviewed agree that **FEAD is a pillar of France’s food aid ecosystem.**

Scope effects are limited because FEAD is in continuity with the MDP. Moreover, French stakeholder’s approach to food aid had already quite a wide scope (e.g., unconditionality of support, links between food aid and social inclusion).

In terms of **process effects, FEAD fostered stronger collaboration between the Managing Authority and partner organisations.** Indeed, whilst the Ministry and partner organisations were already working together as part of national initiatives, the EU programme’s financial weight reinforced this collaboration. The Managing Authority and partner organisations collaborate on all aspects of the FEAD e.g., by devising a grid of accompanying measures and anticipating related audit trails. This bottom-up approach was commended at European level.

Visibility [*visibility*]

Feedback from interviewees suggests that the **French public is aware of FEAD operations and that the support comes from the EU.** For example, during an event three years ago at the Ministry of Agriculture, the FFBA remarked that visitors (i.e., not necessarily end recipients) were aware that the support came from the EU. Moreover, the Restos du Coeur’s founder (comedian Coluche) contributed to creating the MDP, so the Restos du Coeur “always politically and institutionally” promoted the food aid’s European dimension.

Partner organisations agree that because the **EU flag is on the products distributed,** end recipients are aware that the support comes from the EU. Moreover, **volunteers are trained to say that the support comes from the EU.** The Managing Authority has put in place a tool to report non-compliance with FEAD rules. Some instances of **non-compliance with visibility requirements have been signalled,** which shows that the public is aware of these requirements.

9. Good practices

A good practice reported by the Croix-Rouge stems from their branch called “**Croix-Rouge Insertion**”. Croix-Rouge Insertion created “social inclusion sites” whereby vulnerable groups such as the long-term unemployed, homeless persons, or young people without an income learn skills related to logistics. Some of these people are employed in the Croix-Rouge’s warehouses used during FEAD operations. Thus, on some occasions, people at risk of social exclusion found jobs within the context of FEAD operations.

10. Conclusions and lessons learned

FEAD stakeholders are **generally satisfied with the way FEAD is structured in France**. Such a centralised system works well, and allocating budgets to regional/local authorities would fragment food aid policy and effectiveness for target groups.

The evidence gathered from stakeholders’ consultation and desk research indicates that **FEAD reached its objectives**. Eligibility criteria are very loose, with a bottom-up approach to the definition of target groups. Partner organisations believe that this approach is key to the FEAD’s effectiveness. The reasoning behind stakeholders’ evaluation of the FEAD’s effectiveness is that because the food actually reached people, FEAD fulfilled its objectives. Partner organisations would like **more flexibility as regards monitoring and reporting requirements**. They advocate for a risk-based or sample-based approach to ensure that auditing efforts are targeted at specific situations only instead of hindering the smooth running of operations for well-established partner organisations. There could be more digitalisation introduced in monitoring and reporting processes, especially as regards delivery notes.

Similarly, the Managing Authority recognises an **administrative burden** linked to monitoring FEAD operations and submitting expenses for reimbursement. In some cases, even when simplification is encouraged by the European Commission, such simplification cannot happen in practice because of internal audit rules.

FEAD plays an essential role in France’s food aid ecosystem. It has been described by partner organisations as a ‘pillar’ of food aid in France. It is a stable source of supply for partner organisations that can plan their operations over several years. FEAD is also **complementary to national initiatives** such as the Garot law, which contributed to increasing food donations. Whilst FEAD covers long shelf-life products of an end-recipient’s meal, national initiatives provide fresh produce. This complementarity ensures a balanced meal for recipients of food aid.

Appendices

Appendix 1: Methodology

This case study is based on a review of key operational and strategic documents. These documents mostly informed the intervention logic and the section on the national policy framework. Interviews were conducted with representatives from the four partner organisations, the Managing Authority, and the intermediary organisation responsible for procuring the food (FranceAgriMer). Stakeholders’ insights were crucial to shed light on both the FEAD’s design and implementation. Statistical evidence was used to back-up specific sections and present a diagnosis of France’s socio-economic situation since 2013. When triangulating the evidence evoked above, a coherent picture of the FEAD in France emerged.

Following a first draft, gaps were identified, and further interviews were arranged with food aid experts.

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Primary information collection

- Interview with representatives of the FEAD Managing Authority in France conducted in September 2023
- Interviews with representatives of FEAD partner organisations in France conducted between July and September 2023
- Interview with a representative of FEAD intermediary organisation in France conducted in September 2023.

Interview with researchers in the field of food aid policy in France conducted in December 2023.

Annex 3: FEAD indicators

Table A. 74 – General financial data for the implementation of FEAD in France in 2014-2022

Indicator	Total amount of eligible public expenditure approved in the documents setting out the conditions for support of operations (EUR)	Total amount of eligible public expenditure incurred by beneficiaries and paid in implementing operations (EUR)	Total amount of eligible public expenditure declared to the Commission (EUR)	Implementation rate (expenditure declared as share of allocated budget)
2014-2022	812,477,863.83	619,247,646.72	615,972,862.70	76%

Source: SFC 2014 database.

Table A. 75 – FEAD common output indicators in France, 2015-2022

Output indicators on food support distributed	2014	2015	2016	2017	2018	2019	2020	2021	2022
Quantity of fruits and vegetables (tonnes)	6,230.58	7,952.52	7,145.79	7,619.62	7,350.80	14,204.94	11,343.00	15,264.42	15,422.14
Quantity of meat, eggs, fish, seafood (tonnes)	2,368.75	3,543.03	4,757.92	4,697.76	4,714.31	5,552.50	4,872.00	8,304.35	7,151.70
Quantity of flour, bread, potatoes, rice and other starchy products (tonnes)	10,238.82	10,924.54	9,138.99	9,865.82	10,094.12	11,816.64	9,535.00	15,170.72	13,635.29
Quantity of sugar (tonnes)	2,602.67	2,752.84	2,784.38	2,152.08	1,989.11	5,477.00	2,075.00	1,963.66	1,527.77
Quantity of milk products	37,145.77	40,002.20	47,346.57	39,914.37	39,871.07	38,923.46	36,230.00	32,644.73	35,978.64

Output indicators on food support distributed	2014	2015	2016	2017	2018	2019	2020	2021	2022
(tonnes)									
Quantity of fats, oil (tonnes)	2,939.08	4,047.33	2,939.38	2,821.20	2,536.32	2,694.61	3,637.00	3,295.83	1,868.73
Quantity of convenience food, other foodstuff (not falling in above mentioned categories) (tonnes)	4,334.09	4,864.27	6,036.12	6,325.08	6,515.99	2,485.30	5,199.00	6,932.11	5,908.97
Total quantity of food support distributed (tonnes)	65,859.76	74,086.73	80,176.15	73,395.93	73,071.72	81,154.45	72,891.00	83,575.82	81,493.24
Proportion of FEAD co-financed food produc	28.20	29.40	31.73	29.68	34.00	27.40	24.50	28.15	20.81

Output indicators on food support distributed	2014	2015	2016	2017	2018	2019	2020	2021	2022
Percentage of total volume of food distributed by the partner organisations (%)									
Total number of food packages distributed partly or totally financed by the OP	72,78 1,897 .00	76,61 6,897 .00	76,25 2,590 .00	57,71 4,869 .00	54,24 9,743 .00	62,90 8,116 .00	62,93 4,453 .00	59,63 9,117 .00	70,32 3,907 .00

Source: SFC 2014 database.

Table A. 76 – Number of FEAD participants in France in 2014-2022

Result indicators on food support distributed	2014	2015	2016	2017	2018	2019	2020	2021	2022
Total number of	4,047 ,812	4,216 ,026	4,397 ,813	4,459 ,019	4,340 ,340	4,790 ,472	5,504 ,382	5,120 ,090	5,614 ,867

Result indicators on food support distributed	2014	2015	2016	2017	2018	2019	2020	2021	2022
persons receiving food support									
Number of children aged 15 years or below	1,471,148	1,438,335	1,561,066	1,547,553	1,505,296	1,691,539	1,629,078	1,598,303	1,740,609
Number of persons aged 65 years or above	250,801	183,025	177,597	178,253	194,985	231,151	328,131	334,812	364,352
Number of women	2,419,290	2,212,815	2,307,787	2,348,631	2,291,810	2,498,468	2,889,109	2,645,985	2,901,824
Number of homeless	0	1,010,198	0	0	673,077	735,762	613,443	581,793	639,645

Source: SFC 2014 database.

X.8 Italy

11. Context and background

The **Italian socio-economic context has improved or remained constant** since 2014/2015 across most indicators presented in Table A. 77 below, which summarises the most relevant indicators on poverty and social exclusion, severe material deprivation, child poverty, and food insecurity in Italy. Notably, the Italian situation is comparatively worse than the EU average in relation to the at risk of poverty and social exclusion rate (AROPE) for both adults and children, as measured by the AROPE rate, but slightly more positive concerning severe material and social deprivation (SMSD rate).

Table A. 77 – Socio-economic context in Italy

Italy	2015	2016	2017	2018	2019	2020	2021	2022	Trend	
1. At-risk-of-poverty or social exclusion rate (AROPE) Total	28.4	27.8	25.9	25.7	24.6	24.9	25.2	24.4		
2. AROPE Children	34.4	32.6	30.4	29.7	27.2	28.9	29.7	28.8		
3. Severe material and social deprivation rate (SMSD)	12.1	10.1	6.6	6.5	6.4	6.2	5.9	4.5		
4. Severe material deprivation rate (SMD)	11.6	5.8	12.1	10.1	8.5	7.4	5.9	0.0		
5. Inability to afford a meal with meat, chicken, fish (or vegetarian equivalent) every second day	12.6	11.8	14.3	13.4	11.1	9.9	9.1	7.5		
6. Impact of social transfers (other than pensions) on poverty reduction % reduction of AROPE	21.5	21.7	21.4	19.4	21.6	20.2	21.0	29.5	25.8	
7. Housing cost overburden	8.5	8.6	9.6	8.2	8.2	8.7	7.2	7.2	6.6	
8. Self-reported unmet need for medical care % of population 16+	7.0	7.2	5.5	1.8	2.4	1.8	1.8	1.8	1.8	
9. Households with very low work intensity	11.2	12.1	10.8	10.7	9.6	10.2	10.8	9.8		
11. Population in the EU could not afford unexpected financial expenses	38.8	39.9	40.4	38.3	35.1	33.8	32.3	32.7	32.9	
13. Share of total population having neither a bath, nor a shower in their dwelling	0.4	0.4	0.4	0.6	0.5	0.7	0.7			
14. No indoor flushing	0.4	0.4	0.4	0.6	0.5	0.7	0.7			
17. Persons who cannot afford a telephone	0.1	0.2	0.6	0.4	0.3	0.1	0.1			
18. Persons who cannot afford to replace worn-out clothes	15.0	15.0	10.7	7.6	8.2	8.3	7.5	7.6	6.0	
20. Persons who cannot afford to get-together with friends or family (relatives) for a drink or meal at least once a month	13.7	11.1	9.9	6.9	6.5	6.9	6.8	6.5	4.8	
21. Persons who cannot afford internet connection for personal use at home	7.7	7.0	6.2	4.4	4.5	3.8	3.6	3.7	2.6	
22. In-work risk of poverty	9.6	9.8	10.0	11.1	10.9	10.3	9.6	10.1	9.7	
23. Long-term unemployment	8.2	7.4	7.1	6.9	6.5	5.9	5.1	5.4	4.6	
25. Employment rate	55.3	56.0	57.1	57.9	58.5	59.0	57.5	58.2	60.1	
26. Children (aged less than 18) living in households with very low work intensity	8.5	9.0	7.8	7.1	6.2	7.4	8.2	6.2		
27. At-risk-of-poverty rate for children	26.8	26.7	26.4	26.2	24.5	25.1	26.0	25.4	25.4	
28. Severe material and social deprivation rate (SMSD) for children	15.8	12.6	7.4	7.1	5.8	7.1	7.1	4.7		

Source: Eurostat, 2023.

According to available data from Eurostat, 24.4% of the Italian population (14.4 million people) were at **risk of poverty or social exclusion** in 2022, 4 percentage points lower than in 2015, in comparison to the EU-27 average of 21.6% in 2022. The rate of children at risk of poverty or social exclusion is even higher, amounting to 28.8% in 2022 (5.6% lower than in 2015 at 34.4%), slightly higher than the EU average (24.6%). This rate is even higher among the Roma population, where in 2021 the AROPE was 98%.⁵¹⁶ Moreover, 4.5% of Italians (2.7 million people) in 2022 were in **severe material and social deprivation**, in comparison to over 12.1% in 2015 (7.6 percentage points lower), which depicts a more positive situation than the EU average (6.7% in 2022). 4.7% of children in Italy were in severe material and social deprivation in 2022, 11.1 pp lower than in 2015, and similarly lower than the EU average (8.4% in 2022).

Moreover, in 2022 9.8% of Italians (5.8 million people) lived in **households with very low work intensity**, 1.4 percentage points lower than in 2015. In relation to **food insecurity**, the share of Italians who were unable to afford a meal with meat, chicken, fish (or vegetarian alternatives) every second day amounted to 7.5% in 2022 (4.4 million people), 5.1 percentage points lower than in 2014. The overall **employment rate** was 60.1% (35.5 million people) in 2022, 9.7% percentage points lower in comparison to the 8 of the EU (69.8%).

⁵¹⁶ FRA (2021) Roma survey

12. Reconstructing the intervention logic

12.1. National policy framework

The establishment of FEAD in 2014 introduced innovation within the Italian national policy framework of material assistance and social inclusion, while ensuring elements of continuity with previous national policies and programmes. In lack of a comprehensive, structural policy for income support and social assistance until recent years, **FEAD** quickly became a **fundamental element of the Italian political landscape of poverty reduction**.

FEAD significantly builds on the experience and knowledge gathered by its predecessor programme MDP (programme of aid for the most deprived persons), which ran from 1987 to 2013 and aimed at the redistribution of unsold food stock produced through the Common Agricultural Policy funds via charities to reach the most deprived. Several innovations were pioneered by FEAD in Italy, such as the focus on new target groups including deprived children and the homeless, and the introduction of accompanying measures aimed at the social inclusion of the most deprived.⁵¹⁷

The national policy framework has experienced **several key developments** in the last decade with the introduction of the **Inclusion income (Reddito di Inclusione, REI)** in 2018,⁵¹⁸ replaced by the **Citizens' income (Reddito di Cittadinanza, RDC)**⁵¹⁹ in 2019, a conditional and non-individual guaranteed minimum income. Both policies aimed to reduce poverty by providing low-income households with financial aid while facilitating their active participation in the labour market through personalised projects to foster social inclusion and employment. Notably, the key differences between the two concern the eligibility requirements and the amount of financial support granted. To receive REI, Italian citizens or residents are required to have resided in Italy for at least two consecutive years, while in the case of RDC, this number rises to ten years. Moreover, the RDC was granted in monthly payments ranging between EUR 780 and 1330 depending on the number of household members, a sum nearly three times higher than that of REI (EUR 187,50 and 539,82).

On the basis of the Legislative Decree no. 48/2023 of 4 May 2023, the so-called “**Labour Decree**” (*Decreto Lavoro*), the Citizens' income was replaced in January 2024 by two new subsidies: the **Inclusion cheque (assegno di inclusione)**, and the **Aid to vocational training (supporto alla formazione e al lavoro)**. The Inclusion cheque is reserved exclusively for low-income households where at least one family member is either a minor, older than 60 years old, or with a disability, for a maximum monthly value of EUR 780 and a total duration of 30 months.⁵²⁰ On the other hand, the Aid to vocational training is an active labour market policy targeting low-income, unemployed people aged between 18 and 59 actively looking for a job who are also ineligible for the Inclusion cheque as well as individual members of household beneficiaries of the Inclusion cheque, through participation in vocational training, qualification, and re-qualification projects.⁵²¹

One of the key components of the FEAD Programme which was consolidated throughout the first programming period (2014-2020) is its **extensive network of active third sector stakeholders** established through MDP and their **strong involvement in the provision of social services**, which has evolved through time and developed into a widespread network of entities directly working with individuals in extreme poverty and serious

⁵¹⁷ European Commission (2018). FEAD Country Fiche Italy. Available at:

<https://www.lavoro.gov.it/sites/default/files/temi-e-priorita/europa-e-fondi-europei/focus-on/fondo-di-aiuti-europei-agli-indigenti-Fead/Documents/2018-FEAD-Country-Fiche-Italy.pdf>

⁵¹⁸ Ministry of Labour and Social Policies (N.A.). Inclusion income (REI) (*Reddito di inclusione (REI)*). Available at:

<https://www.lavoro.gov.it/temi-e-priorita/poverta-ed-esclusione-sociale/focus-on/reddito-di-inclusione-rei/pagine/default>

⁵¹⁹ Ministry of Labour and Social Policies (N.A.). Citizens' Income (*Reddito di Cittadinanza*). Available at:

<https://www.redditodicittadinanza.gov.it/>

⁵²⁰ Ministry of Labour and Social Policies (N.A.). Inclusion cheque (*Assegno di inclusione*). Available at:

<https://www.lavoro.gov.it/temi-e-priorita/decreto-lavoro/Pagine/assegno-di-inclusione>

⁵²¹ Ministry of Labour and Social Policies (N.A.). Vocational training support (*Supporto formazione e lavoro*). Available at:

<https://www.lavoro.gov.it/temi-e-priorita/decreto-lavoro/pagine/supporto-formazione-e-lavoro>

marginalisation. This extended network plays a key role in the Italian welfare system and provision of basic material assistance and food distribution to the most deprived, as demonstrated by the governance and delivery of the FEAD Programme (discussed in Section 2.4).⁵²²

12.2. Objectives and target groups

As outlined in its Operational Programme, the **general objective** of FEAD in Italy is to **tackle food and severe material deprivation and contribute to the social inclusion of the most deprived individuals, contributing to reaching the EU2020 target for poverty reduction** by decreasing by at least 2.2 million the number of people at risk of poverty and social exclusion in Italy by 2020.

Four types of material deprivation are specifically defined by the Italian Operation Programme:⁵²³ food deprivation; material deprivation of children and young people in the school environment; food and educational deprivation of children and young people in deprived areas; and material deprivation of homeless and other marginalised groups. Five further **specific objectives** are also laid out:⁵²⁴

- mitigate food deprivation;
- promote social mobility to tackle material deprivation of children and young people in the school environment;
- tackle early school leaving to fight educational and social deprivation of young people in deprived areas;
- mitigate material deprivation to tackle specific needs of children and other frail categories in material deprivation;
- tackle extreme marginality, with a focus on the homeless and people in severe deprivation.

Several **target groups** are discerned in connection to the typologies of material deprivation set out:⁵²⁵ homeless people; individuals and families in absolute poverty and severe material deprivation, with particular attention to people living in severe psychological and social discomfort and families with children (among which larger families are prioritised); people with disabilities or housing deprivation; and pupils / young students in deprived conditions or housing deprivation. Figure A. 83 below showcases the **intervention logic of FEAD** in Italy as set out by the FEAD mid-term evaluation.

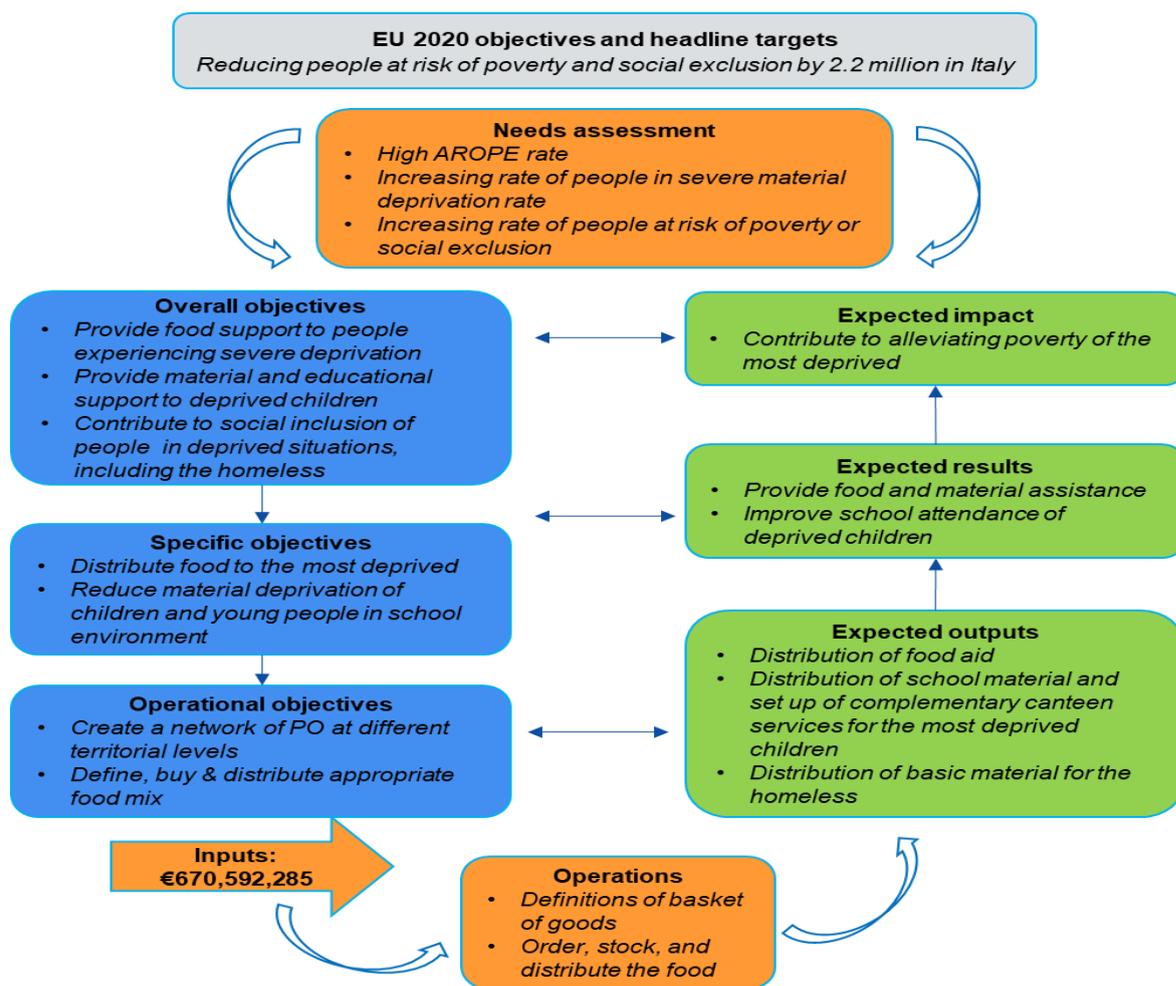
⁵²² European Commission (2018). FEAD Country Fiche Italy.

⁵²³ European Commission (2018). FEAD Country Fiche Italy; Ministry of Labour and Social Policies (2021). OPERATIONAL PROGRAMME FOOD DISTRIBUTION AND BASIC MATERIAL ASSISTANCE (PROGRAMMA OPERATIVO PER LA FORNITURA DI PRODOTTI ALIMENTARI E/O ASSISTENZA MATERIALE DI BASE). Available at: <https://www.lavoro.gov.it/temi-e-priorita/europa-e-fondi-europei/focus-on/fondo-di-aiuti-europei-agli-indigenti-Fead/Documents/PO-1-FEAD-versione-5.0.pdf>

⁵²⁴ Ministry of Labour and Social Policies (2021). OPERATIONAL PROGRAMME FOOD DISTRIBUTION AND BASIC MATERIAL ASSISTANCE.

⁵²⁵ European Commission (2018). FEAD Country Fiche Italy; Ministry of Labour and Social Policies (2021). OPERATIONAL PROGRAMME FOOD DISTRIBUTION AND BASIC MATERIAL ASSISTANCE.

Figure A. 83 – Intervention logic of FEAD in Italy



Source: adapted from FEAD mid-term evaluation

12.3. Implemented operations and accompanying measures

Four measures are foreseen by the Italian FEAD OP, although measure 2 (**material deprivation of children and young people in scholastic environment**) and measure 3 (**food and educational deprivation of children and young people in deprived areas**) have never been implemented due to administrative and regulatory constraints in relation to the burden of centralised procurement procedures at national level, and to the selection of the type of goods to be provided at European level.⁵²⁶ The two remaining measures focus on food deprivation (measure 1) and material deprivation of the homeless and other vulnerable categories (measure 4).⁵²⁷

671 million EUR was allocated to FEAD in Italy, to which an additional 199 million EUR was allocated through REACT-EU funding to counteract the COVID-19 crisis, for the purchase of food goods and the related flat-rate reimbursements to partner organisations for administrative, transport, and storage costs. This brought the **total funding of the FEAD 2014-2020 funding to 870 million EUR** (the largest funding across EU Member States).⁵²⁸

⁵²⁶ European Commission (2018). FEAD Country Fiche Italy.

⁵²⁷ European Commission (2018). FEAD Country Fiche Italy.

⁵²⁸ European Commission (2023). ESIF 2014-2020 EU payments (daily update), Cohesion Open Data. Available at: https://cohesiondata.ec.europa.eu/2014-2020-Finances/ESIF-2014-2020-EU-payments-daily-update-timeseries/gayr-92qh/about_data

Measure 1 was the first to be activated within FEAD in Italy and the most prominent since its outset. This measure aims to address **food deprivation** through the provision of food aid to individuals living in conditions of extreme poverty and vulnerability. As further discussed in Section 2.4, food products are purchased by the intermediary body *Agenzia per le erogazioni in agricoltura* (AGEA) within the Ministry of Agriculture and consequently distributed through partner organisations to direct beneficiaries through different channels. The majority of the Italian FEAD OP budget was allocated to this measure amounting to 988,312,100 million EUR in 2021 (including national co-financing and REACT-EU funding).⁵²⁹

Accompanying measures to Measure 1 included **educational activities** aimed at promoting healthy nutrition (e.g. cooking workshops), **accompaniment to social and administrative services, support and guidance in job searching, reception and listening activities** and **other types of psychological and social support** (e.g. in relation to family budget management, school support, first medical assistance and legal protection).

Measure 4 seeks to address the **material deprivation of homeless people and other vulnerable categories at risk of housing exclusion** as key target groups in order to contrast extreme marginalisation and more specifically, homelessness. It finances the provision of basic material goods (e.g., clothing, hygiene products, sleeping bags, emergency kits, food, ready meals) and other non-financial goods. The measure was first implemented in 2016 in cities and municipalities with more than 250,000 inhabitants. According to the latest annual monitoring report published in June 2022 by the Managing Authority, 50 million EUR has been allocated to this measure.⁵³⁰ Goods are purchased by beneficiaries or by partner organisations and are distributed directly by volunteers from the partner organisations or their accredited entities at their premises or on the streets.⁵³¹

Measure 4 was also combined with a set of **accompanying measures**, encompassing **educational activities and skills training/programmes, accompaniment to services, support and guidance in job searching, legal protection, first aid medical assistance**, and other support activities such as **assistance in housing searches and autonomy, in the purchase of food and non-food products, and assistance in carrying out bureaucratic procedures**.⁵³²

12.4. FEAD governance and delivery system

Key to FEAD implementation in Italy is the **constant cooperation between all relevant stakeholders** within the FEAD national coordinating group, which the programme is structured around. The group is in charge of supervising and monitoring the ongoing implementation of the programme, as well as managing its operational parameters, revising any aspects as needed to reflect the interaction with beneficiaries on the ground, including the food products to be distributed and the criteria for the selection of beneficiaries. The national coordination group is governed by the **Managing Authority**, which is placed within the **Italian Ministry of Labour and Social Policies, General Directorate for Inclusion and Social Policies, and consists of representatives from the intermedia body situated within AGEA, and of representatives of the seven national partner organisations**: Fondazione Banco Alimentare, Associazione Banco Alimentare Roma, Croce Rossa Italiana, Caritas Italiana, Comunità di S. Egidio, Banco delle 453uppo di Carità, and Associazione Sempre Insieme per la Pace.⁵³³

The **implementation of Measure 1**, which represents the majority of FEAD support in Italy, **relies on the FEAD intermediate body and the registered non-profit or public entities operating in the sector acting as partner organisations**. Building on its experience in the implementation of MDP, AGEA oversees the procurement of

⁵²⁹ Ministry of Labour and Social Policies (2021). OPERATIONAL PROGRAMME FOOD DISTRIBUTION AND BASIC MATERIAL ASSISTANCE; European Commission (2018). FEAD Country Fiche Italy; SFC 2014 database

⁵³⁰ Ministry of Labour and Social Policies (2022). ANNUAL REPORT FEAD – OP I (RELAZIONE DI ATTUAZIONE ANNUALE FEAD – OP I). Available at: <https://www.lavoro.gov.it/temi-e-priorita/europa-e-fondi-europei/focus-on/fondo-di-aiuti-europei-agli-indigenti-Fead/Documents/RAA-FEAD-2022.pdf>

⁵³¹ Ministry of Labour and Social Policies (2021). OPERATIONAL PROGRAMME FOOD DISTRIBUTION AND BASIC MATERIAL ASSISTANCE.

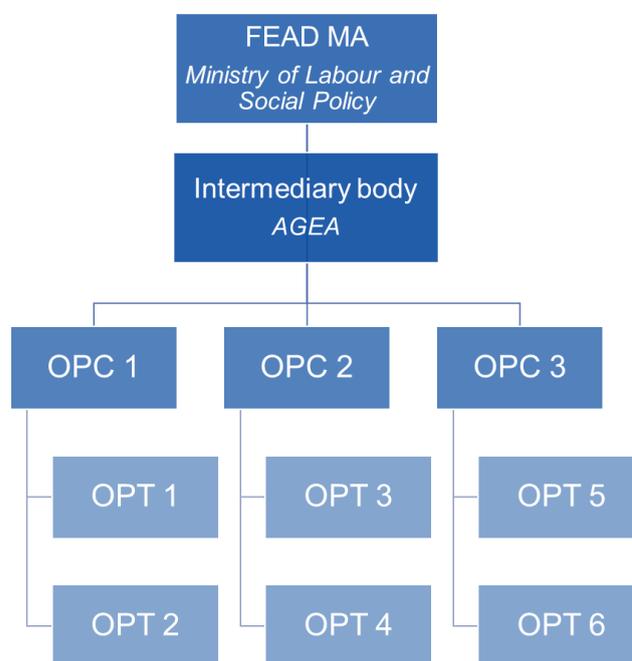
⁵³² SFC 2014 database

⁵³³ European Commission (2018). FEAD Country Fiche Italy.

the food stock through public auctions open to food suppliers and transport service companies and its distribution to the premises or warehouses of the 219 accredited coordinating partner organisations called *capofila* in Italian (OPC). OPC in turn either delivers it to their network of nearly 10,000 local partner organisations (OPT) spread across the national territory or distributes it directly to end beneficiaries. Local partner organisations distribute food through five main channels: canteen services, distribution of food packages, social warehouses (*454support sociali* in Italian), food and beverage units, and door-to-door delivery. Based on their available resources and expertise, local partner organisations also offer a range of accompanying measures for social inclusion spanning from initial needs assessments, orientation and basic counselling services, administrative support and more personalised assistance to basic health care, school support, and job search counselling.⁵³⁴

The **interaction between the key stakeholders involved in the implementation of FEAD** is showcased in the figure below. With regard to Measure 4, the Managing Authority interacts directly with FEAD Coordinating partner organisations without an intermediary body.

Figure A. 84 – Interaction between key stakeholders involved in the governance and delivery of FEAD operations



Source: own iteration

13. Key findings on the implementation of FEAD

13.1. To what extent was FEAD support successful – or not – and why?

Overall achievement of FEAD objectives [criterion: effectiveness]

The qualitative and quantitative evidence analysed, including the interviews conducted with key stakeholders and quantitative indicators, reveals that **FEAD support has been relatively successful in achieving the FEAD specific objectives**, although it is not fully possible to assess the extent of its effectiveness quantitatively due to the non-financial nature of the support provided.

⁵³⁴ European Commission (2018). FEAD Country Fiche Italy.

The key objective of FEAD OP I Italy is to provide **non-financial assistance to the most deprived persons** by food and/or basic material assistance and accompanying social inclusion measures. With regards to FEAD's **specific objectives** in Italy, the stakeholders consulted highlighted that FEAD support has allowed to **alleviate the worst forms of poverty and social exclusion**, representing a positive action in mitigating the effects of extreme poverty; however, it is not possible to accurately measure its impact in quantitative terms because the support provided is non-financial in nature and as such is not able to lift people out of poverty.⁵³⁵ By 2021, FEAD support reached almost 3 million people, of whom 2.1 million were assisted on a continuous basis (about half of the Italian population living in extreme poverty).⁵³⁶ Therefore, although the poverty rate in Italy has not substantially decreased since the beginning of the Programme, mainly due to external circumstances such as the COVID-19 pandemic and the rise of inflation whose impact negatively affected the Italian economy, FEAD is considered an essential form of support that has enabled easing the burden on the most deprived persons and supporting them through the provision of food aid.⁵³⁷

Nonetheless, the support provided under **Measure 1** has been reported by stakeholders to **not sufficiently cover families' basic daily needs** due to the bi-weekly frequency of delivery, which makes it difficult to ensure that deprived families follow a healthy diet.⁵³⁸ Rather, FEAD support aims to integrate families' diets through the provision of basic food products which represents an essential form of support to allow deprived individuals to access products which they would have not been able to otherwise access (e.g., cheese, cured meats, bread, pasta, and later on products for children, fruit and jam were also included).⁵³⁹

On the other hand, the provision of food products and other types of material assistance (e.g. furniture, household appliances) has also been financed by FEAD through **Measure 4 to improve the living conditions and overall wellbeing of the most deprived persons**, with specific focus on the homeless and other vulnerable individuals and families. Material assistance was combined with a range of accompanying social inclusion measures and interventions aimed at supporting the homeless (discussed above in Section 2.2).⁵⁴⁰

Moreover, FEAD funds have contributed to **developing and fostering support structures for alleviating poverty and social exclusion** in Italy, creating greater coordination and stimulating the exchange of information and dialogue between the key stakeholders active in the field of food and material aid. The 2014-2020 FEAD Programme not only brought continuity to the national framework of social inclusion policies and the fight against serious marginalisation, but it also strengthened welfare services and innovated the national welfare policy framework, increasing synergies between the different actors at national and local level.⁵⁴¹ As one of its horizontal principles, FEAD in Italy promoted the principle of partnership by fostering an interactive dialogue between partner organisations, the Managing Authority and the intermediate body AGEA, thus establishing a working relationship between the public and third sector. This provided a unique experience that Coordinating and local partner organisations had not experienced before within MDP, creating a sense of awareness on the topics of poverty alleviation and social inclusion, as well as fostering a network of contacts that enabled important moments of discussion.⁵⁴²

The impact of FEAD support in Italy in relation to FEAD's **general objectives** is more difficult to assess due to their broader nature. FEAD aims to contribute to the objective of **eradicating poverty in the European Union**, aiming to reduce the number of persons at risk of poverty and social exclusion by at least 20 million by 2020 and by 15 million by 2030. As previously mentioned, poverty in Italy has not substantially decreased since the beginning of the roll-out of FEAD, with the incidence rate of absolute poverty among families in Italy having increased by 1.8 percentage points between 2014 (7.7%) and 2021 (7.5%).⁵⁴³ Nonetheless, this is primarily due to unpredictable phenomena and external circumstances such as the COVID-19 pandemic and the cost-of-living crisis rather than due to a lack of effectiveness of the FEAD Programme.⁵⁴⁴ Because FEAD support focuses on food aid, it does not significantly alter the poverty rate, but it rather alleviates situations of extreme poverty and

⁵³⁵ Interview with a representative of an implementing organisation Italy, conducted in September 2023.

⁵³⁶ Chapter 3 of AIRs accepted in 2022, AIR 2021 (SFC 2014 database)

⁵³⁷ Interview with a representative of an implementing organisation Italy, conducted in September 2023.

⁵³⁸ Interview with a representative of an implementing organisation Italy, conducted in October, 2023b.

⁵³⁹ Interview with a representative of the national Intermediate Body in Italy, conducted in September 2023.

⁵⁴⁰ Interview with a representative of an implementing organisation Italy, conducted in October, 2023a.

⁵⁴¹ Interview with a representative of an implementing organisation Italy, conducted in October, 2023a.

⁵⁴² Interview with a representative of an implementing organisation Italy, conducted in September 2023.

⁵⁴³ Statista, 2024. <https://www.statista.com/statistics/577032/incidence-rate-of-absolute-poverty-among-families/>

⁵⁴⁴ Interview with a representative of an implementing organization Italy, conducted in September, 2023.

marginalisation. Nevertheless, FEAD covers an important share of food aid in Italy, where income support measures were only recently introduced, and thus **complements the Italian poverty eradication and social inclusion policy framework**.

While speaking about tangible impact is difficult in quantitative terms at a macroeconomic level, a key impact of FEAD in Italy relates to **promoting social cohesion and enhancing the social inclusion** of the most deprived members of society. In this regard, some of the partner organisations consulted explained that FEAD has helped them in creating and maintaining a bond with individuals living in extreme poverty, which then allows them to bring such individuals closer to the welfare services. In this context, food aid is used as an important tool to reach individuals who are on the outskirts of society, thus beginning their path toward social inclusion by building a relationship of trust between the individuals and social services, which they can then turn to for other more complex issues (e.g. housing, employment, etc.). FEAD creates links between deprived families and services, which is especially key for reaching individuals who are not yet receiving support from services, and which prepares them for their inclusion in society and exit from poverty. Most importantly, the food and material assistance provided by FEAD ensures that the most deprived individuals still maintain hope.⁵⁴⁵ Overall, although FEAD has also been effective in addressing its general objectives, this is less tangibly the case in comparison to the programme's specific objectives.

Reach of target groups [criterion: effectiveness]

The key target groups addressed by FEAD OPI Italy include homeless people, as well as individuals and families in absolute poverty⁵⁴⁶ and severe material deprivation, encompassing the homeless, people with disabilities, migrants, and other vulnerable groups. Beneficiaries of FEAD support can be divided into two main groups: continuous, non-occasional recipients, and occasional beneficiaries, among which those who access aid through canteens. End users who receive food packages through FEAD must be considered continuous beneficiaries if they have obtained food aid monthly for more than six months in the past year; and occasionally if they only access support irregularly. As set out by the Managing Authority, the total number of individuals that can benefit occasionally from the distribution of food packages cannot be higher than 40% of the total number of beneficiaries for each territorial partner organisation, aside from exceptional circumstances authorised by the Managing Authority.⁵⁴⁷

By 2021, FEAD support under Measure 1 reached almost 3 million people, of whom over 2.1 million were assisted on a continuous basis (about half of the Italian population living in extreme poverty), and the remaining 823,000 as temporary beneficiaries.⁵⁴⁸ Overall, individuals who made use of FEAD support in 2021 can be disaggregated into the following groups: 602,000 children (aged 0 to 15), 337,000 elderly (aged 65 and above), 1.5 million women (51.9% of the total recipients), 670,000 migrants, 33,000 people with a disability, and 91,000 homeless persons.⁵⁴⁹

The data gathered on FEAD beneficiaries under Measure 4 reveals that the majority of individuals in severe material deprivation are largely adult, male, and of migrant background. In this case, 29,000 beneficiaries were reached by FEAD support among which 25,000 men (86.4%) and 4,000 women (13.6%). When disaggregating by age, it emerges that the vast majority of beneficiaries are aged between 15 and 65 (27 thousand, 92.7%), nearly 1,000 are younger than 15 (3.4%), and slightly more than 1,000 are elderly (4%), while 22,000 of all recipients under this measure are migrants (76.5%). Finally, 27,000 of these recipients are homeless persons (93.7%), and only 339 (1.2%) are people with disabilities.⁵⁵⁰ The majority of beneficiaries under Measure 4 in 2021 (21,000, 71.1%) also made use of food aid, almost the entirety of which (99.3%) fall within the category of homeless persons.

⁵⁴⁵ Interview with a representative of an implementing organisation Italy, conducted in September 2023; Interview with a representative of an implementing organisation Italy, conducted in October, 2023b.

⁵⁴⁶ According to the Italian National Institute of Statistics' (Istat) definition, individuals and families in absolute poverty are those unable to afford basic goods and services that are essential to protect them from severe social marginalisation. <https://www.istat.it/it/archivio/217028>

⁵⁴⁷ Agenzie per le Derogation AGEA (2019). OPERATIONAL GUIDELINES n. 43 (ISTRUZIONI OPERATIVE n. 43). Available at: [AGEA](#)

⁵⁴⁸ Chapter 3 of AIRs accepted in 2022, AIR 2021 (SFC 2014 database); Ministry of Labour and Social Policies (2022). ANNUAL REPORT FEAD – OP I.

⁵⁴⁹ Ministry of Labour and Social Policies (2022). ANNUAL REPORT FEAD – OP I.

⁵⁵⁰ Ministry of Labour and Social Policies (2022). ANNUAL REPORT FEAD – OP I.

The Managing Authority stores additional information on beneficiaries disaggregated by age, socioeconomic characteristics, gender, income, homelessness and other personal characteristics, collected by the local partner organisations, which the research team has not been able to access at the time of writing in May 2024.

