**Overview of data and indicators for monitoring “vulnerability” of groups at risk in Bulgaria**

**Thematic Report**

Draft December 2019

**Country: Bulgaria**

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**Date: 16 September 2019**

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1. National level indicators for monitoring vulnerability applied in policy frameworks

This section presents a review of the indicators for assessing and monitoring vulnerable populations available at national level and used to inform national policy frameworks.

**1. Roma**

The national policy framework addressing the socio-economic vulnerabilities of Roma is built upon several strategic documents aimed to devise an institutional pathway for solving problems such as poverty, unemployment, poor health-care and education, etc. The review of the eight main strategic documents yielded seventy-four indicators used in informing the objectives and scope of those policies.

The vulnerability indicators[[1]](#footnote-2) are mostly sourced from the National Statistical Institute (NSI) (*Национален статистически институт*, НСИ), both from the census data and from the annual monitoring of households. These indicators are often complemented by data from other sources: private agencies[[2]](#footnote-3), international bodies such as the World Bank (WB)[[3]](#footnote-4), the European Union, including sectoral programmes and projects[[4]](#footnote-5) and Eurostat[[5]](#footnote-6), non-governmental organisations such as the Open Society Institute (OSI) (*Институт „Отворено общество“*, ИОО)[[6]](#footnote-7), and other independent national or international studies[[7]](#footnote-8). In terms of methodology, the indicators are primarily defined by a recurring data collection (yearly, or in the case of census data – in ten-year intervals) with a nation-wide or at least nationally representative scope. In fewer cases the indicators come from short-term single study efforts that target a limited section of society and are only relevant for a given time-frame. With the exception of privately commissioned studies and some international data collection instruments, the general indicators and the corresponding data sets are publicly accessible and available online, but renditions inclusive of the factor of ethnicity are not always accessible. The reliance on official census data and international sources serves to increase the comparability and validity of the indicators (about 70 % of the reviewed general indicators are international by nature or hold at least some international comparability, while for the data sets inclusive of ethnicity an estimation of comparability is not possible). Thus, for example, the national census includes a question (an optional one) about ethnicity (belonging to an ethnic group). For some categories, such as economic activity and education, the publicly available data include disaggregation by ethnicity, but for others, like disabilities, the data are not accessible.

It is also worth noting that the national policy framework on Roma uses a broad definition of the target group. The national Roma integration strategy, for example, defines its target group as ‘Bulgarian citizens in vulnerable socio-economic situation, who identify themselves as Roma, and citizens in a similar situation, who the surrounding population defines as Roma irrespective of their own self-identification’[[8]](#footnote-9).

The policy framework for the Roma population uses reliable data indicators, but it also reveals some shortcomings: lack of concreteness, restricted thematic scope, and insufficient depth and detail.

In the national Roma integration strategy, for five of the thirteen utilised indicators there is no explicit reference to the data source (e.g. all health-related indicators and the indicator on overpopulation of Roma neighbourhoods), while the rest are based upon census data[[9]](#footnote-10). The overreliance on census-based indicators corresponds to the long-term objectives of the strategic documents, but has serious limitations if used for regular monitoring, because the data are collected at large intervals (bigger than the timeframe of most policy documents) and the categories used for data collection are very broad.

Indicators with undefined data source are also found in the ethnic minorities health strategy[[10]](#footnote-11) and the framework programme for integration of Roma[[11]](#footnote-12), while the education integration strategy[[12]](#footnote-13) has no links to statistical data altogether. The ethnic minorities health strategy[[13]](#footnote-14) mentions another problem in relation to the data: most of the national level indicators for monitoring vulnerabilities are applicable to the public at large without accounting for inter-ethnic differences. This is particularly problematic when assessing the severity of a given vulnerability risk for the Roma, as it requires additional analysis of several indicators in combination or reliance on data from a plethora of sources with varying validity, time-frames and applicability. At the same time, the responsible institutions rarely collect data on their own[[14]](#footnote-15) to produce indicators closer in scope and time-frame[[15]](#footnote-16) to the objectives of the respective strategic document.

National policy documents related to the rights of Roma are also restrictive in terms of covering the whole spectrum of possible vulnerabilities. Although in areas such as poverty, unemployment, education and health-care there are a number of measures, the intricacies of these general categories and other adjacent ones are left scarcely explored. Twenty-two out of the seventy-four reviewed indicators relate to education, seventeen – to health-care, twelve – to poverty, nine – to unemployment, and the rest (eleven) are general population indicators. Limited attention is afforded to work exploitation, poor labour conditions, social exclusion, segregation, negative cultural practices, stereotyping, trafficking, and violence/hate crime/hate speech. Only one out of the seventy-four indicators relates to work exploitation[[16]](#footnote-17), while for the rest of the vulnerability risks there are no explicitly mentioned data sources and indicators. Most policy documents comment upon vulnerabilities relating to social inclusion, non-discrimination and professional health and safety, but there is no reference to quantitative data-based argumentation.

The third impediment in the use of indicators for monitoring Roma vulnerability pertains to the lack of depth and detail in including a wide spectrum of available data indicators at the preliminary stages of preparing strategic documents. The policy documents tend to focus on overarching socio-economic indicators[[17]](#footnote-18) that relate to quantitative data, and in doing so, bypass the possibility of including other data categories beyond the traditional socio-economic ones (e.g. participation in cultural life, ICT usage, or financial literacy)[[18]](#footnote-19). Strategic documents[[19]](#footnote-20) containing measures for improvement of Roma health and employability do not actively engage with existing data on labour conditions and the juncture between professional occupation and heightened health risks[[20]](#footnote-21). This is because such data do not include figures disaggregated by ethnicity, which can be directly used as justification or reference. The Roma population, beyond the particular Roma-centred programmes and plans, exists as an outlined, but not thoroughly explored, vulnerable group[[21]](#footnote-22), which results in the dilution and side-lining of possible efforts that dig into the comparative disadvantage of Roma persons vi-a-vis specific risks and vis-à-vis sub-groups within the Roma community (women, children, persons with disabilities, etc.).

For the full list of indicators, see Annex 3: Group tables: national-level indicators utilised in the Bulgarian policy framework, Table 1: Roma.

**2. Children at risk**

The national policy framework in relation to children at risk includes several strategic documents, each suggesting a set of indicators on different vulnerabilities.

The National Strategy for the Child (2008-2018) (*Национална стратегия за детето 2008-2018 г.*)[[22]](#footnote-23) includes a separate section on children at risk, which refers to a number of indicators, but provides no explicit references to the data sources. Some of the indicators are based on data, collected by the National Statistical Institute (NSI) (*Национален статистически институт*, НСИ) from other public authorities (e.g. the police) while others rely on data from one-off surveys. Still, for a significant number of indicators the source could not be identified. Apart from the indicators used to justify the suggested measures, the strategy enumerates the sources that should be used to collect data for the monitoring of its implementation. These include the National Statistical Institute (NSI) (*Национален статистически институт*, НСИ) for data on births and mortality, health and education, and the National Information System of the State Agency for Child Protection (SACP) (*Държавна агенция за закрила на детето*, ДАЗД) for data on children at risk. In addition to that, the strategy highlights the need to combine the collection of statistical data with the results of thematic studies, to develop a set of comparative indicators for the rights and wellbeing of children, to broaden and synchronise the existing indicators with the EU indicators, and to conduct national representatives surveys to inform the development and implementation of policies related to children.

A number of indicators are utilised in the specific policy frameworks on different categories of child victims. The national programme against violence and abuse of children[[23]](#footnote-24) provides indicators on child victims of violence, which are mostly sourced from official statistics (registered cases) and thus exclude unreported incidents. The only exception is the indicator on drug use, which is survey-based and supposedly reflects more accurately the actual situation. The same is valid for the indicators on child victims of trafficking, referred to in the national anti-trafficking strategy, which are mostly based on official statistics (number criminal proceedings, registered signals, etc.)[[24]](#footnote-25). The indicators on children with disabilities and children deprived of parental care, utilised by the deinstitutionalisation strategy, are also sourced from official statistics (registers)[[25]](#footnote-26).

The only set of indicators, explicitly mentioned in a national policy document and based on internationally recognised methodology is the one measuring the risk of child poverty. It is referred to in the national anti-poverty strategy and is based on data from the study on income and conditions (EU-SILC) for 2010[[26]](#footnote-27).

Overall, the majority of utilised indicators cover only the specific vulnerability risks, which define the given group of children as children at risk. Risks such as poverty, access to education, healthcare or other services, social exclusion, etc. are mentioned in the strategic documents but are not linked to any specific indicators.

For the full list of indicators, see Annex 3: Group tables: national-level indicators utilised in the Bulgarian policy framework, Table 2: Children at risk.

**3. People with disabilities**

The new policy framework of persons with disabilities, based on a national strategy and biannual action plans, does not refer to any indicators or data[[27]](#footnote-28). In its background section, the strategy gives an overview of the current situation of persons with disabilities only by describing the existing legislative framework and the activities of the responsible public institutions. The strategy does not define the term ‘persons with disabilities’, but there is a corresponding definition in the legislation. The People with Disabilities Act (*Закон за хората с увреждания*)[[28]](#footnote-29) defines, along the definition of the Convention on the Rights of Persons with Disabilities (CRPD), ‘persons with disabilities’ as persons with physical, mental, intellectual or sensory impairments which in interaction with the surrounding environment may hinder their full and effective participation in public life. Persons with long-term disabilities are defined, using the same components, with the note of the long-term nature of the impairments and a medical expert opinion of a disability of 50 or over 50%.

A relatively comprehensive set of indicators on the risk of unemployment of persons with disabilities are provided in the long-term strategy on employment of persons with disabilities[[29]](#footnote-30). The strategy was originally designed to last until 2020, but was repealed by the government in 2016 with the adoption of the more comprehensive national strategy for persons with disabilities, in which employment is defined as one of its six main priority areas[[30]](#footnote-31). The indicators utilised by this document are mostly based on official data supplied by the employment authorities and based on the entries in the registers of unemployed persons. There are also indicators built upon the regular survey data of the National Statistical Institute (NSI) (*Национален статистически институт*, НСИ) combined with official statistics from the National Social Security Institute (NSSI) (*Национален осигурителен институт*, НОИ).

A similar indicator, measuring the share of unemployed persons with long-term disabilities and based on data from a one-off survey conducted by the National Statistical Institute (NSI) (*Национален статистически институт*, НСИ) in 2011, is utilised by the national anti-poverty strategy[[31]](#footnote-32).

Overall, despite specifically aimed to address the disadvantaged situation of persons with disabilities in areas such as education, employment, healthcare, transport, sports and recreation, etc., the current policy framework does not utilise any indicators for measuring specific vulnerabilities in these areas.

For the full list of indicators, see Annex 3: Group tables: national-level indicators utilised in the Bulgarian policy framework, Table 3: People with disabilities.

**4. Youth (15-29 y.o.)**

The monitoring of the youth, in particular the youth that is not in education, employment or training (NEETs), is extensive and its scope is governed by a variety of policy documents. The research identified at least nine different strategic documents built upon indicators pertaining to young people. Apart from general indicators related to the number, age and gender structure of the youth population, the Bulgarian policy framework is mostly concerned with the employment and economic activity rates of young people, their educational structure, their income and family status, civic activity, interests, health status, and relationship with the judicial system (as victims of crime, offenders, etc.). A large proportion of the data is sourced from the National Statistical Institute (NSI) (*Национален статистически институт*, НСИ), followed by Eurostat, individual ministries, the employment authorities and other agencies that source specific individual indicators and data sets. Data is collected in a recurring manner: mostly yearly, but also monthly (e.g. police statistics), and in ten-year periods (census data). The data can be accessed publicly and freely, with some exceptions of restricted access or undefined data sources.

The comprehensive amount of available indicators and data sets on young persons is due to several factors, the primary ones being the economic imperative behind devising strong and coherent labour market inclusion measures for young people, the high public interest in providing solutions to the Bulgarian demographic crisis (ageing population), and the lack of legal restrictions for age-related data collection similar to those for data collection related to race, ethnicity or sexual orientation, which is generally forbidden by the data protection legislation. With regard to the latter factor, the very young persons as a target group of national policy-making is not nearly as difficult to reach as other groups such as the Roma or the LGBTQ+.

In terms of the data collection instruments utilised, the national policy framework tends to rely on data sourced though nation-wide or at least nationally representative surveys with direct methods of collection (interviews, questionnaires). The National Youth Report (*Национален доклад за младежта*)[[32]](#footnote-33), annually published since 2002, is indicative of a good level of institutional activism in developing and carrying out own data collection efforts, and using the data generated for timely and reliable monitoring of specific potential vulnerabilities that young people in Bulgaria are prone to.

The sixty-three indicators, included in the various strategic documents and aimed specifically at the monitoring of youth in Bulgaria, bring forward key aspects of vulnerability for this particular group. The risks most often associated with youth are: low educational level and limited professional qualifications leading to unemployment and poverty, health issues due to poor lifestyle habits, low awareness of professional and academic development opportunities, insufficient awareness of rights and obligations with respect to labour and political participation, etc. Although this thematic scope is wide, this type of monitoring often fails to grasp the underlying precursors for young people falling into the NEET group.

