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Access to essential services for low-income people

Bulgaria

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European Social Policy Network (ESPN)

**ESPN Thematic Report on
Access to essential services for
low-income people**

Bulgaria

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Summary

In Bulgaria, there is no common definition encompassing all six types of services defined as “essential” in the current report. There are no signs that a common definition will be adopted soon. The nearest thing to a definition of ‘low-income people’ used in Bulgaria is the guaranteed minimum income (GMI). Minimum income protection was changed in 2017 and, before that, had remained unchanged since 2009. In Bulgaria, changes in minimum income protection happened very rarely until 2018 – approximately once every 10 years. The GMI in Bulgaria was the same in 2018 and 2019 (75 BGN, i.e. around €38) and is far below the official poverty line, which is equal to 60% of the median income. In 2019, the government introduced an official poverty line calculated on the basis of the European Union (EU) definition of income poverty and the “Price Indices of a Small Basket (PISB)”, and it started to introduce rules for non-discretionary automatic updating of benefits.

The only national programme to support persons living in poverty who have limited access to an essential service is the targeted heating allowance, provided during winter time to households which pass a means test similar to the one applied for the GMI scheme. In recent years, the scope of the programme has been widened a little and the size of the benefit increased.

In railway transport at national level, and in the public transport of some municipalities, reduced prices are applied to some categories of passengers based on special travel documents. Beneficiaries include people with disabilities, pensioners, schoolchildren and university students, as well as some civil servants, war veterans and children up to 7 years old. These policies do not apply means-tests and do not target the poorest.

There is an emerging tendency to link access to energy and water under a common set of utility services or under an even broader set of services to which access should be granted through a new system of benefits. In this context, terms such as “energy poverty” and “water poverty” have come into use. There have been discussions on energy poverty for about a decade. In this period, a significant number of academic papers and some policy reports were produced. “Water poverty” is a term which appeared more recently and is still used less often, but this situation is changing now with the imminent introduction of some forms of benefits aimed at supporting access to water.

Urgent reforms are pending in the water sector, requiring huge investment for an economy the size of the Bulgarian one. The underlying common theme in discussions about the energy- and water-poor is therefore the liberalisation of prices or the better alignment of regulated prices with production costs. Water shortages naturally bring to the forefront basic issues of water security and access to fresh running water, overshadowing affordability and equity.

Sanitation, despite being related to water, is also usually considered separately. Access to financial services is treated as a clear stand-alone issue, both for the purpose of policies and in expert and public discussions, and is rarely linked to any other forms of deprivation or limited access or to any other services. Overuse of credit from non-financial institutions, which is easy to obtain but difficult to repay, is a major source of indebtedness for the poor in Bulgaria. Cash constraints combined with other factors also lead to mass participation by persons with low incomes in games of chance. Financial literacy should therefore become a topic of primary focus and cover a broad set of issues.

Market-based provision is the only way of accessing digital services in Bulgaria. There is no support of any kind for persons who cannot afford access to the internet for financial reasons or who cannot access digital services due to a lack of skills or other barriers.

1 Overview of national/subnational measures aimed at supporting low-income people in accessing essential services

According to Principle 20 of the European Pillar of Social Rights (EPSR), everyone should have “the right to access essential services of good quality, including water, sanitation, energy, transport, financial services and digital communications”. Moreover, support for accessing such services should be available for those in need.¹ The importance of ensuring access to essential services is also well established globally in the framework of the United Nations 2030 Agenda for Sustainable Development and its 17 related Sustainable Development Goals (SDGs) which was endorsed in 2015 by all UN countries including all EU countries.² This report investigates the extent to which Principle 20 of the EPSR has already been implemented in the six services under scrutiny in Bulgaria. The group of “those in need” is restricted in the report to people on a low income and low-income households.

1.1 Definition of “essential services”

In Bulgaria, there is no official definition (at national or subnational level) of essential services, nor any special regime for facilitating access to most of them by people with low social status and/or low income. The definition of essential services is mainly found in international documents (esp. EPSR and SDGs; see above), but, so far, this has not led to actual policy changes.

1.2 Definition of “low-income people” used in the context of access to services

In Bulgaria, the basic pillar of support for access to essential services is considered to be the social assistance system, but this very often does not cover permanently excluded people, people living in difficult living conditions in ghettos, lonely elderly people, etc. This is the case with access to water and sanitation, especially in ghettos, populated mainly by Roma, including young children and infants. Social assistance is mainly focused on support for the payment of bills for heating and electricity or for buying solid fuel such as firewood or coal, but there are some restrictions on access; moreover, they do not cover all groups.

The nearest thing to a definition of low-income people used in Bulgaria is the guaranteed minimum income (GMI). Minimum income protection was increased in January 2018 (by 10 BGN, i.e. around €5.10) – the first increase since 2009. In Bulgaria, changes in minimum income protection happened very rarely until 2018 – approximately once every 10 years. The GMI in Bulgaria was the same in 2018 and 2019 (75 BGN [€38]) and is far below the official poverty line of 60% of median income which, in 2019, was 348 BGN (€178). Actual social transfers are equal to the GMI multiplied by some factor usually (but not always) larger (but not much) than one, depending on the age, household and health status of the person. Yet, even the largest social transfers calculated by this method are barely enough to lift households out of poverty. If the person has an income below the differentiated minimum income, they receive a benefit which compensates for the difference. In 2019, the government introduced an official poverty line calculated on the basis of the EU “at-risk-of-poverty” indicator definition and the “Price Indices of a

¹ The EPSR was jointly proclaimed by the European Parliament, the European Council and the European Commission on 17 November 2017. For more information on the EPSR, see: https://ec.europa.eu/commission/priorities/deeper-and-fairer-economic-and-monetary-union/european-pillar-social-rights/european-pillar-social-rights-20-principles_en.