The partner organisations consulted highlighted the risk that the rigidity of FEAD requirements brings, particularly the case of the relatively fixed categories of goods provided, hindering the reach of specific target groups, including homeless persons (clothing, personal hygiene products, emergency kits). This has had a negative impact on the distribution of food and material goods provided within Measure 4, where a lack of flexibility in FEAD requirements created complications in the selection of products to be delivered.⁵⁵¹ It was suggested that target groups should also be defined at the local level in order to consider the specific reality of different local contexts and adequately address their needs, allowing for flexibility in the selection of material products.⁵⁵²

Adjustments to FEAD to address new challenges [*criterion: effectiveness*]

FEAD in Italy effectively made **adjustments to address new emerging and urgent needs** resulting from global events such as the COVID-19 pandemic, the Russia's war of aggression against Ukraine, and the rising inflation rate. The **COVID-19** crisis in particular increased an already existing need for food assistance, to a greater extent in the Centre-South but also in the Northern regions, leading to a dramatic surge of 42.6% in direct beneficiaries of FEAD support under Measure 1 in 2021 (nearly 3 million recipients) in comparison to 2019 (2.1 million recipients) pre-pandemic levels.⁵⁵³ The stakeholders consulted emphasised the stress local partner organisations found themselves under in order to meet the heightened demand for food aid, which required them to strengthen their capacity to distribute food by increasing their human resources and spaces available to store food stocks.⁵⁵⁴

Further adjustments were made to FEAD to respond to the **energy crisis and rise in inflation experienced following the Russia's war of aggression against Ukraine**. The inflation rise caused a surge in product prices, which was highlighted by the intermediate body AGEA as a key issue for the roll-out of FEAD in Italy, both in terms of basic foods costing more now than they used to and the increasing requests received by companies in revising the prices of their products, as well as the need to replace products that were previously produced in Ukraine (e.g. sunflower oil).⁵⁵⁵

To counteract the COVID-19 emergency, with decree 116 of 12 May 2020, the Managing Authority **expanded the scope of FEAD support to include among its recipients individuals that had not been priorly assisted** by suspending the previously held limit of 40% continuous, non-occasional recipients, and including several additional entities among its partner organisations to distribute food aid to match the increased demand for support.⁵⁵⁶ A **network of municipal operational centres** (*Centri Operativi Comunali, COC*) was also established by the government to replace the organisations that closed during the pandemic and support the collection of food products and their distribution to municipalities and people in need.⁵⁵⁷ Measures were implemented during the pandemic to specifically help individuals at greater risk of falling into poverty (e.g. seasonal workers, hospitality workers) who were suffering from intermittent poverty.⁵⁵⁸

The **funds devoted to FEAD**, which were originally intended to conclude in 2020, were increased and deferred to continue until December 2023. During the pandemic, these **funds were used to diversify and increase the size of food baskets delivered to beneficiaries** by integrating products that were not typically included (i.e., soups, frozen foods, coffee, chocolate). In the years following the pandemic outbreak, they also **greatly helped to offset the rise in inflation** experienced in recent years, without these resources, the quantities of products able

⁵⁵¹ SFC 2014 database

⁵⁵² Interview with a representative of an implementing organisation Italy, conducted in October, 2023a.

⁵⁵³ Interview with a representative of the national Intermediate Body in Italy, conducted in September 2023: Ministry of Labour and Social Policies (2021). OPERATIONAL PROGRAMME I FEAD – ANNUAL REPORT EVALUATION OF MEASURE 1 (*PROGRAMMA OPERATIVO I FEAD – RELAZIONE ANNUALE DI RIESAME MISURA I*). Available at: [Programa Operativo I FEAD](#).

⁵⁵⁴ Interview with a representative of an implementing organisation Italy, conducted in September 2023.

⁵⁵⁵ Interview with a representative of the national Intermediate Body in Italy, conducted in September 2023.

⁵⁵⁶ Interview with a representative of the national Intermediate Body in Italy, conducted in September 2023.

⁵⁵⁷ Interview with a representative of the national Intermediate Body in Italy, conducted in September 2023; Interview with a representative of an implementing organisation Italy, conducted in September 2023.

⁵⁵⁸ Interview with a representative of an implementing organisation Italy, conducted in October, 2023a.

to be delivered to end users would have dropped dramatically.⁵⁵⁹ **A mechanism to temper companies' requests for price revisions** was also established by AGEA to respond to the increasing demands of businesses to increase their prices due to inflation. On the other hand, due to the surge in requests for food products, an unintended result was that the focus of FEAD in Italy re-shifted from the provision of accompanying measures for social inclusion to the distribution of material goods, which was further enhanced by the subsequent crises.⁵⁶⁰

The operations introduced by **CRII+, REACT EU and CARE** under FEAD were also mentioned for their positive impact on mitigating the negative social effects of the COVID-19 pandemic, energy crises and other crises. The implementation of CRII and CRII+ measures in response to the COVID-19 pandemic led to an increase in the demand for food products of individuals already assisted within FEAD, and those that had not priorly been users and who were affected by the crisis, such as seasonal and hospitality workers.⁵⁶¹ REACT EU was also integrated within FEAD during the pandemic alongside other national funds, leading to a significant increase in the resources available for Measure 1, which were then used to enhance the quantity and types of different products provided to recipients.⁵⁶²

Lastly, the introduction of **CARE** allowed to respond to the Russian war of aggression in Ukraine rapidly and enhanced the support provided by FEAD. Support structures in Italy reported the increased need for food aid to support Ukrainian families fleeing the war, primarily in the Centre-North. The flexibility of the Managing Authority, who allowed the registration of Ukrainians fleeing Russian military aggression as occasional recipients of FEAD support specifically linked to the emergency, enabled partner organisations to provide food assistance to nearly 40,000 refugees. Ukrainians fleeing Russian military aggression still in need of support are now included in the group of continuous recipients, although this number is relatively low because many of them have family ties in Italy and have quickly become employed.⁵⁶³

Horizontal principles of FEAD [*criterion: effectiveness*]

FEAD in Italy **made progress towards some of FEAD's horizontal principles**, with particular emphasis on respecting the dignity of the most deprived persons, preventing discrimination, and reducing food waste.

Measures aimed at **respecting the dignity of the most deprived persons** included the diversification of food baskets, incorporating products not only for their food value but also for the sense of dignity they bring, in respect of a balanced and healthy diet (snacks with lower sugar content, chocolate cream for children) for a total of 25 products offered by the end of the 2014-2020 programming period.⁵⁶⁴ The stakeholders consulted stressed the importance of diversifying the range of products offered, giving beneficiaries the choice of different goods, also in consideration of the specific food needs of different groups (migrants, religious minorities) and of regional traditions within the country, therefore **preventing discrimination against minorities**. According to one of the partner organisations interviewed, it is the task of OPC and OPT to understand the different needs target groups have at a territorial level and translate them in discussions with the Managing Authority.⁵⁶⁵ In this regard, vouchers were mentioned as a potential instrument to better address the diverse needs of recipients as they would allow them to purchase their products independently.⁵⁶⁶ The dignity of beneficiaries has also been safeguarded by the changes made to the packaging of food products, where the label 'help for the deprived' was removed to eliminate the stigma associated with it.⁵⁶⁷

Although FEAD was reported not to have had a direct impact on **reducing food waste** and recovering food surpluses, despite this aspect being foreseen in Italy's FEAD OP, the management of FEAD helps organisations that distribute food to prevent food surpluses from occurring, such as during the COVID-19 pandemic, when many companies encountered difficulties with surplus warehouses.⁵⁶⁸

⁵⁵⁹ Interview with a representative of an implementing organisation Italy, conducted in September 2023.

⁵⁶⁰ Interview with a representative of an implementing organisation Italy, conducted in October, 2023a.

⁵⁶¹ Interview with a representative of the national Intermediate Body in Italy, conducted in September 2023; Interview with a representative of an implementing organisation Italy, conducted in October, 2023a.

⁵⁶² Interview with a representative of an implementing organisation Italy, conducted in September 2023; Interview with a representative of an implementing organisation Italy, conducted in October, 2023b.

⁵⁶³ Interview with a representative of an implementing organisation Italy, conducted in September 2023.

⁵⁶⁴ Interview with a representative of the national Intermediate Body in Italy, conducted in September 2023.

⁵⁶⁵ Interview with a representative of an implementing organisation Italy, conducted in October, 2023b.

⁵⁶⁶ Interview with a representative of an implementing organisation Italy, conducted in October, 2023b.

⁵⁶⁷ Interview with a representative of an implementing organisation Italy, conducted in September 2023.

⁵⁶⁸ Interview with a representative of the national Intermediate Body in Italy, conducted in September 2023.

Facilitating and hindering factors [criterion: effectiveness]

FEAD support has generated important **socio-economic impacts** at macro-economic level in Italy, positively influencing the Italian industrial and agricultural supply chains. According to data reported by AGEA, nearly 700 million EUR have been spent across seven years in the purchasing of food products, which has had a positive impact on financing companies participating in the procurement and supply of food goods. The possibility of producing goods for FEAD was important for these companies, especially as their production continued in great quantities during difficult times for the market when the demand for them would have otherwise been lower. Moreover, through FEAD 100 million contracts worth nearly 1 billion EUR have been managed.⁵⁶⁹

Overall, FEAD is also considered as an essential form of support that has enabled to **mitigate the effects of severe deprivation and ease the burden of almost 3 million people in extreme poverty** through food and material aid.⁵⁷⁰ Nonetheless as remarked above, the stakeholders consulted consider FEAD support under Measure 1 (to integrate families' diets through the provision of basic food products) an essential form of support to allow deprived individuals to access products which they would have not been able to otherwise access, although it does not sufficiently cover families' basic daily needs due to the bi-weekly frequency of food delivery.

On the other hand, **Measure 2** (material deprivation of children and young people in the school environment) **and Measure 3** (food and educational deprivation of children and young people in deprived areas) **have never been implemented due to administrative and regulatory constraints** in relation to the burden of centralised procurement procedures at national level, and to the selection of the type of goods to be provided at European level.⁵⁷¹ The resources originally designed for Measure 2 and Measure 3 (approximately EUR 60 million each) were then re-allocated to Measure 1 for food distribution.⁵⁷²

Measure 2 was intended to provide children and young people with goods for academic use (i.e., notebooks, pens) which would be purchased by partner organisations and then distributed to beneficiaries. However as noted by one of the partner organisations consulted, it became apparent that such a measure would **create a stigma** around the children using scholastic goods clearly labelled as obtained through FEAD funds, soon leading to the elimination of this measure from the Italian OP alongside other **administrative constraints**. Difficulties associated with **Measure 3** specifically concerned the provision of food through school canteens, which was difficult to **carry out as a common project on food education across different territories**.⁵⁷³

Overall cost-effectiveness of FEAD operations [criterion: efficiency]

The stakeholders consulted reported on the **cost-effectiveness** of FEAD operations in Italy, which largely relied on the extended network of volunteers working for the coordinating and local partner organisations (mostly third sector organisations) across the Italian territory.⁵⁷⁴ Almost the entirety of the resources devoted to FEAD in Italy have been used, meaning that FEAD has achieved its objective in a cost-effective way in relation to the distribution of food products. Nonetheless, most of the resources allocated to the four measures outlined in the FEAD Italy were later transferred to food aid (Measure 1); the partner organisations consulted suggested that part of these could have instead been allocated to support training and technical assistance for partner organisations to reduce their administrative burden, given the typically small size of their teams. Technical assistance support was effectively provided for the digitalisation of the fund and its portal in Italy but could have been increased to cover other areas.⁵⁷⁵

⁵⁶⁹ Interview with a representative of the national Intermediate Body in Italy, conducted in September 2023.

⁵⁷⁰ Interview with a representative of an implementing organisation Italy, conducted in September 2023.

⁵⁷¹ European Commission (2018). FEAD Country Fiche Italy

⁵⁷² Ministry of Labour and Social Policies (2020). ANNUAL REPORT FEAD – OP I (RELAZIONE DI ATTUAZIONE ANNUALE FEAD – OP I). Available at: <https://www.lavoro.gov.it/temi-e-priorita/europa-e-fondi-europei/focus-on/fondo-di-aiuti-europei-agli-indigenti-Fead/Documents/FEAD-RAA-2019.pdf>

⁵⁷³ Interview with a representative of an implementing organisation Italy, conducted in October, 2023b.

⁵⁷⁴ Interview with a representative of an implementing organisation Italy, conducted in October, 2023b.

⁵⁷⁵ Interview with a representative of an implementing organisation Italy, conducted in September 2023.

The reported **efficiency of FEAD operations** was associated with the voluntary work of partner organisations in the delivery of food aid, and with the previous expertise of AGEA in the management of the MDP programme. The entire budget allocated to FEAD in Italy, with the exception of 5% devoted to lead organisations (which now has become 7% in the new 2021-2027 programming period), reaches end users directly, while every other expense is covered by third sector organisations. This structure was highlighted as particularly effective because it is rooted in the territory and makes use of small entities with great knowledge of the territory and who are well known to potential beneficiaries, meaning that they are able to maintain a direct relationship with the users and reach vulnerable people more easily.⁵⁷⁶ Moreover, because the intermediate body AGEA was already specialised in the distribution of food before FEAD thanks to the legacy of MDP, it carried over its practices in the procurement of food goods.⁵⁷⁷

A number of **recommendations** were therefore put forward by the partner organisations consulted within the scope of this evaluation. Devoting greater resources to improving the technical and IT skills of partner organisations and providing them with technical assistance was highlighted as a key factor in ensuring the efficiency of FEAD operations in Italy.⁵⁷⁸ Although resources were originally devoted to such purposes, they were unspent in the first programming period. It was suggested that the new programming period could provide greater technical assistance for territories and municipalities in order to increase their efficiency, alongside enhancing communication with the FEAD management bodies to avoid overlaps of responsibilities between different entities (e.g. working with the same target groups, dealing with similar issues) and prevent resources from being wasted.⁵⁷⁹ In this regard, it is necessary for the Italian Managing Authority to increase its involvement in the roll-out of FEAD and coordination with the seven national partner organisations to avoid delays and adequately match the increased volume of requests from persons in need.⁵⁸⁰

Administrative burden of monitoring and reporting requirements [criterion: efficiency]

The implementation of FEAD introduced more complicated **monitoring and reporting requirements** than those foreseen by the previous MDP programme, among which the requirement to provide documentation to certify the status of the individual or the family unit as deprived introduced by the Managing Authority. This led to the creation of a file for each family unit, leading to a significant drop in the number of accredited facilities and recipients reported by one of the partner organisations consulted, giving the idea to local partner organisations of the bureaucratisation of the programme.⁵⁸¹ Reporting requirements are seen by partner organisations as bureaucratic, but at the same time important to avoid fraud and increase awareness of it in the world of volunteering.⁵⁸² There is scope to simplify further monitoring requirements, although these are partly dependent on Italian laws rather than on the applicable EU Regulations.⁵⁸³

The **requirements on the procurement of goods were also deemed as unnecessarily bureaucratic** by the partner organisations consulted, although this was also highlighted as a national problem emerging from the fact that they rely on the procurement code designed for the private sector. Overall, a certain level of bureaucracy is

⁵⁷⁶ Interview with a representative of an implementing organisation Italy, conducted in October 2023b.

⁵⁷⁷ Interview with a representative of the national Intermediate Body in Italy, conducted in September 2023.

⁵⁷⁸ Interview with a representative of an implementing organisation Italy, conducted in September 2023.

⁵⁷⁹ Interview with a representative of an implementing organisation Italy, conducted in October 2023a.

⁵⁸⁰ Interview with a representative of an implementing organisation Italy, conducted in September 2023.

⁵⁸¹ Interview with a representative of an implementing organisation Italy, conducted in September 2023.

⁵⁸² Interview with a representative of an implementing organisation Italy, conducted in October 2023b.

⁵⁸³ Interview with a representative of the national Intermediate Body in Italy, conducted in September 2023.

seen as necessary to monitor the results achieved through public funds. However, practices for the social sector could be streamlined through collaboration between public and private bodies.⁵⁸⁴

The **digitalisation** of FEAD has nevertheless **helped to reduce the administrative burden of monitoring and reporting requirements**. FEAD is now entirely managed through a digital platform (SiFEAD), which is used to monitor products and activities and extract data automatically for reporting, making data visible and available to the Managing Authority and AGEA with transparency and solidity. Initially, the process of digitalisation was seen as a complication because of the high number of individuals lacking IT skills, leading OPC and OPT to spend a lot of time training their staff. Ultimately, digitalisation positively influenced the management of FEAD and led to its simplification and automatization of processes and procedures.⁵⁸⁵ The SiFEAD portal has thus allowed to computerize daily practices that were priorly paper-based and overly complicated (e.g. data storage). The process of certification for continuous recipients has also been simplified; priorly, each recipient had a file containing their ISEE (income declaration made by municipalities), citizenship income, and documentation demonstrating their right to receive FEAD support. Since 2022, recipients can now provide a self-certification themselves online.⁵⁸⁶

Budget was also devoted to **technical assistance for the intermediate body AGEA**, which allowed to contract an external company and thus **hire specialised staff** who greatly helped its work in the roll-out of FEAD, given the small size of the organisation. This was particularly important for the fulfilment of FEAD's monitoring requirements especially due to the high frequency of requests being delivered by AGEA.⁵⁸⁷

Nonetheless, an outstanding issue is that the **audit requirements** imposed on partner organisations do not reflect the simplification introduced through the digitalisation of FEAD. The audit still requires paper evidence and as such the reinstatement of a system that had already been replaced because it is conducted through processes set for other programmes such as ESF which are not tailored to FEAD.⁵⁸⁸ This has led to reverting back to practices that had been digitalised to pass the audit, creating inconsistencies and complications. Although the European Commission has urged for the simplification of monitoring procedures and implementation, there are still multiple steps that could be revised to reduce the burden for both OPs and the Managing Authority.⁵⁸⁹

The unnecessary administrative burden set at national level was also highlighted by the stakeholders consulted. The previously mentioned requirement of providing a family's status as deprived through ISEE by the Managing Authority was problematic because ISEE always reports the situation of the previous year which may not adequately reflect the current need in times of emergency and created an unnecessary administrative burden. To prevent people in need from being excluded, other systems of evaluation were recently introduced, such as the 'current ISEE'.⁵⁹⁰

Simplification measures [criterion: efficiency]

Although some of the bureaucratic steps foreseen by FEAD in Italy are fundamental for the adequate monitoring and tracking of operations in the country, there is scope for improvement or simplification. In order to simplify FEAD processes at the national and EU levels, the partner organisations consulted highlighted that **separate**

⁵⁸⁴ Interview with a representative of an implementing organisation Italy, conducted in October 2023a.

⁵⁸⁵ Interview with a representative of an implementing organisation Italy, conducted in September 2023.

⁵⁸⁶ Interview with a representative of an implementing organisation Italy, conducted in October, 2023b.

⁵⁸⁷ Interview with a representative of the national Intermediate Body in Italy, conducted in September 2023.

⁵⁸⁸ Interview with a representative of an implementing organisation Italy, conducted in September 2023.

⁵⁸⁹ Interview with a representative of an implementing organisation Italy, conducted in September 2023.

⁵⁹⁰ Interview with a representative of an implementing organisation Italy, conducted in September 2023.

interventions on social inclusion aimed at different target groups should be harmonised.⁵⁹¹ In particular, as discussed in the section above, key stakeholders call for **greater simplification in monitoring, reporting and audit requirements** to reduce the administrative burden on organisations involved in the roll-out of FEAD.

Potential strategies to further increase the simplification of FEAD in Italy include other purchasing methodologies such as the **use of vouchers**, which was discussed within the roundtable of the National Coordinating Group. Moreover, vouchers were mentioned by some of the partner organisations consulted as a potential instrument to not only better address the diverse needs of recipients from different religious, ethnic and territorial backgrounds and dietary requirements (e.g. allergies and intolerances), as they would allow them to purchase their products independently, but also to introduce greater simplification within FEAD support overall.⁵⁹² Vouchers could indeed represent a more cost-efficient approach to adapt to the rapidly changing needs of recipients, ensuring that the needs of each key target group across vastly different territorial areas are met, and respecting the dignity of beneficiaries in choosing their own products to purchase independently.

Coherence of FEAD with other interventions [*criterion: coherence*]

In recent years, political attention towards poverty reduction in Italy has increased, with enhanced resources and investments. **FEAD is one of the few stable measures on poverty reduction and social inclusion within the Italian national landscape, where a structured policy is missing.** Most measures implemented in this field over the past years have been short-term interventions linked to specific emergencies, as policies keep changing in each new government, thus hindering continuity in this sector.⁵⁹³

FEAD Measure 1 is complementary to the measures funded by the ESF in Thematic Objective 9 (TO9) - Fostering social inclusion and tackling poverty and discrimination.⁵⁹⁴ The measures included by FEAD are more based on emergencies in comparison with ESF, which rather focuses on active social inclusion. **Measure 4 activities on homelessness are complementary to the activities financed by the ESF** in the PON *Città Metropolitane e Inclusione*, through which material goods are distributed to recipients of accompanying measures for housing independence by ESF.⁵⁹⁵

13.2. Is FEAD still relevant?

Relevance to target groups [*criterion: relevance*]

The **key target groups** addressed by FEAD OP I Italy include **vulnerable categories of the population**, such as homeless people (specifically targeted by Measure 4), as well as individuals and families in absolute poverty and severe material deprivation, encompassing the homeless, disabled people, migrants, children, the elderly, and other groups.

The data made available by the Ministry of Labour and Social Policies makes it possible to assess the degree to which the **most relevant groups targeted by FEAD support in Italy were reached.** Individuals who made use of FEAD support in 2021 in the form of food aid and basic material assistance under Measure 1 (nearly 3 million overall) can be disaggregated into the following groups: 1.5 million women (51.9% of the total recipients), 670,000 migrants, 602,000 children (aged 0 to 15), 337,000 elderly (aged 65 and above), 91,000 homeless

⁵⁹¹ Interview with a representative of an implementing organisation Italy, conducted in October 2023a.

⁵⁹² Interview with a representative of an implementing organisation Italy, conducted in October 2023b.

⁵⁹³ Interview with a representative of an implementing organisation Italy, conducted in October 2023b.

⁵⁹⁴ PON Inclusione (N.A.). ITALY'S OPERATIONAL PROGRAMME (OP) FOR SOCIAL INCLUSION.

Available at: <https://poninclusione.lavoro.gov.it/Pagine/Sintesi-PON-Inclusione-EN>

⁵⁹⁵ Ministry of Labour and Social Policies (2022). ANNUAL REPORT FEAD – OP I.

persons, and 33,000 people with a disability.⁵⁹⁶ Concerning the measure on material deprivation of homeless people and other vulnerable categories at risk of housing exclusion (Measure 4), the majority of beneficiaries are largely adult, male, and of migrant background. Almost the entirety of the 29,000 beneficiaries who were reached by this type of FEAD support in 2021 were homeless persons (93.7%). Overall, the vast majority of recipients are male (86.4%), and aged between 15 and 65 (92.7%), with only a minimal share of recipients being either younger than 15 (3.4%), or older than 65 (4%). A considerable portion of beneficiaries under Measure 4 is made up of individuals in severe deprivation and of a migrant background (76.5%), while a marginal portion of recipients has a disability (1.2%).⁵⁹⁷

A **key issue** in ensuring that the support made available through FEAD is relevant to the needs of the most deprived was highlighted by multiple partner organisations consulted. The **centralised decision-making concerning the food and material goods delivered** through FEAD and **lack of flexibility in this choice at the level of implementing organisations and beneficiaries** due to the fixed categories of products offered may hinder the effective reach of specific target groups (e.g. ethnic or religious minorities with specific dietary requirements, homeless persons) and thus prevent organisations from adequately responding and adapting to the needs of key target groups. As such specific needs largely vary from territory to territory, it is therefore important to allow scope for decisions to be made at the local and regional level in order to consider the specific reality of different local contexts and adequately address their needs, allowing for flexibility in the selection of material products.⁵⁹⁸

Finally, **due to the experience in recent years of several crises** such as the COVID-19 pandemic, the Russia's war of aggression against Ukraine, and the cost-of-living crisis, **new target groups in need of FEAD support emerged**. Due to the pandemic in particular, a wider group of individuals were at greater risk of poverty, including seasonal and hospitality workers who found themselves unable to work and were not adequately protected by a safety net.⁵⁹⁹ Looking ahead at the future, it is important that FEAD support can dynamically shift to adapt to the needs and target groups emerging from global phenomena, ensuring that its key goal of alleviating poverty and easing its burden on the most deprived is promoted.

Relevance of FEAD now and in the future [*criterion: relevance*]

The **continued relevance** of FEAD today as a key element of Italy's national poverty alleviation policy is evidenced by the opinions of the stakeholders consulted. FEAD is not only considered as a form of immediate support for people in extreme poverty, which is especially crucial in moments of crisis such as the COVID-19 pandemic outbreak, but also as a fundamental way to connect people through food assistance. The food packages recipients can access in public spaces or at the premises of the territorial partner organisations thus create a connection between beneficiaries and the services, bringing people closer to the system and ensuring their rights are protected. Therefore, food aid can represent the first step to helping harder-to-reach groups who live outside of the public services system and begin a pathway of community-building and social inclusion. This is specially made possible by the extended network of implementing organisations deeply rooted in their territories and that are actively involved in FEAD delivery at local and regional level.⁶⁰⁰

FEAD is also regarded by the partner organisations consulted as an **innovative tool in the promotion of social inclusion**, which has helped to bring the issue of extreme social marginalisation to the forefront in Italy in the

⁵⁹⁶ Ministry of Labour and Social Policies (2022). ANNUAL REPORT FEAD – OP I.

⁵⁹⁷ Ministry of Labour and Social Policies (2022). ANNUAL REPORT FEAD – OP I.

⁵⁹⁸ Interview with a representative of an implementing organisation Italy, conducted in October 2023a.

⁵⁹⁹ Interview with a representative of an implementing organisation Italy, conducted in October 2023a.

⁶⁰⁰ Interview with a representative of an implementing organisation Italy, conducted in October 2023b.

last 10 years. To ensure that FEAD continues to be relevant in its aim to enhance social inclusion, it is therefore essential to generate continuity with the progress achieved to date through the strengthening and innovation of the networks made up of public services and implementing organisations, as well as to continue experimenting and increasing flexibility with the use of FEAD funds towards poverty alleviation and social inclusion which place the individual at the centre.⁶⁰¹

The lack of a long-standing structural approach to poverty reduction policy in Italy makes the support provided through FEAD ever more relevant. Due to the short-term consecutive changes of government, several income support measures have been introduced and rapidly replaced in recent years, as discussed in Section 2.3 above. **FEAD, on the other hand, has remained a constant form of support offered to the most deprived, despite political shifts, global crises, and other challenges.**⁶⁰²

Several **future trends** could affect the future relevance of this EU support to the most deprived. Among these, migration affects the food requests and demand received by specific minorities (e.g. Muslims) who have different eating habits. The demographic slowdown and low birth rates in Italy and the recent migratory flows also influence the lower demand for food for children because the majority of requests come from adults; this will bring about change in the products offered which should be more targeted.⁶⁰³ Overall, it is hoped that the integration of FEAD within ESF+ will more closely link material distribution to long-term social inclusion paths and emancipation,⁶⁰⁴ in a way that established a more structured policy on poverty reduction and social inclusion which is not solely linked to specific emergencies and is consistent with the approach adopted across the EU.⁶⁰⁵

13.3. Did FEAD make a difference and to whom?

EU added value [criterion: EU added value]

FEAD support has generated added value in Italy in producing beneficial effects that would otherwise not have taken place, complementing existing policies in the country. In particular, FEAD support has led to a re-evaluation of food aid by the European Commission as an emergency measure that must always remain accessible to people in difficulty (especially in countries where income support measures are missing), shifting the focus from social inclusion to material assistance. Such aid must provide immediate connection to people in difficulty, as highlighted by the experience of the pandemic.⁶⁰⁶

The 2014-2020 FEAD Programme introduced innovation in the national welfare policy framework of social inclusion and poverty alleviation policy, while also gaining increasing importance in the political agenda in Italy. Before FEAD, the field of material assistance and severe marginalisation had always been exclusively managed by the Ministry of Labor and Social Policies. With the introduction of FEAD in 2014, other key third sector actors across the national territory who had long been rooted in their territories, gained an increasing influence in the distribution of food aid and material assistance, now being able to participate in dialogue with the Managing Authority and other organisations experienced in the fight against poverty and social exclusion.⁶⁰⁷

⁶⁰¹ Interview with a representative of an implementing organisation Italy, conducted in October 2023a.

⁶⁰² Interview with a representative of an implementing organisation Italy, conducted in October 2023b.

⁶⁰³ Interview with a representative of the national Intermediate Body in Italy, conducted in September 2023.

⁶⁰⁴ Interview with a representative of an implementing organisation Italy, conducted in October 2023a.

⁶⁰⁵ Interview with a representative of an implementing organisation Italy, conducted in October 2023b.

⁶⁰⁶ Interview with a representative of an implementing organisation Italy, conducted in October 2023b.

⁶⁰⁷ Interview with a representative of an implementing organisation Italy, conducted in October 2023a.

FEAD also **strengthened cooperation** between national partner organisations, the Managing Authority and the intermediate body AGEA in **developing and fostering support structures, establishing a working relationship between the public and third sector** while also **increasing synergies between the different actors** at national and local level and **enhancing the local welfare services**.⁶⁰⁸ This provided a unique experience that coordinating and local OPs had not experienced before within MDP, creating a sense of awareness on the topics of poverty alleviation and social inclusion, as well as fostering a network of contacts that enabled important moments of discussion.⁶⁰⁹ The outcomes of this process were enhanced communication and partnership between the key stakeholders involved in the delivery of FEAD, alongside promoting dialogue and smoothening their coordination in matters relating to the choice of products to be offered in baskets, digitalisation, training awareness and management of public funds, and overcoming common challenges, for instance.⁶¹⁰

Finally, **FEAD had an important effect on reaching individuals who are on the outskirts of society**, thus beginning their path toward social inclusion by building a relationship of trust and creating links between deprived families and public services, preparing them for their exit from poverty. In particular, FEAD was effective in reaching homeless individuals, who represent almost the entirety of recipients of FEAD Measure 4, and an extremely vulnerable population.

Visibility [visibility]

Partner organisations and end recipients are to a smaller or larger extent **aware that support comes from FEAD and the EU**. Partner organisations are obliged to display a logo with reference to FEAD aid at their distribution points, as well as on their websites. Labels on food products provided to recipients are also indelible to prevent them from entering the regular market.⁶¹¹ Through FEAD, beneficiaries receive a physical product with the emblem of the European Commission in their home to let them know that they are not alone and receive concrete support, which according to some of the stakeholders consulted, represents an irreplaceable and tangible form of support.⁶¹²

However, it is the opinion of one of the stakeholders consulted that **FEAD and EU support is not entirely visible to the public**. Although the logos and signs are displayed on the organisations' websites, there is little awareness of how much Italy benefits from European funds. There is no institutional culture in Italian civic education schools on what a public body is, which increases the risk of fake news and the understanding of how public funds work.⁶¹³

14. Good practices

A good practice example emerging from the consultations with the stakeholders interviewed concerns the **adjustments made in FEAD delivery to respond** to the rapidly changing needs and consequences of the **COVID-19 pandemic**, which helped to continue ensuring that the specific and general objectives of FEAD in Italy were adequately addressed, particularly in relation to:

⁶⁰⁸ Interview with a representative of an implementing organisation Italy, conducted in October 2023a.

⁶⁰⁹ Interview with a representative of an implementing organisation Italy, conducted in September 2023.

⁶¹⁰ Interview with a representative of an implementing organisation Italy, conducted in October 2023b.

⁶¹¹ Interview with a representative of the national Intermediate Body in Italy, conducted in September 2023.

⁶¹² Interview with a representative of an implementing organisation Italy, conducted in September 2023.

⁶¹³ Interview with a representative of an implementing organisation Italy, conducted in October 2023b.

- The implementation of structural adjustments and new measures made to respond to an increasing need for food aid and number of prospective beneficiaries caused by the COVID-19 crisis; and
- The increased volume of funding devoted to FEAD and its postponement after the end of the originally planned programming period.

The **COVID-19 crisis** increased an already existing need for food aid, leading to a significant rise in the number of prospective beneficiaries of FEAD support, placing local partner organisations under great stress in order to meet this heightened demand, which required them to increase their human resources and physical spaces available to enhance their capacity to both distribute food and store food stocks.⁶¹⁴ Further adjustments were made by the Managing Authority, who expanded the scope of FEAD support to include among its recipients individuals that had not been priorly assisted by suspending the previously held limit of 40% continuous, non-occasional recipients, and to include a number of additional entities among its partner organisations to distribute food aid to match the increased demand for support.⁶¹⁵ To enable this process, a network of municipal operational centres (*Centri Operativi Comunali, COC*) was established to replace the organisations that closed during the pandemic and support the collection of food products and their distribution to municipalities and people in need.⁶¹⁶ Moreover, further measures were implemented tailored to specifically help individuals at greater risk of falling into poverty (e.g. seasonal workers, hospitality workers) who were facing the possibility of intermittent poverty.⁶¹⁷

The increased volume of the funds devoted to FEAD and their postponement after the end of the originally planned programming period in 2020 can also be considered as a good practice in the delivery of FEAD in Italy as a prompt response to an unprecedented crisis. Due to the pandemic, the funds allocated to FEAD were deferred to continue until December 2023 in order to diversify and increase the size of food baskets delivered to beneficiaries by integrating products that were not typically included (i.e., soups, frozen foods, coffee, chocolate). These funds were later used to also offset the rise in inflation experienced in recent years and ensure that the quantities of products delivered to recipients are sufficient despite the increased costs of food products, and have been considered as an invaluable tool to address the urgent demands arising from the pandemic and inflation crises.⁶¹⁸

15. Conclusions and lessons learned

The assessment presented in this case study regarding the implementation of FEAD in Italy, based on a mixture of qualitative and quantitative evidence, reveals **positive outcomes of FEAD support in the country, challenges, and lessons learnt across the different evaluation criteria**: effectiveness, efficiency, relevance, coherence, EU added value, and visibility.

With regard to **effectiveness**, FEAD support has been **relatively successful in achieving the FEAD specific objectives**, namely to alleviate the worst forms of poverty and social exclusion, to improve the living conditions and overall wellbeing of the most deprived persons, and to develop and foster support structures for alleviating poverty and social exclusion in Italy, as evidenced by the number of beneficiaries and intended target groups reached by FEAD support. By 2021, FEAD support reached almost 3 million people, of whom 2.1 million were assisted on a continuous basis (about half of the Italian population living in extreme poverty). Moreover, multiple of the stakeholders consulted through this exercise stressed the important **contribution of FEAD funds to**

⁶¹⁴ Interview with a representative of an implementing organisation Italy, conducted in September 2023.

⁶¹⁵ Interview with a representative of the national Intermediate Body in Italy, conducted in September 2023.

⁶¹⁶ Interview with a representative of the national Intermediate Body in Italy, conducted in September 2023; Interview with a representative of an implementing organisation Italy, conducted in September 2023.

⁶¹⁷ Interview with a representative of an implementing organisation Italy, conducted in October 2023a.

⁶¹⁸ Interview with a representative of an implementing organisation Italy, conducted in September 2023.

creating greater coordination and partnership between the key players active in the field of food and material aid, **bringing continuity to the national framework** of social inclusion policies and the fight against serious marginalisation. There is also a need to be more open and flexible to take other partners on board when needed. On the other hand, although FEAD has also been effective in addressing its general objectives, this is less tangibly the case in comparison to the programme's specific objectives because it is not fully possible to gauge in quantitative terms its effectiveness and impact in eradicating poverty due to the non-financial nature of the support provided, meaning that it would be difficult for the poverty rate in Italy to substantially decrease solely through material assistance. Nonetheless, FEAD support has also **generated an important socio-economic impact** at macro-economic level in Italy, positively influencing the Italian industrial and agricultural supply chains and financing companies participating in the procurement and supply of food goods.

The support provided through FEAD has also been **relatively effective in reaching its key target groups**, as set out in the FEAD OP I Italy: individuals and families in extreme poverty and severe material deprivation, encompassing the homeless, people with disabilities, migrants, and other vulnerable groups. Overall, according to the 2022 Annual FEAD Report delivered by the Italian Ministry of Labour and Social Policies, the almost 3 million individuals who made use of FEAD support in 2021 under Measure 1 can be disaggregated into the following groups: 602,000 children (aged 0 to 15), 337,000 elderly (aged 65 and above), 1.5 million women (51.9% of the total recipients), 670,000 migrants, 33,000 people with a disability, and 91,000 homeless persons.⁶¹⁹ On the other hand, the data gathered on FEAD beneficiaries under Measure 4 reveals that the majority of individuals in severe material deprivation are homeless persons, largely adults, male, and of migrant background. Ensuring flexibility in FEAD requirements, such as in the case of the choice of products, emerged as an important element to maximise the reach of specific target groups such as homeless people and increase simplifications. In this regard, the partner organisations consulted highlighted the need for goods to be decided at the local level, taking into consideration different territorial realities.

FEAD in Italy **effectively made adjustments to address new emerging and urgent needs arising from world events such as the COVID-19 pandemic, the Russia's war of aggression against Ukraine, and the rising inflation rate**, which increased an already pressing need for food aid, leading to a significant increase of direct beneficiaries of FEAD support which was highlighted by several interviewees. Adjustments were also effectively made to counteract the increased costs of products and their diversification following the energy crisis and the Russia's war of aggression against Ukraine, and the subsequent increase in inflation. Under FEAD, the operations introduced by CRII+, REACT EU and CARE mitigated the negative social effects of these crises and increased the resources available to address the specific and general objectives of FEAD.

Progress was also made towards some of FEAD's horizontal principles, with particular emphasis on respecting the dignity of the most deprived persons, preventing discrimination, and reducing food waste. Measures in these areas included the diversification of food baskets, incorporating products not only for their food value but also for the sense of dignity they bring, respect to a balanced and healthy diet, and the changes made to the packaging of food products, where the label 'help for the deprived' was removed to eliminate the stigma associated with it.

The **high cost-effectiveness** reported by the stakeholders consulted regarding FEAD operations in Italy underpins the **efficiency** of its system. The reported efficiency of FEAD operations was linked to the voluntary work of partner organisations in the delivery of food aid, relying on an extended network of volunteers working for the coordinating and local partner organisations (mostly third sector organisations) all across the Italian territory, and with the previous expertise of AGEA in the management of the MDP programme, who carried over its practices in the procurement of food products. This structure was highlighted as particularly effective because it is rooted in the territory and makes use of small entities with great knowledge of the territory and who are well-known to potential beneficiaries, meaning that they can maintain a direct relationship with the users and reach vulnerable people more easily. Nonetheless, **several burdensome monitoring and reporting requirements** could be simplified which mainly concern national legislation on procurement, and excessively bureaucratic audit requirements which do not reflect the simplification introduced through the digitalisation of FEAD. Several lessons can be therefore learned from the 2014-2020 FEAD programming period to further increase the cost-effectiveness of FEAD operations: continuing to devote resources to improving the technical and IT skills of partner organisations and provide them with technical assistance, increasing the involvement of the Italian Managing Authority in the roll-out of FEAD and coordination with partner organisations, and considering the use of vouchers as a new approach to simplify FEAD procedures.

⁶¹⁹ Ministry of Labour and Social Policies (2022). ANNUAL REPORT FEAD – OP I.

In terms of **coherence**, FEAD Measures 1 and 4 are complementary to 2014-2020 ESF measures. The new ESF+ programme integrates FEAD as one of its key areas alongside other poverty reduction policies, including other issues such as migration and youth in a global panner. The ESF+ tender also provided a social intervention plan which outlined the objectives and levels of services that the State must guarantee in each area and the funds available, embracing the multi-fund logic prioritising certain social issues. this should be refined to avoid overlap between different policies and ensure synergies.

FEAD today continues to be **relevant** as a key element of Italy's national poverty alleviation policy, a form of immediate support for people in extreme poverty, and as a fundamental way to connect people through food assistance which brings people in need closer to the public services and initiating their path towards social inclusion. FEAD is also regarded as an innovative tool in the promotion of social inclusion, which has helped bring the issue of extreme social marginalisation to the forefront in Italy in the last ten years. To ensure that FEAD continues to be relevant in its aim to enhance social inclusion, it is therefore essential to generate continuity with the progress achieved to date through the strengthening and innovation of the networks made up of public services and implementing organisations, as well as to continue experimenting and increasing flexibility with the use of FEAD funds towards poverty alleviation and social inclusion which place the individual at the centre.⁶²⁰ Another key issue in ensuring that the support made available through FEAD is relevant to the needs of the most deprived relates to the granting of greater flexibility in the choice of products to be delivered through FEAD support to adequately address the changing needs of diverse target groups and reflect different realities, thus allowing scope for decision-making at the local and regional level. Lastly, future trends could affect the future relevance of this EU support to the most deprived, among which include migration, demographic slowdown, and the imminent integration of FEAD within ESF+.

Overall, FEAD support has generated **EU added value** in Italy in producing beneficial effects that would otherwise not have taken place, complementing existing policies in the country. In particular, FEAD support has led to a re-evaluation of food aid by the European Commission as an emergency measure that must always remain accessible to people in difficulty, shifting the focus from social inclusion to material assistance. Thanks to FEAD, cooperation between national partner organisations, the Managing Authority, and the intermediate body AGEA was strengthened in developing and fostering support structures, establishing a working relationship between the public and third sector while also increasing synergies between the different actors at the national and local level and enhancing the local welfare services.

Finally, the fact that the support they receive comes from FEAD and the EU is more or less **visible** to partner organisations and end recipients, given the requirement for partner organisations to display a logo with reference to FEAD aid at their distribution points and websites, and the mandatory labels on food products provided to recipients. Overall, the physical food package with an EU logo represents an irreplaceable and tangible form of support that enters the recipient's household.

Appendices

Appendix 1: Methodology

This case study is based on the analysis and assessment of a mixture of qualitative and quantitative sources, including stakeholder interviews, desk research, and descriptive statistical analysis. Four interviews were conducted to consult stakeholders directly involved in the delivery of FEAD and active in the field of poverty alleviation and social inclusion. Among the stakeholders interviewed were representatives from the intermediate body AGEA, three coordinating partner organisations, and one additional research institute. Representatives from the Italian Managing Authority, the Ministry of Labour and Social Policies, were contacted several times (via email, telephone) to take part in the evaluation but did not respond.