For the full list of indicators, see Annex 3: Group tables: national-level indicators utilised in the Bulgarian policy framework, Table 4: Very young persons.

**5. Older persons (≥ 55 y.o.)**

The Bulgarian policy framework addressing elderly persons encompasses six major strategic documents, four of which rely on statistical data to inform the specific policy measures adopted therein. As data pertaining to age is generally collected by the National Statistical Institute (NSI) (*Национален статистически институт*, НСИ), virtually all NSI-sourced indicators link to publicly accessible data sets. The same is valid for Eurostat and Eurobarometer indicators and data sets. All indicators identified within the four strategic documents rely on recurring (mostly yearly) data sets, with a handful of indicators from single studies or undefined data collection entities. In the case of the long-term care strategy[[33]](#footnote-34), two of the five indicators utilised have been sourced from specific institutions or research centres, and are also collected in a recurring manner and freely available to the public.

Framework documents bring to the fore that Bulgarian policy-makers identify at least two age-related sub-groups within the larger group of “elders” or “elderly persons”: those over 54 years of age, and those over 65 years of age. The two sub-groups require differentiation in the key areas covered by the strategic documents, and, naturally, in the indicators and data utilised.

There is ostensibly less focus on the over-54 sub-group, which is manly seen as adults of pre-retirement age that could face discrimination when it comes to employment and fair pay. This issue finds reflection in the strategic objectives of the Operational Programme Human Resources Development 2007-2013 (*Оперативна програма "Развитие на човешките ресурси" 2007-2013*)[[34]](#footnote-35), which refers to data sets on unemployment for over-54-year-olds, level of poverty and social exclusion risk for adults over 54 years of age, and the relationship between unemployment and the lack of vocational skills and qualifications for the same sub-group. The National Strategy for Life-Long Learning 2014-2020 (*Национална стратегия за учене през целия живот 2014-2020*)[[35]](#footnote-36) does not refer to any specific data on elderly people, but mentions the low rates of participation in life-long learning of the ageing population.

The over-65 sub-group, on the other hand, is more widely covered by policy documents. The utilised indicators cover areas such as early mortality rates, physical and psychological health and physical activity, social inclusion and participation in the public life, independent and active living, housing, poverty risks, access and usage of social services, etc. It is noteworthy that the data sets for most of the indicators for over 65-year-olds are available for the over-54 sub-group as well, and monitoring along the same categories is practically possible.

The collection of indicators for monitoring the vulnerability risks of the ageing population in Bulgaria is admittedly comprehensive, especially when it comes to demographic trends, poverty and unemployment, as well as health. The national policy framework, however, fails to explore the whole spectrum of available data and to sufficiently engage with issues such as limited access to health-care and medication, limited access to public institutions, unaffordability of maintaining satisfactory living/housing conditions, heightened risks of violence and abuse in the household, increased risk of becoming victim of crimes, etc. This could be, at least partially, explained by the lack of policy reliance on other instruments of data collection apart from the overview and analysis of some (usually overarching) NSI, Eurostat, and other institutional data sets.

Similarly to other vulnerable groups, the monitoring of elders’ vulnerabilities in Bulgaria is characterised by the absence of own data collection by the implementing entities, and the lack of consultancy with service providers to elders and representatives of the older sections of society in general.

For the full list of indicators, see Annex 3: Group tables: national-level indicators utilised in the Bulgarian policy framework, Table 5: Older persons.

**6. People in precarious housing**

The national policy framework on housing does not define the term ‘precarious housing’. Instead, it speaks about affordability of and access to housing that is ‘safe, quality, corresponding to the needs, energy efficient and resistant to climate change’. At the same time, the main policy documents in the area of housing also address the situation of homeless persons as a specific vulnerable group in relation to housing. Because of that, they are also included, for the purpose of this analysis, in the group of people in precarious housing.

Several strategic documents engage with indicators pertaining to housing and housing conditions in Bulgaria, in thematic fields such as availability of public housing, age and amortisation of homes, reliability of construction, availability of basic amenities and services, incidence of occupation of non-residential buildings, etc. The documents mainly rely on census data either from the census in 2001 (e.g. the housing strategy[[36]](#footnote-37) and the renewal of residential buildings programme[[37]](#footnote-38)), or from the census in 2011 (e.g. the strategy on reducing poverty and promoting social inclusion[[38]](#footnote-39)). Although the recently published Draft National Housing Strategy 2018-2030 (*Проект за Национална жилищна стратегия 2018-2030*)[[39]](#footnote-40) utilises roughly the same indicators as its predecessor, it refers to data provided by the World Bank in its 2017 Housing Sector Report on Bulgaria[[40]](#footnote-41). Apart from the World Bank data, all other data collection instruments have been implemented in a recurring manner (ten-year periods) with nation-wide scope and the data can be accessed freely. Only one of the utilised indicators has restricted access.

The utilised indicators are primarily focused on the tangible characteristics and attributes of various types of residential buildings, while the issue of measuring the vulnerabilities of (potential) residents is somewhat marginalised. There are only a handful of indicators used in the national policy framework that directly relate to the monitoring of the nexus between poor housing conditions and poverty, such as the affordability of utility fees, the existence of basic amenities within the household or the access to services such as electricity and clean water. The relationship between poor housing conditions and general health status or between poor housing conditions and access to education are not addressed. There is also an ostensible difficulty in defining what “precarious living conditions” entail (i.e. whether it concerns just basic amenities and services, the existence of health risks, or combination of different factors) and what data would be indicative of the share of the population living in such conditions. In addition to that, although two of the strategic documents[[41]](#footnote-42) identify “homeless persons” as a particularly vulnerable group, there is no elaborated methodology for the collection of data on that group.

For the full list of indicators, see Annex 3: Group tables: national-level indicators utilised in the Bulgarian policy framework, Table 6: People in precarious housing.

**7. Third-country nationals (TCNs)**

The national policy framework on third country nationals, both in terms of refugees and economic migrants, is informed primarily by data indicators sourced from the Ministry of the Interior (MoI) (*Министерство на вътрешните работи*, МВР) (and its Migration Directorate), the National Employment Agency (NEA) (*Агенция по заетостта*, АЗ), the State Agency for Refugees (SAR) (*Държавна агенция за бежанците*, ДАБ), the Ministry of Education and Science (MES) (*Министерство на образованието и науката*, МОН), public universities, the National Commission for Combatting Trafficking in Human Beings (NCCTHB) (*Национална комисия за борба с трафика на хора*, НКБТХ), and other similar institutions.

The indicators included in national strategic documents are primarily linked to the following factors: inflow, outflow and movement of TCNs, issuing of international protection orders, issuing of residence and work permits, enrolment in universities, risk of trafficking (including of unaccompanied children) and access to healthcare (including emergency medical assistance). General data sets for those indicators are publicly accessible through the regular (monthly and/or annual) reports of different institutions or through official registers (e.g. the border registers). Data for indicators, related to the implementation of the national migration strategy[[42]](#footnote-43) and included in its annual action plans[[43]](#footnote-44), can be accessed freely through the respective annual reports[[44]](#footnote-45). Since data collection in this case does not entail the surveying of the actual TCNs, there are no governmental collections on a plethora of social, economic and political risk factors defining TCNs as a vulnerable group. The national policy framework deals almost exclusively with the registration and accommodation of TCNs, which is based on the understanding that once the respective residence permit is issued there should no longer be any difference between a TCN and a Bulgarian citizen in terms of healthcare, education, social assistance, employment, etc.[[45]](#footnote-46)

Focusing solely on indicators on the registration and accommodation of TCNs, the Bulgarian policy framework leaves unexplored a plethora of underlying risks and factors, such as lack of awareness on rights and obligations under national law, arbitrary detention (forced accommodation) of migrants in asylum procedures, discrimination on the grounds of nationality or race, lack of assistance in interactions with public institutions, lack of assistance (or lack awareness of that such assistance is available) in securing housing and employment, limited opportunities for vocational training, language barriers, limited access to and participation in cultural, religious and other social activities, etc.

Besides, the national policy framework completely excludes the gathering of information (feedback) from TCNs either on their experiences during the administrative procedures (asylum procedures, residence application procedures, etc.) or afterwards (e.g. when they interact with other public institutions or with the community).

For the full list of indicators, see Annex 3: Group tables: national-level indicators utilised in the Bulgarian policy framework, Table 7: Third-country nationals.

**8. Children of emigrants**

Monitoring the vulnerability of emigrant household members who remain in Bulgaria is a largely unexplored area in Bulgarian policy-making. At the same time, the impact of emigration is a complex issue with multiple implications. On the one hand, many Bulgarians living and working abroad either support financially their families residing in Bulgaria or are a significant driver for the emigration of other members of their family. On the other hand, family members left behind, who are dependent on the emigrated person, face the risk of exclusion due to insufficient care and support. This is particularly relevant for children as well as, to a certain extent, for other dependant family members such as old parents, persons with disabilities, etc.

There is no specific strategic document dealing with the impact of parent emigration on children left to live with their relatives in Bulgaria. Very few references are made in topic-adjacent policy materials. Three such potential indicators were identified: one yielding quantitative data, but only marginally related to the subject group, and two lacking quantitative data, but directly related to the subject group. The National Strategy for the Child 2008-2018 (*Национална стратегия за детето 2008-2018*)[[46]](#footnote-47), and the draft National Strategy for the Child 2019-2030 (*Национална стратегия за детето 2019-2030*)[[47]](#footnote-48) only mention the need to assess and measure the difficulties and problems of working with children with emigrated parents, and the phenomenon of child isolation and loneliness, which relates to the lack of parental care. The annual child protection programmes[[48]](#footnote-49) and their corresponding annual implementation reports[[49]](#footnote-50) do not refer to any data on the vulnerabilities of such children. Overall, despite some rudimentary conceptualisation, there are no policies or measures for monitoring and addressing the potential vulnerabilities for children of emigrated parents in particular or any other economically dependant emigrant household members in general (e.g. elderly parents).

For the full list of indicators, see Annex 3: Group tables: national-level indicators utilised in the Bulgarian policy framework, Table 8: Emigrant household members.

**9. Victims of domestic violence**

Monitoring the vulnerability risks of the victims of domestic violence in Bulgaria is not homogeneous process. Instead, in the absence of a centralised co-ordination mechanism or a national strategy in the field of domestic violence and gender-based violence, the Ministry of Justice (MoJ) (*Министерство на правосъдието*, МП) and the Ministry of the Interior (MoI) (*Министерство на вътрешните работи*, МВР) cooperate with various non-governmental organisations across the country under annual national programmes[[50]](#footnote-51) and projects funded by the MoJ in line with the current legislative framework[[51]](#footnote-52). In 2016, a district council for the prevention of domestic violence was established in Razgrad[[52]](#footnote-53), but no other municipalities have created similar bodies, despite the efforts of the Ombudsman[[53]](#footnote-54) and the proposed legislative amendments[[54]](#footnote-55).

The result of this decentralisation is the lack of consistent and reliable data on domestic or gender-based violence. Indicators on incidents of domestic violence, the severity of those incidents, and the relationship between the national institutions, the NGOs, the victims and the perpetrators, are available, despite scattered. In line with the national programmes, NGOs collect data on the accommodation, consultation, and provision of services to victims (and in some cases – perpetrators) of domestic violence. Data from the national helpline for victims of domestic abuse, managed by Animus Association Foundation (*Фондация “Асоциация Анимус”*), is collected, disaggregated and analysed in the organisation’s annual reports[[55]](#footnote-56), similarly to data from the national helpline for children[[56]](#footnote-57). The data collection instrument used by Animus is a survey form filled in by the hotline operators on the basis of their conversation with the victim.

Aggregated data on the annual number of criminal proceedings of different types of crimes (as defined in the respective chapters of the Criminal Code) and proceedings under the Protection against Domestic Violence Act (*Закон за защита от домашното насилие*) are available from regional, district and appellate courts[[57]](#footnote-58) and prosecutor’s offices[[58]](#footnote-59). Data sets on police signals relating to domestic violence and relevant indicators could be obtained from the regional directorates and police departments of the Ministry of the Interior (MoI) (*Министерство на вътрешните работи*, МВР)[[59]](#footnote-60) as well as individual crisis centres across the country[[60]](#footnote-61).

The review of policy-related documents brings forward the fact that indicators on the effectiveness, scope and coverage of preventative measures are virtually invisible – there is no existing data on the public opinion and take-up of prevention. The responsible public authorities focus exclusively on post factum indicators with a strong emphasis on the retributive actions by the police and the courts and less attention to the monitoring of victim reintegration. NGOs working with victims implement different projects related to prevention and awareness, but there is little data on their impact. Another impediment to the monitoring of vulnerabilities of victims of domestic violence comes from the underreporting of incidents and the lack of comprehensive mechanisms to increase the share of those who seek help. Monitoring based only on judicial and law enforcement data is not reliable and at the same time some specific sub-groups (e.g. child victims domestic violence) are much deeper explored than others (e.g. women from the ethnic minorities, migrants or LGBTQ+ persons), for which data is generally unavailable. Finally, non-governmental monitoring efforts are often impeded by the lack of publicly available data, the confidentiality of court proceedings and the general rules on personal data protection[[61]](#footnote-62).