² The SDGs and their targets seek to realise the human rights of all, by promoting an integrated notion of sustainable development aimed at creating synergies between economic, environmental and social policies and objectives. For more information on the SDGs, see: <https://www.un.org/sustainabledevelopment/sustainable-development-goals/>.

Small Basket (PISB)”; for 2020, this poverty line has been set at 363 BGN (€185.50) for a single-person household. It also introduced rules for non-discretionary automatic updating of benefits and means-tests for determining the amount of the basic GMI (which was previously determined by the government), and changed the eligibility criteria for heating allowances.

1.3 Measures for facilitating access for low-income people to services

1.3.1 Access to water

In Bulgaria, water and sewerage services are managed by the same companies, and therefore the cost of sanitation and sewage-disposal services is generally included in water bills. **There is currently no existing system to support low-income households with water and sanitation services.** Part of the problem is that, even if there were one, it would only cover officially connected sewer users, and this again excludes people living in ghettos without water and sewerage services. That is where the main problems lie, including health risks associated with a lack of guaranteed access to water. For connected customers who do not pay their bills, stopping access to cold water is impossible and not practised, and there are households with low incomes and high indebtedness to water companies.

In 2012, Bulgaria adopted a National Strategy for the Management and Development of the Water Sector known, in short, as the Water Strategy (WS). Under the WS, the objective of affordability is pursued exclusively through the setting of tariffs, i.e. the pricing policy. Benefits or other mechanisms to support the consumption of poor households are not mentioned. Social issues seem to be peripheral as far as public investment in the water sector is concerned. However, in the last two to three years, the issue of water benefits has become a hot topic, although the first discussions may well have begun more than a decade ago.

Among other issues, the WS mentions that water losses in Bulgaria are at a much higher level than in other EU countries. Inefficiency drives prices upwards, affecting access to water for poor households. Seasonal scarcity is also a result of poor water management and drought.

Expert opinion is completely divided on the question of whether the measures in the water sector funded by the EU Environment Operational Programme correspond to actual societal needs (Doychinova, Stoyanova and Atanasov 2018). The use of EU funding for investment in the water sector can apparently be improved. Expert estimates show that underinvestment has been endemic for a long time and currently the rehabilitation and replacement of the existing, largely depreciated, infrastructure will require huge investment. One solution is to step up privatisation and transfer the burden to end-users through price increases. This route has been recommended by, among others, the World Bank in combination with various approaches to curb the potential negative social effects. One possible approach in the water sector is the introduction of cross-subsidy programmes across groups within the water distribution network. According to a set of practices analysed by the World Bank, this enables low-cost access to water for the poorest, without undermining the financial viability of the system (World Bank 2015). Strategies for expanding private concessions in combination with liberalisation of water prices for households have been criticised for being potentially inefficient and socially undesirable (Grigorova and Medarov 2015). Left-wing NGOs presented overviews suggesting instead that full public ownership should be restored over water supply³.

³ “The world is reconsidering water concessions. Bulgaria does not follow suit.” *Солидарна България (Solidarity Bulgaria)*, 2015. Retrieved 16 December, 2019 (<http://solidbul.eu/?p=4410>).

1.3.2 Access to sanitation

Access to sanitation is provided by the same companies which supply households with water. There are no specific measures for low-income people in relation to this service, as described above.

1.3.3 Access to energy

According to the Bulgarian Law on Social Assistance, eligible persons can receive two types of support: social assistance in cash or in kind, and social services. Social assistance is given to persons who cannot cater for themselves through their labour or their property. Monthly social benefits and heating allowances can be granted to a person who is employed. In reality, it is mostly persons with only occasional employment who will have such low incomes. According to the law, social assistance can be provided to Bulgarian citizens, families and cohabiting persons who cannot cater for themselves through their labour or income from property, or through the persons who are obliged to take care of them according to the Family Code. The latter includes cases where a person has the right to receive maintenance from relatives such as a spouse, children, grandchildren, grandparents and others. Residence is a precondition for the application because social assistance is provided at a municipal level.

Bulgaria has a programme for heating allowances provided during the cold months of the year. The allowance for heating is non-contributory and means-tested. It is granted to families whose income is below a specially defined threshold which depends on a set of household characteristics. Other eligibility criteria must be fulfilled as well. The amount of the allowance is determined by the Minister of Labour and Social Policy. It is granted for the five-month period, called the 'heating season', from November to March. Beneficiaries are allowed to ask to have the sum transferred directly to a supplier. A few beneficiaries choose this option, apparently because it makes it easier for them to use the allowance and automatically proves that they have used it according to the rules. Sanctions are imposed if the allowance is spent on anything other than heating.

The provision of heating allowances uses the main definition for low-income persons applied in Bulgaria. The means-test is based on the official GMI, which has always been determined on a discretionary basis by the government and remains very low. In 2019, the government introduced a mechanism for automatic updating of the official poverty line, based on data from the European Union Statistics on Income and Living Conditions (EU-SILC) and of automatic changes in the GMI linked to the poverty line. The GMI-based thresholds are called differentiated GMI and are different for different groups of vulnerable persons. Differentiated GMI serves as a threshold against which the means-test is applied, i.e. if the per capita income of the person's household is low enough to make the person eligible for support.

Another pillar of the minimum income protection in Bulgaria is the heating allowance given to eligible households for the cold season (officially called the heating season), which covers the period from November until March. For the 2018-19 heating season, eligible households received a heating allowance covering the cost of 385 kilowatt hours (kWh) each month, i.e. 75 BGN (€38) per month or 361 BGN (€184) for the whole heating season (385 kWh is the consumption of a 2 kW heater, enough to heat about 20 m², working for a little more than a week). For the 2019-20 heating season, the monthly allowance was increased to cover the cost of 500 kWh, which was estimated at 93.18 BGN (€46) or 465.90 BGN (€233) for the entire heating season (based on the market price for electricity in October 2019). More than 90% of poor households receiving heating allowances use solid fuel, which is much cheaper than other sources of energy. Solid fuel is used in houses in rural and urban regions but also in small apartment blocks. The total number of energy benefits allocated for the 2018-019 heating season was 209,647 and cost 98,898,841 BGN (€50,587,642).