The lack of information directly shared by the FEAD Managing Authority represents the main limitation of this case study. A variety of primary and secondary sources were also analysed, including national working documents and annual reports of FEAD in Italy.

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Interviews with stakeholders:

- Interview with a representative of an implementing organisation in Italy, conducted in September, 2023.
- Interview with a representative of an implementing organisation in Italy, conducted in October, 2023a.
- Interview with a representative of an implementing organisation in Italy, conducted in October, 2023b.

Appendix 3: FEAD indicators

Table A. 78 – General financial data for the implementation of FEAD in Italy in 2014-2022

Indicator	Total amount of eligible public expenditure approved in the documents setting out the conditions for support of operations (EUR)	Total amount of eligible public expenditure incurred by beneficiaries and paid in implementing operations (EUR)	Total amount of eligible public expenditure declared to the Commission (EUR)
2014-2022	930 583 786.90	588 553 066.13	496 302 507.85

Source: SFC 2014 database.

Table A. 79 – FEAD common output indicators in Italy in 2015-2022

Output indicators on food support distributed	2015	2016	2017	2018	2019	2020	2021	2022
Quantity of fruits and vegetables (tonnes)	12 196 .90	455.05	4 986.28	1 360.19	1 169.37	2 994.32	5 159.40	5 881.55
Quantity of meat, eggs, fish, seafood (tonnes)	1 305.60	0	814.32	631.18	1.418.88	1.947.10	2 126.96	6 312.31
Quantity of flour, bread,	20 634.30	14 042.85	37 443.00	20 842.94	22 371.19	37 589.66	33 892.43	32 121.17

Output indicators on food support distributed	2015	2016	2017	2018	2019	2020	2021	2022
potatoes, rice and other starchy products (tonnes)								
Quantity of sugar (tonnes)	3 776.98	0.00	34.75	539.76	2 617.36	650.08	3 720.18	4 865.16
Quantity of milk products (tonnes)	33 822.51	19 264.30	3 590.25	8 501.64	7 680.21	22 945.51	20 642.62	24 261.31
Quantity of fats, oil (tonnes)	4 641.15	0.00	4 067.09	2 499.21	1 207.35	5 302.71	4 262.94	2 549.52
Quantity of convenience food, other foodstuff (not falling in abovementioned categories) (tonnes)	11 139.87	0.00	7 196.83	6 433.38	6 934.34	5 495.03	17 211.53	23 764.23
Total quantity of food support distributed (tonnes)	87 517.31	33 762.20	58 132.52	40 808.30	43 398.70	76 924.41	87 016.06	99 755.25
Proportion of FEAD co-financed food products in the total volume of food distributed by the partner organisations (%)	62.70	62.74	70.00	68.92	67.40	69.94	51.37	60.18
Total number of meals distributed partly or totally financed by the OP	16 981 240	17 809 135	17 307 881	18 801 412	24 044 183	19 416 787	14 887 130	16 478 979
Total number of food packages distributed partly or totally	51 876 352	51 085 610	49 647 761	11 595 378	12 223 673	9 747 527	12 225 565	12 734 924

Output indicators on food support distributed	2015	2016	2017	2018	2019	2020	2021	2022
financed by the OP								

Source: SFC 2014 database.

*Please note that there was no expenditure in 2014.

Table A. 80 – FEAD participations in Italy in 2015-2022

Result indicators on food support distributed	2015	2016	2017	2018	2019	2020	2021	2022
Total number of persons receiving food support	2 809 131	2 778 207	2 700 012	2 678 264	2 079 209	2 656 579	2 983 801	2 907 307
Number of children aged 15 years or below	856 879	890 560	454 901	501 596	437 822	539 924	602 179	638 559
Number of persons aged 65 years or above	309 205	248 892	197 756	225 324	182 267	301 133	337 425	333 750
Number of women	1 334 337	1 320 000	860 537	1 037.555	970.918	1 304.806	1 538 268	1 491 820
Number of migrants, participants with a foreign background, minorities (including marginalised communities such as Roma)	1 348 383	1 055 718	379 446	616 693	554 828	680 835	687 802	773 480
Number of persons with disabilities	50 564	50 077	38 501	39 338	30 338	32 998	33 209	33 660
Number of homeless	112 365	111 000	217 407	112 533	68 910	88 034	111 547	93 335

Source: SFC 2014 database.

*Please note that there was no expenditure in 2014.

X.9 The Netherlands

16. Context and background

The Netherlands, despite being a small country, **faces significant social challenges**, as indicated by the at-risk-of-poverty and social exclusion (AROPE) rate. This composite indicator, which accounts for the risk of relative monetary poverty, severe material deprivation, and individuals living in households with very low work intensity, provides a nuanced understanding of the country's socio-economic context (Janković-Milić et al., 2019). Between 2015 and 2022, the AROPE rate in the Netherlands averaged around 16.4, meaning on average, 16.4% of the Dutch population was at risk of poverty and/or social exclusion. In 2020 the AROPE rate fell from 16.5 to 16.0, only to rise again to 16.6 and 16.5 in the following years (2021-2022). It should be noted that the AROPE rate remains below the EU average of 22.23%. Nevertheless, an AROPE rate above 0 indicates vulnerabilities within the Dutch society.

Table A. 81 provides a quantitative overview of the socio-economic context in the Netherlands between 2014 and 2022 including the AROPE rate, Severe Material Deprivation and, Severe Material and/or Social Deprivation rate.

Table A. 81 – Socio-economic context in The Netherlands

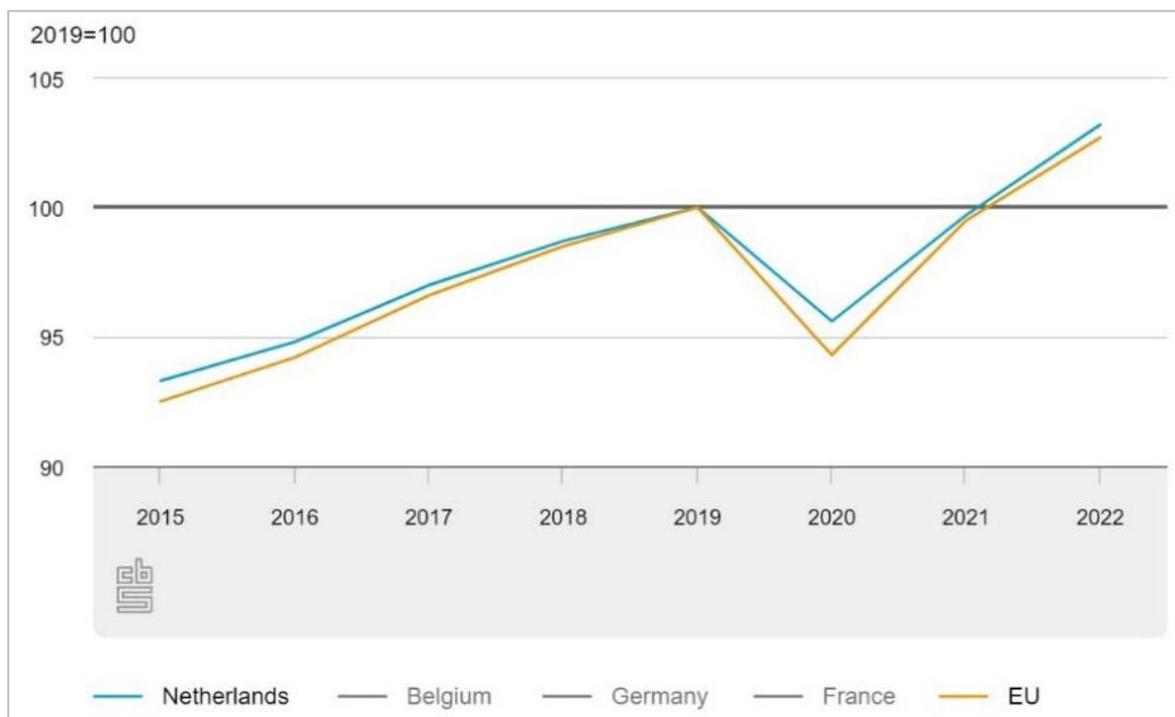
Netherlands	2014	2015	2016	2017	2018	2019	2020	2021	2022	Trend
1. At-risk-of-poverty or social exclusion rate (AROPE) Total		16,4	16,3	16,6	16,5	16,5	16,0	16,6	16,5	
2. AROPE Children		16,8	16,8	16,0	14,9	15,3	16,1	14,8	13,5	
3. Severe material and social deprivation rate (SMSD)		3,2	2,6	2,6	2,6	2,8	2,2	2,1	2,5	
4. Severe material deprivation rate (SMD)	3,2	5,8	2,6	2,6	2,4	2,5	2,1	0,0	0,0	
5. Inability to afford a meal with meat, chicken, fish (or vegetarian equivalent) every second day	2,8	2,2	2,3	1,9	2,1	2,4	2,0	1,8	2,1	
6. Impact of social transfers (other than pensions) on poverty reduction % reduction of AROPE	45,5	48,0	42,5	39,7	39,0	38,3	36,8	36,6	33,8	
7. Housing cost overburden	15,4	14,9	10,7	9,4	9,4	9,9	8,3	12,5	21,7	
8. Self-reported unmet need for medical care % of population 16+	0,5	0,1	0,2	0,1	0,2	0,2	0,2	0,2	0,2	
9. Households with very low work intensity		10,0	9,5	9,4	8,4	8,9	8,7	8,6	8,4	
11. Population in the EU could not afford unexpected financial expenses	23,7	22,9	22,5	20,7	21,5	21,9	19,1	15,1	14,6	
13. Share of total population having neither a bath, nor a shower in their dwelling	0,0	0,1	0,1	0,1	0,1	0,1	0,1			
14. No indoor flushing	0,0	0,1	0,1	0,1	0,1	0,1	0,1			
17. Persons who cannot afford a telephone	0,0	0,0	:	:	0,0	:	:			
18. Persons who cannot afford to replace worn-out clothes	5,3	6,0	5,4	5,0	5,8	5,6	4,9	4,8	5,1	
20. Persons who cannot afford to get-together with friends or family (relatives) for a drink or meal at least once a month	3,3	3,7	2,7	2,9	3,3	3,4	3,2	2,2	3,4	
21. Persons who cannot afford internet connection for personal use at home	1,4	1,4	1,1	0,8	0,6	0,5	0,4	0,4	0,5	
22. In-work risk of poverty	4,6	4,4	4,8	4,3	4,7	3,8	3,9	3,8	3,7	
23. Long-term unemployment	2,7	2,7	2,3	1,7	1,2	0,9	0,7	0,8	0,7	
25. Employment rate	74,6	75,6	76,4	77,4	78,7	79,7	79,3	80,1	81,8	
26. Children (aged less than 18) living in households with very low work intensity		6,4	7,8	6,6	5,8	6,6	7,2	7,0	6,7	
27. At-risk-of-poverty rate for children		14,0	14,8	14,4	13,1	13,6	14,1	13,8	12,7	
28. Severe material and social deprivation rate (SMSD) for children		3,0	2,4	2,6	2,4	2,4	2,0	1,7	2,4	

Source: Eurostat.

The Netherlands is one of the **wealthier countries of the global North**. With a gross domestic product (GDP) per capita of €53.000, the Netherlands was ranked fourth within the European Union (EU) in 2022. According to Netherlands Statistics, this follows consecutive growth with a 3.5% increase from 2021 to 2022 and 4.5% from 2020 to 2021(CBS, 2023).

The figure below illustrates the **change in GDP per capita** of the Netherlands against the average EU trend in the period **between 2015 and 2022**. The trough in the graph is largely informed by the impacts of the COVID-19 pandemic.

Figure A. 85 – GDP per capita of the Netherlands and the EU



Source: CBS, Eurostat.

Despite the relatively strong overall economic situation, **many Dutch citizens face the hardship of poverty and social exclusion on a daily basis**. A 2017 study on in-work poverty found that 5% of the Dutch population live below the poverty line. This risk is further exacerbated in larger cities such as the Dutch capital, Amsterdam, which counted between 25.000 and 26.000 working poor in 2005 (Snel, 2017). In 2021, 3% of the Dutch working population lived in poverty, which amounts to approximately 220,000 working poor across the country (Sociaal Economische Raad, 2021).

Coumans et al., consider homelessness as an indicator for social exclusion and conclude that men are more likely to experience the latter than women. This coincides with the relatively **larger fraction of homeless men in the Netherlands**. Furthermore, the findings emphasise that **individuals between the ages of 30-39** are exceptionally vulnerable to social exclusion through homelessness, as are **people with a non-Western background** (2017).

The **elderly population** is often overlooked in the discussion on poverty and social exclusion, while this group is in fact extremely vulnerable. According to the National Institute of Public Health and the Environment, 1 in 8 (12%) of all pensionable seniors living in the four biggest cities in the Netherlands – Amsterdam, Rotterdam, Utrecht and The Hague – are in social isolation and/or deal with some form of poverty (Baâdoudi et al., 2021).

The silent risk of material and social poverty threatening seniors was emphasised across all interviews. One of the interviewees pointed towards the over-dependence on fixed incomes such as pensions which are often insufficient to keep pace with the increasing cost of living. Another interviewee mentioned the shrinking social circles due to retirement, sickness and death: *“the realities of growing old.”*

Thus, this shows that the peril goes beyond material poverty and that **loneliness and isolation pose real threats for the elderly population**. The COVID-19 pandemic has exposed the vulnerabilities while simultaneously exacerbating them.

17. Reconstructing the intervention logic

17.1. National policy framework

The Netherlands has a **social security system in place to support the livelihood of vulnerable citizens**. This includes wide-ranging social benefits, state pension, and healthcare. According to a respondent from the Ministry of Social Affairs and Employment, this, combined with the relatively small budget, was the main reason to opt for OP II for the FEAD activities implemented in the Netherlands. The emphasis on the socio-emotional component of poverty alleviation under OP II allowed FEAD to complement the Dutch government's existing material and monetary efforts to push back poverty and better complemented the goals of ESF. Furthermore, the Netherlands had reservations against the use of public money for the purchase and distribution of food, especially because national schemes aimed at poverty reduction, with a larger budget, were already in place.

In the Netherlands, FEAD was aimed at addressing the pressing problems of social poverty such as loneliness and social exclusion. In doing so, the FEAD activities effectively promoted engagement and interaction opportunities among seniors, thus contributing to strengthening or enlarging their social network. This is in line with the national social inclusion objectives.

17.2. Objectives and target groups

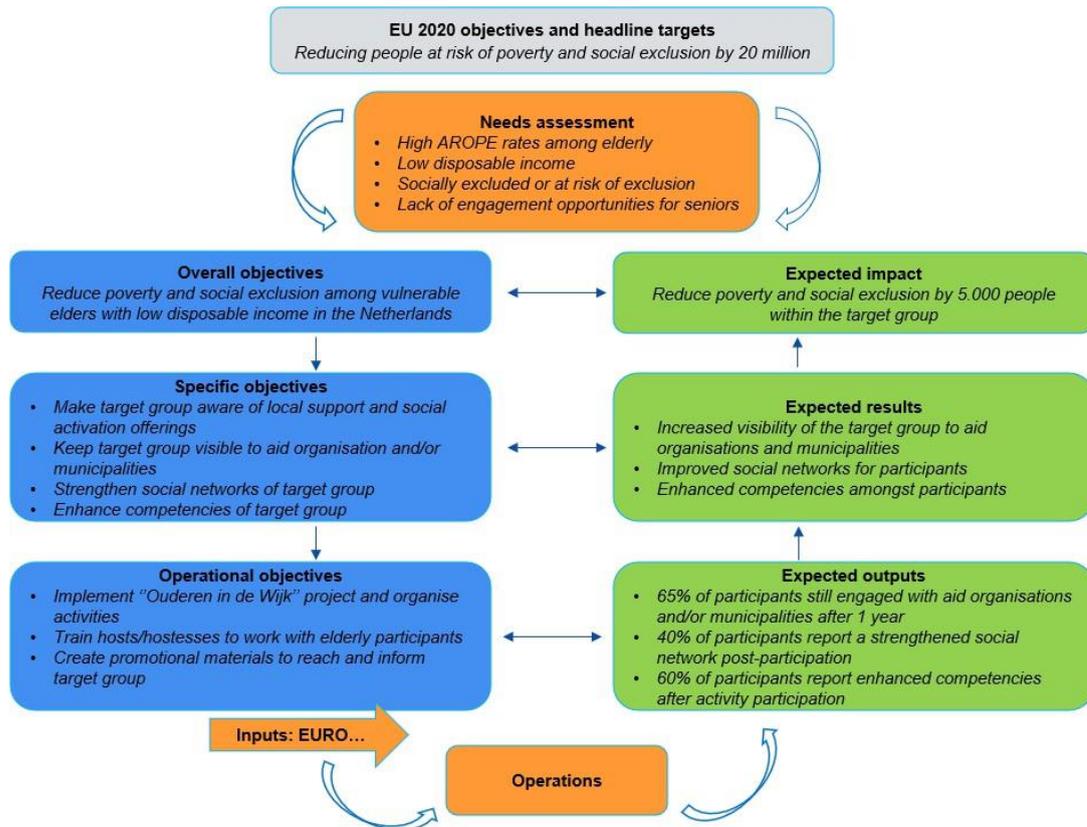
The general objective of the FEAD operational programme in the Netherlands was to reduce the social exclusion of elderly people with a low disposable income (European Commission, n.d.). Accordingly, the **target group included people aged 65 and over at risk of poverty or isolation**. Seniors living below or on the edge of the social minimum income level are considered to be at risk of poverty. The main indicators were incomplete AOW (General Old Age Pension) entitlements, AIO (Supplementary Income Provision for the Elderly) supplement and problematic debts. The target was set to reach 5000 persons.

Multiple interviewees pointed out that the **needs and challenges of the elderly population have largely been underestimated and overlooked**. Due to this, seniors often fall through the cracks of the existing support system. This is one of the most prominent underlying reasons for targeting vulnerable seniors.

The FEAD activities in the Netherlands provided social inclusion assistance to the most vulnerable seniors and support in becoming self-reliant (Baâdoudi et al, 2021). In order to attain this goal, the **specific objectives included guidance to existing local services, improving seniors' social network, and increasing their competences in financial, health, and digital skills**. These objectives are clearly captured in the intervention logic.

Initially, the budget was solely allocated for the most vulnerable and deprived seniors with strict monetary cut off points for receiving FEAD support. However, the **complexity of quantifying loneliness** emerged as a significant challenge. One interviewee recalled numerous instances where vulnerable seniors were ineligible to receive FEAD support as they surpassed the upper-income limit. Recognising the need and impact of socialisation and human contact on seniors, the **eligibility criteria were softened, expanding FEAD's support to those in need**. According to the hostesses working with elderly participants, the mix of people and backgrounds was eventually an asset in fostering a more inclusive and positive environment.

Figure A. 86 – Intervention logic of FEAD in The Netherlands



Source: adapted from FEAD mid-term evaluation.

17.3. Implemented operations

Ouderen in de Wijk (OIDW), which translates to “Seniors in the Neighbourhood”, indeed **targeted vulnerable seniors at risk of social exclusion and poverty**. OIDW was implemented in four cities, Amsterdam, Rotterdam, Utrecht, and The Hague, and was carried out between 2015 and 2022 by the respective public libraries with the main objective of fighting social exclusion amongst vulnerable seniors with low disposable incomes (Baâdoudi et al., 2021).

Specific categories were considered to help identify the **target group** of elderly individuals with a high likelihood of having low disposable incomes and facing social exclusion. According to the Operational Programme, this included **seniors with incomplete AOW payments, those receiving AIO supplement, and indebted elderly individuals attributing debt assistance or legal debt restructuring programmes and using food banks**.

In order to **reach the target group**, OIDW initially **collaborated with third parties** such as SVB (Social Insurance Bank), **municipalities** responsible for debt assistance and the **Legal Aid Board** which already have administrative knowledge of the potential beneficiaries (Operational Programme FEAD, 2014). Other outreach methods included the **city pass scheme** in collaboration with municipalities, **local partnerships** with e.g. doctors, community houses, elderly transport companies, migrant organisations and churches, **marketing campaigns** including distribution of flyers and activity calendars, and **word of mouth advertising** by participants.

In collaboration with the libraries, OIDW essentially aimed to mimic existing community centres for seniors. As such, the **libraries became a space where seniors could come together, socialise and engage in various activities**. These activities included digital skills training for the elderly (Klik&Tik), diverse workshops and classes, shows, games, coffee hours, and movie screenings amongst others. Despite a number of recurring activities such as the coffee hours, the activities varied per library.

The **needs of the elderly in the neighbourhood were taken into account** as much as possible in the range of activities offered as well as the activities offered by existing organisations. This was done by regularly assessing what type of activities the target group would like to partake in and by forming collaborations with local organisations. Furthermore, the activities were low-threshold and easily accessible to promote social interaction and push back loneliness amongst the seniors.

OIDW was the only FEAD activity in the Netherlands. According to an interviewee, focussing on one project was a very deliberate decision to maintain simplicity and ensure feasibility within the boundaries of the budget.

17.4. FEAD governance and delivery system

At the start of the FEAD subsidy period, the **public libraries** in the four major cities in the Netherlands (G4) – Amsterdam, Rotterdam, The Hague and Utrecht- **collectively applied** for FEAD to finance and launch OIDW to support vulnerable seniors. It should be noted that the application was led by the Public Library of Utrecht. **The Ministry of Social Affairs and Employment, responsible for the allocation of FEAD funds, granted the entire budget (€4.6 million) to OIDW.**

The **governance structure was headed by a steering group of executive directors from the four libraries**, with a rotating chairmanship initially held by the Director of Utrecht, followed by The Hague and then Rotterdam. **Each city had a project leader who managed teams consisting of networkers and hostesses, and controllers for financial oversight.** Considering Utrecht's leading role in OIDW, Utrecht's controller played a key role throughout the programme period. Accordingly, Utrecht's controller was in direct contact with OIDW's MA.

Initially, **Mira Media** was appointed as the **external project leader** to oversee the administration of the project. However, the administrative process proved challenging. In 2019, **FFIQS**, an external organisation with expertise in European subsidies, was brought in to effectively support and improve OIDW's administration and overcome the challenges posed.

The **Ministry's Policy Implementation Department worked closely with the project**, involving regular meetings with project leaders and an annual supervisory committee to oversee the project and ensure proper use of EU funds. Both the **Ministry of Social Affairs and Employment and State Audit Service audited the ministry's activities**, providing an additional check on the management of the funds. This was meant as an extra assurance to the Committee.

18. Key findings on the implementation of FEAD

In this section the **key findings on the implementation of FEAD are presented.** For this, OIDW – the sole FEAD activity in the Netherlands – is subject to the evaluation framework and is assessed based on five criteria: **1) efficiency, 2) coherence, 3) relevance, 4) EU added value and, 5) visibility.** The results are based on all available evidence including quantitative data, screening of FEAD operations, results of interviews and additional desk research.

18.1. To what extent was FEAD support successful – or not – and why?

Overall achievement of FEAD objectives [*criterion: effectiveness*]

Loneliness is a serious problem amongst seniors, negatively impacting their quality of life and overall well-being. Research conducted by TNS/NIPO reveals that among the 2.9 million individuals aged 65 and over, nearly 900,000 (31%) experience feelings of loneliness (Operational Programme FEAD, 2014). In an attempt to tackle this, **OIDW facilitated socialisation opportunities.** As highlighted above, the programme's main objectives were to help seniors prevent and overcome social isolation, engage in social activities and in/with society at large, create and expand their social network and, facilitate access to support services such as financial support services, social work and counselling to help the seniors cope with personal, emotional or social issues.

OIDW successfully reached an estimated 4.400 seniors of which roughly 75% corresponded to the envisaged target group. These explicit FEAD beneficiaries are senior participants who fully comply with all

FEAD criteria including the income threshold. It should be noted that the participation of the remaining 25% of the seniors was not funded by FEAD, instead the incurred costs were independently financed by the libraries.

OIDW was considered a successful project amongst all interviews, including Managing Authorities, project managers, hostesses, and beneficiaries. According to them, the **seniors generally reported to be very happy with OIDW and its activities**. This was reflected in the return rate within the project. According to one of the hostesses, *“the opportunity to talk and tell their stories that they have been holding in for so long because they have no one to talk to really sparked joy amongst the seniors.”*

Initially OIDW was designed as a one-year rotating programme, however most seniors kept coming back to the libraries even after a year. For this reason, the intended target of 5000 was not attained. This led to a shift in focus from quantity to quality of support. The main reason for this was acknowledging and accommodating the needs of the participants who were already involved with OIDW. However, this should not be interpreted as a lack of recruitment for potential newcomers. Instead, outreach remained relevant throughout the entire duration of the programme. The activities organised by OIDW facilitated new encounters and social interaction. In many cases, the seniors stayed in touch and established actual friendships. This proved to be especially valuable during COVID-19 as lockdowns and social distancing measures further aggravated the existing risk of social isolation amongst seniors. To ensure continuity despite the outbreak of **COVID-19, OIDW adapted its programme delivery**. Accordingly, digital and hybrid alternatives were implemented to cope with the pandemic and comply with national safety Covid restrictions. (Annual Implementation Report, 2022)

Besides successfully alleviating thousands of seniors from social isolation, **OIDW has been a frontrunner in acknowledging and addressing the specific vulnerabilities of seniors**. As such, many other local organisations followed with similar initiatives and projects in line with OIDW’s target and objectives of supporting vulnerable seniors and combatting loneliness.

Reach of target groups [*criterion: effectiveness*]

OIDW is targeted at vulnerable seniors living in the Netherlands. In accordance with Operational Programme (OP) II, these are elderly people of state pension age of 65 and over with a low disposable income who are (at risk of being) socially isolated (Witkamp & de Ruig, 2018; Baâdoudi et al., 2021). **Senior participants were only eligible to the programme if they did not exceed the social minimum income threshold**. However, the lines regarding social exclusion were much fuzzier due to the unquantifiable and subjective nature of loneliness and isolation.

In practice, the **strict income requirements triggered moral questions whether or not to admit someone to the programme**. There have been numerous instances where seniors were turned down for earning slightly more than the upper limit, sometimes only by a mere €50 per month. One of the interviewees explained that this was due to the strict rules and regulations of FEAD and the conditions for using EU money. However, some cities such as Amsterdam, took a more relaxed approach thereby granting access to OIDW to a wider audience, which eventually inspired the admission process of OIDW in Utrecht, Rotterdam and The Hague as well. To remain compliant with the European Commission's rules and regulations, only the participants meeting the specific requirements were eligible for funding through FEAD. As for the remaining participants, their participation was funded by the libraries themselves, unless they determined otherwise.

Initially, OIDW was intended as a rotational programme of one year. Meaning that there would be a continuous flow- of participants coming in and going out. However, **most participants kept coming back long after a year**. One of the beneficiaries expressed the joy and pleasure OIDW sparked, even describing it as *“a blessing.”* Another beneficiary, who has been part of the programme since its establishment in 2015, mentioned how busy her social life is nowadays with all the different activities and friends from the library.

One of the reasons for not attaining the target of 5000 beneficiaries was the lack of rotation and recurrence of participants. However, the programme did **provide long term support to over 3000 registered participants**. In other words, OIDW allowed for over 3000 vulnerable seniors to feel seen and heard, to establish new social contacts, and in many cases even build real friendships while also raising awareness of the wide range of activities available to them. Additionally, OIDW has been a crucial point of contact to touch base and refer relevant support and care services in line with participants' specific needs.

Vulnerable seniors are a difficult target group to reach. This became evident across all interviews as outreach remained challenging, especially at the beginning of the project. One interviewee also identified the significance of psycho-emotional obstacles such as fear and mistrust. The latter was further reinforced by inquiring directly

into one's financial situation as part of the intake process. To overcome this, building a relationship and gaining trust was prioritised. Thereby shifting the focus from quantity to quality.

As highlighted above, **various communication channels and outreach methods were used to attract participants** such as spontaneous library walk-ins, neighbourhood "find spots", radio advertisements, service provider referrals, and word-of-mouth advertising (Witkamp & de Ruig, 2018). Later, the libraries collaborated with the respective municipalities to identify and recruit vulnerable seniors through so-called *stadspas* or city pass in English. This is a type of municipal discount card offered to residents to access activities, cultural events and services against reduced tariffs. Collaborating with municipalities was recognised by an interviewee as a smart move and that the use of the city passes proved to be a highly effective recruitment strategy. The Ministry of Social Affairs and Employment was never involved in the outreach process and that the libraries took full responsibility of recruiting participants and FEAD beneficiaries.

Adjustments to FEAD to address new challenges [*criterion: effectiveness*]

In 2020, the COVID-19 pandemic caused global disruption, leading to widespread fear and uncertainty. While everyone was affected by COVID-19 in one way or another, the elderly population was exceptionally vulnerable, being at risk of both the virus itself as well as the consequences of the prevention measures such as social distancing which exacerbated social exclusion (Brooke & Jackson, 2020; Inouye, 2021). As a result, **the pandemic emphasised and further exacerbated the risk of social exclusion and loneliness amongst seniors.**

The libraries were quick to respond to the COVID-19 outbreak. This effective crisis management enabled the programme to continue uninterrupted. Furthermore, an interviewee accredited the OIDW project managers for their timely communication of the intended project changes amidst the pandemic with the Ministry of Social Affairs and Employment.

All activities remained accessible throughout the pandemic, albeit in adapted and often less robust ways. (Annual Implementation Report, 2022) Most prominent was the **transition from a physical to a digital space**. The digital implementation of OIDW included hostesses calling the participants, telephone circles amongst groups of participants and online lessons to learn how to video call or watch videos on YouTube for example. While the digital component was indeed a big asset for the participants, it was also an obstacle due to lack of competency. Digital illiteracy was not only something OIDW tried to tackle and take on during the pandemic, but also in the years pre-COVID-19. The newly acquired knowledge and skills proved especially useful in maintaining social contact during the pandemic (Baâdoudi et al., 2021). While the groups were downsizing to comply with COVID-19 guidelines, the workload for hostesses increased due to more one-on-one interactions. This was not only strenuous for the hostesses in terms of time and effort, but also in terms of money, adding extra pressure on the budget.

As **COVID-19 restrictions were eased, OIDW resumed physical activities** as before but in smaller groups and in compliance with the National Institute of Public Health and Environment (RIVM) guidelines such as physical distancing and wearing face masks.

COVID-19 did showcase the success of OIDW's impact on combatting social exclusion and loneliness. Firstly, this was evident as most seniors expressed that they missed coming to the libraries and taking part in OIDW activities on site. Secondly, during the pandemic numerous participants stated that they were able to rely on the social networks and friendships established pre-COVID-19 (Baâdoudi et al., 2021).

The Netherlands did not make use of any of the flexibilities offered in response to the crises (CRII+, REACT EU and CARE). This was mainly due to the libraries remaining open during the pandemic, unlike most other public facilities. Furthermore, the flexibilities would be redundant since all public libraries are government-funded in the Netherlands.

Horizontal principles of FEAD [*criterion: effectiveness*]

It is difficult to quantify OIDW's contribution to the horizontal principles of FEAD (Witkamp & de Ruig, 2018). However, **OIDW has been successful in ensuring cultural diversity** by reaching and accommodating participants with different ethnic, cultural, and religious backgrounds. Accordingly, 27% of all participants in 2021 had a migration background (Annual Implementation Report, 2022). This is in line with Article 9.1 of the subsidy scheme which states that all activities should be easily accessible, considering the cultural diversity of the target group, avoid direct or indirect discrimination, and guarantee equal treatment of men and women.

OIDW actively sought to enhance diversity and inclusion. One of the efforts was to employ multilingual hostesses to make the programme more accessible for non-Dutch speaking participants. (Annual Implementation Report, 2022) Another interviewee consulted shared an anecdote of an Iranian beneficiary who was thrilled to speak in her native tongue with one of the hostesses.

In certain cities, reaching seniors with a migration background was considered challenging, specifically Turkish and Moroccan participants were difficult to reach (Witkamp & de Ruig, 2018). The latter was mainly due to cultural differences. Furthermore, the group composition strongly depended on the neighbourhood. As such, certain neighbourhoods are more diverse which is in turn reflected in the local libraries.

In terms of gender equality, OIDW has reached a vast majority (75%) of female participants. However, all men and women were treated equally throughout the programme. The gender imbalance is not uncommon: while older men are often at greater risk of loneliness, they may have less interest in these types of social activities or perceive higher socio-emotional barriers to partake in them. However, the wide range of diverse activities ensured that there was always something suitable for the participants, both male and female.

In terms of **age**, one interviewee highlighted that *‘‘It’s easy to disregard the diversity of this group by generalising them as old. But there is a big difference between someone who has just retired at the age of 67 and someone who is 90.’’* **OIDW attracted all types of seniors – young, old, male, female, Dutch, non-Dutch, etc –** each with their own underlying motivations to take part in the project.

Success and hindering factors [*criterion: effectiveness*]

The evaluation report commissioned by the Ministry of Health, Welfare and Sport identifies **five key factors contributing to the success of OIDW.** These are: **1) the commitment of the hostesses, 2) getting to know each other and building trust, 3) offering a wide range of accessible activities, 4) providing tailor-made assistance; and 5) the referral and warm handover to other support services** (Baâdoudi et al., 2021).

The interviews also highlighted the **hostesses’ added value** with all interviewees emphasising their significant impact through the time, effort, and personal attention invested in the seniors. Accordingly, **human contact and interaction** contributed to the effectiveness of the programme, and its goal to push back loneliness amongst vulnerable seniors.

Based on the interviews, **accountability and administration burden were the biggest obstacles.** This was mainly due to the stringent EU requirements conditional to the attribution of FEAD. The excessive level of accountability and accompanying administrative burden was a substantial shift in the way of working for a party unfamiliar with European subsidies. Since the **libraries involved were not accustomed to the rules, regulations, and administrative process of EU funds, this posed initial challenges.**

Furthermore, **the administrative burden hindered the effectiveness of OIDW as the level of detail and precision was very time-consuming.** This included e.g. logging the exact time participants arrived and departed, their full names, a checklist to confirm eligibility to FEAD, and all internal meetings. As a result, the hostesses had to allocate a large amount of their time to admin-related work, *‘‘time that could have been better invested in the participants,’’* states one of the hostesses.

Besides the administrative burden, the hostesses were confronted by the **emotional strain of supporting vulnerable seniors.** According to the various interviewees, this all in all heightened the hostesses’ risk of burnout and discontinuing their work at OIDW.

In consultation with the Ministry of Social Affairs and Employment and the European Commission, the **strict eligibility criteria were relaxed to relieve pressure from the beneficiary organisations.** One of the positive side effects of this was the diversification of the participants. **OIDW was expanded to include not only the most vulnerable and deprived seniors, but all seniors in need of socialisation opportunities.** The expansion of the target group allowed for a mixed and diverse group of seniors and contributed to an uplifting environment and an enriching and educational experience.

OIDW is widely recognised for **inspiring many other initiatives targeting (vulnerable) seniors.** While this is certainly a positive development, there is a downside to it as well. One of the interviewees highlighted that this had led to **unnecessary competition between OIDW and other local organisations targeting seniors.** The different initiatives should instead collaborate to broaden the scope of support.

Due to the limited scale and relatively small budget, it is difficult to determine OIDW’s socio-economic impact. However, the evaluation report affirms OIDW’s positive social influence on seniors, reaching beyond the most

vulnerable and financially restricted participants. As such, **OIDW has effectively contributed to reducing (imminent) social isolation and loneliness amongst the elderly** (Baâdoudi et al., 2021).

Overall cost-effectiveness of FEAD operations [*criterion: efficiency*]

OIDW's overall cost-effectiveness was largely impacted by the administrative burden. This was emphasised across all interviews. Accordingly, it is estimated that at least 30% of all resources were spent on administration and accountability of the FEAD subsidy. As mentioned before, most respondents agreed that this time, effort, and money did not benefit the activities nor the commitment toward the target group and could thus have been spent more effectively.

Administration was especially problematic in the early stages of OIDW. Its required extensiveness was claimed to strain a sizeable amount of the resources and in turn hamper the cost-effectiveness of the project. This was further exacerbated due to the hostesses' lack of administrative experience and precision.

In 2018 an overarching project manager was hired to turn the tide of the OIDW's cost-effectiveness. According to him, the most effective measure was **softening the participant's inclusion criteria**. This **significantly facilitated the administrative process and in turn boosted cost-effectiveness**.

Beyond the criticism, numerous interviewees also highlighted the **positive side-effects of the administrative requirements**. They encouraged the hostesses to work in a more organised way and to adopt a systematic approach, which enhanced their level of professionalism. Furthermore, the initial extensive administration was crucial to tackling the challenges of COVID-19 from the outset.

The most cost-effective activities were often the simplest. For instance, the regular coffee hours were an effective means of fighting loneliness and facilitating social inclusion. This was affirmed by both the hostesses and the beneficiaries. The coffee hours were planned on set days and times, providing the seniors with a sense of structure. With many familiar faces returning to the libraries for their coffee catchups, the hostesses were on a first-name basis with the seniors, fostering valuable relationships and friendships. *"Coming together, feeling seen and heard is what really matters for this group,"* says one of the hostesses.

Although the substantial FEAD subsidy of € 4,408,740 allowed for the opportunity to get OIDW off the ground, the **budget was insufficient to finance the entire project** (Witkamp & de Ruig, 2018). EU countries are expected to allocate at least an additional 15% to their national programmes (European Commission, n.d.) However, the total cost of OIDW was roughly €8 million, nearly double the size of the fund. This was because many costs were disapproved by FEAD after already having been incurred such as costs for non-FEAD beneficiaries. This illustrates the high level of accountability and the need for extensive administration required from FEAD.

Administrative burden of monitoring and reporting requirements [*criterion: efficiency*]

As mentioned above, the **administrative burden posed a serious challenge to OIDW's effectiveness, straining both time and monetary resources**. The respondents estimated that 25-35% of the project's resources were dedicated to administrative tasks.

The administration required **extensive monitoring and reporting of participant details and activities**. This included recording participant's attendance times, full names, and eligibility as well as minor things such as the number of coffee cups or pieces of cake consumed. This resulted in it being a time-intensive process.

This was further aggravated due to the **libraries being unfamiliar and inexperienced with managing European funds such as FEAD**. As a result, OIDW initially struggled to comply with FEAD's stringent accountability requirements. To address these issues, a **cooperative approach was adopted to improve compliance with FEAD's rules and regulations**. This included expert advisory support, increased oversight, and comprehensive guidelines for integrating correct monitoring and reporting practices.

While the depth of accountability was seen as excessive and impractical, it was also crucial. This was because it not only needed to comply with FEAD's requirements, but also because the administrative details directly influenced staff remuneration. If a certain percentage of participants met FEAD criteria, it would proportionally increase the hostesses' salaries. **Over time, as administrative requirements were relaxed, the process became more efficient, allowing staff to concentrate more on the OIDW's objectives and create a greater impact.**

Simplification measures [*criterion: efficiency*]

The interviewees recommended several simplification measures for OIDW and points of improvement for handling European funds in the future. Considering the inefficiencies in the administrative approach and such meticulous attendance tracking, the **recommendations** are mainly aimed at **simplifying the administration process**.

Firstly, **shifting towards streamlined accounting protocols and obtaining clear accountant's statements would help reduce the administrative burden**. In addition, this would improve clarity in responsibility allocation, particularly between FEAD and the Ministry of Social Affairs and Employment.

Secondly, for **organisations engaging with FEAD for the first time** – as was the case for the public libraries involved with OIDW – **there is a strong need for comprehensive guidelines, pre-training sessions, etc to better understand expectations and prepare for the administrative load**.

Lastly, **flexibility (e.g., adaptable plans) is important for long-term projects like OIDW**. Accordingly, this allows for learning and making necessary adjustments over time, rather than being bound to rigid, multi-year plans.

Coherence of FEAD with other interventions [*criterion: coherence*]

There are **synergies between OIDW and other national actions and policies aimed at poverty alleviation and social inclusion amongst seniors in the Netherlands**. OIDW's unique focus on addressing the socio-emotional challenges faced by seniors such as loneliness and isolation, complements existing material aid programs. By focusing on these often-overlooked aspects of senior well-being, the project enhances the impact of the Dutch government's support system.

While the comprehensive pension system and healthcare policies provide a solid foundation for financial and health security, OIDW enriches this approach by catering to the social and emotional needs of seniors. This holistic method is essential in fully addressing their diverse challenges, especially those living in poverty and (at the risk of) social isolation. **OIDW's role in the Dutch system is not just supplementary, but is integral, filling gaps that material aid alone cannot cover**.

Furthermore, **OIDW aligns closely with the national objective of fostering social inclusion**. The public libraries function as community hubs that facilitate social connection and promote active participation amongst seniors. This effectively counters the social exclusion often experienced by the elderly, enhancing their overall quality of life. The success of OIDW lies precisely in this dual approach of providing spaces for interaction while simultaneously contributing to the emotional well-being of the participants.

OIDW also provides synergies with broader European initiatives aimed at social inclusion and poverty alleviation such as the European Social Fund (ESF) and the Asylum, Migration and Integration Fund (AMIF). Accordingly, OIDW aligns with ESF's goals in enhancing social inclusion and education, offering a platform for senior engagement and learning through educational activities, workshops, and skills development. Additionally, OIDW also supports AMIF's objective by aiding the inclusion and integration of elderly migrants and refugees.

18.2. Is FEAD still relevant?

Relevance to target groups [*criterion: relevance*]

OIDW's main objective was fighting (impending) social isolation amongst seniors from vulnerable groups (Baâdoudi et al., 2021). As mentioned before, this vulnerability was defined as experiencing poverty and loneliness. The latter is especially problematic as the risk of loneliness increases with age due to functional limitations, decreasing social integration, and lower income levels (Jylha et al., 2004; Luhmann et al., 2016). Poverty may exacerbate loneliness by limiting social participation and provoking the feeling of shame and humiliation (Hudson, 2016; Batsleer & Duggan, 2020). Along these lines, vulnerable seniors are stuck in a vicious cycle of monetary and social poverty.