For the full list of indicators, see Annex 3: Group tables: national-level indicators utilised in the Bulgarian policy framework, Table 9: Victims of domestic violence.

**10. LGBTQ+ persons**

There are no specific strategic documents in the field of monitoring the potential vulnerabilities of LGBTQ+ persons. The Bulgarian policy frameworks on the protection of the rights of disadvantaged groups tends to avoid the issues of sexual orientation and gender identity, which is due to a number of reasons as evidenced by the ongoing debates accompanying the non-ratification of the Istanbul Convention. Monitoring of LGBTQ+ rights and vulnerabilities by public institutions is not envisaged in any national strategy or programme. The only institution that has some data is the Commission for Protection against Discrimination (CPD) (*Комисия за защита от дискриминацията*, КЗД), which includes in its annual reports[[62]](#footnote-63) statistics on the number of received complaints. The data is disaggregated by grounds of discrimination, including discrimination on the grounds of sexual orientation.

Some data, although very limited, are available from the survey on equality and discrimination[[63]](#footnote-64) carried out by the Bulgarian Academy of Science (BAS) (*Българска академия на науките*,БАН) in 2010. The study provides quantitative data on two indicators related to the perceptions of homosexuality as an unfavourable condition socially and in terms of employment.

No other national institution with policy-making responsibilities have done any data collection related to gender or gender identity. This practically leaves LGBTQ+ persons outside any social, economic and political strategies. In its 2018 annual human rights report[[64]](#footnote-65) the Bulgarian Helsinki Committee (BHC) (*Български хелзинкски комитет*, БХК) highlights the fact that none of the LGBTQ+ NGOs in Bulgaria benefits from public funds from the government and that their joint efforts are limited to the organisation of the Sofia Pride.

For the full list of indicators, see Annex 3: Group tables: national-level indicators utilised in the Bulgarian policy framework, Table 10: LGBTQ+.

**11. Energy-poor persons**

Energy poverty is addressed, from a different perspective, by two of the main national policy frameworks: the one on preventing and reducing poverty and the one on energy and energy efficiency. However, none of the main strategic documents, shaping these two policy frameworks, utilise any specific indicators for monitoring any vulnerability risks within this group.[[65]](#footnote-66)

The policy framework for preventing and reducing poverty, defined by the national anti-poverty and social inclusion strategy[[66]](#footnote-67), refers only to the annual amounts paid by the government as ‘energy allowances’ (or ‘heating allowances’). The policy framework on energy and energy efficiency, based on the national energy strategy and a number of other related documents[[67]](#footnote-68), utilises two indicators, both of which are aimed at defining the threshold of energy poverty rather than monitoring specific vulnerabilities of energy-poor persons[[68]](#footnote-69). These indicators are based on survey data collected by the National Statistical Institute (NSI) (*Национален статистически институт*, НСИ).

For the full list of indicators, see Annex 3: Group tables: national-level indicators utilised in the Bulgarian policy framework, Table 11: Energy-poor persons.

**12. Undeclared workers**

The measures in the area of preventing and reducing undeclared work are part of the national policy framework on improving the tax collection, tackling the shadow economy and reducing compliance costs, which is based on a national strategy[[69]](#footnote-70) and its corresponding action plans[[70]](#footnote-71). Despite defining a number of measures for reducing undeclared work, neither the strategy nor the action plans utilise any vulnerability monitoring indicators. The only indicator referred to in the strategy is the share of undeclared employment calculated by the World Bank (WB) in 2011. Several indicators are referred to in the annual evaluation reports on the implementation of the strategy[[71]](#footnote-72), but all of them are based on official data on registered violations and therefore cover only cases detected by the labour inspection authorities.

More elaborated indicators on undeclared workers are included in the Composite Index ‘Business to the Rules’ (*Композитен индекс „Икономика на светло”*)[[72]](#footnote-73), referred to in the updated employment strategy[[73]](#footnote-74) and applied by the National Centre Business to the Rules (*Национален център „Икономика на светло“*). Of the seven indicators on undeclared work, included in the index, one (share of persons working without contracts and social security) is based on comparing statistics from the National Statistical Institute (NSI) (*Национален осигурителен институт*, НСИ) and the National Social Security Institute (NSSI) (*Национален осигурителен институт*, НОИ), while the other six rely on data from annual surveys among employers and employees.

For the full list of indicators, see Annex 3: Group tables: national-level indicators utilised in the Bulgarian policy framework, Table 12: Undeclared workers.

1. Existing data collection instruments for generating data on vulnerable populations

This section presents a review of the data collection instruments for generating statistical data on the vulnerable populations, the results of which produce indicators that could be, but are not, utilised as indicative for national policies.

**1. Roma**

In Bulgaria, a number of non-governmental organisations (NGOs) are involved in Roma-related activities. The majority of these organisations do not collect or produce sociological studies. The review of the work of over forty such organisations[[74]](#footnote-75) yielded information about twelve relevant studies[[75]](#footnote-76), which are exemplary of the variety of alternative instruments used for studying Roma populations and addressing the “difficulty to reach” factor.

The examined data collection efforts make extensive use of direct approaches such as observational[[76]](#footnote-77) or proactive field work[[77]](#footnote-78), guided surveys[[78]](#footnote-79), and face-to-face interviews[[79]](#footnote-80). Such methodologies, especially in the case of limited case-studies, allow for the effective disaggregation of the data by ethnicity and other categories relevant to the specific topic of the research, and for the provision of indicators related to the Roma population in particular. For instance, a study on health in Roma communities by the Romany Health Foundation (*Фондация „Здравето на Ромите“*)[[80]](#footnote-81) has produced over thirty different health and health-care indicators weighted for ethnicity, with data disaggregated by various categories such as age/age group, gender, residence, economic activity, profession, medical condition, etc. It has also linked the accessibility of health-care with residential or housing situations, poverty and unemployment.

Another example is a study on health and health-care access of Roma[[81]](#footnote-82). The project intentionally focused on Roma communities in small towns and villages in an attempt to penetrate “difficult to reach” sub-groups that have the additional vulnerability of impeded access to social services due to location. The report presents both quantitative and qualitative data on indicators in areas such as health self-assessment, women’s and children’s health. Direct approaches of data collection that involve observation and guided responses, although not applicable at general population level, can produce concrete indicators and data categories at target population level (e.g. the Roma population as a whole or individual Roma communities). They also allow for expanding both the scope and the level of detail of the collected information, which is usually missing from the background of the national policy framework.

Some NGOs have focused on reviewing pre-existing data, combined with own analysis and data collection in critical case-studies. This approach provides qualitative indicators of different vulnerability risks faced by the Roma population. Examples of such efforts are the civic participation research[[82]](#footnote-83) and the educational segregation factual analyses[[83]](#footnote-84) carried out by different NGOs. Data collection efforts of this nature are capable of providing novel indicators for monitoring existing, but unexplored social and political vulnerability risks. Case-studies are instrumental in grasping the specificity of Roma vulnerability in its changeability and variance, for instance primary educational segregation in small town schools and secondary segregation in bigger towns and cities[[84]](#footnote-85). Case-studies have the added benefit of differentiating between poor and good practices at the local level so that the good ones can used when developing measures and policies at national level. An example of such a study is the comparative analysis of desegregation practices in Blagoevgrad (poor) and Gabrovo (good)[[85]](#footnote-86). The aspect of discriminatory behaviour against Roma in terms of hate speech is also addressed in media monitoring projects[[86]](#footnote-87). Finally, this type of data collection instruments are effective in transcending the quantitative data and bringing forward the advantages of qualitative estimates.

For the full list of data collection efforts and instruments, see Annex 4: Group tables: national-level data collection efforts and instruments not utilised in the Bulgarian policy framework, Table 1: Roma.

**2. Children at risk**

There are a number of data collection instruments, mostly based on surveys, which generate data on different groups of children at risk. Most of them are one-off activities aimed at generating contextual data for a specific period of time, but there are also some regular (annual) data collection tools.

One-off surveys have been used to assess specific problems such as early drop-out from school[[87]](#footnote-88), special educational needs[[88]](#footnote-89), violence against children[[89]](#footnote-90), child trafficking[[90]](#footnote-91), impact of correctional measures[[91]](#footnote-92), etc. All of these instruments are based on surveys among children and/or their parents and generate data about the share of children in vulnerable situation and, in some cases, their socio-economic profile (sex, age, family background, etc.). The main shortcoming of this approach is that the generated data are usually not comparable with any other existing data, because each instrument uses its own specific methodology customised for the specific purpose of the study. None of these surveys have been done more than once, which makes them relevant only for a specific point in time. Overall, the data generated by these tools can be used as a reliable source of information for defining the scope and the profile of the different groups of children at risk, but, with a few minor exceptions, do not provide enough evidence for other vulnerability risks faced by these children.

Regular data collection efforts have been identified only in relation to children placed in specialised institutions[[92]](#footnote-93). The data are collected by the State Agency for Child Protection (SACP) (*Държавна агенция за закрила на детето*, ДАЗД) through anonymous surveys conducted within the specialised facilities for children during the regular monitoring visits, which the agency is authorised to perform. The generated data provide reliable information on the access to school and the risk of violence as well as some limited information about other vulnerability risks.

For the full list of data collection efforts and instruments, see Annex 4: Group tables: national-level data collection efforts and instruments not utilised in the Bulgarian policy framework, Table 2: Children at risk.

**3. People with disabilities**

There is only a limited number of data collection instruments used to generate data on persons with disabilities and, since they use different criteria to define the profile of respondents, the covered target groups are not comparable[[93]](#footnote-94). There are no surveys covering the broad category of persons with disabilities as defined in the legislation. Instead, the surveys use additional criteria that narrow down the target group (e.g. possession of a disability certificate or membership in an association of persons with disabilities), which limits the reliability of the generated data.

The identified instruments are all based on surveys and have been implemented as one-off activities, which limits their scope to a particular period of time. Some of these efforts, like the study on the social inclusion of persons with disabilities through employment[[94]](#footnote-95), is based on a limited number of in-depth interviews (34 employers and 33 persons with disabilities), which limits the robustness of the findings. Others, like the study on the social status and income of persons with disabilities[[95]](#footnote-96) and the anti-discrimination survey[[96]](#footnote-97), have larger samples but are limited in terms of thematic scope.

The identified data collection efforts generate mainly data on the socio-demographic profile of persons of disabilities, but some of these data can be used for monitoring specific vulnerability risks such as unemployment, poverty, discrimination and violence.

For the full list of data collection efforts and instruments, see Annex 4: Group tables: national-level data collection efforts and instruments not utilised in the Bulgarian policy framework, Table 3: People with disabilities.

**4. Youth (15-29 y.o.)**

While the national policy framework utilises a multitude of indicators related to the educational, economic, marital, and health status of the Bulgarian youth, it lacks engagement with the self-identified needs and personal perspectives of young people. This gap can be addressed through data collection efforts that utilise direct approaches, in addition to the numerous reports by national NGOs offering best practices examples based on analysis of institutional statistics. Due to the easy availability of statistical data on young people from the National Statistical Institute (NSI) (*Национален статистически институт*, НСИ) and various government institutions, the latter type of analytical reports are much more widely spread in comparison with publications that include own data collection.

Six major data collection efforts have been identified, each based upon surveys with different implementation methods: online, paper-based, self-completion and guided questionnaires, semi-structured and in-depth interviews, focus groups, round tables, etc. All of these efforts have yielded quantitative data, albeit partial or not fully disaggregated.

The most recent and most comprehensive study is summarised in the Bulgarian Youth 2018/2019 report[[97]](#footnote-98). It offers a quantitative data set with over twenty different indicators relating to the health condition, material status, financial condition, free time, values, tolerance, perceptions on the relationship between education and employment, life content, and trust in the state and the government of young people aged 14-29[[98]](#footnote-99). The data presented is indicative of the effect of life-style choices and personal opinions on the decision to not participate in tertiary education or take up employment early in life. Employment preferences and views on the work-family balance are also indicative of possible underlying factors for falling into the NEET category. Indicators on the education-employment nexus can also be found in a 2015 study of the preparedness of young people for entering the labour market[[99]](#footnote-100). The issue of causality is also addressed in the 2010 survey of the Business Foundation for Education (BFE) (*Фондация на бизнеса за образованието*, ФБО)[[100]](#footnote-101) inquiring into the employment qualifications of young people in Bulgaria. The survey, carried out among young people below 35 years of age and employers, provides data on the divergence between what skills and qualifications young people consider important for their career development, and what the opinion of the employers is. The survey identifies the reliance on formal education as the sole source of professional qualifications and soft skills as a precursor for the inability to find fitting employment after acquiring secondary or tertiary education. Similarly, the 2015 UNICEF Bulgaria NEET report[[101]](#footnote-102) includes precise indicators on the incidence of different risk factors (family environment, social factors, etc.) for falling into the NEET group. The report also sheds light on the rate of participation of young people in employment or vocational training programmes and projects. The Economic Policy Institute (EPI) (*Институт за икономическа политика*, ИИП) also studied the participation, satisfaction and opinions of the Bulgarian youth on NEA/MES measures targeting NEETs in their 2015 publication on youth unemployment[[102]](#footnote-103). The report emphasises on the lack of awareness and trust as likely perpetuators of economic and educational inactivity among young people. The same stance is evident in a 2015 survey for the National Youth Forum (*Национален младежки форум*)[[103]](#footnote-104).