Each person has a specific differentiated minimum income, which also serves as a means test. If the person has an income below the differentiated minimum income, he/she

receives a benefit which compensates for the difference. In addition, for heating allowances, special coefficients are applied which vary according to the type of household and determine the level of support.

Table 1 provides an overview of current entitlement to the differentiated monthly minimum incomes and the respective heating allowances⁴.

Table 1: Entitlement to monthly benefits and heating allowances per type of household with GMI = BGN 75 (€38.35), 2020

Type of household	Monthly benefit coefficient (%)	Differentiated minimum income (BGN/€)	Heating allowance coefficient (%)	Heating allowance eligibility threshold (BGN/€)
Person aged 75 years or more living alone	165	123.75 (63.27)	311	233.25 (119.26)
Person aged 65 or more living alone	140	105 (53.69)	297	222.75 (113.90)
Person aged 70 or more	100	75 (38.35)	206	154.50 (79.00)
Each of two spouses living together	66	49.50 (25.31)	167	125.25 (64.04)
Person cohabiting with another person or family	66	49.50 (25.31)	224	168 (85.90)
Person living alone	73	54.75 (28.00)	233	174.75 (89.35)
Person with disability (constantly reduced ability to work) living alone	100	75 (38.35)	272	204 (104.30)

Source: Agency for Social Assistance, 2019

Bulgaria still does not have any special programme for supporting the overall energy consumption of poor households, despite the fact that energy poverty has become a part of the public and political debate in the last 10 years. Access to electricity, electricity prices and payment of electricity bills are the main focus of interest.

The distribution of electricity in Bulgaria is carried out by regional companies that hold a licence for the supply of electricity to end-users (Petrova 2019).

Outdated and energy-inefficient housing and steadily rising energy prices are often mentioned as a matter of concern in the context of rising energy poverty (Kulinska 2017).

In the past, most ex-socialist countries which later joined the EU had systems of subsidised electricity prices for households. Until recently, they had retained a price structure which did not correspond to production costs. Domestic electricity was subsidised at the expense of industrial and commercial consumption (Lenz and Grgurev 2017). In this context, liberalisation of energy prices posed many social risks. This line of analysis supports the case for making water supply companies public again (Grigorova & Medarov 2015).

Specific price supplements and additional charges apply to the final electricity selling price, including a "green energy" supplement, a supplement for highly efficient electricity production and a supplement for non-recoverable costs; additional charges for transfer through the transmission network, and for access to the transmission network, also apply (Boneva 2016).

⁴ Information site of the Social Assistance Directorates, <http://pomosti.inform.com/> (in Bulgarian).

Since 2018, some notable examples have emerged at municipal level of the provision of support to poor persons to shift from solid fuel to heating technologies which are less harmful to the environment, and especially to improve the quality of air in urban settlements. The municipality of Sofia started two such programmes, both with EU funding, which cover the full cost of changing the heating technology. The total amount allocated to the programmes is 57 million BGN (€29.144 million) and the initial plan, depending on the demand, is to reach 20,000 households. Although these programmes do not qualify as direct support for the consumption of energy, they have the potential to affect positively the energy efficiency at household level, i.e. lead to reduced costs, better heating or both, and thus contribute to reducing poverty and social exclusion. The Sofia municipality advertised the programme to potential beneficiaries as making their homes cleaner, healthier and warmer⁵. Such programmes are likely to proliferate due to the poor quality of air in many Bulgarian cities and towns, especially during the heating season.

1.3.4 Access to public transport

There is no provision in Bulgarian legislation for reduced prices or social assistance for transport services for low-income citizens. Reduced prices are mostly for public transport subscription cards for people with disabilities, pensioners, schoolchildren and university students, as well as some civil servants, war veterans and children up to 7 years old.

One-off assistance for free travel once a year by rail and bus is offered by the Agency for Social Assistance (ASA) based on the GMI of mothers with three or more children. In 2018, 8,521 mothers received support to travel. The total sum paid by the ASA was 437,353 BGN (€223,709)⁶.

Reductions in rail transport are also provided for group travel and for students and senior citizens, but not for low-income people. For other modes of transport, no reduction is foreseen.

In the field of transport, there are several definitions used to establish eligibility for free travel or discounts, but they are not based on a definition of low income and no means-test is applied. In railway transport, which is publicly owned, persons with a disability categorised as 71% or more, and children aged up to 7, can travel for free, but children have to pay if they use a separate seat. School and university students and the elderly get discounts of up to 50%. The capital and some other big cities offer discounts to students and elderly persons without applying means-tests. Existing subsidies do not target the neediest and do not offer efficient support for working people who commute, either daily or weekly.

1.3.5 Access to digital public services

In Bulgaria, there are no reduced fees or preferential rates for the use of digital services by low-income consumers. Such services are mainly offered by private companies, which choose how to set their tariffs. There is a great deal of concern over the lack of internet access for many low-income people, directly related to their difficult living conditions and limited access to electricity and mobile services, etc.

The results of the 2019 survey, carried out by the National Statistical Institute, of the usage of information and communication technologies in households and by individuals, showed that 75.1% of households in Bulgaria had internet access at home, with an increase of 42 percentage points over a 10-year period. The internet connection used by households was a mobile connection through a mobile phone network (64.0%) and fixed-wire connection (57.8%). Use of the internet was growing fast but nonetheless a quarter

⁵ <https://sofia.bg/bitovootoplenie>.

⁶ Annual Report for 2018 of the Agency for Social Assistance.

of individuals in 2019 had never used it – the other three-quarters were using it at least once a week. Half of those who never used the internet thought it was not useful or interesting, 41.9% said they lacked skills for working with the internet, and according to 24.3% the equipment was too expensive. The use of mobile devices to access the internet displayed large differences according to age. Younger generations used more cloud services and were more likely to buy goods or services on the internet⁷.