In collaboration with the public libraries in Amsterdam, Rotterdam, Utrecht and The Hague, **OIDW aimed to tackle this heightened risk of loneliness**. The goal was to create a safe space for seniors to come together

and be surrounded by “friendly and familiar faces.” To attract seniors to the programme, OIDW was designed to be low threshold and easily accessible. OIDW’s activities were intended to overcome isolation, promote social engagement, expand social networks, and facilitate access to support services (Baadoûdi, 2021). This is **in line with the needs of the target group**.

While OIDW targeted the general risk factors of social exclusion amongst vulnerable seniors, there is a **lack of awareness in diversity amongst seniors**: “A 67-year-old woman who just retired and a 90-year-old man in a wheelchair are very different. Yes, they’re both seniors but they live different lives, with different needs and challenges, and require an entirely different approach.”

The risk of social exclusion amongst seniors was not yet widely acknowledged, nor were their specific vulnerabilities. **OIDW helped raise awareness of these needs and challenges which in turn sparked more efforts and initiatives targeting vulnerable seniors.**

Relevance of FEAD now and in the future [*criterion: relevance*]

All interviewees agreed that **FEAD is highly relevant to the current and future needs in the Netherlands, especially considering ageing demographic trends**. Like many other countries in Europe, the Netherlands is seeing a shift towards an older population. The percentage of those aged 65 and over is expected to rise from 20% to 25% by 2035 (PBL, 2022). This increase means that the problem of social exclusion amongst vulnerable seniors will become more severe and pressing over time, making the continuation of FEAD-type activities and initiatives even more critical.

“We need to think what this [ageing population] means for our social support and care system. The library has a lot of potential here,” notes one of OIDW’s project managers, referring to the libraries’ potential role in mitigating the challenges of ageing. This involves the increased **demand for social support and care systems** which are already under significant pressure. Initiatives such as **OIDW are necessary to help alleviate this pressure and simultaneously address the needs of the seniors**. According to one of the hostesses, the success of the project is evident in the appreciation expressed by the participants and the decision of almost all libraries to continue and independently finance OIDW activities post-FEAD funding. This demonstrates both the success and the sustainability of the FEAD approach.

18.3. Did FEAD make a difference and to whom?

EU added value [*criterion: EU added value*]

FEAD has played a crucial role in firstly, **raising awareness regarding the needs and challenges of seniors** and secondly, **initiating and upscaling activities aimed at supporting this vulnerable group**. “Without FEAD, OIDW wouldn’t have been so successful,” claims one of the project managers. Another interviewee credits FEAD for “finally putting the seniors on the map.”

Most of the libraries involved with OIDW have **continued their activities independently**, even after the conclusion of FEAD funding. The ongoing commitment demonstrates the lasting impact of the initial funding. OIDW has even inspired libraries in other cities and municipalities to implement similar programmes and activities.

OIDW has increased government attention towards the needs of seniors, particularly within the Ministry of Health, Welfare, and Sport. Consequently, this may point towards future governmental initiatives and support targeting vulnerable seniors. This trend extends beyond government circles as an increasing number of organisations are actively investing more in social inclusion projects for seniors. This is a notable change, as seniors were often overlooked in the past.

The libraries’ evolution from ‘a focus on collections to fostering connections’ represents a significant change in their approach to serving the community. This underscores the **evolving role of libraries in addressing the needs of vulnerable groups such as seniors** which is a direct result of OIDW. This evolution reflects a broader trend of libraries becoming more active and socially engaged community centres.

As a result, **public libraries** – especially in Amsterdam, Utrecht, Rotterdam and The Hague – **have gained recognition from various ministries and non-governmental organisations for their broad social potential**. This in turn has led to forming **new partnerships and collaborations** at both city and national levels.

Visibility [visibility]

OIDW is often simplified to a library initiative in common parlance. Some of the senior participants even consider OIDW and the libraries as synonymous. While the programme is indeed carried out by the libraries, it is in fact a collaboration between various public libraries and Mira Media, funded by FEAD. The latter is **openly communicated**. Accordingly, FEAD and the EU are incorporated in all logos and communication channels such as the email signature, banners, flyers, etc.

It is **unlikely that the participants are aware of FEAD and its role in OIDW**. It is more likely that the participants look towards the libraries, (e.g., the municipality or the government) instead. However, the EU and FEAD may be too far away and intangible for the target audience.

However, there have been **efforts to raise awareness regarding the role of FEAD**. For instance, during the intake interviews with the participants, it is explained that OIDW is largely financed by European funds. When one of the beneficiaries was asked to elaborate on the programme's funding structure, she highlighted that the quality of activities was notably better during FEAD than after- thereby insinuating awareness and acknowledging FEAD's contributions to the programme.

19. Good practices

The use of the so-called **city passes as part of the recruitment strategy** was considered a good practice. These city passes – Stadspas (Amsterdam), Rotterdampas (Rotterdam), U-pas (Utrecht), and Ooievaarspas (The Hague) – are offered by the municipality to increase accessibility to cultural and recreation activities often aimed at people with lower incomes or limited resources. The overarching objective of this is to enhance quality of life by making leisure and cultural activities more inclusive and accessible.

Collaboration with municipalities and the respective city passes were successful in promoting awareness of OIDW and reaching seniors. This was mainly because most seniors were already familiar with it and often already made use of the local city passes.

From an administrative perspective, **outreach through city passes ensured that the seniors generally met the eligibility criteria for FEAD**. This is mainly because the city passes are restricted to people with a low disposable income. This in turn facilitated administrative efficiency.

Another good practice was the **regular coffee hours**. Although simple, the consistency of these socialisation opportunities created a sense of familiarity and community amongst the seniors. According to one of the hostesses less is often more to effectively address the needs and challenges of the vulnerable target group. *“Usually, the seniors just want someone to talk to,”* she highlighted. The coffee hours helped to build relationships and incentivised seniors to return to the programme which in turn effectively alleviated social isolation.

The **expansion of FEAD eligibility** was also recognised as a good practice. Expanding the reach of FEAD's support to a wider audience created a greater impact. *“Loneliness is a real threat for all seniors, not only those in poverty,”* a project manager highlighted. Additionally, relaxing the eligibility criteria helped to mitigate the challenges associated with the extensive accountability and administrative burden.

20. Conclusions and lessons learned

OIDW has proven successful in **effectively combating loneliness amongst vulnerable seniors and improving their quality of life**. Fundamental to OIDW's success was the program's focus on fostering social interaction and the role of the hostesses. The skills developed and relationships established during the initial stages of OIDW were especially effective during the COVID-19 pandemic. In response to the pandemic, OIDW adapted its implementation including the transition to digital platforms. This adaptability was crucial, enhancing the program's effectiveness despite facing challenges such as administrative burdens and the emotional strain on staff. An important lesson learned is the value of flexibility in program objectives and methods. Particularly in times of crisis, this flexibility and adaptability can boost effectiveness.

Regarding **efficiency and simplification**, the biggest obstacle was the **demanding administrative burden** which consumed roughly 30% of OIDW's resources. In order to overcome this, OIDW eventually relaxed the

eligibility criteria and expanded the programme beyond the most vulnerable and deprived. Simple, low-cost activities such as regular coffee hours were particularly effective, emphasising that sometimes the simplest solutions can be the most impactful. This highlights the necessity for streamlined and simple administrative processes balancing both compliance with accountability criteria and operational practicality.

In terms of **coherence**, OIDW showed **alignment with national and European initiatives aimed at social inclusion and poverty alleviation**. OIDW complements the Dutch welfare system by addressing the socio-emotional needs of seniors, an area often underserved by traditional aid programmes. In doing so, OIDW has been a key part of a larger strategy to tackle the various challenges seniors face. This underlines the importance of integrating local initiatives with broader national objectives to enhance the overall impact and coherence of social support programmes.

OIDW remains highly relevant, especially with the Netherland's ageing population. OIDW's main objective to alleviate social and monetary poverty is justified considering the increased risk of loneliness and social exclusion among seniors. In collaboration with public libraries, OIDW created accessible and low-threshold environments to respond to the needs of vulnerable seniors. Accordingly, the activities were designed to foster social engagement, network expansion, and access to support services. However, OIDW also brought to light the need for recognising and addressing the diverse needs of the elderly population. To maintain relevance, the programme requires continuous adaptation to the evolving needs and diversity of the target group.

Regarding **EU-added value and visibility**, **FEAD's involvement in OIDW was instrumental in enhancing the support and visibility of seniors' needs**. This collaboration led to sustainable impacts and inspired similar initiatives, demonstrating the transformative power of FEAD's support. Despite these successes, a notable challenge was the gap in the seniors' awareness of FEAD's role, reflecting the broader challenge of effectively communicating the EU's involvement in local initiatives. Therefore, the key lesson learned is the critical importance of developing effective communication strategies to ensure that the target audience recognises and appreciates the role of EU funding in local initiatives.

To conclude, the success of OIDW demonstrates how effectively addressing the nuanced needs of vulnerable seniors can lead to meaningful and lasting social impact.

Appendices

Appendix 1: Methodology

The methodology for the FEAD ex-post evaluation is two-fold and included desk research and in-depth interviews with stakeholders. The Operational Programme, mid-term evaluations, other relevant documents, and reports were reviewed during the desk research. Relevant stakeholders were initially identified through stakeholder mapping, this was later followed by snowball sampling and requesting referrals to other potential respondents during the interviews. All respondents were briefed about the scope of the study and voluntarily participated in the interviews. The interviews were held online via Microsoft Teams which allowed for scheduling flexibility and increased accessibility and convenience. The findings from the interviews were triangulated with the desk research as well as other interviews to enhance credibility. It should be noted that data saturation was attained.

The table below provides an overview of the stakeholders interviewed as part of the evaluation. For privacy reasons, the names of the respondents are not disclosed.

Table A. 82 – Overview of interviewees

Organisation	Role
Ministry of Social Affairs and Employment	Co-project leader FEAD
Ministry of Social Affairs and Employment	Policy officer
Public Library Utrecht	Overarching project manager OIDW
Public Library Amsterdam	Project manager OIDW
Public Library Amsterdam	Hostess OIDW
OIDW participant	Recipient of FEAD
OIDW participant	Recipient of FEAD

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Appendix 3: FEAD indicators

Table A. 83 – Input indicators for the implementation of FEAD in The Netherlands in 2014-2022

Indicator	Total amount of eligible public expenditure approved in the documents setting out the conditions for support of operations (EUR)	Total amount of eligible public expenditure incurred by beneficiaries and paid in implementing operations (EUR)	Total amount of eligible public expenditure declared to the Commission (EUR)
2014-2022	8 817 480.00	4 972 966.00	4 403 056.00

Source: SFC 2014 database.

Table A. 84 – Participants of FEAD in The Netherlands in 2014-2022

Indicator	2016	2017	2018	2019	2020	2021
Total number of persons receiving social inclusion assistance	281	1 211	769	579	366	93
Number of children aged 15 years or below	0	0	0	0	0	0
Number of persons aged 65 years or above	281	1 211	769	579	366	93
Number of women	210	912	613	443	282	79
Number of migrants, participants with a foreign background, minorities (including marginalised communities such as the Roma)	87	301	181	183	124	29
Number of persons with disabilities	3	175	134	149	55	17
Number of homeless	0	0	0	0	0	0

Source: SFC 2014 database.

* Please note that there were no participations in 2014, 2015 and 2022

X.10 Portugal

21. Context and background

Over the evaluation reference period, Portugal's socio-economic context improved substantially. These advancements were particularly evident in key indicators, including the at-risk-of-poverty or social exclusion (AROPE) rate, the severe material deprivation rate, child poverty, and food insecurity.

The AROPE rate, a significant measure of socio-economic wellbeing, served as a reflection of the nation's commitment to addressing poverty and social exclusion. In 2014, it stood at 26.4%, indicating that a considerable portion of the population was grappling with socio-economic vulnerabilities. However, a notable reduction subsequently occurred, with the rate declining to 20.1% in 2022. This reduction signifies an improvement in the accessibility of economic opportunities and social resources for the population. Nonetheless, the poverty gap indicator in 2022 was notably high at 21.7%, highlighting that those in poverty/material deprivation were substantially poorer than the median citizen.

The AROPE indicator for child poverty has experienced a significant transformation. In 2014, the AROPE rate for children was alarmingly high at 31.0%. By 2022, this rate had dropped to 20.7%, highlighting a shift towards ensuring that the nation's children have access to opportunities and resources that enhance their wellbeing. The severe material and social deprivation (SMSD) rate, which reports an enforced lack of necessary and desirable items to lead an adequate life, has experienced a noteworthy decline. In 2014, it was 10.9%, but by 2022, it had decreased to 5.3%. This reflects substantial improvements in addressing material and social deprivation.

Despite the previous economic and financial crisis, Portugal's socio-economic context evolved positively over the reference period. As illustrated in Table A. 85 below, the reduction in poverty and social exclusion, alongside improvements in child wellbeing and material living conditions, showcased the country's commitment to addressing these critical issues. While challenges remained, such as the need to maintain consistent access to nutritious meals, the overall trend was one of progress and improved wellbeing for the population.

Table A. 85 – Socio-economic context in Portugal

Portugal	2014	2015	2016	2017	2018	2019	2020	2021	2022	Trend
1. At-risk-of-poverty or social exclusion rate (AROPE) Total		26,4	24,9	23,4	21,6	21,1	20,0	22,4	20,1	
2. AROPE Children		31,0	26,8	23,0	21,7	20,9	20,8	22,5	20,7	
3. Severe material and social deprivation rate (SMSD)		10,9	9,1	8,0	6,6	5,6	5,4	6,0	5,3	
4. Severe material deprivation rate (SMD)	10,6	5,8	8,4	6,9	6,0	5,6	4,6	0,0	0,0	
5. Inability to afford a meal with meat, chicken, fish (or vegeta	4,0	3,5	3,4	3,0	2,4	2,3	2,5	2,4	3,0	
6. Impact of social transfers (other than pensions) on poverty	27,0	26,1	24,0	22,5	23,8	24,2	26,0	20,0	23,7	
7. Housing cost overburden	9,2	9,1	7,5	6,7	5,7	5,7	4,1	5,9	5,0	
8. Self-reported unmet need for medical care % of population	3,5	3,0	2,4	2,3	2,1	1,7	1,6	2,3	2,9	
9. Households with very low work intensity		10,2	8,5	7,7	6,9	6,2	5,0	5,3	5,6	
11. Population in the EU could not afford unexpected financial	42,2	40,7	38,3	36,9	34,7	33,0	30,8	31,2	29,9	
13. Share of total population having neither a bath, nor a show	1,3	1,5	1,3	1,2	0,9	0,8	0,6			
14. No indoor flushing	1,3	1,5	1,3	1,2	0,9	0,8	0,6			
17. Persons who cannot afford a telephone	0,8	0,9	0,7	0,5	0,3	0,4	0,0			
18. Persons who cannot afford to replace worn-out clothes	19,0	15,8	12,5	11,2	9,3	7,7	8,1	8,6	7,4	
20. Persons who cannot afford to get-together with friends or	15,5	11,2	10,2	9,9	8,1	7,1	7,8	7,2	6,3	
21. Persons who cannot afford internet connection for person	8,9	7,3	5,7	5,4	4,5	3,9	3,7	3,4	2,8	
22. In-work risk of poverty	9,1	9,6	9,5	9,1	8,5	9,9	8,4	10,5	9,6	
23. Long-term unemployment	8,7	7,5	6,4	4,6	3,2	2,8	2,3	2,9	2,7	
25. Employment rate	61,2	62,8	64,2	67,0	69,0	69,8	68,5	70,1	71,7	
26. Children (aged less than 18) living in households with very		8,7	6,4	6,0	5,5	5,2	3,8	4,1	5,3	
27. At-risk-of-poverty rate for children		24,8	22,4	20,7	19,0	18,5	19,1	20,4	18,5	
28. Severe material and social deprivation rate (SMSD) for chil		14,2	11,8	8,6	7,1	5,8	5,4	4,9	4,9	

Source: Eurostat.

Nonetheless, against the backdrop of these advancements, persistent challenges were notable, especially in the domain of food insecurity. While there has been an overall improvement, as evidenced by a decline from 4.0% in 2014 to 3.0% in 2022, in the inability to afford regular meals with meat, chicken, fish, or their vegetarian

equivalents every second day, there was a slight upturn in 2022 compared to 2019 (2.3%). This increase can likely be attributed to the post-COVID-19 pandemic difficulties and, notably, mounting inflation, which surged to 7.83% in 2022, from 6.57% in 2021.

In terms of target groups, food insecurity was generally higher in households without children (Peralta, S. et. al. 2023b). As illustrated in Table A. 86 below, 2.9% of households experienced hunger, and 8.7% could not eat healthily. Single-adult households faced more insecurity, with 4.3% experiencing hunger due to financial reasons. In households with children, 1.9% experienced hunger, and 7.3% worried about insufficient food. In 2021, 15.3% of single-parent families worried about food shortage and 8.2% reported eating less than deemed necessary. A total of 8.6% of large families also had concerns about food shortage, with 4.4% reporting eating less than desired.

Table A. 86 – Food insecurity by type of household (in %)

In the last 12 months, due to lack of money or other means	Worried about not having enough food to eat	Couldn't consume healthy and nutritious food	Ate less than thought necessary	Felt hungry but didn't eat
Total, without children	7.2	8.7	6.3	2.9
One adult	9.0	10.5	8.3	4.3
Two adults both under 65 years old	8.0	9.0	7.0	3.1
Two adults, at least one aged 65 and older	4.9	8.3	5.1	2.0
Other households without children	7.5	7.8	5.6	2.7
Total, with children	7.3	3.7	4.0	1.9
One adult with at least one child	15.3	6.0	8.2	3.1
Two adults with one child	5.3	3.4	3.0	0.6
Two adults with two children	2.7	2.0	1.3	1.1
Two adults with three or more children	8.6	1.8	4.4	1.5
Other households with children	10.0	5.2	5.9	3.4

Source: National Institute of Statistics (INE) Inquérito às Condições de Vida e do Rendimento (ICOR 2021).

22. Reconstructing the intervention logic

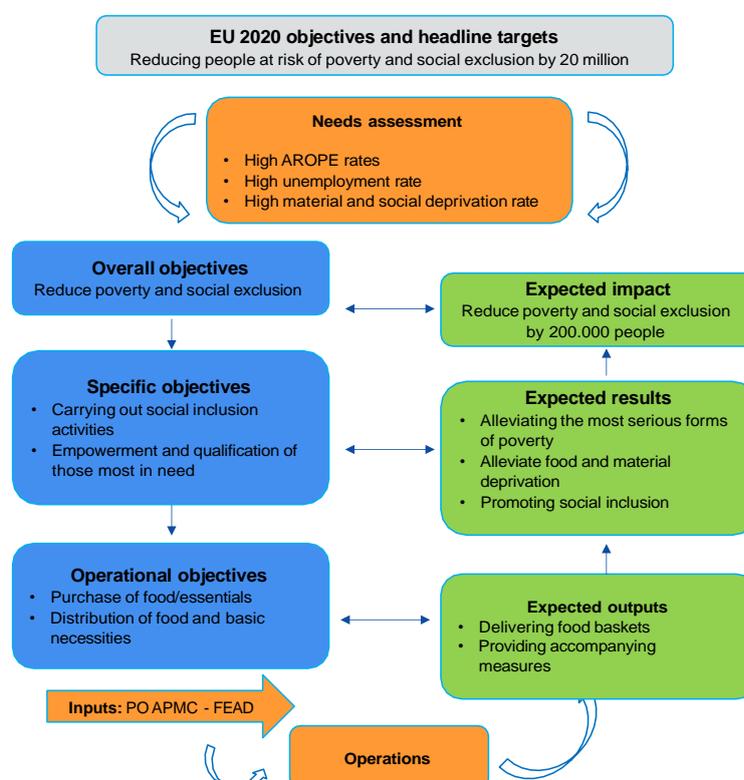
22.1. National policy framework

The overall integration of FEAD operations in Portugal demonstrates alignment with the national policy on social inclusion and poverty alleviation. The programme's planning process designed a balanced and equitable distribution of resources, considering factors such as food variety, nutritional requirements and distribution

regularity. While FEAD's eligibility criteria were in harmony with national policies, it is acknowledged as a complementary initiative, primarily focusing on addressing food needs. The programme sheds light on the existing limitations in anti-poverty measures, emphasising the persistent challenge of insufficient incomes for individuals. Despite complementarity with some national policies, there remains room for greater integration and clarity between FEAD and the broader national poverty strategy, particularly concerning overall strategy implementation.

Recent initiatives, such as the Decent Work Agenda (2023), were integrated into the Portuguese Recovery and Resilience Plan⁶²¹, which aims to reduce working poverty, address precarious employment, and promote collective bargaining, active employment policies, and life-long training. This underlined the necessity of a multifaceted strategy to tackle the intricate challenges posed by poverty and social exclusion.

Figure A. 87 – Intervention logic of FEAD in Portugal



Source: adapted from FEAD mid-term evaluation

22.2. Objectives and target groups

The central objective of FEAD in Portugal was to contribute to the alleviation of the most serious forms of poverty, by providing non-financial assistance to the neediest people, by providing food (food baskets) and carrying out accompanying measures aimed at increasing social inclusion and integration. Approved by the European Commission in 2014, FEAD operates under the *Programa Operacional de Apoio às Pessoas Mais Carenciadas* (PO APMC). The PO APMC programme was funded by FEAD and the State Budget and was aligned with the objectives of Europe 2020 in relation to the poverty reduction target. It aims to contribute to responding to forms of poverty, in order to have an impact on the target of reducing the number of people in poverty or social exclusion by at least 200,000 people by 2020. Portugal has fulfilled this commitment, as

⁶²¹ Ministério do Planeamento (2021), Recuperar Portugal, Construindo o futuro. Available at : <https://recuperarportugal.gov.pt/wp-content/uploads/2021/10/PRR.pdf>

reported by the Portugal Social Balance report⁶²², in 2019, there were 721,000 fewer people in poverty or social exclusion compared to 2007. However, the pandemic significantly impacted living conditions and income in Portugal. In 2020, the at-risk-of-poverty or social exclusion rate reached 22.4%, making Portugal the country in the EU27 with the 8th highest proportion of people facing this vulnerability. This represents an increase of 256,000 people compared to 2019, leaving over 2.2 million people at risk, accounting for more than a fifth of the population. This increase was also felt in the operations of the (PO APMC), having nearly doubled the number of people supported on the mainland, and almost 50% more in the Madeira Autonomous Region from 2021 to 2022.

The programme originally encompassed the following types of operations:

- Acquisition of food products and/or essential goods by a public entity;
- Distribution of food products and/or essential goods by partner organisations;
- Acquisition of food products, preparation, and distribution of prepared meals by partner organisations;
- Technical assistance.

The specific regulation PO APMC incorporates acquisition and distribution of food products/essential goods in Measure 1 (Acquisition and distribution of food and/or essential goods) while addressing the acquisition and delivery of prepared meals in Measure 2 (Provision of free daily meals). However, Measure 2, intended to provide daily free prepared meals to the most deprived individuals by coordinating existing kitchens and canteens, was never implemented and was removed from the programme. The amendment⁶²³ concentrated EU resources on a single measure for food acquisition, excluding European support for widespread provision of prepared meals. This decision reflects the belief that focusing on food acquisition encourages autonomy and personal responsibility. Finally, the "Technical Assistance" Measure includes activities such as preparation, management, control, monitoring, evaluation, information dissemination, as well as actions to strengthen the administrative and technical capacity of entities involved in execution.

The target group of FEAD operations in Portugal comprises support to the most deprived people. To ensure that the programme effectively assists those in socio-economic need, eligibility criteria were established, taking into account factors such as housing stability (i.e. whether or not the beneficiary had a residential address), food storage (e.g. having a fridge), and documentation (e.g. proof of residence).

Vulnerable groups, including the Roma community, were generally covered by the programme. Despite the FEAD regulation at the national level specifically mentioning migrants and homeless people as final beneficiaries, interviews with stakeholders highlighted that migrants and homeless individuals were more likely to receive support through other national initiatives, such as the 'social canteen' within the 'Programa de Emergência Alimentar' (Food Emergency Programme), due to the FEAD requirements being based on documentation and food storage possibilities. In addition, PO APMC also had, for eligibility, an economic evaluation of the household based on Social Security criteria, where households had to prove their condition every 3 months to keep support. These criteria were removed during COVID and later reinstated, resulting in fluctuations in the number of beneficiaries.

⁶²² Portugal, Balanço Social 2022 Relatório Annual (2023). Available at: https://www.novasbe.unl.pt/Portals/0/Files/Reports/SEI%202023/NSBE-Relat%C3%B3rio_Balan%C3%A7o_Social_2022.pdf

⁶²³ By Ministerial Order no. 51/2017, of 2 February, which revoked article 41(2) of Ministerial Order no. 190- B/2015.

As reported by the results of a survey carried out in 2018 (Ministério do Trabalho, Solidariedade e Segurança Social, 2020), among the approximately 25,000 beneficiary households receiving food baskets, 28% were single adults, 22% couples with children, 19% childless couples, 15% single-parent families, and the remaining 16% represent other households with or without children. Within households with children, couples with two adults and one child (20.4%) were the most common, followed by households with two or more adults and one child (14.9%) and households with two adults and two children (14.8%). Breaking down the age groups, as illustrated in the table below, over half (54%) of food basket recipients were aged 19-60.

Table A. 87 – Number of people in the household, by age group in 2018

Number of People in the Household	Number of Households	Percentage
1 to 4 years	3,167	5%
5 to 11 years	8,209	13%
12 to 18 years	10,551	16%
19 to 60 years	35,029	54%
Over 60 years	8,126	12%

Source: Resultados dos questionários efetuados aos beneficiários em 2018, *Ministério do Trabalho, Solidariedade e Segurança Social*

Regarding accompanying measures, the 2022 FEAD Structured Survey highlights a broad spectrum of services provided to FEAD recipients, including those under 15 years old, who make up 26% of the total beneficiaries. The survey indicates that 92% of recipients receive guidance on food preparation, nutrition, and reducing food waste, emphasizing the promotion of healthy eating habits and efficient resource management. Additionally, 86% benefit from advice on managing household budgets, indicating efforts to enhance financial literacy among beneficiaries. Approximately 55% of recipients were referred to relevant social or administrative services, facilitating access to wider support networks. Furthermore, 51% participate in personalised coaching and workshops designed to equip them with practical skills and knowledge. Notably, 23% receive psychological and therapeutic support. Similarly, 23% receive guidance on personal cleanliness, addressing fundamental hygiene concerns.

Implemented operations

In Portugal, FEAD focuses on procuring, storing, and delivering food to the most deprived individuals and families. Additionally, the Operational Programme incorporates support measures to enhance the self-sufficiency, responsibility, and qualifications of these individuals, with the goal of alleviating their difficulties and fostering social inclusion. Despite the fund's intended broader support, 91% of the expenses were directed towards food aid.

According to the results of questionnaires distributed in 2018 (Ministry of Labour, Solidarity and Social Security 2020⁶²⁴) to the partner organisations and beneficiaries, these measures encompass empowering families in food selection, waste prevention, and optimising family budget management. However, within the PO APMC, only three types of actions were funded: optimising family budget management, preventing waste, and selecting food items. Among the support measures, 92% of organisations emphasise providing advice on nutrition, while 86% focus on guidance for family budget management. Referrals to services, individual follow-ups, and workshops were also common. Approximately a quarter mention guidance on personal hygiene and psychological support. However, the impact of accompanying measures on poverty reduction and social inclusion remains uncertain, as reported by the Court of Auditors (2020).

22.3. FEAD governance and delivery system

In Portugal, the FEAD programme operates within the Programa Operacional de Apoio às Pessoas Mais Carenciadas (PO APMC), with coordination from both the Ministry of Labour, Solidarity, and Social Security and the Ministry of Planning and Infrastructure (MPI) to ensure alignment with government policies and objectives. The Agency for Development and Cohesion (AD&C) takes charge of technical coordination and acts as certification authority of partner organisations. Additionally, the Inspection General of Finance (IGF) was designated as the authority responsible for auditing the programme. They oversee the financial aspects and compliance with established rules and regulations. Partner organisations such as the Social Security Institute play a role in implementing and managing the programme, e.g. delivering services, managing resources, or ensuring compliance with program guidelines in their respective areas.

FEAD support was operated through the division of the country into 135 districts in which over 600 partner entities play a central role as intermediary beneficiaries in the food distribution operation. These entities were categorised into those receiving, storing, and coordinating the delivery operation (coordinating entities - *entidades coordenadoras*) and those directly distributing goods to end recipients, preceded by eligibility verification of households (intermediary entities - *entidades mediadoras*). The distribution was carried out as follows:

- At partner organisations' locations, where the most deprived individuals and families receive the food baskets to prepare at home.
- At the residences of the most deprived individuals and families by partner organisations, particularly for those living in remote areas with limited transportation access or those who, due to dependencies or other valid reasons, were unable to travel.

Further, intermediary entities were tasked with implementing accompanying measures and ensuring adherence to specific storage conditions, thereby facilitating the efficient delivery of products to the end recipients.

According to the Court of Auditors (2020), the management and control model of the PO APMC was well-defined but has shown weaknesses in terms of coordination in implementation, supervision of delegated management by the ministries, and on-site verifications.

⁶²⁴ Ministério do Trabalho, Solidariedade e Segurança Social (2020), Cabazes Alimentares Resultados dos questionários efetuados aos beneficiários em 2018

23. Key findings on the implementation of FEAD

23.1. To what extent was FEAD support successful – or not – and why?

Overall achievement of FEAD objectives [criterion: effectiveness]

Portugal has made significant strides in combating poverty and social exclusion, evidenced by a reduction in the risk of poverty and improvements in family incomes. This positive shift can be attributed to increased earnings in the lowest income bracket, improved labour market conditions, sustained wage growth, and enhancements in social benefits, including pension reinstatements. The AROPE rate, a crucial measure of socio-economic well-being, highlights Portugal's commitment to addressing these issues, decreasing from 26.4% in 2014 to 20.1% in 2022.

From 2014 to 2019, there was a generally positive trend, with a decreasing percentage of households facing the inability to afford specified meals. However, in 2020, there was a slight increase to 2.5%, likely attributable to the COVID-19 pandemic, which significantly impacted economic conditions worldwide, leading to financial challenges for many households. In 2021, the percentage remained stable at 2.4%, while in 2022, there was a more noticeable increase to 3.0%, indicating potential ongoing challenges or new economic conditions affecting households during that year. The data reflects the complex interplay of economic factors and external shocks, such as the COVID-19 pandemic, the Russia's war of aggression against Ukraine, the subsequent energy crisis and high inflationary pressures, which affected the ability of households in Portugal to afford essential meals over the specified time period.

In response to the challenges posed by the COVID-19 pandemic and the energy crisis, the programme demonstrated effective adaptation by expanding its operations. Beneficiaries increased from 60,000 to 120,000, leveraging the flexibility provided by CRII and CRII+, including 100% financing and the purchase of protective equipment. When it comes to accompanying measures (e.g. support measures to enhance the self-sufficiency, responsibility, and qualifications of end beneficiaries.), the effectiveness of FEAD remains uncertain, as 91% of the expenses were directed towards food aid, and no evidence on the results of these initiatives can be found in official reports and from the interviews. FEAD's impact on micro-economic stability for beneficiaries was confirmed by existing evidence (2022 FEAD Structured Survey) and from the interviews, enabling families to redirect savings towards essential costs, and whereas 88% of the interviewed mention the positive impact of FEAD on their household. However, challenges such as delayed implementation of accompanying measures and food distribution complexities relating to the COVID-19 and the following inflationary period, have affected effectiveness. The need for clarity and evidence from evaluations and reports on the outcomes of accompanying measures was crucial for a comprehensive evaluation of FEAD's overall impact. This need for clarity was underscored by survey perceptions of beneficiaries regarding accompanying measures: 69% found them very useful, while 29% found them relatively useful.

Reach of target groups [criterion: effectiveness]

As the target group were the most deprived people, regardless of their gender, age or social condition, there was **no differentiation in terms of the distribution of food, or accompanying actions**. The programme's final beneficiaries were individuals or families facing economic hardship, either temporarily, due to unexpected events, or persistently due to structural or economic reasons. The concept of economic hardship, as per the Institute of Social Security (ISS), considers individuals/families at risk of social exclusion, with a per capita income below the annual updated pension threshold (€210.32 in 2019), based on the 'Indexante dos Apoios Sociais' (IAS), which was €435.76 in 2019.

The eligibility criteria for target groups were defined to ensure that the programme effectively reached those in socio-economic need while also considering practical factors such as housing stability and documentation.

Marginalised groups such as the Roma community were generally included, while migrants or homeless individuals were supported through other national initiatives (e.g. ‘social canteen’ within the ‘*Programa de Emergência Alimentar*’ - *Food Emergency Programme*) as they often lacked the necessary documentation to access the programme and the ability to store food. Consulted stakeholders considered FEAD as a complementary instrument to Portugal's social protection measures, providing an opportunity to implement a programme that might have been challenging to finance solely with national funds.

The table below illustrates a growing demand for food aid over the years, with women making up approximately 54% of the aid recipients throughout this period. The annual execution reports revealed the following gender distribution among people who received food:

Table A. 88 – Gender distribution among FEAD recipients (2017-2022)

Indicator	2017	2018	2019	2020	2021	2022
Total number of people receiving food aid	37 761	79 021	92 635	148 561	170 383	154 023
Number of women	20 275	42 009	60 486	80 261	92 323	83 841
% of women	54%	53%	65%	54%	54%	54%

Source: Annual implementation reports.

However, it is worth noting that there was limited information available regarding the exact breakdown of beneficiaries. **The extent to which FEAD support has reached these specific groups**, such as the homeless, children at risk of poverty, Roma, and other vulnerable groups, **remains unclear due to the lack of available information**. This knowledge gap posed a challenge, as **organisations did not have the necessary data to assess the local or regional reach of the programme**. In order to gain a more accurate understanding of the programme's effectiveness, collecting and analysing data on the beneficiaries within these groups at the local or regional level would be essential.

Adjustments to FEAD to address new challenges [*criterion: effectiveness*]

Portugal's **FEAD programme effectively adapted to the COVID-19 pandemic and the energy crisis**.

Portugal's response to the COVID-19 pandemic and the subsequent energy crisis involved several adjustments to its Fund for European Aid to the Most Deprived programme. These changes were aimed at accommodating **increased demand and ensuring support for those in need**. During the COVID-19 pandemic, Portugal took several steps to adapt its FEAD programme. The primary criteria for eligibility, based on socio-economic conditions, remained unchanged. However, there was a substantial increase in the number of beneficiaries, with coverage doubling on the mainland (from 60 to 120 thousand) and substantial expansions in Madeira and the Azores. Expanding the programme's capacity and logistics was necessary to accommodate this increased number

of beneficiaries. This included enlarging warehouses and improving distribution infrastructure. Portugal utilised the flexibilities provided by CRII and CRII+ to enhance FEAD delivery in the following ways:

- **Reprogramming funds for 100% financing:** Portugal leveraged the option to reprogramme funds, allowing them to achieve 100% financing. This likely ensured that they had the necessary resources to address the increased demand for aid during the COVID-19 pandemic and other crises.
- **Purchase of protective equipment:** Thanks to the flexibilities granted by CRII and CRII+, Portugal was able to purchase protective equipment such as gloves and hand sanitizer for distribution during the COVID-19 pandemic.

To ensure uninterrupted support during the pandemic, the assessment of the socio-economic condition of beneficiaries, which was previously conducted every three months, was temporarily halted while the transition from food distribution by organisations to direct delivery to end recipients was noted as a positive aspect, enhancing privacy and safety during the pandemic. These **adjustments have generally been seen as effective in providing support to the target groups during these crises**. However, the lack of clear data to evaluate the coverage and impact on all those in need highlights the importance of ongoing monitoring and data collection to ensure that support remains comprehensive and targeted where necessary.

Horizontal principles of FEAD [criterion: effectiveness]

Available information suggests that **efforts have been made to achieve the stated horizontal principles**, particularly in terms of waste prevention and respecting the dignity of beneficiaries.

With regard to the issue of food waste, there were accompanying measures carried out by the partner organisations that were directly related to the issue of "waste prevention". In this regard, it should be noted that by 31 December 2023, according to the data published in the implementation report, 1,230 training actions had been carried out by the partner organisations on the theme of "waste prevention", covering 60,239 final recipients. Regarding partnership agreements, relevant stakeholders⁶²⁵ have been consulted throughout the programme's implementation, both at an early stage to gather input for the assessment and composition of the food basket and in defining the concept of economic deprivation. In addition to these contributions, they were also consulted on the content of the annual implementation reports, and more recently were informed about the electronic card system to be implemented in Portugal (see below). However, a more comprehensive assessment with quantifiable data and specific examples would provide a clearer understanding of the programme's effectiveness in upholding these principles.

Success and failure factors [criterion: effectiveness]

The **FEAD support programme has had a positive impact in several ways**.

One of the notable positive effects of the FEAD programme, confirmed by all interviewees, is its micro-economic impact on beneficiary families. Through the provision of essential food support, families have been able to save on food expenses, which they can then redirect towards other crucial costs and bills. This increased financial stability within these families contributed to the overall well-being of the recipients and, in turn, society. According to a survey⁶²⁶, the introduction of a monthly food basket for beneficiaries has led to notable improvements in their financial situation. For example, a significant percentage of recipients can now pay their household utility bills on time (72.1%), meet rent and mortgage payments (53.2%), purchase prescribed medications (42.9%), and handle unexpected expenses (33.5%). A considerable proportion can also afford new

⁶²⁵ Including EAPN Portugal - European Anti-Poverty Network; Portuguese Red Cross; Portuguese Federation of Food Banks Against Hunger; Portuguese Caritas; Union of Portuguese Misericórdias (UMP); Union of Portuguese Mutualities; Order of Nutritionists; International Medical Assistance Foundation (AMI); National Association of Parishes (ANAFRE);

National Association of Municipalities

⁶²⁶ PO APC M (2020), Cabazes Alimentares Resultados dos questionários efetuados aos beneficiários em 2018. Available at: [PO APC M Cabazes Alimentares](#)

clothing or shoes (26.9%) and adequately heat their homes (18.4%). Some beneficiaries can invest in books or training (15.2%), while 8.5% of children in these households could regularly participate in extracurricular or leisure activities.

However, the programme has encountered challenges that have negatively impacted its effectiveness. One critical issue underlined by consulted stakeholders is the delayed implementation of accompanying measures. The delay can be attributed to significant logistical challenges encountered throughout the programme, diverting attention away from the accompanying measures. The situation exacerbated with the onset of the COVID-19 pandemic and the following energy/ cost of living crisis. These delays hampered the timely execution of critical aspects of the programme. Additionally, many intermediary beneficiaries did not receive feedback on accompanying measures, making it difficult to assess the programme's true impact.

The FEAD programme also faced challenges related to food distribution, including administrative issues and the variety of food products distributed. The end recipients and entities involved in the distribution of food faced difficulties and additional costs in storing and preserving the food, especially frozen items, due to the package containing an excess of frozen vegetables. However, monthly distribution, instead of weekly, aimed to shift responsibility to intermediary beneficiaries, alleviating pressure on household storage capacity (Court of Auditors, 2020). Administrative hurdles, such as complex procurement procedures, and administrative appeals from suppliers, resulted in several delays or difficulties in distributing the full range of food items initially planned. To address this, the programme adapted by conducting surveys to better understand the needs of recipients and subsequently adjusting the variety of food products. This demonstrates the programme's flexibility in responding to challenges but also highlights the initial difficulties in efficient food distribution.

Overall cost-effectiveness of FEAD operations [*criterion: efficiency*]

In Portugal, **FEAD operations were generally cost-effective**. This was due to the bulk purchase of food by public institutions responsible for social security (ISS - Institute for Social Security), which allowed costs to be reduced compared to market prices. This made it possible to buy more products and distribute them to a greater number of people, except during the period following the start of the Russia's war of aggression against Ukraine, when there was a widespread increase in prices and difficulties in the supply of products. Regarding the type of FEAD activities and the target group, there was no significant differentiation in terms of costs, as the target group is the most deprived people, regardless of gender, age, or social condition. Therefore, the cost associated with each activity was similar.

Nevertheless, the cost-effectiveness of FEAD operations was affected by several factors, some of which were well-recognised by consulted partner organisations. The main factors affecting the cost-effectiveness of FEAD operations included compliance with public procurement standards and legal acts, which, in the case of disputes or challenges, resulted in delays in the procurement and distribution of products. Furthermore, the energy crisis and the widespread price increases resulting from the Russia's war of aggression against Ukraine caused constraints, such as the need for price revisions by suppliers, shortages of raw materials, and disruptions in production and distribution lines. This resulted in delays or failures in the delivery of some items and increased costs in some cases. Noteworthy challenges also revolved around the transportation of food baskets to the most vulnerable recipients. These complications were exacerbated by the considerable quantities of products per delivery and the prevalence of frozen items, often resulting from retroactive deliveries and supplier-related complications. The managing organisations struggled to cope with the demands of storing and preserving these products, thereby underscoring the specific logistical, health-related, and financial hurdles faced by intermediary beneficiaries.

In addition, the decision to opt for direct food distribution introduced supplementary financial commitments for participating organisations. These included expenditures related to equipment procurement or rental, energy usage, and general handling and storage outlays. The approach required valuable technical expertise, thereby

inflating costs and diverting essential resources that might have been more judiciously directed towards aiding families and communities. The management of storage, record-keeping, and distribution, while necessary, encroached upon the executing organisations' capacity, thereby compromising the core support objective of the FEAD programme.