In summary, the non-governmental data collection efforts with direct approaches to collection and smaller sample sizes are useful in providing data on the underlying reasoning for the existence of the NEET group in Bulgaria, and not simply addressing the repercussions for individuals as part of the NEET group.

For the full list of data collection efforts and instruments, see Annex 4: Group tables: national-level data collection efforts and instruments not utilised in the Bulgarian policy framework, Table 3: Very young persons.

**5. Older persons (≥ 55 y.o.)**

The gap in monitoring the vulnerabilities of the elderly population in Bulgaria can be addressed by referring to already available data with disaggregation by age groups (both for the over-54 and over-64 age groups). An example of such data set is the European Health Interview (2008, 2014)[[104]](#footnote-105), which allows for a deeper understanding and monitoring of the health conditions of this particular target group. Indicators pertaining to the frequency of visiting a dentist, general practitioner or medical specialist, combined with low self-assessment of health and the existence of a chronic medical condition could also be informative of possible accessibility/affordability problems.

Another example of available data collection instruments is the ICSS’s 2012 study of domestic violence among elderly persons[[105]](#footnote-106), which utilises methods of direct data collection (survey and focus groups) to produce several key indicators for monitoring the risk of becoming victims of domestic violence for elderly persons, and for specific high-vulnerability elder sub-groups. The study emphasises the importance of consulting professionals that work with elderly persons on a daily basis to bring out specific risks not usually captured by census statistics and nation-wide surveying of the population. The report, however, does not provide more examples of direct surveying service providers and NGOs or elderly people beneficiaries of social services. Non-governmental organisations working with elders, such as Caritas, report primarily on the types of services they provide to elderly persons and the creation of methodological guides for other service providers, where both rely on pre-existing data to “set the stage”, mostly collected by the National Statistical Institute (NSI) (*Национален статистически институт*, НСИ).

For the full list of data collection efforts and instruments, see Annex 4: Group tables: national-level data collection efforts and instruments not utilised in the Bulgarian policy framework, Table 5: Older persons.

**6. People in precarious housing**

Data collection on homeless persons and persons living in precarious housing conditions is generally incomplete. The research identified one data collection effort that specifically focuses on homeless persons and utilises relevant indicators pertaining to their basic needs, income sources, challenges, reasons for social exclusion, shelter, period of homelessness, etc. The study, carried out in 2015 the framework of the City Nomads project[[106]](#footnote-107), combined in-depth interviews with homeless persons in the capital and a survey among the general public, and shed light on key aspects of the lives of homeless persons, largely unexplored through national data collection channels. Although restricted in terms of access, the selection of publicly available data uncovered increased vulnerability to social exclusion due to loss of job, family problems, health condition and drug addiction, among others. The study, being the only such effort resulting in a data set, is indicative of the high level of “difficulty to reach” of homeless persons, as they are not usually captured by census or household surveys due to their non-settled and mobile status.

In terms of persons living in precarious housing, who are not homeless, the majority of research efforts outside of the national policy framework focus on the living conditions in the Roma quarters with emphasis on problems such as illegality of homes, lack of available infrastructure, absence of basic utility services (electricity, running water) and amenities (bathroom, toilet). Examples include the 2016 study on housing in Roma quarters[[107]](#footnote-108) and the 2001 study on the junction between subprime housing conditions and poor health among the segregated Roma communities[[108]](#footnote-109). Such research efforts are capable of supporting a deeper and more comprehensive understanding of the elements of “precarious housing”, the relationship between the quality of housing and related social and physical risks, etc. The direct methods of data collection (surveys, interviews), coupled with the analysis of pre-existing data, are instrumental in the process of devising concrete indicators for monitoring specific sub-groups, especially when it comes to “difficulty to reach”, as in the cases of homeless persons or persons living in illegal dwellings with limited or missing infrastructure.

For the full list of data collection efforts and instruments, see Annex 4: Group tables: national-level data collection efforts and instruments not utilised in the Bulgarian policy framework, Table 6: People in precarious housing.

**7. Third-country nationals**

The national policy framework avoids to directly survey the society to examine vulnerability risks that third-country nationals are potentially prone to. There is no reference in the relevant policy documents to non-governmental organisations as key actors providing relevant indicators for shaping national policy-making either. Nevertheless, NGOs do play a significant part in collecting data on migration issues.

There are two main types of data collection efforts by non-governmental bodies: the first one focuses on the probing of public opinions on the migration crisis and economic migration, while the second one emphasises on observing the participation and the protection of the rights of third-country nationals (both during the international protection procedure and afterwards) to provide demographic, social, labour, healthcare and education data sets.

The first approach is utilised in a 2017 study on the value perceptions of Bulgarians[[109]](#footnote-110) and a 2016 survey on public perceptions of the migration crisis[[110]](#footnote-111). Both surveys inquired into problems such as discrimination, bias and intolerance, EU policy on migration, and perceptions of threat. The second approach is used in several data collection efforts, including: the 2006 study on the rights of migrants by the Bulgarian Helsinki Committee (BHC) (*Български хелзинкски комитет*, БХК)[[111]](#footnote-112), which provides a multitude of useful indicators for monitoring the social, educational and employment integration and the level of awareness of the rights and obligations of migrants in Bulgaria; the 2016 study of migrants in detention centres[[112]](#footnote-113), also published by the Bulgarian Helsinki Committee (BHC) (*Български хелзинкски комитет*, БХК), which shines a light on the problems during asylum procedures; a recent report by Caritas on refugee women[[113]](#footnote-114), which unveils the uneasy relationship between family dynamics and the willingness to participate in the labour market; and the annual reports of Bulgarian Helsinki Committee (BHC) (*Български хелзинкски комитет*, БХК) on the process of granting international protection in Bulgaria[[114]](#footnote-115), which include numerous indicators for monitoring the quality of judicial practice in the field and the quality of the services provided by the responsible authorities, among others.

The research identified six different data collection efforts by Bulgarian civil society actors with complete or partial quantitative data sets available. Five of the six efforts utilise direct data collection instruments such as surveys, structured interviews or in-depth interviews, and one[[115]](#footnote-116) uses structured observation of the judiciary. Albeit limited to a given period (all but one) and engaging with a relatively narrow sample of society, all of these efforts demonstrate the analytical value of collecting data beyond the basic categories referred to in the national policy framework. Such efforts are instrumental in expanding the thematic scope, the reach, and the effectiveness of strategic measures, and illustrate the utility of the prolonged monitoring of third country nationals’ rights even after they are formally “settled” in the country (i.e. after they have received a long-term or permanent residence and work permit, have been registered with a general practitioner, have had their children enrolled in formal education, etc.). The national policy framework struggles with conceptualising and measuring intolerance, incidence of and reasons for hate speech and hate crime, and protection of fundamental rights of migrants, and this gap can be bridged by the instruments and methods of data collection used by NGOs.

For the full list of data collection efforts and instruments, see Annex 4: Group tables: national-level data collection efforts and instruments not utilised in the Bulgarian policy framework, Table 7: Third-country nationals.

**8. Children of emigrants**

Despite the lack of policy engagement with the issue of increased vulnerability of emigrant household members, data on children whose parents have emigrated abroad to work do exist. The research identified two data collection efforts that provide indicators for monitoring the risk factors associated with the so-called “children left behind” (CLB). The ground-setting effort was carried out by UNICEF Bulgaria in 2014[[116]](#footnote-117) and features an combination of data collection instruments and methods such as desk research, institutional data analysis, public surveys, paper-based guided questionnaires, semi-structured interviews, focus groups, in-depth interviews, and others. Over twenty different indicators were devised with the data disaggregated in a variety of categories. The report identified a number of vulnerability aspect for CLB, bringing them closer to the official definition of “children at risk” as per the Child Protection Act (*Закон за закрила на детето*). The areas covered include financial resources, domestic violence, access to and use of health-care services, emotional support given by the emigrated parent, access to daily-life material goods such as clothes and computers, nutrition, school success rates, drop-out rates, involvement in crime, perceptions of drug and alcohol use, etc. with a constant comparison made between children with no parents working abroad, children with one parent working abroad, children of foreign nationals, and children with both parents working abroad. This data set was later analysed and expanded by BSP (Bulgarian School of Politics) in study, which combined an overview of institutional and NGO data with data sourced through focus groups with professionals and representatives of institutions and NGOs working with children[[117]](#footnote-118). The report provides indicators pertaining to the school performance of CLB, the administrative and legal barriers for CLB and their Bulgaria-resident care-takers, and the emotional, communication, and behavioural difficulties for CLB.

Although non-governmental data collection efforts on emigrant families in Bulgaria are few in number, they do provide important examples of what the thematic scope and the instruments for data collection could be to ensure that this group does not fall under the “difficult to reach” category. Direct approaches to sourcing data, such as surveys, have higher instrumental value in providing reliable and detailed statistics on the particular experiences of CLB and the people taking care of them along a spectrum of possible relevant indicators. At the same time, NGO data collection, similarly to the national policy framework, practically excludes from their scope other emigrant family members (e.g. those who are economically dependent on emigrated relatives) and their vulnerabilities.

For the full list of data collection efforts and instruments, see Annex 4: Group tables: national-level data collection efforts and instruments not utilised in the Bulgarian policy framework, Table 8: Emigrant household members.

**9. Victims of domestic violence**

Bulgarian civil society has been increasingly engaging with the protection of victims of domestic and gender-based violence with women’s and children’s non-governmental organisations producing critical documents on the discrepancy between national law and policy measures and the actual situation. There are attempts to broaden the definitions of vulnerable groups to include LGBTQ+ people[[118]](#footnote-119) and further explore the case of Roma women[[119]](#footnote-120). At the same time, data collection efforts by NGOs are rare and, despite extensive research, only five such efforts were identified that provide quantitative data. All but one were carried out within the last four years, which illustrates the relative novelty of the issue both for the policy-makers and for the civil society. Unlike governmental monitoring approaches, NGOs rely on direct methods of sourcing sociological data: face-to-face interviews, in-depth interviews with victims and service providers, guided surveys, and focus-group discussions with professionals. None of the studies are recurring, and thus, they have temporal limitations. With regard to the size of the samples, some studies are based on large samples of 1000+ respondents (national or local level), while others cover relatively small sections of the society.

Those studies, however, suggest instruments to address the impediments faced by governmental monitoring methods. Indicators utilised in the efforts by Partners Bulgaria Foundation (*Фондация „Партньори България“*) and the Center for the Study of Democracy (*Център за изследване на демокрацията*)[[120]](#footnote-121), Alpha Research (*Алфа Рисърч*)[[121]](#footnote-122), and H&D Gender Perspectives Foundation (*Фондация „Х&Д Джендър перспективи“*)[[122]](#footnote-123) provide data on the gaps in reporting domestic and gender-based violence victimisation, thereby giving input in improving the data collection on the incidence and frequency of domestic and gender-based violence. They are also capable of yielding specific household risk factors that could be tell-tale signs of the existence of unreported domestic violence, which is important for designing impactful prevention mechanisms. In-depth interviews, such as those used by Partners Bulgaria Foundation (*Фондация „Партньори България“*) and the Center for the Study of Democracy (*Център за изследване на демокрацията*), are useful in providing an opportunity for continued monitoring of victims after their reintegration, and the factual background needed for measures counteracting re-victimisation.

Data sourced directly from victims and witnesses shed a light on issues of repeated violence and multiplicity of experienced violence in the household[[123]](#footnote-124). Furthermore, small samples are capable of generating data without compromising the anonymity of the participants, and require no exchange of sensitive information between the research organisations and the police or the courts. Finally, the use of an extended list of indicators, such as those used by Partners Bulgaria Foundation (*Фондация „Партньори България“*) and the Center for the Study of Democracy (*Център за изследване на демокрацията*)[[124]](#footnote-125) and by Alpha Research (*Алфа Рисърч*)[[125]](#footnote-126), combined with the coverage of specific sub-groups like Roma women[[126]](#footnote-127), children[[127]](#footnote-128), people living in smaller towns and villages in a specific region[[128]](#footnote-129), lesbian, bisexual and trans women[[129]](#footnote-130), etc. would enable both the expansion of the reach and depth of data collection and the monitoring of certain less explored sub-groups of victims.