1.4 Access to financial services (Directive 2014/92/EU)

The use of financial services is a general problem in Bulgaria. A recent survey of Bulgaria and Romania found that 'large proportions of the populations of both countries are not involved in the formal financial sector, whilst those who are, are of relatively low financial literacy' (Filipova-Rivers 2016). Access to the formal financial sector could be especially problematic for some vulnerable groups such as the Roma.

The implementation of Directive 2014/92/EU in Bulgaria, according to the Active Consumers Association (ACA), does not correspond to the spirit of the directive⁸. The ACA do not claim, however, that the legal obligations are not formally met, despite their negative findings. The ACA is one of the largest and most active NGOs in the field of consumer protection, a member of the European Consumer Organisation. Based on an overview of bank websites and a 'secret client' experiment, the ACA concludes that information on the special account for basic operation envisaged by the legislation is not easy to obtain; in many banks it is hidden deep in their websites or contained in marginal places within general documents or documents dedicated to other products⁹. In most banks, the secret client could learn about this opportunity only after explicitly referring to it, which most vulnerable consumers are unlikely to do. In several banks, the secret client was actively discouraged from opening such an account; in some cases, this was even based on false information, e.g. that high charges apply, or that the requirements for a minimum balance are high.

In Bulgaria in 2017, a study found that 72% of adults had a bank account, but the gap between richer and poorer people was quite large, at 29 percentage points¹⁰ (Demirgüç-Kunt 2018). Bulgaria did not have a significant gender gap in account ownership. The rate of ownership among women (74%) was even slightly higher than among men (71%) but the difference is not statistically significant.

The largest gap existed between those in the labour force (88% of them had an account) and those outside the labour force (51% of them had a bank account). 85% of those with at least secondary education had a bank account, compared with only 42% of those with only primary education or less.

According to the same study, among those who had no account with a financial institution, 20% mentioned long travelling distances as the main reason, while 39% said financial services were too expensive, 11% could not provide the required documentation, and 31% did not trust financial institutions. But by far the most widely mentioned reason was insufficient funds for opening an account – this was mentioned by two-thirds of respondents. Discrimination or direct legal obstacles were not present among the primary reasons, though the answer "could not provide the required

⁷ "Information and Communication Technologies Usage in Households and by Individuals in 2019 | National Statistical Institute". Retrieved 21 December 2019 (<https://www.nsi.bg/en/content/17717/прессъобщение/information-and-communication-technologies-usage-households-and>).

⁸ "Active Consumers Newsletter, no1, 04.01.2019". *Active Consumers*. Retrieved 21 December 2019 (<https://aktivnipotrebiteli.bg/кампания/182/Бюлетин-АКТИВНИ-ПОТРЕБИТЕЛИ,-бр.1,-04.01.2019>).

⁹ "Payment account for basic operations". *Активни Потребители*. Retrieved 21 December 2019 (<https://aktivnipotrebiteli.bg/тест/167/Платежна-сметка-за-основни-операции>).

¹⁰ The World Bank defines income groups based on quintiles of income distribution. To measure gaps in access, a comparison is made between adults in the richest 60% of households and those in the poorest 40% (Demirgüç-Kunt 2018).

documentation” could potentially include disadvantageous or unfair treatment or regulatory barriers. Data, however, clearly show that poverty and low education are among the major obstacles to access, along with low activity: all three variables are of course significantly correlated with each other, so they refer to a common set of excluded and multiply deprived persons.

Access to financial services is a stand-alone issue in the Bulgarian context, which is rarely linked to any other forms of deprivation or limited access or to any other services. For Bulgaria, if financial services are going to be discussed in the future as part of a package of essential services, the topics of concern should be much broader than just access to bank accounts and related services provided by financial institutions. Overuse of credit from non-financial institutions, which is easy to obtain but difficult to repay, is a major source of indebtedness for the poor in Bulgaria. Cash constraints combined with other factors also lead to the mass participation of persons with low incomes in games of chance. Financial literacy should, therefore, become a topic of primary focus and cover a broad set of issues.

2 National policy frameworks and reforms

2.1 National policy frameworks

In Bulgaria, the issue of the GMI and the need for policy frameworks and reforms that would provide a common approach to various forms of poverty and deprivation have been repeatedly discussed. The issue has repeatedly been raised in the Country Specific Recommendation as an area in need of reform and improvement, as well as the need for a better link between the GMI and the poverty line in the country. Reforming the national policy on the GMI will provide much clearer treatment for people living in energy poverty, and better social protection. Heating allowances provided to poor households during winter time are linked to the official GMI through a means-test. An automatic non-discretionary updating of the GMI will lead therefore to a better coverage of the population in need.

Currently, there are some independent efforts to develop adequate definitions of poverty in the fields of energy and water. Some of the concepts used informally in the debates, such as energy poverty and water poverty, as well as the overarching concept of 'vulnerable consumers', give grounds for the potential creation of a common framework in these two areas. These efforts are driven by the prospect of price liberalisation in the markets for water and electricity, in both of which prices are currently determined by a common regulating body. Another driver is public protest, which became quite common in the second decade of this century, usually resulting from price increases or, in the case of water, disastrous events such as the recurring water shortages in various parts of Bulgaria.

There are no signs that transport, digital or financial services could become part of a common framework. Digital and financial services remain too limited even for high-income citizens, especially within public administration and public services, where, despite recent digital reforms, too few services offer real digital access. For this reason, there are no specific measures to facilitate the access of low-income people to them.

2.2 Ongoing or announced reforms

In Bulgaria, there are no ongoing reforms designed to improve access to essential services for low-income people. However, plans have been announced by the government for the introduction of water benefits or a similar mechanism for supporting access to water.