Discussions were underway regarding the future implementation of an electronic card system for food distribution (e.g. vouchers). According to interviewees, this transition has garnered minimal opposition following consultations with partner organisations and the public. The electronic card system promises benefits such as simplifying logistical challenges in procurement, distribution, and storage, potentially reshaping the roles within public administration. It is expected to reduce the need for legal experts in procurement matters, while enhancing overall efficiency. Additionally, beneficiaries will experience a streamlined and user-friendly process, alleviating administrative burdens. This system aims to empower recipients by providing autonomy and choice, while removing barriers of social shame in access to food packages. However, some limitations and budget constraints may apply as available funding may limit the quantity and variety of products that can be purchased, especially when compared to bulk procurement.

Administrative burden of monitoring and reporting requirements [*criterion: efficiency*]

The **administrative requirements of the FEAD programme were considered burdensome** both by the managing authority (MA) and partner organisations. On average, and as an estimate for the MA, **administrative tasks** relating to the monitoring, following up and providing information system support, **amount to 400/ 500 hours each month**, which can vary depending on time of year, such as reporting periods, evaluations, audits, on-the-spot checks. For an overall figure for the programme, it would be necessary to add the hours of each partner organisation and intermediate body. Among the most burdensome tasks, the following were cited:

- **The MA considered the audit requirements out of line with the size of the programme**, and the number of audits (77) very high in relation to the number of operations and the approved budget. As an example, the number of audits carried out on PO APMC, which has an allocation of €208 million and only 297 operations, is very high when compared, for example, with the 136 audits for the POISE (*Programa Operacional Inclusão Social e Emprego* - Social Inclusion and Employment Operational Programme), which has an allocation of €2,568 million and 4,896 operations.
- The process of **designing operational programmes required substantial administrative effort** from the MA as it included defining the concept of economic deprivation, shaping the food basket, conducting public consultations, and planning a territorial strategy. The need to create separate instruments and procedural manuals added to the administrative complexity.
- Both the MA and partner organisations agreed that the **logistics associated with direct distribution were very demanding**, starting with the need for warehouses for the different types of products, as well as the human resources to carry out the distribution (frozen, fresh and dry). Despite periods of crisis (COVID-19 and the Russia's war of aggression against Ukraine), the intermediaries and partner organisations were able to mobilise to ensure the continuity of direct distribution to recipients.

These administrative requirements demanded a considerable allocation of resources, including time and effort. It is worth noting that in some organisations, funds from the FEAD programme were used to support their own operations, which added to the complexity of managing administrative responsibilities. Overall, there was scepticism about the excessive administrative costs and burdens associated with programmes like FEAD and ESF, with the belief that a more streamlined and efficient approach could be adopted to reduce administrative complexities and optimise the programmes' impact. As affirmed by stakeholders, some **potential partner organisations preferred not to engage with FEAD due to its bureaucratic nature, which requires time and resources that volunteers find burdensome**: *"It should be considered that FEAD constitutes only around a third of the total support for food aid that organisations receive. It's a key part but not essential."*

Flat rates, as defined in Article 26(2)(c) of the Regulation, were employed to cover various costs for partner organisations. These flat rates were utilised primarily during the initial phases of the operations. The use of flat rates, in conjunction with the implementation of the information system, yielded several benefits, particularly in terms of streamlining administrative processes and reducing the workload associated with financial reporting. No information was provided as to why the use of flat rates was stopped.

Simplification measures [criterion: efficiency]

The potential transition from direct food delivery to an electronic card system for FEAD distribution has been under discussion in recent years. This change, although not yet implemented, has received minimal opposition after consultations with partner organisations and the public, with no significant objections raised during the public presentation of the proposal.

The shift to an electronic card system offers several advantages. It simplifies various logistical challenges associated with the procurement, distribution, and storage of food, which were previously linked to manual processes. This system is expected to enhance the efficiency of public administration and may lead to changes in the roles and tasks of certain personnel. For instance, it could reduce the need for legal experts to handle procurement-related issues. Overall, the electronic card system is anticipated to increase efficiency. On the beneficiaries' side, the electronic card system is expected to streamline the process and improve user-friendliness, reducing administrative burdens for recipients and the distribution chain. This transition is seen as a positive step in enhancing the programme's effectiveness and, most importantly, in granting people greater autonomy and choice.

Coherence of FEAD with other interventions [criterion: coherence]

The implementation of FEAD activities in the country demonstrated a fair level of coherence with both national policy initiatives and regional funding approaches aimed at addressing poverty and social exclusion. However, there is still room for improvement in terms of coordination between different national initiatives.

The programme's implementation was preceded by a strategic territorial planning process. This planning was conducted meticulously to ensure equitable and balanced distribution across the territory, taking into consideration factors such as the type and diversity of food to be distributed, nutritional requirements to be met, and the regularity of distribution. The planning process involved several key steps, including determining the budget allocated to the programme, calculating the composition of the food baskets, estimating the number of beneficiaries who could be supported, and conducting a study based on local indicators, such as the resident population and unemployment levels in various municipalities. This comprehensive approach allowed for the division of the national territory into 135 regions, with 560 NGOs involved to ensure that a minimum of 150 beneficiaries would be supported in each region. In this context, FEAD operations appear to align effectively with national and regional policies. However, it is crucial to acknowledge that FEAD primarily focuses on food support, emphasising the need for broader anti-poverty measures. This requirement is exemplified by recent initiatives, such as the Decent Work Agenda (2023) integrated into the Portuguese Recovery and Resilience Plan⁶²⁷. This agenda aims to reduce the working poor and precarious employment and to promote collective bargaining, active employment policies, and training. These measures underscore the importance of adopting a comprehensive and coordinated approach to address the complex challenges posed by poverty and social exclusion.

⁶²⁷ Ministério do Planeamento (2021), Recuperar Portugal, Construindo o futuro. Available at: <https://recuperarportugal.gov.pt/wp-content/uploads/2021/10/PRR.pdf>

23.2. Is FEAD still relevant?

Relevance to target groups [*criterion: relevance*]

The design of **FEAD in Portugal appears to be relevant in addressing the needs of the most deprived.**

The FEAD programme has been tailored to meet 50% of the food needs of households experiencing economic hardship. As for whether there were groups whose needs were not addressed by FEAD, it is perceived that no specific groups were excluded from FEAD support. However, considering the programme's design and eligibility criteria, some target groups such as migrants and homeless people received no or limited assistance. Regarding FEAD's ability to support new target groups and address emerging needs, the COVID-19 crisis and the decrease in household income led to a higher number of individuals and families experiencing economic hardship. Through the PO APMC, FEAD was able to increase the number of beneficiaries, extending support to more than 100% on the mainland, 50% in Madeira, and 10% in the Azores. This margin for expansion was identified in collaboration with the respective social security institutions.

The design of FEAD appears to effectively reach specific target groups in the country. It has also displayed adaptability in response to the heightened needs resulting from the COVID-19 crisis, the energy crisis, and the arrival of migrants from Ukraine due to the Russian aggression. Although certain groups may have received more constrained support due to the programme's design, FEAD has proven its capability to adjust and broaden its scope when required.

Relevance of FEAD now and in the future [*criterion: relevance*]

The objectives and **operations of FEAD in the country were considered highly relevant** for meeting the needs of the target groups.

Several current and future trends have the potential to affect the relevance of FEAD support in the future.

The ongoing Russia's war of aggression against Ukraine has led to a significant increase in food prices, impacting the programme due to its limited budget. This affected both the quantity of food that can be procured and the number of people who can be supported. Additionally, the current high interest rates may result in the emergence of new groups facing economic hardship. People with existing bank loans, such as mortgages, have experienced a substantial increase in monthly payments. Similarly, people renting have seen significant increases in their housing expenses, leading to a significant reduction in disposable income and potentially expanding the pool of those in need. Other stakeholders affirmed that climate change poses a significant risk in the southern region of Portugal, which is already grappling with high poverty rates. Climate-related factors, such as extreme weather events and changing patterns of resource availability, can impact food distribution and procurement due to supply shortages, price increases and delays. Partner organisations have noted a growing demand for water, which is not currently covered by FEAD. It is anticipated that addressing this need will become increasingly crucial. Climate-induced water shortages can impact not just access to drinking water but also the capacity to prepare specific food items.

Finally, Portugal, like many other European countries, is facing challenges related to housing access, largely influenced by tourism and migratory flows. The increase in migration, both from other countries and within Portugal, has driven up housing costs and created overcrowding in urban areas. This situation can pose difficulties for people living in small, overcrowded spaces, affecting their ability to manage, store, and cook food effectively, especially if a similar programme in the future does not adapt to varying contexts. Additionally, organisations on the field report a significant increase of people in homelessness, particularly in the urban centres, many with migratory backgrounds, which can pressure the food support systems in the short and medium-term.

23.3. Did FEAD make a difference and to whom?

EU added value [criterion: EU added value]

FEAD was designed with specific goals to promote social inclusion and combat poverty, which would not have been achieved without EU-level intervention. These goals include:

- Mitigating food insecurity to reduce instances of social inequality.
- Providing a predictable food distribution system that offers non-monetary support, making a significant impact on the monthly budgets of families.
- Ensuring balanced coverage across the entire national territory, including the mainland and the Autonomous Regions, through careful advance planning to reach areas with higher needs.
- Offering effective, regular, and ongoing food support that addresses approximately 50% of the nutritional needs of each recipient, contributing to a balanced diet for the most vulnerable populations.

It is essential to note that all entities involved in food distribution (intermediaries/partner organisations) were responsible for developing social support and assistance activities for the most deprived individuals in their areas of operation. In the case of FEAD, leveraging the capabilities of these intermediaries has resulted in innovative and distinctive measures of support. These measures include empowering recipients in various aspects, such as optimising family budget management, waste reduction, and food selection. Moreover, the way the programme was designed to cover the entire national territory has led to various partnerships between different entities that have organised ways to reach even the most challenging areas.

This cooperation and institutional coordination were particularly evident during the COVID-19 crisis, ensuring that even during the pandemic, with all the constraints and limitations in place, recipients continued to receive food support. This demonstrates the considerable benefits that national authorities and partner organisations have derived from their involvement in FEAD operations, including enhanced cooperation.

Several partner organisations emphasised the significance of establishing the FEAD Network⁶²⁸, which was considered an innovative approach and a valuable addition to the programme. The network facilitated the exchange of best practices, the discussion of pertinent issues, and the generation of knowledge among representatives from national agencies, public entities, and civil society organisations from various countries. This European initiative should be emulated on a national scale, as it could serve as a crucial platform for fostering cooperation and sharing ideas and insights. The FEAD Network spurred critical reflections on what food support should entail, the inclusion of alternative options and practices, and even brought to the discussion the experiences of cards/vouchers in food/material support, which was, for several countries and organisations involved in FEAD, an opening for reflection and practices, especially in the context of a pandemic.

Visibility [visibility]

The awareness among the general public and end recipients that support came from FEAD and the EU varied. While there was formal information provided during the application process and indications at FEAD distribution points, most of the beneficiaries were not aware that the support they received was funded by the European Union. However, there have also been efforts to showcase FEAD/EU-funded operations through television channels, as evidenced by a report from Euronews⁶²⁹.

⁶²⁸ More info here: <https://ec.europa.eu/social/main.jsp?catId=1207&langId=en>

⁶²⁹ Video: Europa debate risposta social à pandemia (min 2.20). Available at <https://www.youtube.com/watch?v=REkfvcrXpvQ>

24. Good practices

When faced with the challenges of the COVID-19 pandemic, FEAD showcased high adaptability. Doubling its recipients' coverage and adjusting infrastructure for more effective logistic, the programme demonstrated resilience and responsiveness to unprecedented demand.

As confirmed by the MA and POs, one of the good practices refers to the **effective transition from organisation-based food distribution to direct delivery during the pandemic**. Direct food delivery temporarily enabled the implementation of stringent safety and health measures as minimising direct contact between individuals became a priority. Delivering food directly to recipients' homes reduced the risk of exposure to COVID-19 compared to traditional organisation-based distribution where people may gather in larger groups. As confirmed by partner organisations, this shift in the food distribution also highlighted a commitment to the privacy and dignity of the recipients, ensuring that people in need could access food assistance without the potential stigma or discomfort associated with receiving aid in a public setting.

25. Conclusions and lessons learned

Effectiveness

Portugal's significant strides in reducing poverty and social exclusion are evident through decreased AROPE rates and improved socio-economic conditions. While the programme adapted well to the COVID-19 pandemic, the effectiveness of accompanying measures remains uncertain, lacking evidence on outcomes. In terms of target groups, FEAD demonstrated inclusivity, targeting the most deprived individuals without differentiation. However, a knowledge gap exists regarding the specific breakdown of beneficiaries, hindering a comprehensive evaluation.

The lack of clear data for evaluation emphasises the importance of ongoing monitoring and data collection.

Efficiency

FEAD operations in Portugal were generally cost-effective, leveraging bulk purchases by public institutions. The ability to buy more products at reduced costs allowed wider distribution, though challenges during the Russia's war of aggression against Ukraine affected prices and product supply. Factors influencing cost-effectiveness included compliance with procurement standards, energy crisis constraints, and logistical challenges in transportation, especially for frozen items. Discussions on implementing an electronic card system aim to enhance efficiency, but potential budget constraints may arise.

The administrative requirements of the FEAD programme were considered burdensome, consuming significant time and effort of intermediate authorities as well as beneficiaries. Tasks related to monitoring, reporting and information system support were estimated to be 400/500 hours per month at the MA level.

Coherence

The FEAD programme in Portugal has shown coherence with national policy initiatives and regional funding approaches, aligning with strategic territorial planning. The lessons learned emphasize the significance of adopting a comprehensive and coordinated approach to tackle the multifaceted challenges of poverty and social exclusion, going beyond immediate food support.

Relevance

FEAD in Portugal has proven its relevance by effectively targeting specific groups facing economic hardship. The programme's design, aimed at fulfilling a significant portion of food needs, aligns with its objectives. The flexibility displayed during the COVID-19 crisis was key in expanding coverage based on increased needs.

Lessons learned highlight the importance of continual assessment and responsiveness to emerging challenges. Recognising the future relevance of climate-related factors, such as extreme weather events, and the increasing demand for water (not currently covered by FEAD), is pivotal. Additionally, challenges tied to housing access influenced by tourism and migratory flows warrant careful consideration. The adaptability of FEAD's approach to diverse contexts and its responsiveness to emerging trends will be indispensable for maintaining relevance in future scenarios.

EU Added Value

The programme's multifaceted impact, spanning from alleviating food insecurity to implementing accompanying measures, highlights the distinctive contributions facilitated by EU support. Lessons learned underscore the significance of harnessing intermediary capabilities for innovative measures and the advantages derived from national cooperation and coordination, particularly in times of crises. The innovative approach of the FEAD Network stands out as a model for fostering collaboration, exchanging ideas, and generating knowledge on a European scale. However, having more opportunities for dialogue with other national organisations would be highly beneficial, fostering increased cooperation and knowledge sharing.

Visibility

FEAD's visibility to the general public and beneficiaries remains a challenge. While formal information processes exist, there is room for improvement in communicating EU support. Efforts to showcase operations through media, such as television channels, provide a valuable avenue for increasing visibility. Lessons learned stress the importance of ongoing efforts to enhance awareness, ensuring that beneficiaries recognise and appreciate the EU's role in supporting initiatives like FEAD.

Appendices

Appendix 1: Methodology

The researcher employed a comprehensive methodology to gather evidence and insights involving extensive desk research, utilising reports such as the mid-term evaluation of the programme, annual execution reports, and documents from national ministries. Quantitative data played a pivotal role in explaining the socioeconomic context during the implementation period, including percentages, numerical breakdowns, and detailed statistics on people at risk of poverty or with difficulties in securing a meal. The results of the questionnaire conducted in 2018 by the Ministry of Labour, Solidarity, and Social Security provided valuable and complementary information, indicating the use of survey instruments to directly collect data from beneficiaries. The main primary evidence comes from stakeholder consultations and interviews were integral components of the research methodology, offering qualitative insights into the perception of FEAD as a complementary instrument to Portugal's social protection measures. Interviews involved managing authorities, partners organisations, anti-poverty NGOs as well as experts in the field of social protection.

Additionally, the researcher incorporated information from the Court of Auditors, indicating an integration of external audit findings and assessments into the evaluation process. This diverse and comprehensive methodology, encompassing quantitative data, official reports, stakeholder interviews, questionnaires, and external audits represents the evidence for this case study.

Appendix 2: References

Desk research sources listed alphabetically.

- Eurostat (2019), EU statistics on income and living conditions (EU-SILC) methodology - concepts and contents, Statistics Explained.
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Appendix 3: FEAD indicators

Table A. 89 – Input indicators for the implementation of FEAD in Portugal in 2016-2022

Indicator	Total amount of eligible public expenditure approved in the documents setting out the conditions for support of operations (EUR)	Total amount of eligible public expenditure incurred by beneficiaries and paid in implementing operations (EUR)	Total amount of eligible public expenditure declared to the Commission (EUR)	Implementation rate (expenditure declared as share of allocated budget)
2014-2022	243,793,742.47	157,067,850.59	149,628,520.25	61%

Source: SFC 2014 database.

Table A. 90 – Common Output Indicators in Portugal in 2014-2022, per year

Output indicators on food support distributed	2014	2015	2016	2017	2018	2019	2020	2021	2022
Quantity of fruits and vegetables (tonnes)	1 217.00	1 368.00	0	128.12	5 344.54	3 391.82	9 450.89	10 306.85	7 624.50
Quantity of meat, eggs, fish, seafood (tonnes)	859.00	984.00	0	72.86	2 019.01	1 894.51	2 086.81	3 153.54	1 890.71
Quantity of flour, bread, potatoes, rice and other starchy products (tonnes)	1 758.00	1 928.00	0	108.89	1 436.26	1 503.16	4 848.11	5 518.16	2 821.36
Quantity of sugar (tonnes)	442.00	539.00	0	0	0	0	0	0	0
Quantity of milk products (tonnes)	2 510.00	2 982.00	0	267.84	3 507.35	3 265.12	7 144.80	7 938.66	9 049.89
Quantity of fats, oil (tonnes)	921.00	449.00	0	19.20	152.15	173.58	566.94	646.33	294.67

Output indicators on food support distributed	2014	2015	2016	2017	2018	2019	2020	2021	2022
Quantity of convenience food, other foodstuff (not falling in abovementioned categories) (tonnes)	0	0	0	8.47	486.67	827.77	508.33	341.87	847.40
Total quantity of food support distributed (tonnes)M	7 707.00	8 250.00	0	605.38	12 945.98	11 055.96	24 605.88	27 905.41	22 528.53
Proportion of FEAD co-financed food products in the total volume of food distributed by the partner organisations (%)	50	50	0	0.05	73.89	87.52	94.17	94.83	93.75
Total number of food packages distributed partly or totally financed by the OP	448 686	408 737	0	19 725	279 050	281 266	452 543	613 154	531 127

Source: SFC 2014 database.

Table A. 91 – Number of FEAD participants in Portugal in 2014-2022

Result indicators on food support distributed	2014	2015	2016	2017	2018	2019	2020	2021	2022
Total number of persons receiving food support	448 686	408 737	0	37 761	79 021	92 635	148 561	170 383	154 023

Result indicators on food support distributed	2014	2015	2016	2017	2018	2019	2020	2021	2022
Number of children aged 15 years or below	111 522	96 529	0	10 939	21 114	30 384	41 610	46 375	41 907
Number of persons aged 65 years or above	45 040	42 630	0	1 865	4 752	7 399	9 170	11 681	12 062
Number of women	195 043	173 853	0	20 275	42 009	60 486	80 261	92 323	83 841
Number of migrants, participants with a foreign background, minorities (including marginalised communities such as the Roma)	0	0	0	6 945	8 809	18 722	12 637	14 000	14 823
Number of persons with disabilities	0	0	0	921	1 103	2 139	1 180	1 310	1 343
Number of homeless	0	0	0	21	16	96	76	84	0

Source: SFC 2014 database.

X.11 Romania

1. Context and background

Romanian society has made major progress in reducing the risk of poverty and social exclusion during the 2014-2022 period (see AROPE indicator in Table A. 92 below). Despite the progress, the share of people at risk of poverty and social exclusion⁶³⁰ at the national level is still high. In 2022, Romania ranks the first among the EU countries in terms of the share of people at risk of poverty and social exclusion. More than one in three Romanians (34.4%) were at risk of poverty and social exclusion in 2022 (Table A. 92) compared to more than one in five at the EU level (21.6%).⁶³¹

Table A. 92 – Socio-economic context in Romania

Romania	2014	2015	2016	2017	2018	2019	2020	2021	2022	Trend
1. At-risk-of-poverty or social exclusion rate (AROPE) Total		44.5	46.0	42.5	38.7	36.1	35.6	34.5	34.4	
2. AROPE Children		52.8	55.3	48.0	44.3	37.8	40.5	41.1	40.7	
3. Severe material and social deprivation rate (SMSD)		34.0	35.9	32.4	28.3	24.5	25.3	23.1	24.3	
4. Severe material deprivation rate (SMD)	25.9	5.8	23.8	19.7	16.8	14.5	15.2	0.0	0.0	
5. Inability to afford a meal with meat, chicken, fish (or vegetarian equivalent) every second day	22.7	19.7	21.8	19.2	16.3	14.2	14.7	19.2	22.1	
6. Impact of social transfers (other than pensions) on poverty reduction % reduction of AROPE	12.9	13.3	14.2	16.6	16.1	15.3	15.8	17.9	16.5	
7. Housing cost overburden	16.2	15.9	14.4	12.3	10.3	8.6	7.1	7.6	8.5	
8. Self-reported unmet need for medical care % of population 16+	9.8	9.4	6.5	4.7	4.9	4.9	4.7	4.4	4.9	
9. Households with very low work intensity		6.2	6.4	5.4	6.0	4.5	4.7	3.5	4.2	
11. Population in the EU could not afford unexpected financial expenses	52.7	51.4	54.5	52.5	45.9	44.3	47.3	47.3	47.9	
13. Share of total population having neither a bath, nor a shower in their dwelling	32.5	30.8	30.5	27.8	26.0	22.8	21.6			
14. No indoor flushing	32.5	30.8	30.5	27.8	26.0	22.8	21.6			
17. Persons who cannot afford a telephone	5.7	4.6	3.6	2.2	1.4	0.9	0.6			
18. Persons who cannot afford to replace worn-out clothes	32.4	30.3	38.8	36.8	32.8	29.8	29.0	24.9	24.3	
20. Persons who cannot afford to get-together with friends or family (relatives) for a drink or meal at least once a month	35.7	32.0	29.5	26.6	23.0	22.2	21.1	21.3	22.5	
21. Persons who cannot afford internet connection for personal use at home	30.0	25.1	25.7	24.3	21.3	21.1	19.8	11.7	9.1	
22. In-work risk of poverty	15.0	14.7	14.3	13.3	11.2	12.3	11.2	12.4	12.2	
23. Long-term unemployment	3.4	3.6	3.4	2.4	2.2	2.0	1.8	2.0	2.2	
25. Employment rate	53.7	54.9	55.8	58.0	59.0	60.2	60.2	61.9	63.1	
26. Children (aged less than 18) living in households with very low work intensity		7.6	8.1	5.8	7.1	5.0	5.7	3.2	4.7	
27. At-risk-of-poverty rate for children		38.1	37.2	32.2	32.0	30.8	30.1	29.8	27.0	
28. Severe material and social deprivation rate (SMSD) for children		40.2	43.5	37.0	31.5	25.8	29.7	28.2	30.8	

Source: Eurostat.

Among the EU Member States, the highest share of people at risk of poverty or social exclusion was reported for Romania (34.4 %), where 24.3% of population lives in severe material and social deprivation. These rates were notably higher compared to other EU countries.⁶³²

⁶³⁰ The risk of poverty and social exclusion represents the aggregation of three indicators: ‘risk of poverty, severe material and social deprivation and/or living in a household with a very low work intensity’.

⁶³¹ Eurostat, (2023). People at risk of poverty or social exclusion in 2022.

⁶³² European Commission (2023). Key figures on European Living Conditions 2023 edition. Available at: <https://ec.europa.eu/eurostat/documents/15216629/17704280/KS-HC-23-001-EN-N.pdf>

Further data from the world bank published in 2020, shows that during 2015-2020, economic growth in Romania translated into a substantial decline in the poverty rate too: from 27.8% in 2015 to 10.7% in 2020. This is supported by the steady increase in the employment rate (as shown in Table A. 92). However, again, poverty rates remained high compared to countries with similar income levels.⁶³³

According to the Eurostat data presented in the Table A. 92, the rate of people who were in-work and at risk of poverty in Romania decreased from 15% in 2014 to 12.2% in 2022. However, in 2022 approximately 22.1% of people were unable to afford a meal with meat, chicken, fish (or vegetarian equivalent) every second day, the highest rate among EU countries. Compared to 2014, there has only been a decrease of 0.6 percentage points (from 22.7%), showing modest progress for this indicator. Whereas, in terms of access to internet at home, the progress is notable, in 2014 there were 30% people were unable to afford an internet connection for personal use at home, while in 2022 the rate was much lower: 9.1%.

Vulnerable groups at particular risk of poverty included the elderly (65 years and over). According to Eurostat data, the at risk of poverty rate for 65 years or over in Romania in 2012 was 35.7%, although this had decreased to 19.50% by 2022. Roma were also particularly vulnerable, with an AROPE of 78% in 2021, an even higher figure than in 2016, the previous point of comparison.⁶³⁴ Homeless people are another vulnerable group who are poorly addressed by social policies (also due to the lack of identity documents and weak monitoring mechanisms at the level of social services). According to the socio-economic analysis for the programming of European funds 2014 – 2020 (published in 2013), experts estimated between 2004 and 2007 there were between 11,000-14,000 homeless people, of which around 5,000 were living in Bucharest. *‘The majority become homeless after leaving a fostering centre or another institution (either upon turning 18/finishing studies, or under other conditions) [...]. So, the homeless shelter seems to be the second "stop" in an institutionalised route that starts in children's homes/fostering centres. For the most part, homeless people in Romania are men aged 21-30/51-60. The majority do not work because they are not able to work, as they have severe health problems. A large proportion of homeless people do not have identification, and most do not have health insurance. Access to medical and social services is extremely low.’*⁶³⁵

Romania was among the Member States with a larger allocation of FEAD funds and determined that the **most relevant target group of the FEAD interventions in the country were children**. Despite the decrease of AROPE rate of children from 52.8% in 2015 to 40.7% in 2022, the level of this indicator remains above the AROPE indicator for the general population (34.4%) – as indicated in Table A. 92. A representative from an international NGO mentioned that *‘[...] Because the programme [FEAD(POAD)] had interventions that specifically addressed children from marginalised communities, it would be interesting to see why, on the one hand, we have important, significant progress in the [ARPE] indicator for the general population, but when we look at children,⁶³⁶ we still have a huge percentage’.*⁶³⁷

According to a recent UNICEF study⁶³⁸ *‘for families and children in the EU, the cost-of-living crisis is being experienced primarily through higher prices for food and energy. [...] There is a long-standing need to address persistently high rates of child poverty in the EU, which the COVID-19 pandemic has accentuated. The recent records of EU-27 countries show how reducing child income poverty has been a difficult task. Overall, between 2011 and 2021, the average child income poverty rate in the EU fluctuated between around 18 and 21 %.’*

⁶³³ Poverty & Equity Brief: Romania (2023). Available at: [Global POVEQ ROU.pdf f](#)

⁶³⁴ FRA (2021) Roma Survey

⁶³⁵ National Authority for the Protection of Children's Rights and Adoption, 2015. Statement from the FEAD version 7.0, 2021

⁶³⁶ In Romania, the children target group is between 0 – 18 years old.

⁶³⁷ Interview with representative from UNICEF, conducted in October 2023

⁶³⁸ UNICEF (2023). Children and the cost-of-living Crisis. Available at: [UNICEF Innocenti | Innocenti Global Office of Research and Foresight](#)

Romania has a resident population of 19 million,⁶³⁹ out of which 3.62 million are children. Since 2015, the number of children has been decreasing due to external migration and declining birth rate. Over 47% of children live in rural areas, with lower living standards and more precarious access to quality social services as compared to the urban population. Three in 10 children in Romania (28.2%) are affected by severe material and social deprivation.⁶⁴⁰ Moreover, Romania has the highest rate of children at risk of poverty or social exclusion in the European Union (41.5%) and it increased for the second consecutive year, almost doubling the EU average (23.8%).⁶⁴¹

Both prior to the EU accession and after, the effects of the multiple economic crises that Romanian society went through following the transition from a totalitarian system, in the 1990s, to democracy manifested themselves unfairly for a majority of the population.⁶⁴² *‘The population of Romania is the one that has borne a disproportionately high part of the economic and social costs of the crises; in other words, almost every generation has known a period of “sacrifice”; the costs were unevenly distributed, pressing especially on the shoulders of those with medium and low incomes’.*⁶⁴³ This social reality has been fuelled by a desire to make Romania an attractive country for foreign investments, which has resulted in high GDP levels compared to other Eastern European countries. Unfortunately, the quality of life of the population has not developed in accordance with the economy.

⁶³⁹ National Institute of Statistics (NIS) (2023). Romania in Figures. Available at: <https://insse.ro/cms/en/tags/romania-figures>

⁶⁴⁰ European Commission (2023). 2023 Country Report – Romania, p.60. Available at: https://economy-finance.ec.europa.eu/system/files/2023-05/RO_SWD_2023_623_en.pdf

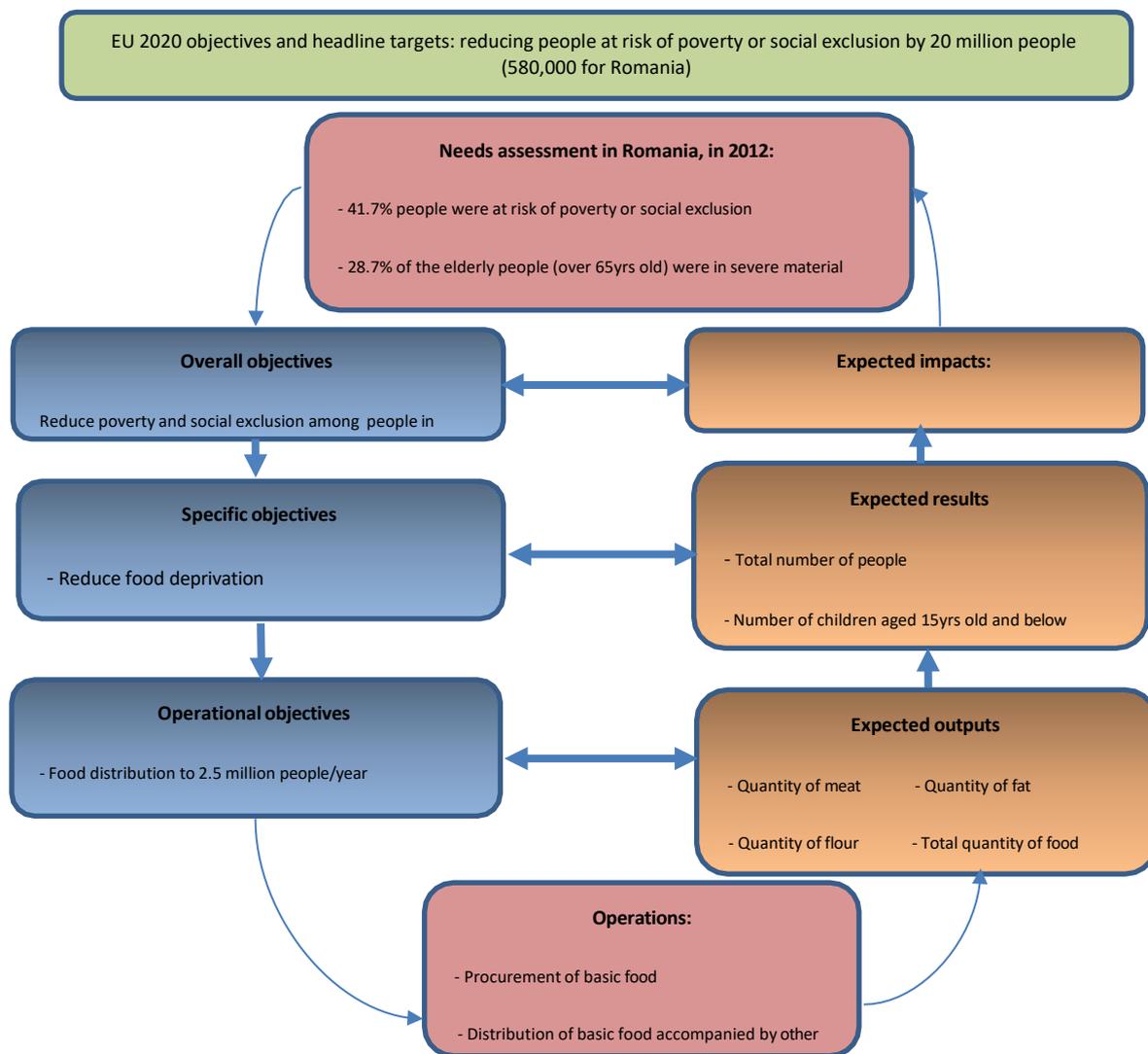
⁶⁴¹ UNICEF (2022). Country Office Annual Report: Romania. Available at: [RAM3 COAR.rdl](#)

⁶⁴² The transition period in Romania is between 1990-2007, after the Communist fall in December 1989 and the entrance of Romania in EU in 2007.

⁶⁴³ Cătălin Zamfir (coord). The Research Institute for Quality of Life (ICCV), Social Report 2020 - The Pandemic and the Standard of Living. Social protection policies.

2. Reconstructing the intervention logic

Figure A. 88 – Intervention logic of FEAD in Romania⁶⁴⁴



Source: Adapted from FEAD mid-term evaluation.

2.1. National policy framework

The national Managing Authority (MA) of the FEAD Operational Programme (OP) in Romania, which is part of the institutional framework of the former Ministry of European Funds (currently, Ministry of European Investments and Projects – MIPE) has taken all necessary steps to ensure compliance with legislative requirements for both the ESF Operational Programme Human Capital – OPHC (POCU) and the Operational Programme Aid to the Most Deprived in Romania FEAD (POAD). All EC provisions aimed at ensuring results orientation were followed during the preparation of the programme or immediately after.

The national regulatory framework was developed to enable the effective implementation of EU requirements, as part of the accreditation process the MA undergoes at the beginning of the programming period. Operational

⁶⁴⁴ No baseline and target indicators were established for POAD/FEAD 2014-2020.

procedures are perceived to be very useful both for the monitoring process and for all other functions and they are the backbone of all activities carried out by the MA.

Overall, the FEAD programme is connected with a) the Operational Programme Human Capital OPHC (POCU) indicating the complementarities and synergies that must be pursued, in the form of accompanying measures, with ESF; and with b) other state programmes that finance complementary interventions for the same target groups as the FEAD (POAD), such as the *'Every Child in Kindergarten'*, *'Highschool money'* or *'Euro 200'*.⁶⁴⁵ In addition, FEAD is coherent with other programmes implemented by NGOs: *'This programme [FEAD (POAD)] targeted an immediate need; it was a quick response to a need that vulnerable groups had. The less good part of this programme is that there are no complementary services around this material assistance. . FEAD was a particularly good programme, especially at a time of crisis for the most vulnerable groups, but it did not help them to get out of poverty.'*⁶⁴⁶ Examples of programmes initiated by NGOs are provided in Annex 4.

Changes to the regulatory framework for FEAD (POAD)

In June 2022, the Romanian government issued the Emergency Decree (EOG) no. 63/2022 to put in place temporary measures to grant material support to individuals at risk of material deprivation and/or at risk of extreme poverty, partially supported by non-reimbursable external funds, as well as some measures regarding the distribution of this support. The package of material support, called *'Support for Romania'*, was in place, until 31 December 2023. The budget for these measures granted through social e-vouchers for the period 1 June 2022 – 31 December 2023, was 3,100,000,000 lei (EUR 623,449,860). This amount increased to the value of 6,281,200,000 lei (EUR 1,263,230,085), by EOG no. 165/2022 of 8 December 2022, which amended EOG no. 63/2022.⁶⁴⁷ Another change was made by EOG no. 113/2022 regarding some necessary measures for the implementation of the FEAD intended for the new target groups, including Ukrainians fleeing Russian military aggression (see Section 3).

2.2. Objectives and target groups

The 2014-2020 Operational Programme Aid to the Most Deprived in Romania FEAD was designed to support the distribution of food and basic material assistance for the most deprived persons, referred to in Article 2(5) of EU Regulation no. 223/2014 of the European Parliament and of the Council of 11 March 2014, regarding FEAD. The programme complies with the strategic direction of the Europe 2020 Strategy as well as the Partnership Agreement for Romania 2014-2020, which aimed to reduce the risk of poverty and fight social exclusion. The interventions financed by FEAD contributed to the achievement of the objective set in the framework of the Europe 2020 Strategy and the National Reform Programme, namely by reducing the number of people in Romania at risk of poverty and social exclusion (estimated 580,000) by 2020, compared to 2008. All FEAD measures, including those aimed at social inclusion, were designed to eliminate poverty manifested by the lack of possibilities to ensure a basic level of food and material support.

Target groups⁶⁴⁸

According to the Emergency Decree (EOG) no. 63/2022, the following categories of persons and families may benefit from material support in the form of social e-vouchers:

- individuals benefitting from the public pension system, individuals in the records of sectoral pension houses and beneficiaries of rights granted on the basis of special laws, paid by territorial pension houses/sectoral pension houses, whose net monthly income is less than or equal to with 1,500 lei (EUR 301).

⁶⁴⁵ For more national programmes coherent with FEAD see Annex 4 - National schemes addressing food or material deprivation (FEAD version 9, 2023)

⁶⁴⁶ Interview with World Vision International representatives conducted in October 2023.

⁶⁴⁷ MA FEAD (2022). Annual Implementation Report.

⁶⁴⁸ For more information regarding the mechanism of the final recipient's eligibility conditions see Annex 6 - Target Groups (FEAD version 9, 2023)

- persons - children and adults - classified as severely, severely or moderately disabled, whose net monthly income is less than or equal to 1,500 lei (EUR 301).
- families with at least two dependent children whose monthly net income per family member is less than or equal to 600 lei (EUR 120).
- single-parent families whose net monthly income per family member is less than or equal to 600 lei (EUR 120).
- families that have established the right to social assistance under the conditions of Law no. 416/2001, with subsequent amendments and additions.
- homeless people as they are regulated according to the legal provisions in force.

The **Guaranteed Minimum Income – GMI (VMG)** represents the most important means of support for people who lack the necessary mechanisms to get out of poverty and is regulated by Law 416/2001. Although GMI (VMG) provides a small amount, it has a considerable impact on reducing absolute poverty among beneficiaries. However, **GMI (VMG) beneficiaries** remain among citizens with extremely low incomes, among whom almost one in three live in absolute poverty even after receiving social assistance.⁶⁴⁹ *‘All these categories of deprived people have been clearly defined in the legislation - elderly people with a minimum income below 1500 lei, there were some eligibility conditions established for children from single-parent families or from families with a dramatic situation in the labour market, mothers who received newborn kits, including mothers who fled from Ukraine. We have applied the provisions of the legislation in force.’*⁶⁵⁰

2.3. Implemented operations and accompanying measures

Romania implemented FEAD through OP I: ‘food and/or basic material assistance operational programme’ and provided food and basic material assistance to the most deprived persons,⁶⁵¹ combined, where applicable, with accompanying measures, aimed at alleviating the social exclusion of most deprived persons.

In Romania, (as in some other Member States) implementation was delayed due to the late adoption of the FEAD Regulation and consequently late approval of the OP. In Romania, distribution of food packages and hygiene products were distributed, as well as the provision of warm meals, educational vouchers for children and kits for newborns. These measures were accompanied by accompanying measures which are described in the Applicant’s Guide. *‘In principle, accompanying measures were provided by the entities distributing the aid, either administrative-territorial units or school inspectorates or schools in the case of educational support, together with other non-profit organisations. These measures are social and educational, and they refer for example to access to education, and attendance of educational activities. There was also a medical component, so we had the whole spectrum of integrated services to ensure the inclusion of people.’*⁶⁵²

The accompanying measures included the following: educational measures on encouraging school attendance, ensuring personal hygiene and housing, school and/or career guidance and personal finance management advice, facilitating access to health services, facilitation of access to educational and cultural local activities. The partner organisations, together with the affiliated establishments directly supplying school materials, carried these measures out themselves or in cooperation with other organisations. The measures set out above were not exhaustive and were planned and implemented according to the individual needs of the target group, without prejudice to the dignity of the person.

During the school year of 2017-2018, the Ministry of Education distributed school supplies to children in pre-school education and in primary school. *‘Basically, we purchased about 52,000 packages [school supplies] for pre-schoolers and 308,000 backpacks that were distributed to children in schools from 1st grade to 8th grade, as a complementary support to the national programme*⁶⁵³ *supported by the Romanian government.’*⁶⁵⁴

⁶⁴⁹ FEAD version 9 (2023).

⁶⁵⁰ Group interview with MA FEAD staff conducted in 2023.

⁶⁵¹ For more information regarding the measures implemented see Annex 5 – Detailed description of FEAD actions.

⁶⁵² Group interview with MA FEAD staff conducted in October 2023.

⁶⁵³ Annex 4 provides detailed information the support provided by the national programme.

⁶⁵⁴ Interview with a representative from the central authority beneficiaries - Ministry of Education.