For the full list of data collection efforts and instruments, see Annex 4: Group tables: national-level data collection efforts and instruments not utilised in the Bulgarian policy framework, Table 9: Victims of domestic violence.

**10. LGBTQ+ persons**

In the absence of governmental data collection efforts on LGBTQ+ rights, several NGOs have produced analytical reports on the relationship between LGBTQ+ persons and public institutions, society, and the political sphere. There are a number of instruments employed in data collection efforts by NGOs, with an emphasis on direct sourcing from members of the LGBTQ+ community via interviews, focus groups, surveys, etc. Data from interviews is mostly narrative, while such from online questionnaires and surveys is quantitative. Considering the limited attention afforded to the LGBTQ+ community from public institutions, both types of data, and the indicators used, are instrumental for monitoring this particular group. The research identified six different data collection efforts by NGOs. Those efforts provide information on three areas key to policy-making in relation to the LGBTQ+ community.

The first important aspect pertains to the target groups. The 2018 study by GLAS Foundation (*Фондация GLAS*)[[130]](#footnote-131) brings forward the analytical value of gathering data on public opinions for the delineation of possible heightened social risks for people of non-heterosexual orientation and non-cis gender identity. The studies of victim recollections of hate crime by Youth Organisation “Deystvie” and the GLAS Foundation, on the other hand, provide valuable indicators on the incidence, reasons and setting of LGBTQ+-phobic acts – currently a grey area in police statistics and court proceedings.

The second aspect is the choice of data collection instruments. The NGO experience with collecting statistics and information on LGBTQ+ persons points to the fact that both passive and direct approaches have their value. Recurring and thorough monitoring of the media and the work of the courts and the police can be of used for monitoring risk factors such as hate speech/hate crime[[131]](#footnote-132), negative stereotyping, harassment and abuse[[132]](#footnote-133), domestic violence[[133]](#footnote-134), etc. Direct approaches such as surveys, interviews and focus groups can be informative of the specific institutional and legal barriers for LGBTQ+ people and families[[134]](#footnote-135) as well as of of the impact on their lives of homo- and trans-phobic narratives. In the area of education and youth, the Bilitis report on the expression of sexual orientation and gender identity in schools[[135]](#footnote-136) demonstrates the advantages of face-to-face interviews and the disadvantages of online surveys.

Finally, NGO data collection efforts could inform government policies in terms of vulnerabilities that ought to be addressed. The studies identify the following problems: legal and administrative barriers to exercising fundamental rights, institutionalised discrimination, lack of social support for same-sex families, greater risk of homo- and trans-phobic acts of violence or derogatory behaviour, no access to means of reporting domestic violence due to negative stereotyping on the part of the police, no cooperation by public servants, absence of safeguards against harassment in the educational system, etc. Data on public perceptions, albeit limited, shows that LGBTQ+ persons in Bulgaria face a higher risk of becoming victims of violent crimes and derogative language and acts in comparison with the average cis-gendered heterosexual person.

For the full list of data collection efforts and instruments, see Annex 4: Group tables: national-level data collection efforts and instruments not utilised in the Bulgarian policy framework, Table 10: LGBTQ+.

**11. Energy-poor persons**

There is very little research and data collection in the area of energy poverty. A study published in 2014 concluded that, although ‘there is no doubt energy poverty is becoming a major problem across the EU’, in Bulgaria ‘there is no systematic research or rigorous scientific basis on this issue’[[136]](#footnote-137).

The few national studies in the area of energy poverty refer to the EU indicators for measuring and monitoring this phenomenon, more specifically the data on the inability to keep home adequately warm and on arrears on utility bills, both provided by Eurostat.

The only relevant data collection instrument, which provides a different set of data, is a study on energy poverty by Open Society Institute – Sofia (OSIS) (*Институт Отворено общество – София*, ИОО)[[137]](#footnote-138), published in 2016. The study suggests an innovative methodology for monitoring energy poverty, based on a combination of survey data on households and consumption simulation. The household survey used for the study includes data disaggregated by ethnicity (Bulgarian, Turkish, Roma or other), segregation (segregated or not segregated communities), economic situation (above or below the poverty threshold, unemployed household members), household/family type (number of household members, number or children), etc. This enables the generation of data on energy poverty disaggregated by these criteria as well as data on the intersectionality between different groups (e.g. energy poverty in segregated communities depending on the number of children).

For the full list of data collection efforts and instruments, see Annex 4: Group tables: national-level data collection efforts and instruments not utilised in the Bulgarian policy framework, Table 11: Energy-poor persons.

**12. Undeclared workers**

There are a number of studies on hidden economy in Bulgaria[[138]](#footnote-139), but when it comes to undeclared work most of them either estimate only the share of undeclared workers or evaluate the negative impact of undeclared work on public revenues (taxes and social security contributions). Nevertheless, there are some data collection instruments that generate data on the profile of undeclared workers, which can be used for monitoring specific vulnerabilities.

As undeclared work is illegal, most data collection instruments use alternative criteria to define their target group and subsequently explore the share of undeclared workers within this group.

One such criterion is the absence of a valid health insurance (all legally employed persons have a valid health insurance). A study on this issue, conducted in 2007[[139]](#footnote-140), suggests a methodology for measuring poverty among uninsured persons by combing the results of two different surveys. This approach also enables a comparison between the results obtained for different subgroups defined by ethnicity, age, education, etc.

Another criterion, which also covers undeclared workers, is the so-called ‘demotivation’. A recent study exploring the situation of ‘demotivated persons’ (permanently unemployed persons who are not actively seeking a job)[[140]](#footnote-141) provides data on the share of permanently unemployed persons, who do not seek a job, because they work (and get payment) without a contract.

The situation of undeclared workers is also covered by studies focused on other vulnerability risks such as discrimination[[141]](#footnote-142) and ethnicity[[142]](#footnote-143).

For the full list of data collection efforts and instruments, see Annex 4: Group tables: national-level data collection efforts and instruments not utilised in the Bulgarian policy framework, Table 12: Undeclared workers.

1. International data collection instruments/efforts generating data on vulnerable populations that could be useful in the Bulgarian context

This section presents a review of the available data collection instruments/efforts for generating data on vulnerable populations, which are applied in other countries, as well as internationally.

**1. Roma**

International data collection efforts on monitoring the economic, social and political vulnerabilities of the Roma in cross-country and cross-ethnic aspects are prolific with collecting entities such as the United Nations Development Programme, the European Union Fundamental Rights Agency (FRA), UNICEF, different branches of the Open Society Foundation across Europe, the European Roma Rights Centre, Human Rights First, GRETA, various European Commission Directorates (e.g. DG-NEAR), among others. International data collection efforts have both the capacity and the resources to engage in in-depth and wide-spectrum research and analysis of the conjunctions between fundamental rights and impediments to their exercising experienced by Roma communities and sub-groups within those communities.

Large-scale international data collection efforts in the area of minority rights rely on direct instruments of data collection – face-to-face interviews and surveys, rather than opting for the collection of nationally-provided data. Examples of direct surveying (face-to-face interviews) of the Roma population is the 2009 EU-MIDIS (Minorities and Discrimination Survey), the 2015/2016 EU-MIDIS II, and the 2017 Regional Roma Survey. The execution of such efforts is due to the need for up-to-date information on the position of Roma people that is directly sourced from the target group of socio-economic strategies for the purposes of reliable monitoring[[143]](#footnote-144). A similar approach is taken up by the 2009 Health and the Roma Community Report[[144]](#footnote-145), the 2011 Regional Roma Survey[[145]](#footnote-146), and the 2018/2019 Roma and Travellers Survey[[146]](#footnote-147). All those efforts are followed by the publication of focus reports and infographics, which place the data into perspective and supply the necessary interrelatedness of the different indicators and data categories – e.g. the six EU-MIDIS I focus reports presenting the collected data[[147]](#footnote-148). The availability of detailed data disaggregation enables the further concretisation of the results, and the inclusion of intersectional approaches – e.g. the gender approach taken up by FRA in its 2019 report on the results of EU-MIDIS II[[148]](#footnote-149). The comparison between Roma women, Roma men, and non-Roma women in the report is vital for grasping the concept of added vulnerability due to gender. The 2014 Roma Health Report[[149]](#footnote-150), alternatively, uses a combination of desk research (existing national and international data) and field work (semi-structured interviews and input from Roma NGOs). Passive data collection instruments (desk research, media monitoring, analysis of pre-existing data) are utilised in the Human Rights First’s Violence Against Roma: 2008 Hate Crime Survey[[150]](#footnote-151), which provides data on 11 countries in Europe. Similarly, GRETA processes data from national governments along its own indicators for monitoring human trafficking trends[[151]](#footnote-152). Mixed-approach case-studies of the socio-economic position of Roma in individual countries have been undertaken in many Balkan states: the 2017 ERRC report on Roma statelessness, marginalisation and discrimination in Ukraine and the Western Balkans[[152]](#footnote-153), the 2016 UNICEF Report on the conjunction between negative cultural practices and educational non-continuation of Roma girls in Bulgaria[[153]](#footnote-154), the 2015 UNICEF paper on Roma women’s and children’s rights in Bosnia, Northern Macedonia and Serbia[[154]](#footnote-155), and the 2017 UNICEF ethnographic research on Roma child marriage in Serbia[[155]](#footnote-156), among others.

Foreign data collection efforts are also quite prolific and are spread across Europe following the migration and settlement pattern of the Roma population. A viable example is the case-centred analysis of discrimination with focus on Roma women by the FSG (Spain)[[156]](#footnote-157) – a passive data collection approach using media monitoring and case-law analysis. Direct face-to-face interviewing and surveying was applied in the 2007 Social Diagnosis of the Roma Community in Spain report by the Spanish Ministry of Healthcare, Social Services and Equality (*Ministerio de Sanidad, Servicios Sociales e Igualdad*)[[157]](#footnote-158), which placed an important emphasis on the social inclusion of Roma, as well as on the maintenance of their culture and the free exercise of their right to freedom of expression. The use of focus groups is evident in the 2014 Roma human rights report by the Ukrainian “Chiricli” Women’s Fund[[158]](#footnote-159). The report underscores the effects of internal displacement on Roma persons from the Crimea region, while giving insight on indicative areas such as political participation and personal safety. The instrumentality of investigating foreign data collection efforts is primarily in the recognition of a need for case-by-case examination of Roma communities, the inclusion of socio-political aspects of vulnerability, and the increased inclusion of intersectional analysis in estimating the relative vulnerability of the Roma population in its gendered and age-wise disaggregation.

For the full list of international and foreign data collection efforts and instruments, see Annex 5: Group tables: international/foreign data collection efforts/instruments, Table 1: Roma.

**2. Children at risk**

At international level, there is variety of data collection efforts aimed at identifying and monitoring specific vulnerabilities of children. The leading international organisations in this field are UNICEF and the World Health Organisation (WHO), but data is also collected by other actors such as the Council of Europe, the World Bank, the EU and some non-governmental organisations.

Thanks to the significant resources at their disposal and their established networks at global level, international organisations are capable of generating comparable data with a very broad geographical coverage. At the same time, such organisations are rarely involved in primary data collection through their own surveys. Instead, they base their studies on data collected from their own national focal points or similar structures[[159]](#footnote-160) or data provided by national governments[[160]](#footnote-161). The comparability of such data depends on the comparability of the data collection methodologies used at national level and particularly on the definitions of the categories used for collecting the data. Organisation like UNICEF, which are actively involved in humanitarian aid, are also generating data directly linked to the provided assistance (e.g. amount of the committed funding, categories and numbers of reached beneficiaries, etc.)[[161]](#footnote-162). There are a few examples, however, of international organisations implementing their own multinational surveys and thus generating comparable primary data[[162]](#footnote-163).

Instruments aimed to collect data on behavioural patterns or social norms that cause a certain phenomenon (e.g. school dropout of children) rely on more complex methodologies combining desk research (documentary analysis) and some form of fieldwork (focus groups, interviews, observation, etc.)[[163]](#footnote-164). There are also examples of studies combining qualitative analysis (desk reviews, consultations with stakeholders, etc.) and quantitative analysis of pre-existing data (survey data, census data, public finance data, etc.)[[164]](#footnote-165).

In more sensitive areas like trafficking in human beings, data collection is usually based on the number of identified/registered cases reported by the national governments or law enforcement authorities[[165]](#footnote-166).

At EU level, the most comprehensive study on children at risk is the feasibility study exploring the implementation conditions and potential added value of a child guarantee for vulnerable children[[166]](#footnote-167). The study is based on available data, but it also discusses the data quality, reliability, coverage and limitations.

In terms of accessibility, the full data sets used to produce the published reports are usually not accessible. Instead, comparative figures and tables are sued to illustrate the main findings. There are, however, some exception, like the 2012 health behaviour in school-aged children (HBSC) study published by the World Health Organisation[[167]](#footnote-168), which includes, as an annex, the survey methodology (including survey response, achieved sample size and mean ages by country) and supplementary data tables related to the respective sections of the report.