Due to problems in the water sector, with large losses of water estimated at about 60% of the flow and huge inefficiencies, the issue of affordability is mixed up with or overshadowed by issues of basic access to water in the long run. In a joint workshop of the World Bank with several Bulgarian ministries, water security was defined as "access to adequate quantities of acceptable-quality water for sustaining livelihoods, human well-being, and socio-economic development; for ensuring protection against water-borne pollution and water-related disasters; and for preserving ecosystems in a climate of peace and political stability". Access, however, can have a double meaning – availability, and/or affordability. In Bulgarian policy debates, the term "socially tolerable price" is used, which is not strictly defined, to refer to a price level that can be reached without grave social consequences. This is a price which can be accepted without affecting households too much, including poor households.

In 2019, the city of Pernik, one of the 28 district centres situated close to the capital of Bulgaria, experienced a shortage of water supply due to a depleted dam. Currently, the city is under very restrictive water rationing. As water in the reservoir is below the operational minimum, the scarce water supply is of substandard quality.

It was not this incident that brought the issue of water poverty to the fore but the prospect of large-scale concessions of municipal water companies, which could be linked

to liberalisation of regulated prices. Even without privatisation, prices for water are expected to rise fast. The energy and water regulator has already announced price increases from January 2020. The price is expected to increase by up to 10% in 24 of the 28 districts in Bulgaria¹¹. Following the disastrous events in Pernik, the Prime Minister announced his preference for public, probably state, ownership of water companies after mergers and consolidation.

At the end of 2018, after protests triggered by increases in water prices for households, the state regulator for water and energy made a proposal to the government to introduce water benefits for the poor¹². There was little follow-up action until the end of 2019, when, in a series of media appearances, the Minister of Regional Development gave assurances that the price for water would remain socially acceptable¹³. It should be noted that the estimated limits of social acceptability are increasing at a rate of about 5% per year. At the end of 2019, a price of 10 BGN (€5.10) per cubic metre was considered socially acceptable in the city of Sofia, whereas in 2014 it had been 8.20 BGN (€4.10), according to official estimates made by the regulatory body responsible for energy and water.

The Minister of Regional Development announced, during a session of parliamentary questions that took place at the end of 2019, that water benefits were to be introduced in 2020¹⁴. From the preliminary statements made and the subsequent discussions in the parliament, it appears that an in-kind version of water benefits is being considered. Most probably, the state will pay for a certain level of consumption by eligible households. Some media quoted an estimate that about 500,000 persons would need support through water benefits and the whole programme would cost about 50 million BGN (€25 million) per year¹⁵.

¹¹ "Price for water to increase by up to 10% after New Year". *Mediapool.bg* 17-Dec-2019. Retrieved 22 December 2019 (<https://www.mediapool.bg/vodata-poskapva-do-10-sled-nova-godina-news301441.html>).

¹² "EWRC proposed water benefits for the poor" *Dnes.Dir.Bg* Dec 17 2018. Retrieved 16 December 2019 (<https://dnes.dir.bg/obshtestvo/kevr-predlozhi-vodni-pomoshti-za-sotsialno-bednite>).

¹³ "Avramova: The price for water will remain socially tolerable." *nova.bg*. Retrieved 20 December 2019 (<https://nova.bg/news/view/2019/12/13/271674/аврамова-цената-на-водата-ще-остане-социално-поносима/>).

¹⁴ "Water benefits to be introduced next year" *Mediapool.bg*. Retrieved 16 December 2019 (<https://www.mediapool.bg/vodnite-pomoshti-tryabva-da-se-vavedat-dogodina-news301324.html>).

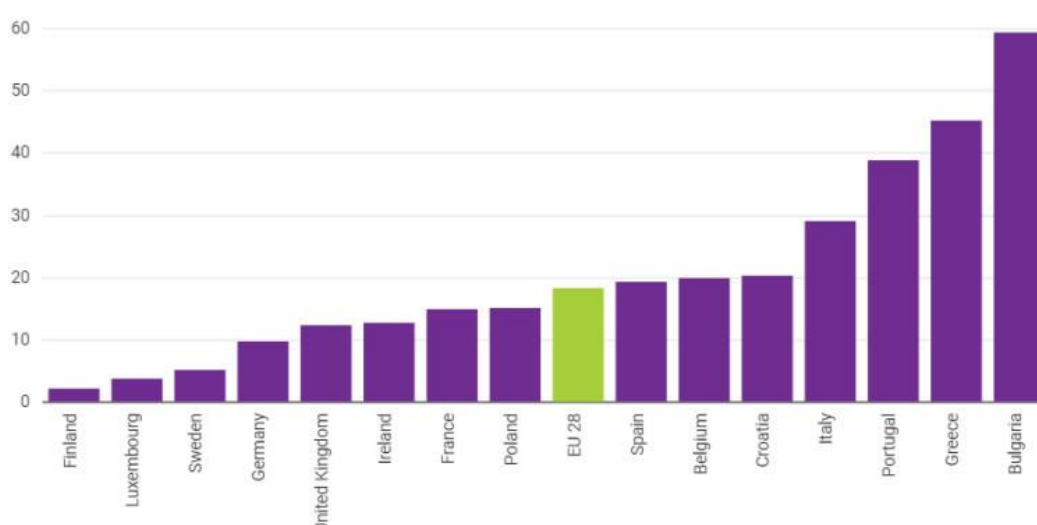
¹⁵ "Water benefits to start at the second half of 2020", *Duma Daily*, Retrieved 16 December 2019 (<https://duma.bg/davat-vodni-pomoshti-ot-srednata-na-2020-g-n205479>).

3 A focus on access to energy

Bulgaria has the worst performance in the EU in terms of energy poverty, according to the European Energy Poverty Index (EEPI) published by the European Climate Foundation¹⁶ (Figure 1). This applies both to the provision of constant heating in winter and to the possibility of cooling dwellings in summer through the electricity grid. Given the country's geographic location, at the borderline between moderate continental and Mediterranean climates, heatwaves during the summer months, as well as climate change leading to more warm months in the year, will be a cause for concern in the coming decades.