Accompanying measures are part of OP I, and Romania, is one of the 6 EU countries⁶⁵⁵ which decided to not draw on the EU budget for accompanying measures, rather choosing to finance these itself.⁶⁵⁶ These measures include [...] *counselling and information on available social services or other public and private assistance, basic counselling activities and workshops*’’.⁶⁵⁷

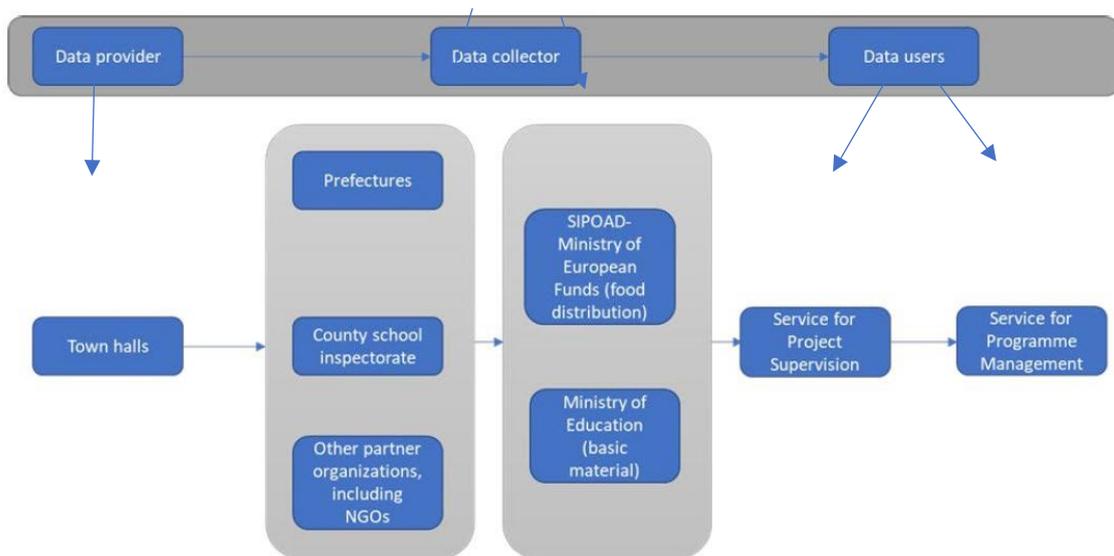
Priority was given to those facing severe material deprivation (rather than those at risk of poverty and social exclusion), which FEAD was already addressing through supporting the socio-economic integration of the most vulnerable people. Unfortunately, FEAD is the only programme addressing poverty in Romania and its capacities are limited.

2.4. FEAD governance and delivery system

The main actors involved in the monitoring of FEAD funded projects are: (1) the MA; (2) certifying authorities; (3) audit authorities; and (4) partner organisations. The two beneficiaries of FEAD are the MIPE (the former Ministry of European Funds) and the Ministry of Education (MoE), which are responsible for the implementation of operations and data collection. For the food distribution component, the structure in charge of implementing operations is the FEAD Implementation Service (SIPOAD) within the MIPE, and the MoE for the basic material assistance component (school supplies).

The Directorate-General for the European Human Capital Programme (DGPECU) is responsible for both the OPHC (POCU) and the FEAD – both of which are entities under the coordination of the MIPE. This means that a few staff representatives in the OPHC MA also have FEAD-related responsibilities, to varying degrees, from 5% to 80%.⁶⁵⁸

Figure A. 89 - Institutional structure of FEAD in Romania⁶⁵⁹



Source: World Bank, evaluation report, May 2021.

The FEAD MA is responsible for data validation, aggregation, and reporting. There are no intermediary bodies (IBs), nor a Monitoring Committee for the FEAD (POAD). The FEAD institutional network for implementation includes partner organisations, public bodies and/or non-profit organisations that distribute food and/or basic

⁶⁵⁵ Together with Belgium, Cyprus, Estonia, France, and Hungary.

⁶⁵⁶ DG EMPL (2018). FEAD Mid-Term Interim Evaluation Report.

⁶⁵⁷ Interview with the Research Institute for Quality-of-Life representative conducted in October 2023.

⁶⁵⁸ World Bank (2021). Functional Assessment of FEAD (POAD)

⁶⁵⁹ World Bank (2021). Functional Assessment of FEAD (POAD)

material assistance and provide accompanying measures⁶⁶⁰ directly or through other partner organisations. They also provide data for monitoring to the MIPE and MoE (as beneficiaries). The main partner organisations are County School Inspectorates (under the MoE) and County Prefectures (under the Ministry of Interior – MoI), as well as NGOs (such as the Red Cross) and religious institutions. At county level, prefectures were responsible for setting up working groups for the implementation of the POAD. Prefectures are also in charge of sending to the beneficiaries the annual reports on POAD implementation at county level (Figure A. 89).⁶⁶¹

Compliance is also regularly checked by the Audit Authority (AA) and EC. The AA may issue recommendations to improve institutional structure, process, and procedures, as appropriate. Most recommendations are implemented as issued. If significant deficiencies are identified in the programme’s management and control system, payments from the EC may be blocked until the situation is rectified.⁶⁶²

3. Key findings on the implementation of FEAD

3.1. To what extent was FEAD support successful – or not – and why?

Overall achievement of FEAD objectives [criterion: effectiveness]

The FEAD OP was approved by the European Commission in November 2014 – Decision no. C (2014) 9102. Later, it had a series of changes, to respond as best as possible to the challenges faced by deprived groups, the last change being in September 2022 through Decision no. C (2022) 6638, to make the mechanisms more flexible in implementation and facilitate the access of target groups to aid facilities through the following measures:

- granting social e-vouchers both for food products and for prepared food.
- expanding the eligibility criteria regarding final recipients to include individuals vulnerable over the age of 65 (for food aid).
- changing the target group for delivery of newborn kits by including foreign citizens or stateless persons originating from the zone of armed Russia’s war of aggression against Ukraine.
- Expanding the use of social e-vouchers to cover the purchase of food aid as well as basic material assistance for the homeless.

Overall, the 2014-2020 Operational Programme Aid for Most Deprived Persons FEAD contributed to **strengthening social cohesion and reducing extreme poverty** by distributing basic food (in the form of food packages and prepared food), school supplies for children, kits for newborns, clothing and footwear and hygiene products to the most disadvantaged people. In addition to this type of assistance, the partner organisations (e.g. World Vision Romania, SERA Foundation, Ovidiu RO Association etc.) also offered accompanying measures⁶⁶³ aimed at encouraging the social integration of these people. European aid through POAD is complemented by national schemes targeting people in extreme poverty (details in Annex 4).

Nearly 283,600 tons of food were distributed in Romania between 2014 and 2022.⁶⁶⁴ By the time of the mid-term evaluation, in Romania the coverage rate was above 80%, with intensity of support at around 20kg per participant per year.⁶⁶⁵ In terms of material support a total of 2.3 million people⁶⁶⁶ benefited from material support

⁶⁶⁰ These measures are provided with FEAD funds as well as with national funds (see Annex 4).

⁶⁶¹ World Bank (2021). Functional Assessment of FEAD (POAD)

⁶⁶² World Bank (2021). Functional Assessment of FEAD (POAD)

⁶⁶³ Such as: advice on personal hygiene, advice on food preparation and storage, referral to the social and administrative services, counselling for managing the family budget etc.

⁶⁶⁴ MA FEAD (2022). Annual Implementation Report

⁶⁶⁵ DG EMPL (2018). FEAD Mid-Term Interim Evaluation Report

⁶⁶⁶ Cumulative value, according to the MA FEAD (2022). Annual Implementation Report

between 2020 and 2021 (the only two years when this type of support was active in Romania). As for the social e-vouchers, between 2021 and 2022, there were over half a million people⁶⁶⁷ benefiting from this measure.

In Romania, **FEAD addressed the changing needs by adjusting the type of food products provided and how they were distributed**. For example, in 2014, vouchers were sent to eligible people, which enabled them to collect their food packages. This approach proved not to be effective, as the packages were pre-defined. The delivery mechanism was thus adapted – in this way the responsibility for food delivery changed from Ministries to the local level.⁶⁶⁸

According to the MA staff, the effectiveness of FEAD in providing non-financial assistance to the most deprived is considered to be good, *‘[...] because the most deprived people are the ones who have been targeted by our measures. But more than that, given the support provided, the administrative-territorial units, inspectorates and schools have identified at community level the most disadvantaged people, issued documents so they can get their due rights from the Romanian state, in addition to FEAD support. An inventory was done by granting these types of support at community level, and this is how FEAD has contributed and brought added value: the most deprived people received the attention and care of community leaders.’*⁶⁶⁹

Furthermore, Romania appears to invest relatively more resources in relation to both their population at risk of poverty and social exclusion and their poverty reduction target, thus highlighting the important role FEAD plays in the country to fight absolute poverty and material deprivation. Even though investment seems to be higher, no progress in distribution of goods is registered in Romania, where problems have been experienced in procurement procedures.⁶⁷⁰

Despite the administrative burden which affects the programme’s effectiveness, there are stakeholders who consider that *‘if we refer only to the severe material deprivation part, the programme has really had a positive impact’*⁶⁷¹ and, in terms of improvement, various collaborations are encouraged, meaning that the OP *‘should be combined with other measures at national level. We also had OPHC (POCU) that addressed marginalised communities and social inclusion and services.’* The collaboration should not only be in terms of material support, but as well in terms of *‘social services and the old social benefits component. Only when all these three components are brought together for a sufficient time, stable results may occur in terms of reducing the risk of poverty and social exclusion.’*⁶⁷²

Reach of target groups [criterion: effectiveness]

- Regarding reaching the target groups, **Romania implemented various changes to better address the needs of the target groups** and to fine tune FEAD, especially the updating of eligibility criteria and improve targeting.

EOG no. 113/2022 put in place necessary measures for the implementation of the FEAD intended to reach the most deprived people, account for the expenses related to the support of Ukrainians fleeing Russian military aggression, as well as provide grants from external non-refundable funds for investments intended for the technological modernisation of small and medium enterprises (SMEs). Further vulnerable groups were identified and categorised as eligible to benefit from material support based on social e-vouchers. This included newborns, mothers who have given birth since 2022, foreign citizens or stateless persons from the zone of armed Russia’s war of aggression against Ukraine. This measure grants financial support in the form of a voucher worth 2,000 lei (EUR 420) for a mother of a newborn in order to

⁶⁶⁷ 521,631 people - cumulative value, according to the MA FEAD (2022). Annual Implementation Report

⁶⁶⁸ For more national programs correlated with FEAD see Annex 4 - National schemes addressing food or material deprivation (FEAD version 9, 2023)

⁶⁶⁹ Group interview with MA FEAD staff conducted in October 2023

⁶⁷⁰ Group interview with MA FEAD staff conducted in October 2023

⁶⁷¹ Interview with UNICEF representative conducted in October 2023

⁶⁷² Interview with UNICEF representative conducted in October 2023

purchase products necessary for the care of the newborn. Social e-vouchers for newborns, were financed by FEAD within the limits of the budget available for this measure, in accordance with the rules of eligibility.⁶⁷³

According to the most recent Annual Implementation Report (2022), the programme had the following achievements in terms of target groups:

- Total number of people receiving support through vouchers, cards or other indirect delivery instruments: 521,634 out of which 221,196 were children under 15 years of age; 296,822 persons over 65; 363,713 women and 5,502 homeless.
- At the mid-term point of the programme implementation, Romania was among the countries with the highest quantity of food distributed (about 70%).⁶⁷⁴ Overall, Romania was also among the countries with the higher allocations of funds for this form of support, thus the progress of this output indicator tends to match the expectation - 283,595 tons of total food distributed between 2014 and 2022.⁶⁷⁵
- As for the outcome indicators referring to the food support, in cumulative numbers, between 2014 and 2022 there were 11,350,951 people who received food support. Out of this total, 2,272,600 were children under 15 years of age; 2,308,912 were persons over 65; 3,997,369 were women; 192,044 were migrants, participants of foreign origin, minorities (including marginalised communities such as Roma); 1,753,496 were people with disabilities, and 8,639 were homeless people.⁶⁷⁶
- In terms of the outcome indicators referring to the basic material assistance, in cumulative numbers, between 2014 and 2022 there were 2,310,223 people who received this type of support. Out of this total, 722,663 were children under 15 years of age; 249,017 were persons over 65; 680,171 were women; 129,275 were migrants, participants of foreign origin, minorities (including marginalised communities such as Roma); 422,959 were persons with disabilities, and 2,164 were homeless people.⁶⁷⁷

As regards the implementation of operations, during 2017 the MA's actions were focused on the modification of the OP and, implicitly, on the elaboration of new implementation documents required by the beneficiaries (implementation partners). Although the procedure for amending the FEAD was launched in August 2016, the European Commission's approval for this amendment was issued on 20 February 2017, by Commission Decision C (2017) 1086 final.

- Despite all the efforts for adjustment to the needs, the evidence indicates that **Romania addressed the needs of homelessness people, migrants and other minorities less effectively**. Homeless people were recipients of hot meals provided through the 'Support for Romania' programme. According to MA staff, they *'discussed with NGOs that have social canteens and provide services to homeless people. It was not a matter of the types of documents that are needed for homeless people. They do not need the social security number. The implementing partners (i.e. NGOs) were not interested to apply for these calls because we could not include eligible expenses for the staff providing support, just as we did cover any costs with the staff from the territorial units, schools, ANEPIS (National Agency for Social Inspection) or from the National House of Pensions, who dealt with the support measures. We could not pay NGO salaries using FEAD'*.⁶⁷⁸

There were **additional challenges in reaching the target groups**, especially children, which were generated by the pandemic period. MA staff found solutions to overcome these bottlenecks by allocating the unspent amounts to other types of expenses. *'[...] As far as I remember there were certain amounts from school materials and kits which were reallocated. We found ways to make things work. There were no big challenges to which we could not adapt and for which we did find a solution every time'*.⁶⁷⁹

Despite the challenges in terms of the bureaucratic procedures, overall, it is perceived that the programme had an impact on targeted groups and there is a certain progress. *'[...] If we analyse Eurostat data on the severe material deprivation rate in Romania, we notice that from 26% in 2014 we have now reached 5.20% in 2021. In*

⁶⁷³ Management Authority of FEAD (2023). FEAD Annual Implementation Report 2022

⁶⁷⁴ DG EMPL (2018). FEAD Mid-Term Interim Evaluation Report and FEAD Annual Implementation Report 2022

⁶⁷⁵ At the end of 2022, according to the FEAD Annual Implementation Report 2022

⁶⁷⁶ FEAD Annual Implementation Report 2022

⁶⁷⁷ FEAD Annual Implementation Report 2022

⁶⁷⁸ Group interview with MA FEAD staff conducted in October 2023

⁶⁷⁹ Group interview with MA FEAD staff conducted in October 2023

terms of severe material deprivation in Romania, we are still far behind the European Union average, but [...] I think the programme had an important impact in terms of the positive progress in Romania [...].⁶⁸⁰

Adjustments to FEAD to address new challenges [*criterion: effectiveness*]

- In Romania, according to a representative from a beneficiary organisation ‘[...] the pandemic has left its mark, forcing us to totally change the project implementation strategy. It also had a negative impact on spending money and even on some of the results assumed at the level of each project... But with all the difficulties, the programme had to continue. The school supplies continued to be distributed every school year, until the beginning of each school year.’ [...] and in 2020 the voucher scheme was launched”.⁶⁸¹

- In fact, in Romania, the **categories of people who have been affected** were the following:

The already most disadvantaged students were strongly affected by the consequences of the COVID-19 pandemic, leading to high school dropout rates. The measure aimed to provide educational support⁶⁸² and encourage the return to school. The initial estimated targets were 300,000 children enrolled in school, however data collected in 2020 during COVID-19 resulted in the estimated target being much higher (400,000 children enrolled in school).

New mothers, in an already financially precarious situation were further negatively affected by the effects of COVID-19. According to the National Agency for Payments and Social Inspection (ANPIS) records, in 2018, 2019 and 2020, the average number of children born in socioeconomically deprived environments was 15,000 newborns per year. In the COVID-19 period, one of the most affected categories of people were mothers who gave birth in 2021, with the right to a guaranteed minimum income, who are part of families receiving family support allowance, including single mothers, who are at risk (e.g. with disabilities), temporarily in critical life situations (victims of calamities, domestic violence, dependent people, etc.) and/or who are in particularly vulnerable situations (e.g. no longer have a home). This also included mothers who do not have identity documents and cannot access civil rights, as well as mothers from another minority. For all these groups social support services were necessary.⁶⁸³

- In 2022, the crisis of Ukrainians fleeing Russian military aggression led to Romania providing newborn kits for Ukrainian mothers and children.

- Thus, the FEAD measures for these target groups found within the OP for basic material deprivation (P.2): namely P2.1 - basic material deprivation (school materials) and P2.2 - basic material deprivation (kits for newborns) were financed by REACT-EU, and these programmes were adapted to the pandemic context from the perspective of the size of the target group, the financial allocation, as well as from the perspective of the implementation mechanism.⁶⁸⁴

- Thus, the measure P2.1 - basic material deprivation (school materials) had an allocation of EUR 44,000,000 from REACT-EU, and measure P2.2 - basic material deprivation (kits for newborns) an allocation of EUR 12,000,000 from REACT-EU. At the same time, the financial line of the existing measures within the programme was strengthened in relation to the size of the interventions already financed (e.g.: supporting the most disadvantaged categories of people who benefit from hot meals based on social e-vouchers), as well as those measures launched in 2021 (such as the provision of clothing and footwear, sleeping bags, etc. for the homeless). The measures taken at the level of the EU, as well as in Romania, in the context of the COVID-19 pandemic, allowed for changes in the legislation concerning social e-vouchers, and determined the needed to update the implementation mechanism by transposing it in accordance with social distancing norms.⁶⁸⁵

The amendment of the Operational Programme from 2017 onwards mainly aimed at diversifying the target group and the aid offered through the FEAD and the products offered have been supplemented to address more types of deprivation and precariousness, such as: the introduction of hot meals through canteens, the introduction of pre-school supplies, hygiene kits to both food assistance recipients and homeless people, kits for newborns,

⁶⁸⁰ Interview with UNICEF representative, conducted in October 2023

⁶⁸¹ Interview with Ministry of Education representative, as central authority beneficiary, conducted in October 2023

⁶⁸² For more information regarding the measures implemented see Annex 5 – Detailed description of FEAD actions

⁶⁸³ Management Authority of FEAD (2023). POAD Annual Implementation Report 2022

⁶⁸⁴ Management Authority of FEAD (2023). POAD Annual Implementation Report 2022

⁶⁸⁵ Management Authority of FEAD (2023). FEAD Annual Implementation Report 2022

clothing, shoes and sleeping bags for homeless people. The change to the programme also related to an increase in the frequency with which FEAD support was/is provided.

The operations foreseen in the programme and the total financial allocation for each operation were:

- Food aid distribution (basic food) – EUR 409,496,933
- Distribution of school supplies (school materials) – EUR 27,000,000
- Distribution of newborn kits – EUR 12,000,000
- Distribution of clothing and footwear etc. for the homeless – EUR 6,000,000
- Distribution of hygiene products – EUR 38,400,000.

During 2018, the MA's actions focused on the harmonisation of the national legal and procedural framework, as well as the development of new implementation documents required by the beneficiaries, which were necessary following the amendment of the FEAD in 2017.

This resulted in new specific Guidelines as part of the Government Decision no. 784/ 04.10.2018 which was approved for the establishment of measures necessary for the implementation of FEAD.

The elements of novelty introduced by GD no. 784/2018 mainly concern:

- **Restricting the categories of target group** (end recipient) eligible for food support. This occurred because of economic measures that led to some categories of people no longer being considered “vulnerable”.
- The **introduction of a new intervention to support disadvantaged people** in their difficult times, namely the provision of hygiene products for the whole family falling into one of the target group categories. This measure was necessary because, in Romania, the lack of personal and household hygiene products has negative effects on health and the ability to access education, or a job.
- **Increasing the frequency** with which support funded by the FEAD is provided.

Horizontal principles of FEAD [*criterion: effectiveness*]

The **horizontal principles were part of the applicant's guidelines, and they were a cross-cutting concern for the implementation of all programme activities**. From this perspective it is hard to quantify them in the absence of specific indicators, but there is qualitative data supporting this finding. *‘[...] The difference from OPHC (POCU) is that there were percentages allocated, and all these provisions were later found in the evaluation grid. And this was a separate criterion where the applicant had to explain how the project contributes through the proposed activities to the promotion of horizontal principle in the FEAD (POAD). How was compliance with these principles subsequently pursued in implementation? - we do not know very well, but we have made sure that the applicant takes them into account from the moment of writing the application.’*⁶⁸⁶

Overall, the horizontal principles took into consideration the dignity and do-not-harm principles, gender equality, non-discrimination, accessibility for people with disabilities, demographic change, and sustainable development. According to MA staff, FEAD was designed and implemented without any discrimination regarding the needs of the target groups and the eligibility criteria stipulated in legislation. *‘[...] We collect data to see how many women, men, children, and elderly benefit from these measures. When we provided food packages, all people had access regardless of gender, age and so on. Moreover, we did not collect data on ethnicity to avoid stigmatization. We collected only the data necessary to provide support for reducing material deprivation.’*⁶⁸⁷

In some of the activities, regarding the food distribution, the NGOs hired a nutritionist, in order to establish a balanced diet, but the impact was very low. For example, there are no coherent policies within the programme to monitor food access, (as one of the Sustainable Development Goals is Goal 2, about creating a world free of hunger by 2030). *‘World Vision also has warm meals in many schools [...] If we give only flour, sugar, and oil, how do you ensure a balanced diet? When we advocate for healthy nutrition, we often hear this line: ‘Let's be realistic, we're talking about the most vulnerable.’ We have a big problem: many children go to bed hungry.*

⁶⁸⁶ Group interview with MA FEAD staff conducted in October 2023.

⁶⁸⁷ Group interview with MA FEAD staff conducted in October 2023

*We should have nutritionists; we should know the community and the target groups. And speaking of partners, we should select the partners more carefully who are capable to implement specific measures, instead of having the Ministry of Education giving the same packs to everyone’.*⁶⁸⁸

Besides receiving the support from a nutritionist, people should be taught how to use the vouchers. Even though the programme is supposed to reach all target groups in need, quite often these people must receive support for having access to these measures, because they either do not have the information about aid opportunities, or do not know in practice how to get it.

Success and failure factors [criterion: effectiveness]

Overall, the **FEAD was successful** in Romania. This is supported both by the perception of the stakeholders who were interviewed as part of this case study and the vast majority of respondents to the FEAD end recipient satisfaction survey. In the absence of a comparable social inclusions and poverty reduction programme in Romania for the programming period 2014-2020, it can be inferred that FEAD has been fairly successful in its objectives. The success is mainly due to the **direct support which was provided before the pandemic**, and more recently by the **implementation of the electronic voucher system (e-vouchers)**, which is more flexible in terms of the products people may purchase, and at the same time, facilitates the monitoring process: ‘[...] *We track consumption on these cards and the level of consumption is very high, which means there is great interest for this food support measure. [...] In this way we have ensured that people have easy access to a type of support which is tailored to their individual needs’.*⁶⁸⁹

It is important to note a **gap in implementation between 2017 and 2019**, as illustrated by the dynamic of input and performance indicators of food distribution in Romania (see Annex 7). Romania, like other countries, managed a smooth transition between the old (within the EU CAP policy) and the new programme, sometimes through ad-hoc measures, but more generally by relying on the already existing framework for food support, which had a good start between 2014 and 2016. The gap that followed meant in some instances that the innovations brought about by FEAD were gradually embedded through successive refinements of the OPs. In the case of Romania, for example, a full redraft of the programme to better serve the purposes of FEAD took place between 2017 and 2019, which were transition years with no implementation.

It is in this period that the **e-voucher system** was piloted, the **process of which not an easy one**, as it required to have knowledge regarding the local supply chains in rural and urban areas. In this context, there were negotiations with Sodexo and Lidl for access to the most vulnerable and isolated areas. The preferred option was Sodexo, having larger regional coverage. Even though the **social e-vouchers** ensure easy and tailored support, the shift from in-kind, direct support to indirect voucher-based support was not easy, but it was necessary mainly because of the difficulty of the procurement procedures for food and hygiene packages, which was inefficient, i.e. very time consuming, as well as hindering access to FEAD by persons living in remote and isolated areas.

When it comes to distributing **food and hygiene products**, the **social e-vouchers simplified the procedures** and diversified the access to desired products, but when it comes to the **school supplies**, the providers came up with very low prices in response to the public procurement procedure. This type of practice, which is used by the providers to be sure that they will be awarded the contract, generates certain savings, but the quality of the products distributed is low. For example, the backpacks were reported as being of a very modest quality, even though the products were formally meeting the standards. *‘We are talking about achieving the results from a quantitative point of view, not qualitatively. It is one thing if you can offer a child a backpack of 50 lei and another to offer a backpack of 30 lei. We asked the bidders to meet all the norms imposed by the Ministry of Health regarding the size of the backpack, the weight etc., Formally, they all met them, because otherwise the public procurement procedure could not have been carried out. Normally, if it had been a good backpack, it*

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Interview with World Vision International representative conducted in October 2023

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Group interview with MA FEAD staff conducted in October 2023

could have been used for a year or two, but many of them broke down in the first year of use. We do not know how the children used them, but still, if the economic operator brings you a backpack for 30 lei, an amount which also included the company's profit. In the end that indicates a low quality of the product. So, we can say that we were efficient, but who knows when those children will have the opportunity to get a new backpack to go to school... And until then, they are left with nothing, because what they received did not last.'

In terms of **supporting the FEAD beneficiaries⁶⁹⁰ in the long term** the MA organised meetings at the ministry level, with the participation of representatives of several stakeholders, such as NAPSI (ANEPIS) – the National Agency for Payments and Social Inspection, GDSACP (DGASPC) - Child Protection DG, the Red Cross, the Romanian Patriarchate. Despite the positive feedback regarding FEAD *'unfortunately, no project was submitted within these calls, and we have submitted the request to the European Commission to relocate the unspent EUR 6 million. So, although we made all the efforts and had all the openness to inform potential beneficiaries, probably, one of the reasons was the lack of a financial allocation for personnel.'*⁶⁹¹

A **further weak point** identified by MA staff was the provision of support for homeless people. This is because *'for these calls for projects to provide clothing, shoes, sleeping bags, we launched eight competitive calls. No comments were made to the guide during the consultation period, no clarifications were requested regarding the programmatic documents related to these calls.'*⁶⁹²

As for how the programme responded to the **changing needs of the target groups**, this was updated according to the dynamic of the context (e.g. response to the COVID-19 pandemic and Ukrainians fleeing Russian military aggression) and, there was flexibility in adapting the programme to the socio-economic or geopolitical crisis. Even if target groups were clearly defined in the legislation, the intervention and implementation of measures took time. *'[...] perhaps because of bureaucratic, administrative reasons, for example, if we talk about social e-vouchers or vouchers to cover energy costs. The problem behind social e-vouchers was the rising inflation and prices of basic foods. We should have responded more quickly, although it was a big plus that the programme was able to cover these costs for beneficiaries in the context of the volatile social problems.'*⁶⁹³

If we consider the **socio-economic impact** of the POAD program, this can be seen at the level of the final recipients, implicitly at the community level, but as well at the level of services and goods' providers. For example, people were educated to access modern payment methods, but also to be accountable for the support that they received, by updating their personal IDs and registering their domiciliary situations.

However, it is perceived that in Romania the highest budget allocation was/is on direct material support (food and social e-vouchers), which provides only short-term solutions. In the long run, the vision of the OP should be revised. *'[...] Material/ financial assistance should be combined with educational measures, otherwise the impact is zero. ...Instead of adapting the programme to reach a long-term impact, i.e. long-term improvement of the situation of vulnerable groups, we have adapted it to simplify the implementation, and we ended up simply giving these vouchers.'*⁶⁹⁴

Overall cost-effectiveness of FEAD operations [*criterion: efficiency*]

From 2021 onwards, instead of receiving direct support, end recipients of FEAD could also receive indirect support through a voucher system, which, as explained above, proved to be more efficient. The NGOs had

⁶⁹⁰ In Romania the partner organisations are called 'beneficiaries' and they are different from the end users of the FEAD funds.

⁶⁹¹ Group interview with MA FEAD staff conducted in October 2023

⁶⁹³ Interview with UNICEF representative conducted in October 2023

⁶⁹⁴ Interview with World Vision international representative conducted in October 2023

⁶⁹² Group interview with MA FEAD staff conducted in October 2023

access to private funding, as well as European funding, such as through ESF and the OPHC (POCU), the CARE programme for refugees resulting in easier collaboration. One such example is the UNHCR's service hub at RomExpo, Bucharest, when 16 partners from different UN agencies, authorities and NGOs assisted refugees with various protection services, as well as with documentation, cash assistance and healthcare.⁶⁹⁵ During that time, 90% of the material assistance was supported by World Vision Romania, from international funding programmes. Moreover, the assistance, was not only directed to the Ukrainian refugees, but to Romanian people as well, '[...] At the beginning of the programme, the focus was on distributing food, sanitary products etc. This meant a colossal infrastructure and more than that, we were always thinking that perhaps the target groups do not find in the package what they need. We carried out many interviews with them to check the level of satisfaction. This complicates your life if you do not have a mechanism for collecting feedback on the needs. We always had 20 people sitting around, applying questionnaires to see what people needed. We realized that it is extremely complicated to cover all the needs, and we introduced cards, an equivalent of the voucher'.⁶⁹⁶ The flexibility of having a voucher and the possibility to buy products according to the tailored needs is not only more efficient, but it brings satisfaction to the final recipient.

In terms of the average cost of food support, there are large variations in the unit cost per person and per kg. In Romania there is a low cost per kg and the programme prefers to provide financial aid, with less logistics and implementation costs. Overall, although there is scope for reduction of administrative costs the **delivery costs are considered high**, but necessary to reach those who are the most in need.⁶⁹⁷

Administrative burden of monitoring and reporting requirements [*criterion: efficiency*]

Overall, **FEAD appears to be less burdensome compared to other operational programmes**. There are procedures in place for programme and project monitoring, Annual Implementation Report - AIR (RAI) drafting, programme revisions etc. All these procedures have appendices and templates. Monitoring is initiated once the project is approved and contracted. Then, the data found in the application (goals, results, targets, and financial values) become the baseline and reference for project implementation and monitoring. Beneficiaries are responsible for observing, documenting, and reporting project progress based on information received from partner organisations. The monitoring process starts from the moment of signing the financing contract and ends three years after the completion of the project.

Each project has assigned a monitoring officer who is the "interface" between the MA and the beneficiary. For verification, using the principle of four eyes, when verifying the technical reports submitted by the beneficiary, another project manager is appointed (the two officers are called Officer 1 and Officer 2), and the results of their verification are validated or reconciled by the Project Supervision Service (SSP) administrator. The monitoring data is aggregated, analysed, and included in reports which are presented to the management of the MA, Minister of Investments and European Projects, EC and other interested parties. According to a survey conducted in 2022 on the FEAD end recipients' satisfaction for the period 2017-2021 **more than three quarters of the representatives of FEAD partner organisations found the administrative requirements rather easy to comply with**.⁶⁹⁸

Despite being less burdensome, according to the mid-term evaluation of FEAD,⁶⁹⁹ there were **high monitoring costs** for written evidence (e.g. long documents with evidence on final recipients), there were **too many forms to fill out and too many database updates** to do, driving up costs. The evaluation report highlights the fact that the identification of end recipients is mainly based on income criteria, and in countries such as Romania, when these criteria are used, income is verified through declarations that end recipients must provide to the relevant authorities and upload into national or local databases (including databases on social benefits or guaranteed

⁶⁹⁵ <https://reliefweb.int/report/romania/unhcr-romania-ukraine-refugee-situation-update-weekly-update-75-04-december-2023>

⁶⁹⁶ Interview with World Vision international representative conducted in October 2023

⁶⁹⁷ DG EMPL (2018). FEAD Mid-Term Interim Evaluation Report

⁶⁹⁸ Metro Media Transylvania (2022). Survey Report on the POAD Final Recipients' Satisfaction for the period 2017-2021

⁶⁹⁹ <https://ec.europa.eu/social/main.jsp?langId=en&catId=1089&newsId=9331&furtherNews=yes>

minimum income), as well as based on social inquiries carried out by social workers or local authorities to identify the end recipients.

The MA FEAD staff perceives the FEAD monitoring and evaluation procedures as relevant and compliant, but some of the monitoring forms are considered by the partners quite complicated to use and there is no clear consensus on the capacity at MA level to collect and analyse data. As a solution, training, additional guidelines and more realistic timelines should be considered. MA staff considers the data collected to be generally complete and reliable, but there are mixed views among the partners on the quality of the verification process.⁷⁰⁰

On the other side, SMIS is considered easy to use and good for submitting data, but not good enough for aggregating, reviewing and validating it. It would be useful to work on the interconnection between different databases (for example FOREXEBUG - Ministry of Finance or SIIIR (Integrated Information System of Education in Romania) - Ministry of Education, as well as local level databases) and to avoid unnecessary administrative burden both for the beneficiaries and the MA staff.

Concerning the staff members, at the EC's recommendation the MA assigned approximately two-three people to each department, dividing the responsibilities of FEAD and OPHC (POCA). Over time, this labour division has been put into practice to ensure the necessary resources for the FEAD and avoid situations when the MA staff was mostly focusing on the tasks related to the OPHC (POCA), which is a more demanding programme, and was overlooking the FEAD -related tasks.⁷⁰¹

Based on a rough estimation of the working time of the MA FEAD staff, out of the total working time allocated to POAD by one staff member, at least **15% is allocated to the administrative responsibilities** and the rest to the beneficiary and audit requirements. *‘‘Currently, when the pressure is very high on the beneficiary to report and submit the payment requests, we allocate about 30-40% from our working time to the beneficiary to advise them how to proceed with these documents.’’*⁷⁰²

An estimation from beneficiary’s perspective (partner organisations who are implementing the FEAD funds) indicates that for example for monitoring and reporting the cost is the following: one person working approximately 40 hours per month multiplied by approximately EUR 20. In their project, they had to temporarily hire an external consultant to prepare the documents.⁷⁰³

In addition, there are **projects financed from POAD technical assistance carried out by a specific structure within the Ministry of Investments and European Projects**. These projects include (1) support for MIPE on POAD management and implementation by providing logistics, (2) support for the MIPE regarding the conduct of POAD 2018–2021 tenders - auxiliary services; and (3) continuous training of the MIPE staff involved in the coordination, management, and implementation of the POAD.⁷⁰⁴

There are three administrative activities which are the most burdensome:

- In Romania the MA required copies of the lists of end recipients with signature for receiving food packages, although these could be checked by sampling at the local authority’s level. The provision of a database with the final recipients was the most complicated requirement and could not be attained since the list was in physical format at the administrative territorial units and was not centralised or accessible to all the parties involved.
- The eligibility of each individual was difficult to be established, therefore instructions were issued to establish the precise reporting modalities for the beneficiaries; to comply with these instructions the beneficiaries (i.e. public authorities) had to adapt their activities and follow the procedures imposed both by the programme and by the internal audit authority’s staff who very often have no idea about the nature of the programme and the reality at the grassroots level.

⁷⁰⁰ World Bank (2021). Functional Assessment of FEAD (POAD)

⁷⁰¹ World Bank (2021). Functional Assessment of FEAD (POAD)

⁷⁰² Group interview with MA FEAD staff conducted in October 2023

⁷⁰³ World Bank (2021). Functional Assessment of FEAD (POAD)

⁷⁰⁴ World Bank (2021). Functional Assessment of FEAD (POAD)

- Partner organisations in charge of monitoring aid delivery must copy hundreds of sheets of paper containing data about the aid recipients. In addition, monitoring visits to the delivery sites are not covered by the regular work schedule and travelling budget of the partner organisations.⁷⁰⁵

However, due to the digitalisation at the level of public authorities, the burden decreased to a certain extent for the MA staff: *'[...] the data is corroborated, verified, concatenated, correlated, and checked by the Special Telecommunications Service'⁷⁰⁶ - that manages all databases of public authorities in Romania. Thus, we receive databases with people who are eligible at the level of central institutions. We no longer need to ask for documents from people who receive support, because the institutions that provide the database have already checked the accuracy of the data. We also check if the products or the services purchased were those compliant with the measures we supported through that call. We no longer have such an administrative burden as we had in 2020 and before.'*⁷⁰⁷

Simplification measures [criterion: efficiency]

Romania is one of the countries implementing indirect support through vouchers. The lessons learned by the FEAD MA from the use of e-vouchers can be summarised on three levels: (1) the delivery mechanism, (2) the use of the card by final beneficiaries, and (3) the management system and control. *'[...] In our country, the schemes are already complete, they are well established, and voucher schemes are regulated by legislation, and the success is maximum, in the sense that people benefit from support with a certain frequency.'*⁷⁰⁸

The purchase of the products and services was made according to national legislation and could be controlled from the beginning. However, during the early years of FEAD implementation all people, no matter their age, received the same products, which is considered to be efficient, but not necessarily effective. *'[...] The content of the packages was standard, thus we managed to efficiently respond to the needs of the disadvantaged people.'*⁷⁰⁹ *'[...] The target groups were different, with different needs and distributing packages with a standard content, the same for everyone, it might not have been effective'*⁷¹⁰

Delivering vouchers to end recipients has proven to be faster, cheaper and lead to fewer problems than the in-kind form of support. Expenses related to large purchases of products, storage and distribution were no longer needed, but the delivery of auxiliary measures was more difficult to achieve. Due to the electronic social voucher schemes the end recipients have access to a greater variety of products, adapted to their needs and preferences, they no longer faced the possibility of products expiring, but, in isolated areas the use of vouchers is more difficult, a larger network of operators is needed, and the use of voucher cards by the elderly population has proven to be more difficult. Nevertheless, this approach of delivering support based on cards and vouchers protected the end recipients from stigmatisation. *'[...] Moreover, we are talking about not stigmatizing this category of people: if they walk on the street with a package of 25 kg the stigma is visible. However, having a plastic card in your pocket that you can use in the store and pay like any normal person is different. There is no stigma attached to it.'*⁷¹¹

In terms of programme monitoring and management of implementation, purchases of this type proved to be **less exposed to the risks of financial corrections**, the beneficiaries can monitor in real time the consumption of the support received, the number of supporting documents is reduced, and the reimbursement is made only on the amounts used by the end recipients.⁷¹²

Overall, the FEAD measures pay only for certain services and goods, which can lead to **the demand for certain products to increase artificially** (e.g. for certain school supplies in the case of social e-vouchers). *'[...] There is a network of commercial entities involved in implementation: distributors, partner stores etc. In theory this is good for their business because they are growing. But after the support schemes end, the business goes down. It is not clear how they manage such fluctuations.'*⁷¹³

⁷⁰⁵ DG EMPL (2018). FEAD Mid-Term Interim Evaluation Report.

⁷⁰⁶ <https://sts.ro/ro/despre-noi/>

⁷⁰⁷ Group interview with MA FEAD staff conducted in October 2023.

⁷⁰⁸ Group interview with MA FEAD staff conducted in October 2023

⁷⁰⁹ Group interview with MA FEAD staff conducted in October 2023

⁷¹⁰ Interview with World Vision representative conducted in October 2023

⁷¹¹ Interview with World Vision representative conducted in October 2023

⁷¹² FEAD Annual Implementation report, 2022

⁷¹³ Interview with UNICEF representative conducted in October 2023

Coherence of FEAD with other interventions [*criterion: coherence*]

FEAD was **designed to be complementary to the state and civil society's support**. Furthermore, to avoid double funding and to coordinate with interventions funded for marginalised communities and disadvantaged people, the FEAD (POAD), OP Human Capital, OP Social Inclusion, and OP Employment and Education were all placed under the coordination of the Ministry of European Investment Projects (MIPE).

*'The role of FEAD is complementary to the national policies [OPHC (POCU)] in the field of poverty reduction. FEAD complements the measures taken at national level, the legislation with measures identified through a needs assessment financed from European funds.'*⁷¹⁴

However, overall, the complementarity with other programmes/activities is insufficiently ensured, and there are **opportunities for development of the complementarity** of FEAD with other support measures in the country, such as:

- supplementing the food stock by developing partnerships with stores and social projects (food banks, partnerships encouraged by food waste reduction policies, etc.),
- partnerships with social enterprises that can involve end recipients (gardens that can provide fresh fruits and vegetables, local farms, storage and/or distribution services, etc.),
- the involvement of volunteers at the local level,
- the collaboration of partner organisations with the public social assistance system and with other projects in the sphere of social inclusion, through which additional services can be offered to the end recipients,
- correlation of interventions with activities financed from other sources (e.g.: “fruit and milk” distribution programme in schools, LEADER programme, etc.).⁷¹⁵

In the case of the school supplies support, the first round of FEAD was based on complementarity between the school supplies purchased through FEAD and the ones that children received through the national aid scheme, which started in 2001. For FEAD the eligibility criteria were defined in the legislation to have the same end recipients who receive the incentive of 500 Ron (EUR 100) for school supplies from the national aid scheme.

However, *'FEAD is [also] an outdated programme if we look at it together with the other national policies and programs. FEAD is very helpful in a country with so much poverty, but there is a need for complementary of the programs. For example, we have different interventions providing food to the children in schools, but every year we have the same problem – there is not enough money. Why not join these measures and have a real impact on school dropout, school attendance, nutrition?'*⁷¹⁶

It is important to look at coherence at central level, but FEAD is an **intervention which is designed to address needs and to be implemented at local level**. For this reason, the programme's coherence and complementarity is a matter of dialogue and cooperation among the central government, local authorities, and civil society. For example, it is not clear how the measures planned and implemented through FEAD were correlated with the anti-poverty measures foreseen in the Local Development Strategies and Plans of Action. Every national programme which is designed to address and implement measures at the grassroots level should consider these local level strategies in order to increase effectiveness and impact.