International data collection efforts on child-related issues cover a variety of topics ranging from early child development to health, education and well-being. In term of vulnerability risks, the studies focus primarily on health and access to healthcare (including nutrition and care) as well as education and early school dropout. Other vulnerability risks such as poverty and violence are also covered, but are generally less researched compared to health and education.

For the full list of international and foreign data collection efforts and instruments, see Annex 5: Group tables: international/foreign data collection efforts/instruments, Table 2: Children at risk.

**3. People with disabilities**

International data collection efforts targeting persons with disabilities are mostly aimed at assessing the scope and profile of this target group and the level of accessibility (or the existing barriers) of various services such as healthcare, rehabilitation, education, transport, etc. The leading international organisation in this field is the World Health Organisation (WHO), but other actors such as the United Nations (UN), The World bank (WB) and the European Union (the European Commission and the EU Agency for Fundamental Rights) have also collected or generated relevant data.

The most comprehensive data collection efforts at international level rely on data collected from other sources. The two most important studies in this respect are the World Report on Disability[[168]](#footnote-169) published in 2011 by the World Health Organisation (WHO) and The World Bank, and UN Flagship Report on Disability and Development[[169]](#footnote-170), published in 2018. The World Report on Disability reviews the data on disability prevalence and the situation of people with disabilities worldwide in areas such as health services, rehabilitation, support and assistance services, inclusive environment, education, and employment. It also gives a comprehensive overview of other data collection efforts implemented at national level or internationally. In addition to the report, the World Health Organisation (WHO) maintains a comprehensive database of national-level statistics compiled by WHO and its partners in close consultation with Member States and including descriptive and analytical summaries of health indicators for major health topics.[[170]](#footnote-171) The UN Flagship Report on Disability and Development examines disability and the Sustainable Development Goals (SDGs) at the global level and reviews, among others, the availability of data at national level.[[171]](#footnote-172)

Some international data collection efforts rely on the gathering of qualitative data from national stakeholders. The United Nations have utilised this approach for examining specific topics such as the situation of older persons with disabilities[[172]](#footnote-173) and the right of persons with disability to liberty and safety[[173]](#footnote-174). The collected data was obtained through questionnaires sent to national-level stakeholders: governments, national human rights institutions, civil society organisations. A similar approach (data obtained from national governments) was utilised by the Academic Network of European Disability Experts (ANED) for its synthesis report on the right of persons with disabilities to live independently and be included in the community[[174]](#footnote-175).

A similar approach was utilised by the International Labour Organisation (ILO) for its compendium of national methodologies for collecting data on the labour force characteristics of people with disabilities. The information was obtained by sending questionnaires to and collecting data from the websites of national statistical authorities and other government agencies[[175]](#footnote-176). The compendium offers country-by-country overview of data collection methodologies used in national census and surveys.

There are also survey-based data collection efforts, which generate primary data on specific policy-related issues. One such instrument is the school-to-work transition survey[[176]](#footnote-177) implemented by the International Labour Organisation (ILO) to obtain data on the transition from students to workers of disabled people in order to effectively include them in employment policies.

Qualitative data at international level have also been collected through fieldwork research (interviews and focus groups). The approach was utilised by the EU Fundamental Rights Agency (FRA) in its research on the right to independent living of persons with intellectual disabilities and persons with mental health problems[[177]](#footnote-178).

Finally, an innovative approach for developing statistical outcome indicators concerning the rights of persons with disabilities was developed by the EU Agency for Fundamental Rights (FRA)[[178]](#footnote-179). The suggested set of 12 indicators are based on data from major international surveys such as the EU-SILC (European Statistics of Income and Living Condition), the European Quality of Life Survey (EQLS) and the European Social Survey (ESS), among others.

Overall, at international level, there is plenty of statistical and survey data on persons with disabilities. There are also comprehensive overviews of data collection methodologies applied at national level as well as indicators for monitoring the situation of persons with disabilities and the way they exercise their rights.

For the full list of international and foreign data collection efforts and instruments, see Annex 5: Group tables: international/foreign data collection efforts/instruments, Table 3: People with disabilities.

**4. Youth (15-29 y.o.)**

Data related to young persons, NEETs in particular, is available from Eurostat[[179]](#footnote-180). They are collected along a plethora of indicators in areas such as number and percentage of the population of NEETs, gender and age, educational levels, early school leave, poverty risks and social inclusion, etc. Eurostat data sets are available on an annual basis with instrumental disaggregation categories. Similar data collection along specific indicators is carried out by the OECD[[180]](#footnote-181) on an annual, quarterly or monthly basis with a coverage of all OECD member states. Those primary data sets are utilised in analytical reports by various international and national organisations and institutions to bring forward the interrelations between different factors. The 2016 Eurofound report on the diversity of the NEET vulnerable group[[181]](#footnote-182), for example, utilises existing primary data sets and makes own adjustments to generate data for each of the identified sub-groups. This type of analysis also yields data on the similarities between different states and regional geographic clusters thereby bringing forward the need for different policy focal points in each cluster and each state. The use of nationally-collected data is evidenced in the report on the labour market in the Western Balkans[[182]](#footnote-183), published by the World Bank and the Vienna Institute for International Economic Studies. The report offers a comprehensive collection of indicators and corresponding data for six Western Balkan states and four EU peer countries (including Bulgaria), engaging with indicators such as unemployment rates (long-term and other types), employment, earnings, etc. disaggregated by age and gender, with distinct indicators for NEETs in particular.

Foreign national data collection efforts related to young persons with a focus on the NEET sub-group are found in most countries across Europe. In Romania, NEETs are addressed in a 2014 report[[183]](#footnote-184), which relied on face-to-face interviews among over 1,300 respondents aged 15 to 29 years of age (random stratified sample) and engaged with a variety of indicators related to family life, living conditions, social inclusion and participation, access and quality of education, participation in the labour market, civil and political involvement, etc. The data sets are further disaggregated along categories such as gender, educational level, socio-economic status and age. A different approach is taken by the UK House of Commons 2018 Briefing Paper on NEETs[[184]](#footnote-185). The report relies on primary data gathered by the Office for National Statistics (ONS)[[185]](#footnote-186), which collects data on NEETs on a quarterly basis with disaggregation by age. The monitoring of NEETs in the UK also uses data collected by the Department for Education, Eurostat, OECD and labour market observations in individual UK countries. Thus, final estimates of NEET vulnerabilities and risk factors for the purposes of policy-making and policy-adjustment are based upon several data sources, both national and international. The Maltese approach to monitoring youths not in education, employment or training is based on a nation-wide NEET census[[186]](#footnote-187). The sample was defined by data from the Employment and Training Corporation database, and the identified youth were personally invited to participate in a face-to-face home-based interviews. Such an approach is potentially possible in states with relatively small population or small proportion of NEETs. The census gathered data along indicators related to living situations, social contacts, life satisfaction, level of education, future academic plans, work experience and interests, feedback on the EU Youth Guarantee and the national measures incorporating it, challenges to finding employment or continuing education, needs and beneficial national measures, etc. Gender-based and district analysis was also included. The Maltese experience was also instrumental in providing data about the existing sub-groups within the NEET group.

The international data collection efforts are methodologically close to what has been chosen as a means of monitoring of youth in Bulgaria. Large-scale surveying addressing the vulnerabilities of NEETs has not been identified among the preferred data collection instruments. Foreign data collection seems to rely more on interviews and on engaging with specific sections of society that are pre-determined or randomly selected. The Romanian and Maltese experiences exemplify the potential utility of targeting smaller sample sizes in a more concrete manner in respect of the indicators used.

For the full list of international and foreign data collection efforts and instruments, see Annex 5: Group tables: international/foreign data collection efforts/instruments, Table 4: Very young persons.

**5. Older persons (≥ 55 y.o.)**

Elderly populations often become the target group of international monitoring efforts, especially due to the EU-wide demographic crisis and the ageing population of the EU as a whole. The leading primary data collection source is Eurostat, which produces comprehensive annual data sets with a variety of indicators pertaining to the lives of elders in the EU. Examples of monitored areas include: share of the elderly population vis-à-vis other age groups, life expectancy at 65, healthy life years at 65, share of elders living alone, share of economically active elders, share of elders who travel, share of elders who use the internet, income rates, poverty rates, etc.[[187]](#footnote-188) Eurobarometer[[188]](#footnote-189) also collects data about the lives of elderly persons across the EU in areas such as perception of elders in society, age discrimination, life expectancy, barriers to older persons in the workplace, perceptions on retirement, support for elders by the state, etc. Country-specific data[[189]](#footnote-190) is also publicly available.

Another example of wide-scoped international data collection is SHARE[[190]](#footnote-191) with its nine waves carried out from 2004 to 2019. Although the publications containing the qualitative results of the surveys throughout the years are publicly and freely available, the quantitative data sets[[191]](#footnote-192) are restricted to registered users. Nevertheless, SHARE offers comprehensive data sets along multiple groups of indicators such as life satisfaction, health – objective and subjective assessments, financial condition, family relations, educational status, poverty, and a plethora of different risk factors. The final wave of the SHARE engages with eight new countries in the EU (including Bulgaria, which was not included in the previous six waves) and now yields data for all 28 EU Member States.

Thematic international studies often include a complex of data collection instruments. For example, the 2011 World Health Organisation study of elder maltreatment[[192]](#footnote-193) relies on multiple sources (national and international) of pre-collected data, but also on self-executed surveying of elderly persons and care-givers. The research effort covers some 53 countries worldwide and explores “niche” risk factors for elders with regard to violence, abuse, harassment and poor health. Some smaller scale regional international data collection efforts, on the other hand, rely on direct approaches. For example, the 2018 report on successful ageing in Europe[[193]](#footnote-194) utilises data sets from an online survey among seniors in France, Belgium, Italy and Germany along indicators such as staying in touch with society, interest in new information, participating in society, having good relationships with friends and family, nutrition, hobbies and cultural participation, among others. Other regional studies prefer the tried-and-tested methodology of analysing pre-existing data. For example, the 2017 paper on the challenges to the welfare state in the Western Balkans[[194]](#footnote-195) predominantly utilised Eurostat data to pinpoint institutional shortfalls that heighten the vulnerability of elders and other risk groups in the region.

Foreign monitoring efforts are rely on the non-sensitive nature of age-related data. Recurring data collection on the elderly is usually carried out by the statistical offices. Such examples are the USA National Census Bureau[[195]](#footnote-196) and the UK Office for National Statistics[[196]](#footnote-197). Both bodies publish extensive census data (the latest US census was in 2010, and the latest census in the UK was in 2011) disaggregated in relevant categories in line with indicators on the composition of the elderly population, growth rates, financial, marital, educational and employment status, etc. Data collected by statistical bodies are utilised in governmental analytical reports[[197]](#footnote-198) that deal with the risk factors that elders encounter in their daily lives, and help shape policy measures on prevention and alleviation. Such analytical approaches dominate the academic literature as well, which points to a weak impetus to undertake own data collection efforts when data is readily available from national statistical offices or international sources.

Both international and foreign data collection efforts utilise indicators to monitor risk factors, vulnerabilities and difficulties that older workers and elderly persons are prone to. Monitoring aspects such as the instances of discrimination, the difficulty of changing jobs after 55 years of age, the issue of care-giving within the family, and the level of participation in social and cultural life, including via the internet, shows a continuous expanding of the thematic scope of sociological studies and the need for policy-makers to engage with “private” areas such as corporate culture and family dependency.

For the full list of international and foreign data collection efforts and instruments, see Annex 5: Group tables: international/foreign data collection efforts/instruments, Table 5: Older persons.

**6. People in precarious housing**

In the international experience of monitoring housing is divided in two groups. The first one engages with national and international data sets to carry out comparative analysis between different states or groups of states along indicators relating to the number of available housing, its ownership and distribution, and the challenges encountered by persons who live in subprime conditions or are incapable of securing housing. One example of such analytical effort is Housing Europe’s 2015 review of the state of housing in the EU[[198]](#footnote-199), which utilises Eurostat, OECD and national statistics to develop country profiles in terms of the increase rate of house prices, inequality and housing exclusion, political response to homelessness, recovery of construction, effects of labour mobility and migration, etc. The CECODHAS’s 2012 European housing review[[199]](#footnote-200) draws on recent national statistical reports and international databases along indicators such as financial burdens of housing on persons at risk of poverty, rate of overcrowding for persons at risk of poverty, percentage of dwellings with and without basic amenities and services, rate of severe housing deprivation, availability of social housing, increase rate of construction costs, availability of housing allowances, etc. The FEANTSA 2018 overview of social exclusion in Europe[[200]](#footnote-201) combines nationally sourced data and Eurostat statistics to provide country-specific profiles according to indicators such as housing cost overburden rate, cost of housing, overcrowding, severe housing deprivation, inability to maintain adequate home temperature, etc.