Figure 1: Percentage of poor households which have difficulty maintaining an adequately warm domestic temperature in winter (2017, %)

Percentage of poor households (in the lowest quintile of income) which have difficulty maintaining an adequately warm domestic temperature in winter, in 2017 in %.



Source: EEPI, 2019

3.1 Barriers in the access to energy

There are two main factors that contribute to energy poverty: low income and the poor energy efficiency of dwellings, which act in combination. The housing stock in Bulgaria is quite old and most of it is not in good condition. There are two sections of the housing stock that may provide the biggest challenge in terms of energy poverty: buildings built during socialism from prefabricated concrete blocks, and single-family houses in urban areas. Most of the urban Roma neighbourhoods consist of single-family houses in poor condition, around 40% of them informally built. The following types of programmes could therefore greatly reduce energy poverty without directly targeting it: 1) better urban planning, and producing/updating cadastral plans in areas with informal buildings; 2) legalising informal housing; 3) retrofitting old buildings to increase their energy efficiency; and 4) building new social housing.

¹⁶ Assessing Member States' progress in alleviating the domestic and transport energy poverty nexus, European Energy Poverty Index (EEPI), January 2019.

https://www.openexp.eu/sites/default/files/publication/files/european_energy_poverty_index-eepi_en.pdf

3.2 Groups particularly disadvantaged in their access to energy

The groups that have been mentioned in the context of energy poverty in different analyses and in documents produced by the government are: 1) persons living below the official poverty line; 2) single-person households (mostly with elderly persons); 3) households with five or more members; 4) Roma living in segregated neighbourhoods, especially in informal housing; 5) persons inhabiting dwellings with low energy efficiency; 6) persons using old, energy-inefficient domestic appliances (this group overlaps with the group of persons living below the official poverty line); and 7) households with unemployed persons.

In May 2016, the Ministry of Energy discussed the issue of energy poverty, in view of the expected liberalisation of electricity prices. The ministry announced a definition of energy poverty, which was said to have been produced in collaboration with the Ministry of Labour, the World Bank and the European Commission. According to the definition, 14% of Bulgarians were categorised as vulnerable (energy) consumers. Details about the exact procedure to estimate a coverage of 14% for the planned “Mechanism for support of vulnerable consumers” were not given. From the draft of the document published for public discussion¹⁷, it can be deduced that the criteria applied are the same as for the beneficiaries of GMI schemes, with slightly higher thresholds, i.e. better aligned with the Eurostat poverty line which, in 2019, became the official poverty line in Bulgaria. The expected measures include lower electricity prices for a period of five years. Potential beneficiary groups are: persons who are getting heating allowances; persons aged 70 years or more who live alone and are only receiving pension income and live below the poverty line; people with 90% disability who are entitled to assistance; and households with disabled children.

Some analyses of energy poverty have been conducted in Bulgaria since 2016 in response to the public debate. Energy poverty has mostly been framed as a product of other forms of deprivation or of various circumstances at a personal, household or community level. Energy poverty is usually not analysed in terms of its consequences and effects on social inclusion. This is mainly due to the fact that energy poverty is not an immediately observable reality, but a phenomenon based on complex definitions, some of which produce conflicting results. Another reason for energy poverty being difficult to analyse together with other personal and household characteristics is the difficulty in obtaining relevant data. Household surveys that otherwise contain a rich variety of personal and household variables usually lack details on energy consumption. Household budget surveys and administrative datasets on energy consumption contain little or no other personal or household variables. Below we summarise two studies, both of which use simulations to derive their results. There are other publications on energy poverty in Bulgaria but they do not rely on their own empirical results: they either summarise other findings or are designed primarily as advocacy tools putting the accent on a single issue such as energy efficiency.

Peneva (2019) uses the Household Budget Survey (HBS) of the National Statistical Institute from 2014 to test how several definitions of energy poverty would work in Bulgaria. The HBS is not very rich in variables other than income and expenditure data and some general information on the structure of the household and the housing situation. This is the reason why using this dataset does not allow us to distinguish many aspects of vulnerability to energy poverty. On the other hand, data on energy consumption in the HBS are much more reliable.

According to **the ten per cent rule**, the energy-poor are those households that spend more than 10% of their equivalised monthly income on energy. This method of measurement highlights single- and multi-member households as being relatively more vulnerable than others, with one-person households falling in a special category as well

¹⁷ <http://www.strategy.bg/FileHandler.ashx?fileId=11988>.

as households with four adult members. The heating technology and the structure of the household are the most important factors in determining energy poverty measured by this method (Peneva 2019).

According to the **Low Income High Cost** method, a household is considered to be energy-poor if: 1) its income is below the poverty line (the official threshold set at 60% of the median income of the population for the respective year) and 2) spending on energy is higher than the median for the country. This method would classify as energy-poor those poor households that live in dwellings with low energy efficiency, i.e. have high electricity costs. In Bulgaria, the energy poverty rate estimated by this method is the lowest – 10%. These are persons living in households on a very low income; the poverty rate according to the official poverty line is more than twice as high, which means that only half of the households living under the official poverty line would qualify as energy poor. Peneva (2019) recognises that this method leads to “hidden poverty” because poor households would not be able to afford high energy costs. Peneva believes that, under this method, the group identified as energy-poor would overlap significantly with those identified as vulnerable consumers under the definition preferred by the government.

Poverty after energy costs defines as energy-poor those households whose equivalised income after statutory energy expenditure is less than 60% of the median household income or the official poverty line for the reference period. 35% of the population are energy-poor according to this method. This method highlights single-person households as the most poor (Peneva 2019).

Under the **minimum income standard**, the energy-poor are households where the minimum equivalised cost of living is greater than the residual equivalised income after equivalised energy expenditure. A poverty rate of 52% was estimated on this basis. Households in the HBS with more than three members tended to have lower total income than households with two or three members. Households with five members or more tended to be quite poor, which affected their energy consumption. Apparently, they tried to economise on energy to have enough means to cover other necessities (Peneva 2019).