It is widely recognised that reducing the poverty rate in Romania based only on the European funds is difficult and not realistic, however, **currently at the local level the EU funds tend to represent the main source of funding/investment for the local authorities to cover the costs for development of services and infrastructure**. In the future, these funds will be reduced, which is why a profound social protection reform is much needed. This should address not only the legal framework, but also to what extent the institutional network (from central to the very grassroots level) gives support to the most vulnerable people. The current approach tends to increase dependency on support, rather than giving the most vulnerable in society the means to be socially and professionally integrated in their communities. In addition, as it has been widely proven that individuals are most vulnerable in times of crisis and so far, the social systems in the country have provided only ad hoc support. *'[...] We see what it is about, what resources we have at our disposal, and we decide at the moment to what*

⁷¹⁴ Group interview with MA FEAD staff conducted in October 2023

⁷¹⁵ FEAD Annual Implementation report, 2022

⁷¹⁶ Interview with World Vision International representative conducted in October 2023

*extent we want to address the needs of those people who are affected by the crisis at that moment, and then we offer a type of support in parallel with the protection system. This is the problem, the benefits are granted in parallel and, sometimes are implemented by institutions which are not responsible with the social protection in Romania. In this matter, we have the MIPE - Ministry of European Investments and Projects, former Ministry of European Funds responsible with the implementations of FSE funds in Romania, than the Ministry of Internal Affairs who managed the programme for the Ukrainian refugees, with no preparation or responsibility in social protection, only internal security and civil defence, while the central authority responsible with the social protection policies in Romania is the Ministry of Labour, but with no involvement in FEAD actions.*⁷¹⁷

For more details, see Appendix 4 - National schemes addressing food or material deprivation.

3.2. Is FEAD still relevant?

Relevance to target groups [*criterion: relevance*]

Different approaches were used to understand and define the needs of the target groups, such as: testing the aid provided on a sample of end recipients or conducting surveys, by additionally consulting partner organisations and experts, usually on health and nutrition issues. Moreover, in Romania, FEAD is the only or primary source of food aid. In this manner it provides an essential service. Regarding basic material deprivation, even though winter clothes for homeless people were needed they were not distributed.

The relevance of the programme for children from the most deprived communities refers to the prevention of school dropout. Romania still has a high rate of school dropout compared to other EU countries. In addition, there is a high poverty rate in employment and *'[...] there are studies showing that the early school dropout rate is strongly correlated with the poverty rate in employment. Children who leave the education system prematurely will mainly get lower-paid jobs or will work illegally. Any intervention which addresses this problem in disadvantaged, rural, marginalised communities, is welcome.*⁷¹⁸

In addition to the original target groups defined under FEAD (POAD), new target group categories have emerged over the programming period, such as pre-school children, mothers and babies at risk of abandonment, homeless people, and people in temporary crisis situations. When asked about new target groups, MA staff confirmed that is not about new groups or categories of people who need these types of interventions, but about the volume of the target groups. This refers to the people who were not ex-ante identified as eligible to receive support but were identified by the social inquiry conducted within the frame of the programme. Even though the new people identified by social inquires (who are for the first time end beneficiaries of FEAD) do not have permanent income, they either are embarrassed to go to the local authorities to apply for social support or simply do not have the information about the opportunities for support.

Relevance of FEAD now and in the future [*criterion: relevance*]

In Romania, there is a sort of stigma regarding any form of state aid, especially for children from vulnerable communities who sometimes are bullied by their peers at schools.⁷¹⁹ To expand the aid in the case of educational vouchers, which addressed this problem, the MA worked closely with the social assistance directorates in administrative-territorial units or schools. However, it should be mentioned that the school staff involved did not receive any financial bonus to motivate them to be more actively involved in the identification of children in need. In some instances, this was perceived as unfair because the social assistance staff received bonuses within the frame of complementary interventions such as the OPHC (POCA) ones. *'We had schools where the school staff - the principal and the accountant, and the computer scientist - had to do all this social inquiry work and did not want to communicate to everyone, they only communicated to those they knew were deprived.*⁷²⁰

The MA staff made efforts to increase the number of end users among children. A potential main bottleneck was the transition of the programme from the Ministry of Education to the MIPE. The cooperation between MA/MIPE and the schools was not always very good. In such circumstances the MA had to ask for the NAPSI (ANPIS) intervention, or to rely on parents' cooperation to increase the number of children covered by the programme.

⁷¹⁷ Interview with UNICEF representative conducted in October 2023

⁷¹⁸ Interview with UNICEF representative conducted in October 2023

⁷¹⁹ Interview with UNICEF representative conducted in October 2023

⁷²⁰ Group interview with MA FEAD staff conducted in October 2023

However, complying with the procedure to fill in the file⁷²¹ was costly and time consuming, and often the parents considered that they were spending more than the children were getting. In the end it turned out that the involvement of Ministry of Education was highly instrumental because it was very important to have a high eligibility rate, first for increasing the coverage of the programme and including as many children as possible, but also from the perspective of engaging the funds and reducing the expenditure from the state budget, especially in times of crisis.

For the future, it is important to connect aid support with social services. In view of decreasing FEAD support after 2027, more efforts should be made to undertake major structural reforms of the tax system, public administration, administrative-territorial and to set in place an investment mechanism to support the social domain both in the long term and in times of crisis. In the future, FEAD will continue to have an important role in Romanian society overall and the target groups will still benefit from FEAD type of support.

3.3. Did FEAD make a difference and to whom?

EU added value [criterion: EU added value]

In Romania, due to FEAD (POAD), **vulnerable people who would otherwise have gone unnoticed were brought to the attention of the authorities.** In particular, in the town hall social services in the larger towns and Bucharest, these people received information about their rights and the services they were entitled to. The most popular accompanying measures end recipients benefited from, were advice on personal hygiene, followed by advice on food preparation and storage.

FEAD was also considered to have a good influence on the staff involved in the programme implementation, as organisational skills (database, accounting, public procurement, procedure, monitoring, auditing etc) were increased in Romania. Overall, the **programme brings together local administrations and other public institutions** to share information on issues and make proposals for the benefit of the programme and, ultimately, of the end recipients. *'We explained the partnerships we needed to have with the administrative-territorial units, for example, to collaborate with ANPIS. They started to report more to central institutions, to pay more attention to reporting and identifying people.'*⁷²²

FEAD increased the collaboration among various ministries (e.g. Ministry of Labor, MIPE and ME), **state and private institutions, social society and local administrations.** The partnership with civil society was instrumental, especially in providing warm meals, and demonstrated its value at the community level. The relationship between the Social Assistance Directorate and the end users increased, and vulnerable people became more aware of their social rights and obligations.

As for the **measures addressing the Ukrainians fleeing Russian military aggression, it was easier to work with the traditional partners**, such as the Red Cross Response Programme, because they have experience in delivery goods and vouchers. This may have led to a less transparent selection of partner in this crisis situation, *'[...] there should have been from the very beginning a criterion regarding what percent of the resources to be allocated to accompaniment services to discourage traditional partners. The impact might have been greater. I am part of the MA OPHC (POCA) Monitoring Committee where we discussed how to coordinate our interventions. This is because we also had assistance, for example, in OPHC (POCA) and ESF, but it did not work out very well, because even now, if I look at the monitoring reports of FEAD and OPHC (POCA), I cannot cross-check which of the beneficiaries who received support in one programme did not receive in the other. FEAD was complementary, but we also did double funding many times through other programmes, through assistance, subsidies etc., for example, OPHC (POCA).'*⁷²³

⁷²¹ The parents had to fill in a file with the child details regarding the inscription to FEAD aid

⁷²² Group interview with MA FEAD staff conducted in October 2023

⁷²³ Interview with World Vision international representative conducted in October 2023

Although FEAD support for the most disadvantaged people in Romania has been modest compared to the needs of the target group, both in quantity and in frequency, it is estimated that **stopping the FEAD support would contribute to a decrease in the quality of life of those supported.**⁷²⁴ Unfortunately, the impact of different types of financial support is not analysed, nor how these measures contribute to innovative aspects and, ultimately, to the wellbeing of the end recipients.

Visibility [visibility]

The FEAD programme in Romania has its own logos inscribed on the packages and more recently on vouchers, thus all end recipients are informed that the support they receive is EU-funded. *‘Children had the possibility to use vouchers. The children and parents know who the funder is.’*⁷²⁵ Despite this optimistic perception at the level of MA, at grassroots level it appears that the situation is different in the sense that if the beneficiaries are asked who provided the support they received the answer was often *“the city hall”* or *“the schools”*. *‘[...] When we offered supplies in schools, we asked them, ‘where do you think this support comes from?’, and all of them said, “from the local authorities”.’*⁷²⁶

Moreover, all the school supplies and packages had only the EU logo to avoid children feeling stigmatised. The visual identity measures were respected, in a manner less obvious and to produce as little discomfort as possible to those who use the backpacks, for example. *‘[...] Many parents refused the backpacks and school supplies packages because they do not want their children’s classmates to mock their children.’*⁷²⁷

4. Good practices

One of the most popular EU-funded measures in Romania is the **“Hot Meals”**⁷²⁸, which aims to provide hot meals to elderly people with low income and to homeless people. The measure, managed by the Ministry of Investments and European Projects, offers to vulnerable people social e-vouchers with a value of 180 lei (approx. EUR 35) per month. To date, more than 11,000,000 hot meals have been provided to the elderly with modest incomes and to the homeless, and more than 8,000 restaurants and canteens from all over the country were involved in providing the food. In rural areas, where many beneficiaries of social e-vouchers for hot meals are concentrated, the usage rate of this form of aid is almost 100%.

The programme also stimulated the end recipients’ social and financial inclusion, with a surprising effect: the elderly, with an average age of 82, learned very quickly to use the voucher card, which was the first voucher card for many of them. More than 300,000 cards have been issued and used, and more than 2,000 POS (Points of Sale)⁷²⁹ have been introduced in rural areas, laying the foundation for a digitisation model with immediate positive effects in the local community. At the same time, the programme helped small restaurant owners to maintain their business during the pandemic, given that the COVID-19 crisis had negatively affected the hospitality sector. For some of them, this project was even an opportunity to increase their turnover.

Another good example comes from the legislative framework, regarding the Emergency Decree of the Government no. 63/2022 establishing the national mechanism for granting **social e-vouchers**⁷³⁰.

The sum of 3.1 billion lei (EUR 623 million) has been allocated for the implementation of the measure. The objective was to support disadvantaged people in the above categories by providing social e-vouchers for food and hot meals. This measure was implemented from 1 June to 31 December 2022. The expected result was an increase of the net incomes of disadvantaged people in the context of rising food and energy prices worldwide. Please see the findings presented in the previous sections (i.e. Section 3.1 Success and failure factors, regarding the social e-vouchers) explaining in detail how this type of aid was developed in Romania and why it was considered effective and efficient.

⁷²⁴ Interview with the Research Institute for Quality-of-Life representative conducted in October 2023

⁷²⁵ Group interview with MA FEAD staff conducted in October 2023

⁷²⁶ Interview with World Vision International representative conducted in October 2023

⁷²⁷ Interview with Ministry of Education representative, as central authority beneficiary, conducted in October 2023

⁷²⁸ <https://mfe.gov.ro/programul-mese-calde-exemplu-de-bune-practici/>

⁷²⁹ POS - Point-of-Sale is an electronic device that can retrieve, store and transmit card payment information.

⁷³⁰ <https://www.fonduri-ue.ro/vouchere>

5. Conclusions and lessons learned

The FEAD needs an intervention framework which invites and encourages collaboration with all the stakeholders involved, from ministries and local authorities to civil society and private investors. Without this framework, the aid process can be hindered by a lack of support, which can be bureaucratic and needs creativity to put in place innovative solutions. There are several actions which should be taken to improve FEAD in the future, such as:

- Developing accompanying/complementary services, such as counselling measures, a minimum level of psychological support, in addition to material and basic food aid.
- Planning and carrying out an impact analysis, to capitalise the support measures by the direct beneficiaries.
- The FEAD measures should be complementary to all the programmes dedicated to the most vulnerable people in Romania. FEAD covers just a small part of the support for the targeted group, besides the support that the Romanian state frequently gives. A closer collaboration with the territorial administrative units (local administration) and NGOs is very important because they are in direct contact with the end recipients. It should be noted that for an aid programme to be sustainable and effective it must not allow end recipients to become dependent on it. Unfortunately, in Romania, FEAD creates this dependency because of the way it is implemented (e.g. financial support without additional support for access to the labour market). FEAD should go hand in hand with integration and insertion measures, in order to effect positive sustainable change on end recipients' lives.

Appendices

Appendix 1: Methodology

The case study was drafted based on the analysis of the data collected from five interviews (of which one was a group interview and four individual interviews) with key national stakeholders of FEAD in Romania and the desk review of the programme document (different versions until the most recent one dated 2023), annual implementation reports, other relevant reports and studies, and EUROSTAT data.

In terms of limitations, the low level of accessibility and stakeholder interest in participating in the evaluation was a significant constraint to data collection. This was largely due to the pressure perceived by all stakeholders given the approaching end of the programming period. However, considerable efforts have been made in terms of updating contact details and conducting intensive correspondence by phone and e-mail, to obtain the support of beneficiaries in data collection, including obtaining updated documents for the desk study. By extending the data collection period, we were able to conduct interviews and document study, sufficient to achieve triangulation of data from different sources and a more accurate analysis.

With reference to the impact measurement, it should be noted that some projects are still under implementation or have recently been completed, which makes it challenging to realistically estimate the impact of interventions. For the same reason, it is difficult to analyse the real status of achievement of the indicators. The status of indicators presented in the most recent Annual Implementation Report (i.e. from 2022) is even less relevant to the current situation of the projects.

Appendix 2: References

- Cătălin Zamfir (coord). The Research Institute for Quality of Life (ICCV), Social Report 2020 - The Pandemic and the Standard of Living. Social protection policies
- DG EMPL (2018). FEAD Mid-Term Interim Evaluation Report
- Eurostat, (2023). People at risk of poverty or social exclusion in 2022
- Management Authority of FEAD (2023). FEAD Annual Implementation Report 2022
- FEAD version 7 (2021)
- FEAD version 9 (2023)
- UNICEF (2023). Children and the Cost-of-living Crisis
- World Bank (2021). Functional Assessment of FEAD (POAD).

Appendix 3: FEAD indicators

Table A. 93 – Input indicators for the implementation of FEAD in Romania in 2014-2022

Indicator	Total amount of eligible public expenditure approved in the documents setting out the conditions for support of operations (EUR)	Total amount of eligible public expenditure incurred by beneficiaries and paid in implementing operations (EUR)	Total amount of eligible public expenditure declared to the Commission (EUR)	Implementation rate (expenditure declared as share of allocated budget)
2015-2022	621 928 241.99	321 356 014.99	222 411 315.28	36%

Source: SFC 2014 database.

Table A. 94 – FEAD output indicators in Romania in 2014-2022, per year

Output indicators on food support distributed	2014	2015	2016	2017	2018	2019	2020	2021	2022
Quantity of fruits and vegetables (tonnes)	0	0	0	0	0	0	2 561.52	2 567.73	2 509.78
Quantity of meat, eggs, fish, seafood (tonnes)	4 451.70	17 758.30	3 381.91	0	0	0	0	0	0
Quantity of flour, bread, potatoes, rice and other starchy products (tonnes)	9 190.50	36 663.50	47 512.19	0	0	0	16 365.25	16 404.94	16 034.70
Quantity of sugar (tonnes)	2 872.00	11 457.00	16 654.84	0	0	0	2 371.78	2 377.53	2 323.87
Quantity of milk products (tonnes)	0	0	0	0	0	0	0	0	0
Quantity of fats, oil (tonnes)	2 872.00	11 457.00	25 925.37	0	0	0	4 743.55	4 755.06	4 647.74
Quantity of convenience food, other foodstuff (not falling in abovementioned categories) (tonnes)	0	0	3 710.97	0	0	0	0	0	0
Total quantity of food support distributed (tonnes)	19 386.20	77 335.80	97 185.28	0	0	0	30 074.12	30 147.06	29 466.67
Proportion of FEAD co-financed food	100.0	100.00	85.00	0	0	0	0	0	0

Output indicators on food support distributed	2014	2015	2016	2017	2018	2019	2020	2021	2022
products in the total volume of food distributed by the partner organisations (%)									
Total number of meals distributed partly or totally financed by the OP	0	0	0	0	0	0	0	11 027 838	0
Total number of food packages distributed partly or totally financed by the OP	1 436 019	5 743 190	7 903 190	0	0	0	1 185 888	1 188 764	1 161 935

Source: SFC 2014 database.

Table A. 95 – Number of FEAD participants in Romania in 2014-2022

Result indicators on food support distributed	2014	2015	2016	2017	2018	2019	2020	2021	2022
Total number of persons receiving food support	612 262	2 449.049	4 432 214	0	0	0	1 185 888	1 485 586	1 185 952
Number of children aged 15 years or below	123 275	493 959	602 629	0	0	0	356 577	359 512	336 648
Number of persons aged 65 years or above	144 028	589 296	867 851	0	0	0	129 521	426 800	151 416
Number of women	285 571	1 142 282	1 264 728	0	0	0	351 206	600 707	352 875
Number of migrants, participants of foreign origin,	0	0	0	0	0	0	55 059	69 345	67 640

Result indicators on food support distributed	2014	2015	2016	2017	2018	2019	2020	2021	2022
minorities (including marginalised communities such as Roma)									
Number of persons with disabilities	99 054	408 627	469 603	0	0	0	238 581	250 263	287 368
Number of homeless	0	0	0	0	0	0	825	6 794	1 020

Source: SFC 2014 database.

Appendix 4: National schemes addressing food or material deprivation⁷³¹

P1 - food deprivation (basic foods)

National schemes:

From 2007 to 2013, Romania benefited from the same type of programme, addressed to the most deprived people, financed by the *European Agricultural Guarantee Fund (EAGF)* - "Ensuring a food surplus for the poorest population in the European Union" (PEAD). The EU aid took the form of food for approximately 2.5 million people. **The Agency for Payments and Intervention in Agriculture (APIA)** provided the management of this programme.

In the period 2007-2013, the EU allocated funds and goods to Romania from the stocks of intervention amounting to a total of approx. EUR 260,000.

The added value that FEAD brings refers to focusing and increasing the aid offered to deprived people, considering the amounts made available by EAGF and the government of Romania which are two times higher than those in PEAD, the introduction of accompanying social inclusion measures and the encouragement of school attendance by introducing aid in the form of school supplies, which indirectly leads to the social inclusion of children.

The Romanian Red Cross started, in September 2009, the **Food Bank Project**, the purpose of this project being to support families/single persons who cannot meet their daily food needs with basic food. Currently, the Food Bank operates through the Red Cross and has more than 150,000 end recipients.

Emergency Decree no. 115 of 16 July 2020, regarding some measures to support the most deprived categories of people who benefit from hot meals based on social e-vouchers, granted from non-refundable external funds, as well as some measures for their distribution.

P2 - basic material deprivation

P2.1 - basic material deprivation (school materials)

National schemes:

Law 272/2004 transfers to local budgets amounts for ensuring social protection measures. This law covers approx. 40,000 children, the minimum funding limit is on average 600 lei/year/child.

“Highschool money” (HG 1488/2004) outlines the methodology for applying the programme aimed at students from high schools and vocational schools from families whose monthly gross income per family member is max. 150 lei. In total, 98,000 students benefited from this programme. The scheme had an annual value of approx. 17 million lei.

Euro 200 Law 269/2004 grants financial aid for the purchase of a computer to families with pupils and/or students of accredited state or private education, up to the age of 26 who come from families with a maximum

⁷³¹ FEAD version 9 (2023)

gross monthly income of 150 lei per member by family. The total number of beneficiaries in 2014 was 15,794 people, worth approximately EUR 3,150,000.

Law 248/2015 national programme ‘‘Every Child in Kindergarten’’ allocates social e-vouchers worth 50 lei/child/month conditional on the child’s attendance at kindergarten. Disadvantaged children from families with an income below 284 lei/family member/month benefit from social e-vouchers.

Law 34/1998 (Art. 5) grants subsidies from public budgets for associations and foundations authorised as providers of social services. The state budget can cover part of the expenses with the salaries of care and social assistance staff, food for the beneficiaries of social canteens or other food provision services, for the beneficiaries of residential centres, fuel for the means of transport of day centres, care units at home and social canteens. The local budget granted subsidies for current operating expenses of the social assistance units, approved by decision of the local council. The total amount granted in 2016 was EUR 4,066,000, for 138 associations and foundations and 9587 beneficiaries.

Emergency Ordinance no. 133 of August 7, 2020, regarding some measures to support the most disadvantaged categories of students who benefit from educational support based on social e-vouchers for educational support granted from non-refundable external funds, as well as some measures for their distribution, with the amendments and subsequent additions.

P2.2 - basic material deprivation (kits for newborns)

[National schemes:](#)

Law 272/2004 transfers to local budgets amounts for ensuring social protection measures. This law covers approximately 40,000 children, the minimum funding limit is on average 600 lei/year/child.

Law 34/1998 (Art. 5) granted subsidies from public budgets for associations and foundations authorised as providers of social services. The state budget can cover part of the expenses with the salaries of care and social assistance staff, food for the beneficiaries of social canteens or other food provision services, for the beneficiaries of residential centres, fuel for the means of transport of day centres, care units at home and social canteens. The local budget granted subsidies for current operating expenses of the social assistance units, approved by decision of the local council. The total amount granted in 2016 was EUR 4,066,000, for 138 associations and foundations and 9587 beneficiaries.

The legal provisions regarding some measures to support the most disadvantaged categories of mother-newborn couples who benefit from material support based on social vouchers on electronic support granted from non-refundable external funds as well as some measures for their distribution.

P2.3 - basic material deprivation (clothing and footwear, sleeping bags, etc.)

[National schemes](#) - there are none.

P2.4 - basic material deprivation (hygiene products)

[National schemes](#) - there are none.

[Appendix 5: Detailed description of FEAD actions](#)⁷³²

P1 - food deprivation (basic foods). Food deprivation is managed by MIPE.

[The actions carried out for the distribution of food packages.](#)

The food packages were delivered to the headquarters of the partner organisations and distributed by these to the final beneficiaries in compliance with visibility measures. The activity of providing food aid packages was coordinated by the beneficiary and was carried out in accordance with the contractual terms and established delivery times. In the case of immovable persons, the packages with food aid were distributed at the home of the end recipients, with the support of the partner organisations (territorial administrative units, i.e. local administration) that provided the necessary infrastructure for transport. The beneficiary and the partner organisations followed the inclusion of people in the target group, including for persons/families temporarily in critical life situations, defined according to EOG no. 84/2020, and in other similar situations established by social investigations and who are in particularly vulnerable situations, as well as people who live in informal settlements. Providing support to people belonging to this category can be achieved only if there were:

- food stocks, after exhausting all stages of distribution for family members and single persons to whom it is established, by written provision to the mayor,

⁷³² Management Authority of FEAD (2023). POAD Annual Implementation Report 2022

- the right to a GMI (VMG) granted based on Law no. 416/200, with subsequent amendments and additions, also for the members of families receiving the allowance for family support granted under Law no. 277/2010 regarding the support allowance to the family, republished, with subsequent amendments and additions, as defined by EOG no. 84/2020 for the establishment of necessary measures for the implementation of the Operational Programme Aid to the most deprived people – FEAD (POAD).

Within the project with SMIS code 125099 entitled "Granting food aid packages within the POAD 2018-2021, until 2022, a number of three tranches, were distributed, out of the six, provided in the financing application. The third distribution took place between 01.10.2021 –28.02.2022 for a number of 1,187,849 packages.

The food package contained the following amounts: oil (4 litres); sugar (2 kg); white wheat flour (5 kg); sorghum (4 kg); rice (4 kg); pasta flour (800 g); canned pork (900 g); canned beef (1.5kg); canned liver pate (1 kg); fruit compote (1.44kg); fruit jam (360 g); dietary jam (360 g).

Actions carried out for the distribution of social e-vouchers for hot meals.

Social e-vouchers for hot meals were distributed from the issuing unit to the prefect's institution, according to the centralising tables communicated by each prefect's institution.

The partner organisations distributed, in accordance with the lists provided and in compliance with EOG no.115/2020 social e-vouchers for hot meals to eligible people from the target group, respectively, people who have reached the age of 75 or over, who benefit from a pension or other rights by special laws, paid by territorial pension houses and homeless persons/families, including persons/families who have been evicted, and families with children who do not have a stable residence, especially single-parent families.

The ticket holder benefited from a hot meal, provided by the affiliated units that accepted social e-vouchers for hot meals, as defined in national legislation applicable, respectively in EOG no. 115/2020 regarding some measures to support the categories of the most disadvantaged people who benefit from hot meals via social e-vouchers, granted through non-reimbursable external funds, as well as some measures of their distribution.

In 2022, the call "The granting of social vouchers on electronic support for products, food and hot meals" was launched, aimed at P1 - food deprivation (1 basic food) with a total eligible value of EUR 57,730,000. Within this call, the project was approved with SMIS code 157929, with the title "Material support based on social e-vouchers for the purchase of food products and/or for the provision of hot meals for the categories of persons at risk of material deprivation and/or risk of extreme poverty - "Support for Romania", whose beneficiary is the Ministry of Investments and European Projects/Directorate General POAD implementation, with a total eligible value of EUR 57,704,674.52.

The nominal value of a social e-voucher for hot meals is 180 RON (almost EUR 36).

P2 - basic material deprivation

Actions carried out for the distribution of school materials.

The implementation mechanism is carried out through the purchase of social e-vouchers for educational support for eligible disadvantaged children. The MIPE purchases from social e-vouchers for educational support and distributes them to the partner organisations who, in turn, distribute them to the end recipients.

The partner organisations are the Ministry of Education, state preschool units, primary and gymnasium units, the county school inspectorates and the School Inspectorate of the Municipality of Bucharest, the institution of the prefect and local public administration authorities.

The role of the partner organisation is to identify and compile the list of end recipients and distribute social e-vouchers to parents/legal representative/guardians of eligible children from the target group.

The nominal value of a social voucher on electronic support for educational support is 500 lei.

In 2022, the project with SMIS code 152590 with the title "Educational support based on social e-vouchers for the most disadvantaged student categories", had a total value of 331,371,550 lei.

Within the project, 224,809 educational vouchers were distributed for the school year of 2021-2022. Also, the project was modified to allow it to continue into the school year of 2022-2023.

Actions regarding the granting of kits for newborns

The implementation mechanism is carried out through the purchase of social e-vouchers for newborns.

MIPE purchases social e-vouchers for newborns from the accredited issuing unit and distributes them to partner organisations who, in turn, distribute them to end recipients.

In August 2022, the call "Granting kits for newborns - measure P2.2 kits for newborns within the POAD" with a total eligible allocation of EUR12,000,000. Within this call, the project SMIS code 156834, with the title "Granting of kits for newborns" had a total eligible value of EUR 6,094,230.17 (30,070,150.50 lei), and the beneficiary was the Ministry of Investments and European Projects/Directorate General Implementation POAD.

[The actions carried out for the distribution of clothing and footwear, sleeping bags etc.](#)

The mechanism for implementing this type of support for basic material deprivation was run in three ways:

1. The Ministry of European Investments and Projects, through the General Directorate of Implementation POAD, together with partner organisations purchases clothing items and shoes and sleeping bags intended mainly for the homeless, mainly over winter.
2. Purchase of social e-vouchers – by the Ministry of Investments and European projects.
3. NGOs accredited as providers of social services, alone or in partnership with institutions central and/or local, county and/or regional public, as partner organisations to purchase clothing and footwear sleeping bags and other intended items for homeless people, mainly for the winter. This implementation represented the changes that were proposed for 2023.

[The actions carried out for the distribution of hygiene products.](#)

This type of support for basic material deprivation is managed by the Ministry of Investments and European Projects, through the General Directorate of POAD Implementation.

The implementation mechanism followed the delivery to the headquarters of the partner organisations of the packages with hygiene products and distribution to final beneficiaries in compliance with visibility measures.

The partner organisations involved in carrying out this activity were the town halls, as well as the institutions of the prefect from 41 counties, respectively the institution of the prefect of the municipality of Bucharest, these had the obligation to follow the inclusion of people in the target group.

The categories of the most deprived who benefited from basic material assistance were:

- family members and single persons to whom it is established, by written provision of the mayor, the right to a guaranteed minimum income granted based on Law no. 416/2001 regarding the guaranteed minimum income, with subsequent amendments and additions.
- members of families receiving family support allowance granted under Law no. 277/2010 regarding the allowance for family support, republished, with amendments and subsequent additions.
- persons/families temporarily in critical life situations, respectively victims of crises, dependent persons, defined according to this emergency decree, and in other similar situations established by social surveys and who are in special situations of vulnerability, as well as people living in informal settlements.

Providing support to people belonging to this category was achieved by distributing hygiene products after the exhaustion of all distribution stages for categories a) and b), as they are defined by EOG no. 84/2020 for the establishment of necessary measures for POAD implementation.

The hygiene package that was distributed contains the following products and quantities: toothbrush (5 pcs); toothpaste (300 ml); liquid soap (500 ml); children's shampoo (800 ml); adult shampoo (500 ml); laundry detergent (2700 g).

To make aid more efficient, the distribution of these products intended to contribute to personal hygiene and home hygiene was accompanied by accompanying measures.

[Appendix 6: Detailed description of FEAD target groups⁷³³](#)

The eligibility conditions of the end recipients were established based on the following mechanism:

⁷³³ FEAD version 9 (2023)

For P1. A food deprivation (basic food) – food packages and P 2.4 material deprivation (hygiene products):

1. Families in severe poverty who benefit from Law 416/2001 on the guaranteed minimum income or whose monthly income and assets, according to independent income declarations, would fall within the limits established by Law 416/2001.
2. Families with children who benefit from Law 277/2010 for family support or whose monthly income per family member, according to independent income declarations, is below the minimum threshold established by this law (threshold in 2016: maximum 200 lei/ family member/month).
3. elderly people who benefit from social allowance for pensioners, according to Emergency Decree no. 6/2009 regarding the establishment of the social allowance for pensioners.
4. Homeless persons/families (including persons/families who have been evicted and families with children who do not have a stable residence, especially single parents).
5. Persons temporarily in critical life situations, namely victims of crises, dependent persons (defined as persons with serious and pronounced disabilities, adults and children, who do not benefit from care in residential, public or private social services), other people in particularly vulnerable situations determined by social surveys, as well as people who are part of informal settlements (as they are defined in annex 2 to Law no. 350 of June 6, 2001, on territorial planning and urban planning, with the amendments and subsequent additions). The temporary situation of vulnerability will be justified by the public authorities with duties in the field of social assistance.

For P1. B food deprivation (basic food) – food products and hot meals granted through social e-vouchers, the categories of people the most deprived beneficiaries are:

- a) people who have reached the age of 65 or over, who benefit from the social allowance for pensioners or other rights through special laws, paid through territorial pension houses. If the end recipients benefit from several allowances or income from pensions in payment and their cumulative value exceeds the value of the social allowance for pensioners, they do not benefit from social e-vouchers for food products and hot meals.
- b) homeless persons/families (including persons/families who have been evicted and families with children who do not have a stable residence, especially single-parent ones).

For P2.1 basic material deprivation (school materials)

- a) children enrolled in state, primary and secondary education, who meet the income criteria established in the National School Supplies Programme, according to Law 126/2002, respectively who are dependent families whose average monthly net income per family member, achieved in July of each year, is a maximum of 50% of the gross minimum basic salary per country.
- b) preschool children enrolled in state education, who are eligible for Law 248/2015.

For P2.2 basic material deprivation (kits for newborns)

- a) mothers who gave birth in 2021, but no later than three months after the birth of the child and for whom the right to a guaranteed minimum income is established, by written order of the mayor, based on Law no. 416/2001 on the guaranteed minimum income, with subsequent amendments and additions.
- b) mothers who gave birth in 2021, but no later than three months after the birth of the child and who are part of families receiving family support allowance granted under Law no.277/2010 regarding the family support allowance, republished, with subsequent amendments (including minors).
- c) mothers who gave birth in 2021, but no later than three months after the birth of the child and who are in a risk situation (example: people with disabilities).
- d) mothers who have given birth since 2021, but no later than three months after the birth of the child, who are temporarily in critical life situations (victims of crises, domestic violence, dependent persons, etc.) and/or who are in particularly vulnerable situations. Example: they no longer have a home, have been evicted from their own home or any other situation of vulnerability that the partner organisation considers would fall under this point. The temporary situation of vulnerability will be justified by the partner organisations.
- e) any other category of mothers who gave birth starting in 2021, but no later than three months after the birth of the child and who do not have identity documents and cannot access civil rights.

- f) mothers who are minors, but no later than three months after the birth of the child.
- g) mothers who gave birth in 2022, but not later than three months after the birth of the child, foreign citizens or stateless persons from the zone of armed Russia's war of aggression against Ukraine.

According to Emergency Decree of the Government no. 113/2022 regarding some necessary measures for the implementation of the FEAD, settlement of expenses regarding supporting refugees from Ukraine, as well as giving grants from external funds non-reimbursable for investments intended for digitalising SMEs, the end recipients of these measures are:

- a) mothers who gave birth in 2022,
- b) mothers who gave birth in 2022,
- c) mothers with disabilities who gave birth in 2022, but no later than three months after the birth of the child.
- d) mothers who gave birth in 2022, but no later than three months after the birth of the child, temporarily in critical life situations (victims of crises, domestic violence, dependent persons and/or who are in particularly vulnerable situations, determined by the investigation of a social assistance drawn up by public authorities with duties in the field of social assistance or on the basis of a social investigation report drawn up by public authorities with attributions in the field of social assistance at the request of the person or the report of a third party;
- e) mothers who gave birth in 2022, but no later than three months after the birth of the child and who do not have identity documents and who, for this reason, cannot benefit from civil rights.
- f) mothers who are minors who gave birth in 2022
- g) mothers who gave birth in 2022.

For P2.3 basic material deprivation (clothing and footwear, sleeping bags, etc.)

- a) homeless persons/families (including persons/families who have been evicted and families with children who do not have a stable residence, especially single parents).
- b) persons temporarily in critical life situations, i.e. victims of crises, dependent persons (drug or alcohol addictions that create a situation of vulnerability, elderly persons in a situation of dependence on assistance), and in other similar situations established by social evaluations. The temporary situation of vulnerability will be justified by the public authorities with attributions in the respective field/accredited NGO managing the implementation/accredited social service providers.

1. Context and background

Throughout the evaluation reference period (2013-2022), Sweden's socio-economic indicators have been relatively stable at a level above the European average. There have been minor fluctuations, but a general negative development can only be seen in 2022.

Sweden's at-risk-of-poverty or social exclusion rate (AROPE) was at 18.2% in 2014, compared to the European average of 24.0%. Over time, the AROPE levels have dropped in Sweden but rose again to 18.6% in 2022. The indicator for child poverty is also significantly below the European average of 24.6%. In 2014, it stood at 19.2%. After a peak at 22.7% (almost at the EU average of 24%) in 2019, it declined to 18.9% in 2022.

The severe material and social deprivation (SMSD) rate is significantly below EU average. In 2014, it was 1.1% compared to the EU average of 9.7%. However, the SMSD rate increased in Sweden to 2.4% in 2022, compared to the EU average, which dropped (albeit to 6.7%) in 2022. The SMSD rate for children shows a similar development, from 1.2% in 2014 to 3.0% in 2022. This reflects increased challenges regarding material and social deprivation in Sweden, albeit at low levels in a European perspective.

The indicator regarding the inability to afford a meal with meat, chicken, fish (or vegetarian equivalent) every second day shows that the situation in Sweden is significantly less challenging than in most European countries. In 2014, this indicator was at 1.6% compared to the EU average of 9.7%. This level has been relatively consistent over the years but showed a slight increase in 2022 to 2.4%.

The two areas where the socio-economic context in Sweden is most challenging from a European perspective are Households with very low work intensity and Housing cost overburden. In 2015, the percentage of households with a very low work intensity was 7.8%. It has since risen to 8.2%, in contrast to the EU average, which has dropped from 10.1% to 8.3% over the period. The same situation can be seen for Children (aged less than 18) living in households with very low work intensity. In 2022, the percentage in Sweden (7.4%) is at the EU level (7.6%). In terms of housing cost overburden, the level in Sweden has been constant at approximately 8.5-9% over the reference period. After a positive development at the European level, Sweden is at the same level as the EU average, with 9.2% in 2022 for this indicator.

Sweden's socio-economic context can be seen as the background for choosing an operational programme for social participation (OP II) under FEAD 2014-2020. According to the indicators, results show that Sweden has fewer challenges regarding material and social deprivation as well as inability to afford a meal than most European countries. In line with the Swedish welfare model, there are several efforts at national and local level aimed at reducing social and economic exclusion, which could be extended through FEAD support.

Table A. 96 – Socio-economic context in Sweden

Sweden	2014	2015	2016	2017	2018	2019	2020	2021	2022	Trend
1. At-risk-of-poverty or social exclusion rate (AROPE) Total		18,2	17,7	17,2	17,7	18,4	17,7	17,2	18,6	
2. AROPE Children		19,2	19,1	18,3	20,5	22,7	19,6	19,0	18,9	
3. Severe material and social deprivation rate (SMSD)		1,1	0,7	1,0	1,4	1,5	2,0	1,4	2,3	
4. Severe material deprivation rate (SMD)	1,0	5,8	0,8	1,1	1,6	1,8	1,8	0,0	0,0	
5. Inability to afford a meal with meat, chicken, fish (or vegetarian equivalent)	1,6	1,8	1,3	1,8	1,5	2,0	1,9	1,6	2,4	
6. Impact of social transfers (other than pensions) on poverty reduction	48,0	45,3	45,8	46,1	43,3	40,8	42,7	44,5	39,9	
7. Housing cost overburden	8,6	8,7	8,5	8,4	8,3	9,4	8,3	8,5	9,1	
8. Self-reported unmet need for medical care % of population 16+	1,7	1,3	1,6	1,4	1,5	1,4	1,5	1,3	1,8	
9. Households with very low work intensity		7,8	7,8	8,2	8,3	8,3	7,9	8,8	8,2	
11. Population in the EU could not afford unexpected financial expenses	20,4	19,8	20,7	19,7	20,2	20,5	19,8	18,4	21,2	
13. Share of total population having neither a bath, nor a shower in their own home	0,5	0,7	0,1	0,0	0,1	0,1	0,1			
14. No indoor flushing	0,5	0,7	0,1	0,0	0,1	0,1	0,1			
17. Persons who cannot afford a telephone	0,0									
18. Persons who cannot afford to replace worn-out clothes	2,7	2,0	2,4	1,9	2,2	2,5	3,1	2,7	3,8	
20. Persons who cannot afford to get together with friends or family (recreation)	1,0	1,1	1,1	1,4	1,6	1,3	1,5	1,0	2,0	
21. Persons who cannot afford internet connection for personal use at home	1,3	1,2	0,7	0,6	0,6	0,3	0,5	0,5	0,7	
22. In-work risk of poverty	6,2	6,7	5,3	5,6	5,6	6,0	5,2	4,2	5,9	
23. Long-term unemployment	2,3	2,3	2,0	2,0	1,7	1,5	1,8	2,0	1,9	
25. Employment rate	74,4	75,0	75,7	76,3	76,8	76,6	74,9	75,4	77,1	
26. Children (aged less than 18) living in households with very low work intensity		8,4	8,1	8,0	9,2	9,2	8,8	8,5	7,4	
27. At-risk-of-poverty rate for children		18,1	18,7	18,6	19,3	21,5	18,7	18,1	17,2	
28. Severe material and social deprivation rate (SMSD) for children		1,2	0,6	1,2	1,9	2,5	3,3	1,7	3,0	

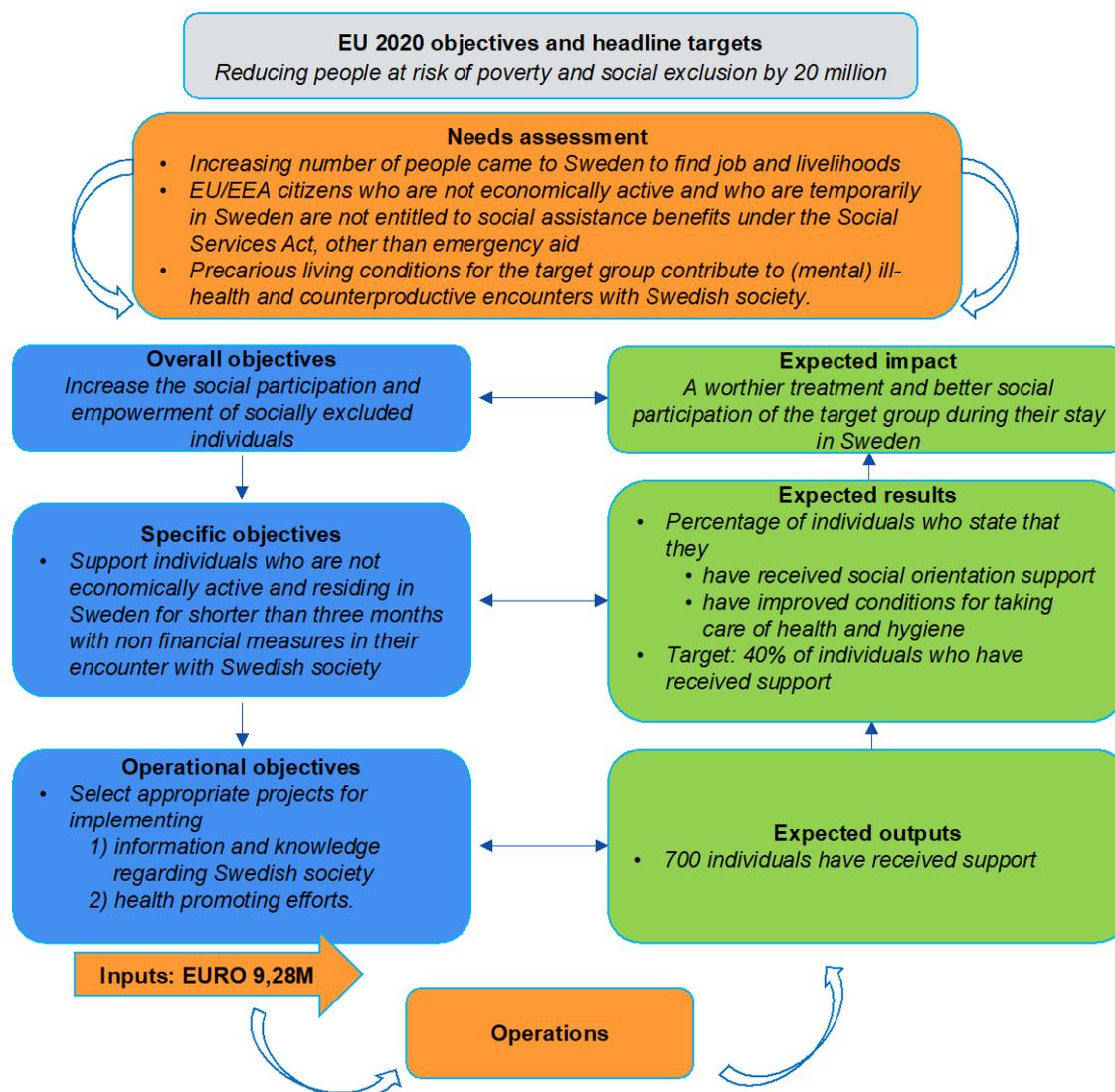
Source: Eurostat.