The second group relies on direct approaches to data collection in the form of surveying key sections of society, groups and populations. The 2018 report on homelessness services in Europe[[201]](#footnote-202) is an example of such a data collection effort, as it utilises a standardised questionnaire among experts in 16 EU states and yields data sets to monitor the incidence of legal frameworks for homelessness services, their proliferation and quality across the selected states, and the different types of services offered in urban and rural areas. The Eurofound Quality of Life survey[[202]](#footnote-203) (four in total, the last published in 2017) is another example of large-scale surveying effort (questionnaire, quota sampling by state) that provides various data including: percentage of social housing from all housing by state, satisfaction with local area, poor neighbourhood quality, neighbourhood problems, difficulties in accessing neighbourhood services, connectivity and infrastructure, feeling safe, perceptions of housing insecurity, etc. The EQLS data is further utilised in analytical reports by the Eurofound, e.g. in the costs and consequences of inadequate housing report[[203]](#footnote-204). Primary collection efforts by Eurostat[[204]](#footnote-205) must also be considered in providing data for the monitoring of risk factors linked to living in precarious housing or homelessness.

Thematic international collection efforts utilising quantitative instruments can be illustrated by the 2017 (draft) report on youth living conditions and housing[[205]](#footnote-206) which examines youths’ experiences in six countries in Europe and offers brief country-specific data. Eurostat[[206]](#footnote-207) also collects annual country data on youth living conditions in areas such as overcrowding, severe housing deprivation and housing cost overburden.

Foreign data collection efforts on living conditions and access to housing in the Balkan region are often characterised by their focus on the Roma populations, as is the case of the 2007 Roma Inclusion Barometer by Open Society Institute – Romania[[207]](#footnote-208), which provides useful insight into the access to services and the proliferation of different types of housing issues among the Roma population in Romania: ownership of kitchen and bathroom appliances, ownership of hygienic items, incidence of incurring debt as a result of paying utility bills, lack of electricity, running water, any type of heating, access to indoor toilets and a separate kitchen, home ownership and legality of the dwelling, access to infrastructure, etc. In the USA, alternatively, the monitoring of homeless persons, for instance, is done by the US Interagency Council on Homelessness[[208]](#footnote-209), which provides state-specific data sets on the number and percentage of persons experiencing homelessness, with possible segregation by family/household, veterans, chronically ill, young adults, children, homeless unaccompanied students, etc. In Australia, data collection on the homeless and those living in precarious housing is done by the Federal Government jointly with civil society volunteers (Homelessness Australia)[[209]](#footnote-210). The results are published regularly as fact-sheets relating to the risk factors for groups such as children, young people, women, older people and disabled people in becoming homeless, utilizing both self-collected data and census data sets and indicators.

Overall, the monitoring of persons living in precarious housing conditions or falling into homelessness is a regular practice. However, most data collection efforts focus on the tangible factors that underpin inadequate or absent housing and devise methodologies to measure them, rather than making large-scale efforts to explore the inherent risks that arise from tangibly poor housing. At the same time, international and foreign data collection efforts explore the sub-group differences and recognise the increased vulnerability of certain sub-groups such as children, the elderly and, especially on the Balkans, the Roma population. Another important aspect is the expanding thematic scope including not only the material assets of a household, but also issues such as affordability of housing, cost overburden, overcrowding, and housing-related indebtedness.

For the full list of international and foreign data collection efforts and instruments, see Annex 5: Group tables: international/foreign data collection efforts/instruments, Table 6: Persons in precarious housing.

**7. Third-country nationals**

Third country nationals, especially in the context of the 2015 migration crisis, have been in the focus of many international organisations. Thus, there are comprehensive data sets on the number of refugees, internally displaced persons (IDPs), returnees, asylum-seekers, stateless persons, etc., which facilitate the monitoring of migration trends. Examples of such data collection efforts include the annual UNHCR reports on forced displacement[[210]](#footnote-211), the annual statistics on refugee populations by the World Bank[[211]](#footnote-212), and Eurostat data sets for first-time asylum applicants and decisions[[212]](#footnote-213). In the EU, the 2018 EASO annual report[[213]](#footnote-214) reviews the trends in the number of refugees, the number of international protection applications and their outcomes, the incidence of reform and judicial developments, and the treatment of vulnerable sub-groups. Funding and expenditure indicators related to migration programmes are available in the UNHCR Annual Global Reports[[214]](#footnote-215). Data collection in these cases is primarily based on country reports, collection of own data at the local level, and NGO and regional organisations’ statistics. Global data collection can also be based on structured observations of institutions and media, and sourcing data from regional and local actors. One such example, with no exclusive quantitative data sets, is the annual Human Rights Watch report on human rights protection around the globe[[215]](#footnote-216).

In relation to migrant integration, the OECD/EU regular reports on integration[[216]](#footnote-217) provide wide-scoped data sets on areas such as labour market integration (unemployment, risks of economic exclusion, working conditions, job skills, contracts, access to vocational training, etc.), living conditions (income, poverty, housing conditions, health status, etc.), civic and social integration (nationality acquisition, voting, gender equality, belonging, discrimination, etc.), youth and gender integration (education, care, literacy, NEETs, unemployment, forced inactivity, etc.), among others. Similar data sets are also available in Eurostat Migrant Integration Statistics[[217]](#footnote-218). Individual integration measures in European states by category and by thematic areas (health, education, housing, etc.) are analysed in the 2019 Eurofound report on the role of public services in refugee/asylum-seeker integration[[218]](#footnote-219). The report, however, does not supply quantitative data on the efficacy of public services’ involvement in integration. Housing problems of refugees are addressed in the 2019 AIDA reception of refugees and asylum-seekers report[[219]](#footnote-220), which combines quantitative (e.g. reception capacity of individual states) and qualitative (e.g. obstacles to accessing accommodation post recognition) data. Illegal employment of migrants is the focus of EMN’s 2017 report[[220]](#footnote-221) on illegal employment, which is based upon analysis of data sourced from governments to design monitoring indicators for increased risks of being caught into undeclared work agreements for third-country nationals.

Regional analysis and data collection efforts address the potential differences between recipient states, such as those demonstrated in the 2017 DG IPOL comparative report on integration of refugees in Greece, Hungary and Italy[[221]](#footnote-222). The report utilised government-sourced data to devise own indicators pertaining to the level of integration in each state, in categories such as employment, education, healthcare, access to social services, active participation and social inclusion, etc. Local data collection efforts, on the other hand, rely both on official data from governmental institutions, and own data collected either via strategic observation or by direct methods such as surveys and interviews with professionals. The 2016 report by the Greek Ombudsman on the return of third-country nationals[[222]](#footnote-223) is an example of such a data collection effort utilising a plethora of instruments with the objective of comparing national practice with international standards on return procedures. A similar example is the 2018 German Federal Office for Migration and Refugees report on labour market integration of refugees[[223]](#footnote-224), in which the general demographic indicators are sourced from governmental bodies, while statistics and narrative data on labour integration by private companies are sourced via interviews and focus groups among a random selection of companies based in Germany.

For the full list of international and foreign data collection efforts and instruments, see Annex 5: Group tables: international/foreign data collection efforts/instruments, Table 7: Third-country nationals.

**8. Children of emigrants**

Emigrant household members, primarily viewed in terms of children left behind (and sometimes other family members like spouses), have been a long-standing priority for UNICEF. The organisation has produced several reports on children left behind (CLB), mostly based on pre-existing local data sets and academic publications. Examples from UNICEF include the 2008 working paper on the social risks for children and women left behind[[224]](#footnote-225), and the 2010 report on CLB[[225]](#footnote-226). The analysis focuses on diverse areas of personal and social life such as income stability, poverty, education, health and healthcare, gender roles and family dynamics, as well as the emotional and psychological impact of being an emigrant household member. Overall, UNICEF reports focus primarily on countries in the Global South (Uganda, Bangladesh, Mali, Sri Lanka, etc.), with some exceptions (Romania, Moldova, etc.).

A similar approach to the examination of vulnerabilities of CLB is utilised in the 2018 report on the health impact of parental migration by the Wellcome Trust[[226]](#footnote-227). The methodology used is based upon a comprehensive overview of publications and pre-existing field studies with an emphasis on China. While it does not entail its own surveying, the effort yields a comprehensive data set on the relationship between parental migration and the health (including psychological) of CLB. The report expands the thematic scope of pre-existing research to include risks such as substance use, abuse, injury, and infectious diseases. A different approach (in-depth individual interviews and focus-group discussions) is taken by the 2011 IOM paper on the needs of children and elderly persons left behind[[227]](#footnote-228). This report confirms that the international community views CLB as de facto “children at risk”, as the sample of the study defines CLB as “children deprived of parental care”. The report also notes that the elderly “without the care of their family and relatives” are rarely viewed as an equally vulnerable group, highlighting a plethora of vulnerability factors apart from poverty and material deprivations such as emotional wellbeing, loneliness, safety, psychological issues, etc.

At national level, studies have been found in Romania, Lithuania and Moldova. In Romania, a 2007 report by the Open Society Institute (formerly the Soros Foundation) explores the effect of migration on CLB. The research utilised an opinion poll (non-guided self-completion questionnaires) among over 2,000 students and a series of interviews with local decision-makers, focusing on thematic areas such as school performance, GPA, sources of emotional support, psychological wellbeing, as well as the differences between key determining factors for school performance of children in intact families, with one migrant parent and with both parents absent. In Lithuania, a 2007 research effort by the Ombudsman for Children’s Rights[[228]](#footnote-229) focused on the living conditions and education of CLB. The report relies on a data set developed through questionnaires sent to over 650 schools, and sheds light on the living situation of CLB, the observed changes in behaviour after parental migration, the incidence of negative behavioural changes and their types, the main challenges for CLB in the educational sphere, etc. The situation in Moldova is examined in the 2006 UNICEF-Moldova report on CLB[[229]](#footnote-230), which utilises a plethora of data collection instruments and methods (workshops, questionnaires, focus group discussions, in-depth interviews) to provide non-quantitative data on the psycho-emotional development of CLB, their relationships with parents, relatives and friends, school performance, access to and use of resources, participation in the community, views of the future, etc. More resources on these and other countries are available on the website of the European NGO network “Children Left Behind”.

Overall, key aspects of vulnerability of emigrant household members can be grasped both though the analysis of pre-existing data sets and through primary research of the target group. The Lithuanian experience to use schools as contact points is a good example for facilitating the access to the target group. The involvement of experts working with children and care-givers in focus groups and thematic discussions is another tool for obtaining reliable data. In terms of the scope of the target group, there is a need to expand the data collection efforts to include not only CLB, but also the older persons and spouses of emigrants.

For the full list of international and foreign data collection efforts and instruments, see Annex 5: Group tables: international/foreign data collection efforts/instruments, Table 8: Emigrant household members.

**9. Victims of domestic violence**

One of the major international efforts for generating data on domestic and gender-based violence are public opinion surveys done by Eurobarometer. The reports on domestic violence against women[[230]](#footnote-231) and gender-based violence[[231]](#footnote-232) are key in examining the public awareness with regard to issues such as the prevalence of domestic and gender-based violence, types of violence, support and protection mechanisms, legal regulation, reasons and causes, severity of the issue for women, etc.

In 2015, the EU Fundamental Rights Agency (FRA) published a report on the results of an EU-wide survey[[232]](#footnote-233) on violence against women with the goal of directly measuring the public perceptions of the prevalence and consequences of physical and sexual violence, as well as stalking, psychological violence, childhood violence, and the fear of victimisation.

At regional level, the OSCE survey on violence against women[[233]](#footnote-234) is the main source of data on South-eastern Europe (Albania, Bosnia and Herzegovina, Montenegro, North Macedonia and Serbia, Moldova and Ukraine) indicative of public perceptions and incidence of different types of domestic and gender-based violence, including psychological violence, stalking and sexual harassment, their impact and reporting and the experiencing of violence among specific groups of women. The report also includes information on the policy frameworks of the participant states evidencing the fact that six out of the seven states do have a specific strategic document addressing the issue of violence against women. It is also noted that in all seven states the Council of Europe Convention on Combating Violence against Women and Domestic Violence (Istanbul Convention) has entered into force[[234]](#footnote-235).

These data collection efforts use direct approaches to gathering information: face-to-face interviews, computerised questionnaires and standard surveys. A different approach is utilised by the UNSD 2010 World’s Women report[[235]](#footnote-236), which combines data from administrative records and population-based surveys in developing global statistical indicators on violence against women (incidence, frequency, severity). The report affords special attention to specific types of violence such as female genital mutilation (FGM) and wife-beating. Building up on such efforts, the UN Office on Drugs and Crime issued a global study on homicide in 2018[[236]](#footnote-237), addressing the issue of gender-related killings of women and girls by intimate partners/family members, which sourced information from official sources such as national courts. Monitoring of governmental measures in compliance with the Istanbul Convention are provided and collected by the Council of Europe GREVIO[[237]](#footnote-238). In 2018, the Swedish foundation Kvinna till Kvinna published an extensive collection on women in politics, gender-based violence and women’s rights defenders for six countries in the Western Balkans, gathering data from local governments and NGOs[[238]](#footnote-239).