A simulation of electricity consumption in 2016 using a large household survey found that most of the persons living above the poverty line spent less than 10% of their incomes on electricity, while almost all of those living below the poverty line spent more than 10%. Unlike Peneva (2019), this analysis focused only on the share of income spent on electricity among various groups of persons and types of households. About a quarter of poor households with children were estimated to spend more than 30% of their incomes on electricity. Lonely elderly persons were also found to be much more vulnerable. Households with unemployed persons were also more vulnerable, while working in the informal economy did not seem to have a serious impact. This study also presented case studies showing how poor people economised on energy to cater for other needs (Zahariev et al. 2016).

3.3 Interaction between energy poverty and other aspects of social exclusion

At the 20th Annual Conference of the Municipal Energy Efficiency Network in March 2018, during the Bulgarian EU Presidency, several main challenges facing the country in terms of energy poverty were addressed and discussed, as follows.

- Social poverty and exclusion, which inevitably leads to a poor quality of life, unhealthy living conditions and inability to maintain one’s home.
- The legislative framework in Bulgaria, which does not yet promote long-term measures for energy renewal or phased (step by step) renewal. No requirements and incentives have been introduced to replace existing inefficient heating systems. Support is still directed towards reducing final energy consumption, and even in the case of full public financing for the renovation of buildings, no change

to heating systems is required. This approach can hardly encourage local authorities to pursue their own energy policies or diversify energy supplies within their territory.

- Access to up-to-date energy services. This is still limited and information reaching the end-user on energy optimisation opportunities is scarce. There is considerable potential for implementing low-cost and no-cost measures for energy efficiency measures, but the relevant advice on appropriate measures, as well as the benefits of deep renovation and access to finance, is still insufficient.
- Grants, which cover 100% of the cost of improving the energy efficiency of multi-family housing units, support the expectation that improvements in energy performance must be fully paid for by the state and disrupt the health of the emerging energy services market. It is imperative to find a sustainable financing scheme to continue investing in the renovation of the building stock.
- Low energy prices (inaccessible to a large population but still 30% lower than the regional market) make the cost of deep renovation less cost-effective and with a longer payback period.

The Operational Programme Regions in Growth 2014-2020, with a total budget of 3 billion BGN (€1.5 billion), with European and national co-financing, is managed by the Ministry of Regional Development and provides funds to support the energy efficiency of public buildings and multi-dwelling blocks, worth nearly 1 billion BGN (€500 million), which should support policies to reduce energy poverty in households and public buildings. This programme is not specifically aimed at relieving energy poverty and is arguably not easy to access for apartment blocks, which are home to many vulnerable households. There is no official information on the composition of beneficiaries but the media have focused on some cases of retrofitting buildings inhabited by very poor Roma households, i.e. the so-called Carmen block in the town of Kazanlak retrofitted recently¹⁸.

Overall, energy poverty in Bulgaria poses serious problems requiring systematic political action by governments. There is no such joint action yet, and policies regarding the definition of the GMI remain an unresolved issue in Bulgaria.

¹⁸ <https://nova.bg/news/view/2019/02/07/239888/наскоро-саниран-блок-в-ромска-махала-тъне-в-боклуци-видео>. Unfortunately, the retrofitting was picked up by journalists to showcase Roma as bad owners.

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Annex

Table A1: Essential service – Water

1) Definition of “low income” used in the context of the delivery of the service in the country:¹⁹

In Bulgaria, there is no definition of low income at national or regional level related to essential water services.

2) Measures aimed at facilitating access for low-income people to water (for hygiene purposes, to cook...) in the country:

	National (*)	Subnational	
		Regional (only if <i>no</i> for national) (**)	Local (only if <i>no</i> for national) (**)
Reduced tariffs	No	No	No
Cash benefits	No	No	No
In-kind benefits	No	No	No
Advice/training or information services	No	No	No
Provision of a basic/uninterrupted supply	No	No	No

(*) For each measure: Does the measure exist in the country at national level (“Yes”/“No”)?

(**) **Only** if the measure does not exist at national level **and** if the service is organised at subnational level: Does the measure exist at regional level (Yes in all regions; Yes in most regions; Yes but only in a few regions; No)? And at local level (Yes in all local entities; Yes in most local entities; Yes but only in a few local entities; No)? Important: if a measure exists as a **general social support measure**, not specifically aimed at facilitating access for low-income people, the answer is “No”.

¹⁹ **National definition** used in this context (most frequently used definition if there is more than one definition). **Only if** there is no national definition **and if** the service is organised at subnational level, most common definition used in this context at regional (if any) or local (if any) level.

Table A2: Essential service – Sanitation

- 1) Definition of “low income” used in the context of the delivery of the service in the country:²⁰

In Bulgaria, there is no definition of low income at national or regional level related to essential sanitation services.

- 2) Measures aimed at facilitating access for low-income people to sanitation (i.e. systems for taking dirty water and other waste products away from dwellings in order to protect people's health) in the country:

	National (*)	Subnational	
		Regional (only if <i>no</i> for national) (**)	Local (only if <i>no</i> for national) (**)
Reduced tariffs	No	No	No
Cash benefits	No	No	No
In-kind benefits	No	No	No
Advice/training or information services	No	No	No

(*) For each measure: Does the measure exist in the country at national level (“Yes”/“No”)?

(**) **Only** if the measure does not exist at national level **and** if the service is organised at subnational level: Does the measure exist at regional level (Yes in all regions; Yes in most regions; Yes but only in a few regions; No)? And at local level (Yes in all local entities; Yes in most local entities; Yes but only in a few local entities; No)? Important: if a measure exists as a **general social support measure**, not specifically aimed at facilitating access for low-income people, the answer is “No”.