2. Reconstructing the intervention logic

At the time of the development of FEAD 2014-2020, an increasing number of people moved to Sweden to find work and livelihoods. This was due to the free movement of EU/EEA citizens and their family members, one of the cornerstones of EU cooperation. The right to move freely throughout the EEA has had many positive effects on employment, growth and competitiveness. However, many EU/EEA citizens who came to Sweden had a hard time finding a job. Also, they were occasionally subjected to emergency distress, as they did not qualify for shelter or livelihood support in Sweden. This is because EU and EEA citizens who are not economically active and who are temporarily in Sweden are not entitled to social assistance benefits under the Social Services Act, other than emergency aid.

Analyses that were conducted by The National Board of Health and Welfare showed that the need for support and assistance varied, and that needs often differed from the needs of other homeless people. EU/EEA citizens who are not economically active were deemed to have specific problems, and the conclusion drawn was that efforts aimed at this group of people should be tailored to their specific circumstances.

Figure A. 90 – Intervention logic of FEAD in Sweden



Source: adapted from FEAD mid-term evaluation

For FEAD 2014-2020, Sweden chose the Operational Programme for social participation (OP II) aiming to assist socially vulnerable individuals who are not entitled to support and assistance under the Social Services Act. This way, measures financed by FEAD would complement regular national efforts. In Sweden, there are several efforts at national and local level aimed at reducing social and economic exclusion and helping disadvantaged groups to enter employment. Efforts that stimulate low unemployment and high employment rates are central to general welfare policy in Sweden. Non-economically active persons residing in Sweden for a shorter period than three months lack corresponding basic support. They only have a right to emergency aid, and there are no regular initiatives for this target group. It was estimated that this group consisted of about 3,000 to 4,000 people.

FEAD 2014-2020 in Sweden planned to reach a minimum of 700 unique individuals from the target group during the programming period. Actions were primarily focused on preventive measures, such as reproductive and dental health, along with basic social information regarding Swedish society.

The ex-ante evaluation of the FEAD OP in Sweden was conducted by The National Board of Health and Welfare. It was concluded that the allocated budget resources were small in relation to the specified targets and the size of the target group. The analysis further showed that a large majority of the target group resided in a small number of municipalities, not evenly distributed over the country. Therefore, it was proposed that the programme should primarily be aimed at the municipalities that hosted the most people from the target group.

In terms of the intervention logic, The National Board of Health and Welfare assessed that the proposed actions in the Swedish FEAD OP were well motivated based on current legislation in Sweden, survey results regarding homelessness among EU citizens, and public and civil sector experiences from working with the target group. It was concluded that health initiatives are important, and that such measures should be provided based on the specific needs of the individual.

2.1. National policy framework

In Sweden, there are several efforts at national and local level aimed at reducing social and economic exclusion and helping disadvantaged groups to enter employment. Efforts that stimulate low unemployment and high employment rates are central to Swedish welfare policy. All individuals considered to be residents in Sweden have access to health care and education in accordance with the Health Care Act (1982: 763) and the School Act (2010:800). Non-economically active persons residing in Sweden for a shorter period than three months do not have corresponding rights to basic support.

The target group for the Swedish FEAD OP is individuals who are not eligible for support and assistance under the Social Services Act, i.e. individuals who do not have a residence permit or reside in the country. These individuals are subsequently not included in the target group of the national Social Fund programme. Thereby, complementarity was achieved between the FEAD OP and the Social Fund OP in Sweden.

2.2. Objectives and target groups

The main objective of the Swedish FEAD programme (OP II) was to increase the social participation and empowerment of socially excluded individuals. The target group was individuals who are not economically active and residing in Sweden for a shorter period than three months. There were no exact numbers regarding the size of the group, as the number of individuals varied during the year. An estimation was made that during some periods of the year, there were approximately 3,000–4,000 people in the country that could be included in this target group.

The specific objective of FEAD was to support the target group with non-financial measures in their encounter with Swedish society. The expected results of the measures under the FEAD programme were that individuals in the target group had received 1) information and knowledge regarding Swedish society, and 2) health promoting efforts.

The output indicator that was used was the total number of individuals who received support within the FEAD OP. The target was to support 700 individuals during the programming period 2014-2020. Result indicators used were the percentage of individuals who at the end of participation stated that they 1) had received support (information, interpretation, guidance, etc.), and 2) had improved conditions for taking care of health and hygiene. Baseline was zero as there were no previous data regarding such measures in Sweden. The target was set to 40% of individuals who received support from FEAD.

2.3. Implemented operations

Implemented operations within the FEAD programme in Sweden have had 1) a social, community-oriented nature, and 2) a health-promoting nature. Funded projects have had an emphasis on one or the other orientation or could consist of operations of both orientations. In total, 8 projects were funded under the Swedish FEAD OP.

Examples of operations with a community-oriented character implemented in the projects are:

- Information regarding conditions, rights, and obligations in Swedish society.
- Interpretation and translation of crucial information.
- Directions to street kitchens or shelters.
- Basic language teaching.
- Efforts to promote e-inclusion.
- Learning social venues.
- Social outreach activities.

Examples of operations with a health-promoting character are:

- Efforts to provide opportunities for personal hygiene and maintenance of daily routines.
- Information and other actions aimed at improving health or preventing ill health.

2.4. FEAD governance and delivery system

The Managing Authority (MA) and Certifying Authority (CA) of the FEAD Operational Programme in Sweden was the Swedish ESF Council, by appointment of the Ministry of Health and Social Affairs. Payments by the European Commission were made to the Swedish National Debt Office, and the audit authority for FEAD was the Swedish National Financial Management Authority.

The MA was the same as for ESF 2014-2020. Benefits have been reported in terms of existing experience and knowledge about managing EU funds within the Swedish ESF Council. Routines have also been established to avoid double financing by FEAD and ESF. These benefits are confirmed by the interim evaluation of the implementation of FEAD in Sweden.

The MA has had 22 partner organisations for the implementation of FEAD, covering a majority of the public and non-profit organisations that encounter the target group in their work. The assistance in the Swedish FEAD OP has been delivered through 8 specific projects. These projects were based on partnerships between civil society organisations and public authorities, primarily emanating from the three major cities in Sweden. The projects had national or regional coverage, focusing on areas where most of the target group resided.

3. Key findings on the implementation of FEAD

3.1. To what extent was FEAD support successful – or not – and why?

Overall achievement of FEAD objectives [criterion: effectiveness]

Sweden chose a FEAD operational programme for social participation (OP II), aiming to assist socially vulnerable individuals who are not entitled to support and assistance under the Social Services Act. Specifically, FEAD activities were directed towards non-economically active EU/EEA citizens residing in Sweden for a period shorter than three months. This was because at the time of the development of FEAD 2014-2020, an increasing number of people moved to Sweden to find work and livelihoods.

There were no numbers regarding the size of the target group, as the number of individuals varied during a given year. It was estimated that during some periods of a year, there were approximately 3,000–4,000 people in the country that could be included in the target group. Focus for FEAD was on non-financial measures for social inclusion of the target group, where activities for social orientation and health-prevention were offered. Subsequently, the Swedish FEAD OP has not been directly focused on eradicating poverty, but on making the situation better for the target group during their stay in the country. There are no other EU, national or regional

initiatives in Sweden with similar or complementary objectives, and the support offered by FEAD has not been otherwise provided in national social inclusion policies. The FEAD OP was planned to complement regular national efforts and operations within ESF. The FEAD OP had an adjacent, but not overlapping, target group with ESF.

The FEAD OP in Sweden was based on the assumption that the severe living conditions for the target group contributed to ill-health and counterproductive encounters with Swedish society. By providing non-financial support to the target group, it was expected that the living conditions and empowerment of the target group would increase. Experiences from the implementation of the FEAD OP, as stated in interviews and in the programme evaluation, support the underlying assumption of the programme. The aid provided by the Swedish FEAD OP is seen as relevant but limited in terms of participants' basic needs.

Even if FEAD support is perceived to be limited, the aid provided through FEAD is still seen as relevant as there was no other support offered to the target group in regular national policy. The overall assessment of the programme evaluation is that FEAD has made a difference for vulnerable EU/EEA citizens in Sweden, primarily by alleviating distress, remedying urgent needs and contributing to increased quality in the current life situation. The assessment is summarised in four points:

- Projects have contributed to the participants' increased understanding and ability to navigate in Swedish society. Efforts have generated knowledge of the rights, opportunities, and obligations that exist in Sweden.
- Projects have supported participants in practical matters, for example linked to measuring blood pressure, access to contraceptives, or filling out forms. Projects have also helped the participants to access support outside project activities, primarily by guiding them to care and other available support agencies in the local community, such as shelters, soup kitchens, and labour market information for vulnerable EU citizens.
- Projects have increased participants' knowledge of health-related issues, for example how health problems can be prevented through simple measures.
- Projects have contributed to empowerment in terms of making the participants feel seen, taken seriously and treated as fellow human beings.

FEAD primarily contributed to alleviating the distress of participants rather than changing their life situation in a long-term perspective. It was not possible to measure the long-term impact, as EU/EEA citizens do not need to register if they do not stay in the country longer than 90 days. This means that there is no statistical basis for measuring any long-term impact.

Overall, it is concluded in the programme evaluation as well as in interviews that FEAD in Sweden was designed as a relatively independent initiative, without connection to national policies or existing initiatives for the target group. The overall assessment is that FEAD made a difference for vulnerable EU citizens, primarily by alleviating distress, responding to acute needs, and contributing to increased quality in the current life situation. Projects have contributed to the implementation of new working methods, to newly developed cooperation, and have increased the knowledge of the target group in Sweden.

Reach of target groups [criterion: effectiveness]

Sweden chose a FEAD operational programme for social participation (OP II) aiming to assist socially vulnerable individuals who are not entitled to support and assistance under the Social Services Act. This includes non-economically active persons residing in Sweden for a period shorter than three months, which at some periods of the year was estimated to be 3,000–4,000 individuals.

The FEAD OP was implemented through 8 projects based on partnerships between civil society organisations and public authorities. The projects emanated from the three major cities in Sweden but generally had a national coverage. Operations were primarily focused on preventive measures, such as reproductive and dental health, along with basic social information regarding Swedish society. The underlying assumption was that increased

knowledge and improved health would lead to increased conditions for social participation and empowerment among the participants.

The programme evaluation indicates that the overall implementation of FEAD was effective in terms of reaching the target group. The general assessment of the evaluation is that FEAD has made a difference for vulnerable EU citizens in Sweden, primarily by alleviating distress, remedying urgent needs and contributing to increased quality in the current life situation. Crucial for reaching the target group were competent project employees who were successful in building trust with the target group, well-functioning cooperation between agencies, needs-based interventions, and a high degree of participant involvement.

In terms of hindering factors, this mostly refers to the design of the FEAD programme in Sweden. In the programme evaluation, it is stated that FEAD's construction in Sweden seems to have been primarily based on the boundaries of the programme and what FEAD should not contribute to, rather than the fund's actual goals and intended mode of operation. At the beginning of the programme period, there were challenges linked to different interpretations of what would be classified as eligible expenditure in the projects. Consequently, the implementation of the programme was initially limited by a lack of appropriateness of activities, high staff turnover, and differences in approach and collaboration.

According to FEAD financial data and indicators, a total of 4,290 individuals received support through FEAD in Sweden. Almost all (96%) were homeless, 62% were women, and 1% of registered participants were children. In Sweden, records of people with Roma background are not kept. According to interviews with stakeholders, EU/EEA citizens who came to Sweden to find jobs were primarily Roma. Subsequently, the target group reached by FEAD interventions was reportedly to a large extent Roma. In the programme evaluation, it was concluded that the target group mainly consisted of people from Romania and Bulgaria without permanent residence rights who supported themselves by, for example, begging.

Adjustments to FEAD to address new challenges [*criterion: effectiveness*]

There were no substantial changes to FEAD in Sweden. Many of the funded FEAD operations were finalised when CRUI+, REACT EU, and CARE had already been introduced. In the programme evaluation, it is concluded that after the outbreak of COVID-19, ongoing projects functioned as an information channel in the work to increase the target group's knowledge of the disease and to clear up misunderstandings and rumours linked to vaccination.

The primary changes that were made concerned the monitoring system. The plan for monitoring and evaluation had to be revised as participants were reluctant to state their name and other personal information required for the monitoring system. At project level, there were uncertainties regarding when an individual has completed participation, as well as how questions regarding result indicators should be asked. Subsequently, routines for participant registration were clarified in the middle of the programme period. Also, the case management systems, EBS2020 and the e-archive Public 360°, were developed so that they could correctly and efficiently handle cases based on laws and regulations.

Horizontal principles of FEAD [*criterion: effectiveness*]

A recurring theme in the interviews has been that operations focusing on preventive reproductive health have highlighted the situation for women and issues relating to gender equality. This is also a conclusion in the programme evaluation. It is the overall assessment of the evaluation that FEAD projects are largely imbued with the horizontal criteria. This assessment is based on four factors.

Special adaptations have largely been made to accommodate participants with illiteracy or cognitive challenges.

Project activities were carried out in accessible premises, which lowered the thresholds for participation for individuals with physical functional variations or physical ill health. Projects have also conducted outreach activities, in which field workers supported individuals in their own environment. This further lowered the thresholds for participation.

Several projects worked actively to reach women. The work has included the recruitment of female field workers and the implementation of group activities for women only, linked to themes such as sexual and reproductive health and violence in close relationships. In some projects, volunteers or other staff have supported with childcare during the implementation of activities to make it easier for mothers to participate.

Gender and equality issues were addressed in discussions with the participants. The importance of consent and the right to decide over one's own body has repeatedly been raised as a theme in information initiatives about sexual and reproductive health.

The conclusion that FEAD has been successful in reaching women in the target group is supported by output indicators, which show that 62% of the total number of participants in FEAD were women.

Success and failure factors [*criterion: effectiveness*]

The overall assessment of the programme evaluation is that FEAD has made a difference for vulnerable EU/EEA citizens in Sweden, primarily by alleviating distress, remedying urgent needs, and contributing to increased quality in the current life situation. Central success factors in the implementation especially include competent project employees who have been successful in building trust with the target group, well-functioning cooperation between actors from different sectors, needs-based interventions, and a high degree of participant involvement. The fact that funded projects have been well implemented was also confirmed by the interviews with stakeholders. The experience conveyed is that health-oriented operations are a suitable base for addressing issues regarding social orientation.

Unintended results particularly concern knowledge creation about the target group, specifically through researcher and project meetings. This is highlighted in interviews but is also a prominent finding in the programme evaluation. It is concluded that it concerns general knowledge of the degree of vulnerability of the target group and how it is expressed in different ways, an increased knowledge of what lack of trust means for the individual and how a lack of trust can be bridged, an increased knowledge of the situation of vulnerable EU citizens in their home country, and a deeper insight into why they seek to come to Sweden. Representatives of the funded projects have been able to pass this knowledge on to decision-makers, officials and collaborating parties, especially through researcher meetings organised as a part of the FEAD OP.

Hindering factors primarily stem from the design of the programme. The programme evaluation states that the construction of the FEAD OP in Sweden seems to have been primarily based on what the fund should not contribute to, rather than the fund's actual goals and intended mode of operation. The target group was narrow and the general conception is that FEAD should have had a wider target group and several different types of interventions. Stakeholders mention that it has been problematic to have a fixed, limited target group over such a long period of time as needs vary over time. Also, stakeholders state that project activities were designed based on assumptions about the needs of the target group, rather than the actual needs of individuals.

Interviewed stakeholders generally portray a political scepticism with regard to the implementation of FEAD in Sweden. One stakeholder stated that *"It says something about politics, it was a vulnerable group that ordinary authorities should not deal with. Civil society should work with them. That limitation also indicates that the will to assist the target group is very small. It was a political choice"*.

Given the limitations in the design of the programme, there is still a perception that there have been efforts that have had an effect for individuals in the target group. Health-oriented interventions and social-oriented information are reported by stakeholders to have had a positive effect since they have been implemented alongside other efforts that were financed with other means, not visible in FEAD reporting. To meet basic needs with the target group, other means in the regular activities of engaged NGOs have been used to satisfy basic needs. *"What you want is a job, housing, and food for the day. And those were the things you weren't supposed to offer in FEAD. Social inclusion through education, what you could apply for was not what the target group needed"*. The notion conveyed is that FEAD operations alone have not been enough, but they have been useful since they have been supplemented by regular efforts in civil society. *"The combination is the key. They have received important information and social activities. They have received help to get in contact with authorities, information about their rights. But they would not have gotten that if there had not been other interventions"*.

A hindering factor, reported by stakeholders in interviews, is that NGOs have found it difficult to meet the limiting definitions of the target group. For instance, many NGOs do not have specific operations for specific target groups, as they apply an inclusive perspective where anyone at risk is welcome. This ultimately meant that they refrained from applying for FEAD funding.

The programme evaluation sums up by stating that FEAD has to a lesser extent improved participants' long-term life situation. This is partly due to the scope of the programme, which has not allowed for activities such as education or labour market initiatives with greater potential to make a difference in a longer term. Another important explanation is the target group's exposed situation in their home countries, which can only to a very limited extent be solved through temporary project activities in Sweden.

Overall cost-effectiveness of FEAD operations [*criterion: efficiency*]

There is little data regarding the cost-effectiveness and efficiency of FEAD in Sweden. The interim evaluation of FEAD in Sweden concluded that there was a complementarity between FEAD and ESF. It was also stated that ESF can provide knowledge and experience to FEAD and FEAD can provide knowledge and experience to ESF, not least through the research meetings that were organised. The complementarity between FEAD and ESF was also highlighted in stakeholder interviews. It was stated that The Swedish ESF Council was able to use experience, systems, and procedures from the management of the European Social Fund to effectively implement the FEAD OP. It was nonetheless reported that it would have been better if the small FEAD programme in Sweden had not been organised as a programme that was separate from ESF. The programme evaluation also concluded that at the beginning of the programming period, there were challenges linked to different interpretations of what would be classified as eligible expenditure in the projects.

The Swedish FEAD OP includes non-financial measures for social inclusion, where activities for social orientation and health prevention were offered. Within these operations, experiences show that preventive measures for reproductive health were particularly successful. This was a specific intervention which proved to be of utmost relevance for the target group, especially for women. It was also reported that health-oriented operations were a suitable ground for addressing issues regarding social orientation.

The Swedish FEAD OP was based on the distribution of support by non-governmental organisations in daily contact with the target group. This is seen as an optimal delivery mechanism, due to the neutral role of the civil society which generates more legitimacy with the target group.

Administrative burden of monitoring and reporting requirements [*criterion: efficiency*]

There is little data regarding administrative burden of monitoring and reporting requirements. Any burdens stemming from the requirements of monitoring and reporting have not been highlighted in stakeholder interviews or in evaluation reports. There is no support for further simplification of the FEAD OP. According to stakeholder interviews, there is no evidence of gold-plating when implementing FEAD. This is supported by the interim and final evaluation of the FEAD OP in Sweden.

There is, due to difficulties in the implementation of the monitoring system, no data regarding impact of FEAD in Sweden. The primary changes that were made concern the monitoring system. The plan for monitoring and evaluation was revised during the programming period. Some participants were reluctant to state their name and other personal information required in the monitoring system. At project level, there were uncertainties regarding when an individual had completed participation, as well as how questions regarding result indicators should be asked. Subsequently, routines for participant registration had to be clarified during the programming period.

The programme evaluation concludes that there were challenges in the monitoring system, as a base for evaluating the impact of the programme. When the programme was launched, the idea was that all participants would answer a survey. In the interim evaluation, several problems with this model were identified. Lack of trust in authorities, along with reading and writing difficulties, meant that many participants did not want to complete the survey. As a result, several projects constructed their own follow-up schemes. As the design differed between projects, results could not be aggregated. Participant evaluations have also been challenged by the mobility of the target group.

Simplification measures [*criterion: efficiency*]

There is not much data on the theme of simplification of FEAD in Sweden. Based on interviews with the Managing Authority for the Swedish OP, there was no need for further simplification of FEAD. It has been beneficial for the implementation of the programme that the MA has been able to provide knowledge and experience from its work with ESF. The complementarity between FEAD and ESF was also highlighted in stakeholder interviews. It is generally stated that the Swedish ESF Council was able to use experience, systems, and procedures from the management of the European Social Fund to effectively implement the FEAD OP.

It was also reported that it has been counterproductive to implement FEAD as a specific OP, separated from ESF. In the stakeholder interviews, it was stated that this need for simplification has been solved by the integration of FEAD in ESF+.

Coherence of FEAD with other interventions [*criterion: coherence*]

In Sweden, there are several efforts at national and local level aimed at reducing social and economic exclusion and helping disadvantaged groups to enter employment. Efforts that stimulate low unemployment and high

employment rates are central to Swedish welfare policy. Non-economically active persons residing in Sweden for a shorter period than three months do not have corresponding rights to basic support. Subsequently, the Swedish FEAD OP has not in itself been focused on eradicating poverty, but on making the situation better for the target group during their stay in the country. There are no other EU, national or regional initiatives in Sweden with similar or complementary objectives, and the support offered by FEAD is not otherwise provided in national social inclusion policies.

Since the target group for the Swedish FEAD OP was individuals who do not have a residence permit or reside in the country, these individuals are not included in the target group of the national ESF OP. Therefore, there has been a complementarity between FEAD and ESF in Sweden. Operations within the FEAD OP were planned to complement regular national and regional operations within ESF. The target group for FEAD is non-economically active EU and EEA citizens who are temporarily in Sweden and are not entitled to social assistance benefits under the Social Services Act. Thereby, the has had an adjacent, but not overlapping, target group with ESF. The latter was aimed at individuals covered by actions in national labour market policy and already employed. The interim evaluation of FEAD in Sweden concluded that there was a complementarity between FEAD and ESF. It was also stated that ESF could provide knowledge and experience to FEAD and FEAD could provide knowledge and experience to ESF, not least through the research meetings that were organised.

3.2. Is FEAD still relevant?

Relevance to target groups [*criterion: relevance*]

FEAD in Sweden was an operational programme for social participation (OP II) aiming to assist socially vulnerable individuals who are not entitled to support and assistance under the Social Services Act. This included non-economically active persons residing in Sweden for a period shorter than three months, which at the time of the programming was estimated to be 3,000–4,000 individuals at some periods of the year. In the programme evaluation, it was concluded that the target group mainly consisted of people from Romania and Bulgaria without permanent residence rights who supported themselves by, for example, begging and returning cans in order to redeem the deposit.

Operations were primarily focused on preventive measures, such as reproductive and dental health, along with basic social information regarding Swedish society. Central success factors in the implementation especially consist of competent project employees who have been successful in building trust with the target group, well-functioning cooperation between actors, needs-based interventions, and a high degree of participant involvement.

The overall assessment of the programme evaluation is that FEAD's focus on social information and health promotion efforts is relevant to the target group, and that the projects addressed the needs of the participants. This assessment is based on several factors. Firstly, both interviewed project staff and participants expressed a view that physical and mental ill-health is widespread in the target group, and that knowledge of the rights, opportunities, and obligations that exist in Swedish society was often low. The fact that the projects actually had participants can in itself be seen as an indicator that project activities met the needs of the participants. Participation in the projects has – unlike many ESF projects where participants are formally assigned – been voluntary. The projects have neither been able to set requirements nor offer compensation for participation in the form of material assistance but have been referred to the fact that the support given is perceived as valuable by the target group.

FEAD meant that the target group gained access to interventions to which they otherwise would not have had access. Social information and health-promoting efforts were to a limited extent offered to the target group outside the framework of FEAD. According to programme evaluation and stakeholder interviews, outreach activities in FEAD projects led to contact with new groups of individuals that were otherwise hard to reach. A positive aspect of this is that after the outbreak of COVID-19, projects functioned as a channel for information in the work to increase the target group's knowledge of the disease and to clear up misunderstandings and rumours linked to vaccination.

At the same time, there is a consensus that FEAD's focus on social information and health promotion has only covered parts of the target group's needs. There is a basic need for material support, such as food and shelter, that the project efforts could not meet. Secondly, there is a need for labour market support. Both needs are perceived as great by the target group. Subsequently, the aid provided by the FEAD OP has been relevant but limited. Allocated funds are small in relation to the objectives of the programme and the size of the target group. The aid is relevant as there is no other support offered to the target group in regular national policy. Most individuals are assumed to return to their home country, and the support offered by FEAD initiatives contribute to a worthier treatment and better social participation of the target group during their stay in Sweden. Multiple sources have concluded that FEAD to a lesser extent has improved participants' long-term life situation. This is partly due to the scope of the programme, which has not allowed for activities such as education or labour market initiatives with greater potential to make a difference in the long term. Another important explanation is the target group's exposed situation in their home countries, which to a limited extent can be solved through temporary project activities in Sweden.

Relevance of FEAD now and in the future [*criterion: relevance*]

The design of FEAD in Sweden was a response to an increasing number of EU/EEA citizens who came to Sweden to find work and livelihoods. This was a new situation for national actors, and these individuals were not entitled to social assistance benefits under the Social Services Act, other than emergency aid. In this context, FEAD was used as an instrument to offer support to non-economically active persons residing in Sweden for a shorter period than three months and therefore not entitled to regular welfare support. *“It was a different time when the FEAD programme was written. Sweden was taken aback when migrants came and started begging in public. FEAD became a response targeting efforts to people who were not eligible for welfare support”*. Since then, the situation has changed and there are not as many non-economically active EU/EEA citizens in Sweden as at the time of the programming of FEAD. Therefore, FEAD is not perceived to be as relevant now as when the programme was designed. Nevertheless, there are aspects of FEAD support that have a general relevance in the future, in terms of addressing needs for vulnerable individuals and the implementation of ESF+.

Even though FEAD efforts are finished, the programme evaluation calls for national, regional, and municipal actors to have a strategy for how vulnerable EU citizens should be supported. It is also concluded that there is a great demand for increased transnational cooperation with countries such as Romania and Bulgaria, to contribute to changed conditions in the target groups' home countries.

A result from FEAD In Sweden is the knowledge creation concerning the target group, specifically through researcher and project meetings. The programme has contributed to the general knowledge of the degree of vulnerability of the target group and how it is expressed in different ways, increased knowledge of what the lack of trust means for the individual and how a lack of trust can be bridged, an increased knowledge of the situation of vulnerable EU citizens in their home country and a deeper insight into why they seek to come to Sweden. Representatives of the funded projects have been able to pass this knowledge on to decision-makers, officials and collaborating parties, especially through researcher meetings that were organised as a part of the FEAD OP. Interviewed stakeholders state that this knowledge is transferrable to future work in poverty, social exclusion and discrimination.

3.3. Did FEAD make a difference and to whom?

EU added value [*criterion: EU added value*]

The primary EU added value resulting from the Swedish FEAD OP is the expanded scope of national actions directed at socially excluded individuals. If it had not been for FEAD, there would be no corresponding support for the target group.

FEAD can be seen to have generated role effects in that health promotion interventions for the target group were developed in new collaborations between public authorities and civil society organisations. However, as the operations implemented within FEAD were based on temporary partnerships not included in national policy, the chances for the mainstreaming of local and regional innovations are slim. The interim evaluation of the

implementation of the FEAD OP in Sweden also highlights barriers for the mainstreaming of methods and partnerships at a national level (process effects).

The programme evaluation concludes that FEAD in Sweden lacks objectives at an organisational and structural level. Projects have developed structures for implementing FEAD efforts in short perspective, primarily by strengthening cross-sectoral co-operation with other organisations and contributing to increased knowledge of the target group by using new methods. Thereby, the programme evaluation verifies the finding in the interim evaluation in terms of process effects. The long-term organisational footprint is deemed to be more uncertain as it is unclear to what extent continuing activities for the target group could be financed after the project ends. This is because there is no other support offered to the target group in regular national policy. The evaluation does not estimate that the programme contributed to any lasting structural effects, in terms of making an impression on policy or legislation outside the projects' local or organisational context. Stakeholder interviews show that possible role effects are most likely to be found at partner organisations in civil society. This is described as a result of the participation in network activities with FEAD. *“It has been educational, not least taking part in the international exchanges. We have worked with material support, and FEAD has meant that we got to talk to others about how they work with material support. We have received information of experiences from the projects. They have been mapping and a knowledge contributor. We have gained knowledge about the target group's needs and situation, and we have had dialogues with the EU Commission and the government office in Sweden”.*

Visibility [visibility]

There is little data regarding the general visibility of FEAD in Sweden. This theme is not covered in evaluations of the programme. Interviewed stakeholders lack knowledge of the visibility of FEAD amongst the general public. It is stated that there has been sufficient awareness of FEAD interventions with relevant actors in the system and with the target group. It is also reported that there has been an awareness that FEAD actions have been funded by the EU.

4. Good practices

An example of good practice in the Swedish FEAD OP is the knowledge creation process concerning the target group. This is generated by researcher meetings organised under FEAD in collaboration with The Migration Studies Delegation (Delmi), the Research Council for Health, Work and Welfare (Forte) and the Swedish Research Council. The networks provided a platform to produce knowledge regarding the needs of the target group; EU and EEA citizens who are not economically active and who are temporarily in Sweden are not entitled to social assistance benefits under the Social Services Act, other than emergency aid.

The purpose of the researcher networks was to facilitate meetings between researchers and practitioners in the funded projects. Researcher networks were organised twice a year, and they are focused on different themes. The first meeting in 2016 was held on the theme of migration and work, and the second theme was minorities, vulnerability and equality.

In Sweden, there is a general lack of knowledge regarding the needs of the target group, and the researcher network has been identified as an arena for learning between researchers, public officials, and practitioners from the civil society. Representatives of the FEAD OP state that such learning processes are perceived to contribute to capacity building of civil society regarding how to provide information to vulnerable individuals outside society. Correspondingly, project practitioners are contributing to general knowledge creation regarding the information needs of the target group. Thus, the researcher networks are seen as an arena for dissemination of research as well as practitioner experiences regarding EU and EEA citizens who are not economically active and who are temporarily in Sweden and are not entitled to social assistance benefits under the Social Services Act, other than emergency aid.

The interim evaluation concluded that the researcher meetings are likely to have contributed to strengthening programme implementation by raising awareness of poverty alleviation. It is then stated in the programme evaluation that knowledge creation concerns general knowledge of the degree of vulnerability of the target group and how it is expressed in different ways, an increased knowledge of what the lack of trust means for the

individual and how a lack of trust can be bridged, an increased knowledge of the situation of vulnerable EU citizens in their home country, and a deeper insight into why they seek to come to Sweden. Representatives of the funded projects have been able to pass this knowledge on to decision-makers, officials and collaborating parties, especially through researcher meetings that have been organised as a part of the FEAD OP. It is also reported in the stakeholder interviews that FEAD have resulted in actors gaining knowledge about the target group's needs and situation and having contributed to a developed dialogue concerning material support to the specific target groups in Sweden.

5. Conclusions and lessons learned

For FEAD 2014-2020, Sweden chose an operational programme for social participation (OP II) aiming to assist socially vulnerable individuals who are not entitled to support and assistance under the Social Services Act. At the time of the development of FEAD 2014-2020, an increasing number of people moved to Sweden to find job and supply. Therefore, FEAD specifically targeted non-economically active EU/EEA citizens residing in Sweden for a period shorter than three months.

The focus for FEAD in Sweden has been on non-financial measures for social inclusion of the target group, under which activities for social orientation and health prevention were offered. Efforts that stimulate low unemployment and high employment rates are central to Swedish welfare policy, and there are several efforts at national and local level aimed at reducing social and economic exclusion and helping disadvantaged groups to enter employment. Non-economically active persons residing in Sweden for a period shorter than three months do not have corresponding rights to basic support. Subsequently, there are no other EU, national, or regional initiatives in Sweden with similar or complementary objectives, and the support offered by FEAD is not otherwise provided in national social inclusion policies. This means that the Swedish FEAD OP was not directly focused on eradicating poverty, but rather on making the situation better for the target group during their stay in the country.

Overall, it is concluded that FEAD in Sweden been designed as a relatively independent initiative without connection to national policies or existing initiatives for the target group. Even if FEAD support is perceived to be limited, the aid provided through FEAD is still perceived as relevant as there is no other support offered to the target group in regular national policy. The overall assessment of the programme evaluation is that FEAD has made a difference for vulnerable EU/EEA citizens in Sweden, primarily by alleviating distress, remedying urgent needs, and contributing to increased quality in the current life situation.

FEAD targeted socially vulnerable individuals who are not entitled to support and assistance under the Social Services Act, which includes non-economically active persons residing in Sweden for a period shorter than three months. At some periods of the year, it was estimated that the group consisted of 3,000–4,000 individuals. FEAD was implemented through 8 projects based on partnerships between civil society organisations and public authorities. The overall implementation of FEAD is reported to have been effective, in terms of reaching the target group. A total of 4,290 individuals received support through FEAD in Sweden. Almost all (96%) were homeless, 62% were women, and 1% of the registered participants were children. The target group reached by FEAD interventions was largely Roma.

It was reported that operations focusing on preventive reproductive health have highlighted the situation for women and issues relating to gender equality were particularly relevant. Central success factors in the implementation especially consist of competent project employees who have been successful in building trust with the target group, well-functioning cooperation between actors from different sectors, needs-based interventions, and a high degree of participant involvement.

Hindering factors in the implementation of FEAD largely stem from the design of the programme. The construction of FEAD in Sweden was reported to focus on what the fund should not contribute to, rather than the fund's actual goals and intended mode of operation. The target group was narrow, and the general view is that FEAD should have had a wider target group and several different types of interventions. A problem was that the programme had a fixed, limited target group over a long period of time as needs vary. Partner organisations also stress that programme activities were based on assumptions about the needs of the target group, rather than the actual needs of individuals.

Given the limitations in the design of the programme, there is still a perception that there have been efforts that have had an effect for individuals in the target group. The collaboration with partner organisations (NGOs) has been crucial in this aspect. Health-oriented interventions and social-oriented information are reported to have had a positive effect since they have been implemented alongside other efforts that were financed by other means, not visible in FEAD reporting. To meet basic needs in the target group, other means in the regular activities of engaged NGOs have been used to satisfy basic needs not covered by FEAD. The conclusion is that FEAD operations alone were not sufficient, but they have been useful since they have been supplemented by regular efforts in civil society.

- There is little data regarding cost-effectiveness and efficiency, administrative burden, and the theme of simplification of FEAD in Sweden. It is generally stated that the Managing Authority (The Swedish ESF Council) has been able to use experience, systems, and procedures from the management of the Social Fund to effectively implement FEAD. However, it was perceived as counterproductive to implement FEAD as a specific OP separate from ESF. The integration of FEAD in ESF+ is seen as a more suitable design for the implementation of the programme.

There were no substantial changes to FEAD in Sweden. Many of the funded FEAD operations were finalised when CRII+, REACT EU, and CARE had already been introduced. The primary changes that were required concerned the monitoring system, which created several challenges. The plan for monitoring and evaluation had to be revised as participants were reluctant to state their name and other personal information required for the monitoring system. Also, a lack of trust in authorities, along with reading and writing difficulties, meant that many participants did not want to complete the survey used to measure the impact of the programme. Therefore, there are no data regarding impact at individual level.

- The overall conclusion is that FEAD's focus on social information and health promotion efforts was relevant to the target group, and that project activities addressed the needs of the participants. FEAD resulted in the target group gaining access to interventions to which they would otherwise not have had access. Social information and health-promoting efforts are to a limited extent offered to the target group outside the framework of FEAD. Outreach activities in FEAD projects led to contact with new groups of individuals otherwise hard to reach.

- At the same time, the conclusion is that FEAD's focus on social information and health promotion only covered parts of the needs of the target group. Project operations could not meet a basic need for material support, such as food and shelter. Nor could they offer labour market support. Both needs are perceived as great by the target group. Subsequently, the aid provided by the FEAD OP has been relevant but limited.

- FEAD has contributed to a raised awareness of poverty alleviation in Sweden. For this purpose, researcher networks have been an arena for learning between researchers, public officials, and practitioners from the civil society. However, the future needs of actions implemented by FEAD are different. The design of FEAD in Sweden was a response to an increasing number of EU/EEA citizens who came to Sweden to find job and supply. Since then, the situation has changed and there are not as many non-economically active EU/EEA citizens in Sweden as at the time of the programming of FEAD. Therefore, FEAD is not perceived to be as relevant now as when FEAD was designed. Nevertheless, there are aspects of FEAD support that have a general relevance in the future, in terms of addressing needs for vulnerable individuals and the implementation of ESF+. In this perspective, FEAD is seen to have contributed to strengthened cross-sectoral co-operation and an increased knowledge of the target group by using new methods where health promotion interventions for the target group were developed in new collaborations between public authorities and civil society organisations. However, as the operations implemented within FEAD are based on temporary partnerships not included in national policy, the chances for mainstreaming of local and regional innovations are slim.

Overall, it is concluded that FEAD 2014-2020 in Sweden was designed as a relatively independent initiative, without connection to national policies or existing initiatives for the target group. FEAD has made a difference to vulnerable EU citizens, primarily by alleviating distress, responding to acute needs, and contributing to increased quality in the current life situation. Funded projects have contributed to the implementation of new working methods, and have developed cooperation, and projects have increased the knowledge of the target group in Sweden. It is less likely that the programme contributed to any structural effects, in terms of making an impression on policy or legislation outside the projects' local or organisational context.

Appendices

Appendix 1: Methodology

This case study has been carried out on the basis of desk research, as well as stakeholder interviews with the Managing Authority and partner organisations of FEAD in Sweden.

Desk research has covered:

- Amendments and changes to FEAD OP in Sweden (FEAD OPs, all adopted versions from 2014 to 2023).
- Description of interventions by country by type of operation and evaluation criteria (Annual implementation reports 2014-2022, considering qualitative and quantitative information)
- Information from national ex ante, interim, and final programme evaluation of FEAD OP in Sweden.
- Input, output, and result indicators for FEAD as reported by Member States (annual)
- Evolution of main indicators from 2013 (=baseline) to 2019 and from 2020 to 2022 for each type of FEAD support:
 - Individuals at risk of poverty (Eurostat / EU-SILC);
 - Child poverty;
 - Homelessness (FEANTSA reports 2014-2021)
- For the case study, four interviews have been carried out with five individuals.
- One representative of the Managing Authority, The Swedish ESF Council.
- Two representatives of the FEAD Monitoring Committee, from the Ministry of Social Affairs.
- Two representatives of the FEAD Monitoring Committee, from partner organisations (NGOs).
- The interviews were conducted as digital interviews using Microsoft Teams. They had a semi-structured approach based on the evaluation criteria set up for the case study. Interviews were assessed to be sufficient in terms of providing data for the case study, when analysed in relation to national evaluations conducted. For the case study, service providers in the projects were not interviewed. This was not possible as projects had been finalised for some time. Such data was instead collected in the national evaluations.

Appendix 2: References

Desk research sources listed alphabetically.

- Socialstyrelsen (2014). Förhandsutvärdering av programförslag angående fonden för europeiskt bistånd till dem som har det sämst ställt (FEAD).
- Oxford Research (2017). Utvärdering av FEAD – Fonden för de som har det sämst ställt.
- Strategirådet (2022). Programutvärdering av FEAD i Sverige.
- Metis (2018) FEAD Mid-Term Evaluation. Available at: http://publications.europa.eu/resource/cellar/51421b36-54f8-11e9-a8ed-01aa75ed71a1.0001.01/DOC_1

Appendix 3: FEAD indicators

Table A. 97 – Input indicators for the implementation of FEAD in Sweden in 2014-2022

Indicator	Total amount of eligible public expenditure approved in the documents setting out the conditions for support of operations (EUR)	Total amount of eligible public expenditure incurred by beneficiaries and paid in implementing operations (EUR)	Total amount of eligible public expenditure declared to the Commission (EUR)
2014-2022	8 052 035.00	7 722 579.00	7 404 829.67

Source: SFC 2014 database.

Table A. 98 – FEAD participants of social inclusion assistance in Sweden in 2016-2021

Indicator	2016	2017	2018	2019	2020	2021
Total number of persons receiving social inclusion assistance	505	1 097	414	658	1 175	441
Number of children aged 15 years or below	25	25	6	1	2	0
Number of persons aged 65 years or above	3	0	1	20	20	13
Number of women	325	777	328	380	633	228
Number of migrants, participants with a foreign background, minorities (including marginalised)	504	1 041	413	658	1 175	367

Indicator	2016	2017	2018	2019	2020	2021
communities such as the Roma)						
Number of persons with disabilities	0	0	0	0	0	0
Number of homeless	497	1 049	410	596	1 133	429

Source: SFC 2014 database.

*Please note that there were no participations in 2014, 2015 and 2022.