²⁰ **National definition** used in this context (most frequently used definition if there is more than one definition). **Only if** there is no national definition **and if** the service is organised at subnational level, most common definition used in this context at regional (if any) or local (if any) level.

Table A3: Essential service – Energy

1) Definition of “low income” used in the context of the delivery of the service in the country:²¹

The nearest definition used in Bulgaria for low-income people is the GMI. The main definition of low income is applied in the provision of heating allowances, which cover five months in the coldest part of the year. The mean- test is based on the official GMI, which has always been determined on a discretionary basis by the government. The GMI in Bulgaria was the same in 2018 and 2019 (75 BGN, i.e. around €38), which is far below the official poverty line of 60% of median income.

2) Measures aimed at facilitating access for low-income people to energy (to light dwellings, heat or cool dwellings, and use home appliances) in the country:

	National (*)	Subnational	
		Regional (only if <i>no</i> for national) (**)	Local (only if <i>no</i> for national) (**)
Reduced tariffs	No	No	No
Cash benefits	Yes	No	No
In-kind benefits	No	No	No
Advice/training or information services	Yes	No	No
Provision of a basic/uninterrupted supply	No	No	No

(*) For each measure: Does the measure exist in the country at national level (“Yes”/“No”)?

(**) **Only** if the measure does not exist at national level **and** if the service is organised at subnational level: Does the measure exist at regional level (Yes in all regions; Yes in most regions; Yes but only in a few regions; No)? And at local level (Yes in all local entities; Yes in most local entities; Yes but only in a few local entities; No)? Important: if a measure exists as a **general social support measure**, not specifically aimed at facilitating access for low-income people, the answer is “No”.

²¹ **National definition** used in this context (most frequently used definition if there is more than one definition). **Only if** there is no national definition **and if** the service is organised at subnational level, most common definition used in this context at regional (if any) or local (if any) level.

Table A4: Essential service – Public transport

1) Definition of “low income” used in the context of the delivery of the service in the country:²²

No specific definition.

2) Measures aimed at facilitating access for low-income people to public transport in the country:

	National (*)	Subnational	
		Regional (only if <i>no</i> for national) (**)	Local (only if <i>no</i> for national) (**)
Reduced tariffs	No	No	No
Cash benefits	No	No	No
In-kind benefits	No	No	No
Advice/training or information services	No	No	No

(*) For each measure: Does the measure exist in the country at national level (“Yes”/“No”)?

(**) **Only** if the measure does not exist at national level **and** if the service is organised at subnational level: Does the measure exist at regional level (Yes in all regions; Yes in most regions; Yes but only in a few regions; No)? And at local level (Yes in all local entities; Yes in most local entities; Yes but only in a few local entities; No)? Important: if a measure exists as a **general social support measure**, not specifically aimed at facilitating access for low-income people, the answer is “No”.

²² **National definition** used in this context (most frequently used definition if there is more than one definition). **Only if** there is no national definition **and if** the service is organised at subnational level, most common definition used in this context at regional (if any) or local (if any) level.

Table A5: Essential service – Digital public services

1) Definition of “low income” used in the context of the delivery of the service in the country:²³

In Bulgaria, there is no definition of low income at national or regional level related to essential digital public services.

2) Measures aimed at facilitating access for low-income people to digital public services (e.g. digital post, digital fiscal services, digital social security services, digital healthcare appointments) in the country:

	National (*)	Subnational	
		Regional (only if <i>no</i> for national) (**)	Local (only if <i>no</i> for national) (**)
Reduced tariffs	No	No	No
Cash benefits	No	No	No
In-kind benefits	No	No	No
Advice/training or information services	No	No	No
Provision of a basic/uninterrupted supply	No	No	No

(*) For each measure: Does the measure exist in the country at national level (“Yes”/“No”)?

(**) **Only** if the measure does not exist at national level **and** if the service is organised at subnational level: Does the measure exist at regional level (Yes in all regions; Yes in most regions; Yes but only in a few regions; No)? And at local level (Yes in all local entities; Yes in most local entities; Yes but only in a few local entities; No)? Important: if a measure exists as a **general social support measure**, not specifically aimed at facilitating access for low-income people, the answer is “No”.

²³ **National definition** used in this context (most frequently used definition if there is more than one definition). **Only if** there is no national definition **and if** the service is organised at subnational level, most common definition used in this context at regional (if any) or local (if any) level.

Table B1: Essential services – Summary table

- 1) Measures aimed at facilitating access for low-income people to the different services that exist at national, regional and/or local level in the country
- 2) Broader policy framework under which all or some of these measures are organised in the country
- 3) Ongoing or announced reforms of measures and/or related frameworks aimed at (further) enhancing effective access to the service for low-income people in the country

	1. Measures (NAT, SUBNAT, BOTH, NONE) (*)	2. Policy framework (**)		3. Ongoing or planned reforms (Yes/No)
		National (Yes/No)	Subnational (Yes/No)	
Access to water	NONE	No	No	Yes
Access to sanitation	NONE	No	No	No
Access to energy	NAT	Yes	No	No
Access to public transport	NONE	No	No	No
Access to digital public services	NONE	No	No	No
Access to basic financial services (***)	NAT	Yes	No	No

(*) This column summarises the response provided in Tables A1-A5 above. "NAT" means that all the measures that exist in favour of low-income people are national measures; "SUBNAT" means that there are no national measures but some of/all the measures that exist are subnational measures; BOTH means a mix of NAT and SUBNAT; "NONE" means that there are no measures, be it at national or subnational level.

(**) Is there a broader national policy framework under which all or some of these measures are organised in the country for some of/all the services under scrutiny ("Yes"/"No")? **Only if** there is no such national framework for one service **and if** the service is organised at subnational level: Is there a broader subnational policy framework under which all or some of these measures are organised for this service ("Yes"/"No")?

(***) Open and use payment accounts with basic features (Directive 2014/92/EU).

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