National statistics on domestic and gender-based violence are available in the Balkan region. For instance, the Albanian State Institute for Statistics (INSTAT) produces annual reports[[239]](#footnote-240) containing judicial data on domestic and gender-based violence disaggregated by type of violence, age and gender of victims and perpetrators. The reports source information from different public bodies such as the police and the Ministry of Justice. In 2019, INSTAT also published its third report on violence against women and girls[[240]](#footnote-241), based on a nationally representative survey in 12 prefectures. The survey covered physical, psychological, economic and sexual violence and coercive behaviour by intimate partner or non-partner, including harassment, stalking, male refusal to use contraception, and domestic violence against pregnant women. The Albanian National Strategy and Action Plan on Gender Equality 2016-2020[[241]](#footnote-242) outlines a plethora of publications relating to governmental and non-governmental monitoring of domestic and gender-based violence. Similar monitoring measures (covering both reported and unreported incidents) exist in Bosnia and Herzegovina, where the local Agency for Gender Equality publishes statistical reports on violence against women[[242]](#footnote-243) with multiple indicators relating to the frequency, severity and incidence of different types of violence. The report also makes relevant interrelations between type of residence and level of education, and domestic and gender-based violence victimisation and perpetration.

For the full list of international and foreign data collection efforts and instruments, see Annex 5: Group tables: international/foreign data collection efforts/instruments, Table 9: Victims of domestic violence.

**10. LGBTQ+ persons**

In terms of international efforts for gathering data on the social, economic, and political experiences of LGBTQ+ people, including discrimination, negative stereotyping and bias, there are several key actors: the International Lesbian, Gay, Bisexual, Trans and Intersex Association (ILGA), the EU Fundamental Rights Agency (FRA) and the UNDP. Data collection efforts by those actors focus on the direct surveying of the population at large when probing for public perceptions, and qualified sampling when collecting responses from persons identifying as LGBTQ+. Vast-scoped surveys take the form of online questionnaires. These include the FRA EU LGBT Survey I[[243]](#footnote-244) and EU LGBT Survey II[[244]](#footnote-245), the 2017 ILGA minorities survey[[245]](#footnote-246), and the 2016 ILGA global attitudes survey[[246]](#footnote-247). A combination of surveying methods was used in the 2015 UNDP research on China[[247]](#footnote-248): online surveys along with semi-structured and in-depth interviews. A similar approach of relying on several data collection instruments (analysis of the legal and policy frameworks, gathering data from the judiciary, civil society and other governmental institutions, carrying out observational and proactive field work, organising focus groups with members of the community and civil society representatives, etc.) is demonstrated in the 2017 UNDP country-specific reports and factsheets on homophobia and transphobia in Eastern Europe[[248]](#footnote-249). This was complemented by an additional report on the intersex community in Eastern Europe[[249]](#footnote-250), which utilises passive data collection instruments such as institutional observation and analysis of national legal and strategic documents. Analytical approaches to monitoring the dynamics of bias and discrimination against the LGBTQ+ community is illustrated by the latest edition of ILGA homophobia report[[250]](#footnote-251), which includes a comprehensive comparative analysis of national laws vis-à-vis international law and practice in some thirteen categories under the umbrella of criminalisation, protection and recognition. ILGA has also created an interactive map of Europe[[251]](#footnote-252) that assesses the percentage of achievement of LGBTI human rights by country, using around seventy relevant indicators.

At national level, LGBTQ+ rights are monitored by both governmental and civil society actors. An example of an extensive survey of the LGBTQ+ community is the 2017 UK National LGBT Survey[[252]](#footnote-253), based upon an online questionnaire, and inquiring into aspects of daily life such as life satisfaction, safety, comfort, incidence of experiencing homo- or trans-phobic acts, education, healthcare, employment and work dynamics, etc. The survey also engaged with marginalised aspects such as conversion therapy, mental health and access to sexual health services. Another example is the Human Rights Campaign survey on LGBT youth in America[[253]](#footnote-254) (online survey, face-to-face interviews), which targeted youth aged 13 to 17. The collection effort provided ample data for four follow-up reports[[254]](#footnote-255) concerning opinions and perceptions related to “coming out”, added vulnerabilities for ethnic LGBT sub-groups, gender-expansive youth, and bisexual youth. Good practice examples relating to the establishment of governmental units or bodies specifically designed for monitoring LGBTQ+ rights, the equalisation of gender identity and sexual orientation with race in terms of addressing hate crime, and the raising of public awareness scores through policy measures and campaigns, are outlined in the 2009 FRA homophobia and discrimination legal analysis report[[255]](#footnote-256).

For the full list of international and foreign data collection efforts and instruments, see Annex 5: Group tables: international/foreign data collection efforts/instruments, Table 10: LGBTQ+ persons.

**11. Energy-poor persons**

At international level, data collection instruments on energy poverty and energy-poor persons are implemented by a number of actors ranging from the EU to private research organisations.

A comprehensive set of indicators for measuring and monitoring various aspects of energy poverty is implemented by the European Commission’s Energy Poverty Observatory (EPOV)[[256]](#footnote-257). There are four primary indicators for energy poverty, of which two are based on self-reported experiences of limited access to energy services (based on EU-SILC data) and the other two are calculated using household income and/or energy expenditure data (based on HBS data). In addition to that, EPOV gathers data on a number of secondary indicators that are relevant in the context of energy poverty, but not directly indicators of energy poverty itself (e.g. energy prices and housing-related data).

EPOV data and indicators are used by other international actors such as the European Energy Network[[257]](#footnote-258).

The majority of international data collection efforts at European level rely on statistics (either from national statistical authorities or from Eurostat) and survey data from major surveys like the EU-SILC. Overall, most studies use the same data (hosing conditions, energy prices, arrear in paying utility bills, ability to keep home warm, etc.), but combine them in different way to explore different aspects of energy poverty. Examples of the various ways in which data are interpreted are the studies published in the framework of the EU funded projects INSIGHT\_E project[[258]](#footnote-259), REACH[[259]](#footnote-260) and SEE SEP (South East Europe Sustainable Energy Policy)[[260]](#footnote-261).

At national level, there are also data collection efforts generating primary data through household surveys or similar instruments. One such example is the assessment of energy poverty in Greece[[261]](#footnote-262).

For the full list of international and foreign data collection efforts and instruments, see Annex 5: Group tables: international/foreign data collection efforts/instruments, Table 11: Energy-poor persons.

**12. Undeclared workers**

Grey economy in general and undeclared work in particular are priority areas of many international actors, including the EU. In 2017, the European Commission published its own evaluation of the scale of undeclared work across the EU using an innovative measuring approach called the Labour Input Method (LIM)[[262]](#footnote-263). The LIM uses macroeconomic data to measure, for each Member State, the discrepancy between reported labour supply and demand data. The method generates comparable data for all Member States on the level of undeclared work in the private sector, including disaggregated data by type of employment. Primary survey data on undeclared work is also generated by Eurobarometer. Special Eurobarometer editions on undeclared work were released in 2007[[263]](#footnote-264) and 2014[[264]](#footnote-265). They provide data mainly on the sociodemographic profile of undeclared workers and their motivation to get involved in undeclared work. The other major actor at EU level, the European platform tackling undeclared work, is mostly involved in awareness raising activities, for which it relies on data collected from other sources[[265]](#footnote-266).

The other actors carrying out research in the area of undeclared work at international level are not collecting their own primary data. Instead, they produce their reports using a combination of analysis of already existing data and desk research (literature review, review of policy documents and legislation, etc). Examples of such studies, covering all EU Member States, are the studies on undeclared work produced by the Dutch research company Regioplan[[266]](#footnote-267), the University of Sheffield[[267]](#footnote-268) and Eurofound[[268]](#footnote-269).

At regional and national level, there many studies of the scope and impact of grey economy and undeclared work. Most of them, however, do not rely on their own data collection instruments, but refer to the data collected at international level. Examples of such research efforts are the study on undeclared work in the service sector in the countries from South East Europe[[269]](#footnote-270) and the diagnostic report on undeclared work in Greece[[270]](#footnote-271).

Overall, international data collection efforts focus on the evaluation of the share and profile of those employed as undeclared workers (in the private sector as a whole or in specific industries) with no particular focus on the impact of undeclared work on the persons’ socioeconomic situation. No specific studies examining the potential vulnerability risks for undeclared workers have been identified.

For the full list of international and foreign data collection efforts and instruments, see Annex 5: Group tables: international/foreign data collection efforts/instruments, Table 12: Undeclared workers.

1. Desirable instruments and approaches to apply for filling the data gaps

This section describes the existing gaps in data and indicators, explains the reasons preventing the collection of data by existing instruments and gives recommendations for possible approaches to remedy such shortfalls.

**1. Roma**

There are three main challenges to national data collection indicators on the Roma population in Bulgaria: (1) lack of concreteness; (2) restrictions in the thematic scope; and (3) limited depth and detail.

***Key recommendation: Reliance on alternative data collection instruments for monitoring Roma populations***

The identified challenges are not only due to the instrument applied nationally, but also to the methodology of devising indicators and disaggregating data. In relation to the first challenge, some of the problems are due to the restrictive national legislation[[271]](#footnote-272). As a result of the partial collection of ethnic data and the successive lack of disaggregation of the data along minorities, official (census) data are reliable as regards the entire population, but not as regards the different ethnic groups, including the Roma. Such a situation calls for an amendment in the instruments of data collection – away from census-type interviews. Roma populations are efficiently comprehended in detail when using instruments such as thematic field work organised in case-studies. The international and foreign experience complements this by suggesting that national institutions should be more proactive in taking up own data collection efforts that target specific groups of the Roma populations (e.g. families with children in segregated schools) to bring the collected data closer to the aims and strategic objectives of the policy framework. The UNDP[[272]](#footnote-273) specifically emphasises on the importance of utilising recently-sourced data with carefully tailored indicators.

***Key recommendation: Continuously amending the thematic scope of the national policy framework to cover marginalised aspects of vulnerability***

The restrictions in the thematic scope mainly pertain to the lack of optimisation of the policy focus beyond overarching categories such as poverty, unemployment, education and healthcare. New research in the international sphere brings forward a trend of expansion in the vulnerability risks, factors and topics to be studied and recorded by governments in relation to the protection and free exercise of fundamental rights. For the Roma community critical aspects include the effective and long-term monitoring of violence, hate speech and hate crime, with sub-categories such as in-school violence, police brutality, and extreme forms of nationalisms on the political arena; monitoring of human trafficking trajectories for Roma women and children with accents on the sale of new-borns, sexual and work exploitation; monitoring of labour conditions; monitoring of social inclusion and the protection of Roma culture, as well as other aspects.

***Key recommendation: Avoiding the homogenisation of Roma population and promoting the individual study of sub-groups***

With regard to the challenge of lack of depth and detail, national policy documents need to afford greater attention to sub-groups of existing data and to the study of intersectionality. International and foreign data collection efforts highlight the need for application of gendered approaches to successfully design strategic measures for the improvement of the socio-economic and political position of Roma women and Roma children, alongside and aside from Roma men. Intersectional efforts would also be efficient in studying the gravity of vulnerability of Roma persons with added risk factors. Beyond-national efforts are also inclusive of qualitative, not just quantitative data, organised in case-studies.

***Suggested approach***

The Roma population is big enough and relatively easy to reach to be covered by a general household survey. However, the Roma as a homogenous group have been monitored by a number of data collection and research efforts. Therefore, an advisable approach would be to include the Roma in a general household survey with additional questions aimed at exploring the situation of specific subcategories such as Roma women and Roma children.

For the full list of desirable instruments and indicators, see Annex 6: Group tables: desirable instruments, indicators and disaggregation categories, Table 1: Roma.

**2. Children at risk**

There are three main challenges to national data collection indicators on the children at risk in Bulgaria: (1) diverse target group; (2) age-related limitations; and (3) accessibility.

***Key recommendation: Decomposing the group into subgroups and using different approaches depending on each subgroup specificities***

Children at risk do not represent a homogenous group, which makes a uniform approach toward the entire group practically inapplicable. Each category of children at risk has a different socioeconomic profile and is exposed to different vulnerability risks. This is evident also from the legal and institutional framework and from the available research, which clearly differentiate between the different categories of children at risk (child offenders, child victims, children with disabilities, children deprived of parental care, etc.). This challenge can be overcome by decomposing the group into subgroups based on pre-defined criteria and organising data collection according to these criteria. This approach has been partly implemented by the National Statistical Institute (NSI) (*Национален статистически институт*, НСИ) and the State Agency for Child Protection (SACP) (*Държавна агенция за закрила на детето*, ДАЗД), but needs to be further streamlined for future data collection.

***Key recommendation: Defining the scope of data that can be collected directly from the target group***

One of the challenges related to the collection of data for children in general, and for children at risk in particular, is the age of target group. Children, especially below a certain age, could not be surveyed by applying the same methodology used for surveying the adult population. Legal restrictions (e.g. informed consent, permission of parents or guardians, etc.) pose an additional challenge. A possible solution to this problem is the precise definition of the scope of data that can be collected directly from children and the one that needs to (and can) be collected from their responsible adults.

***Key recommendation: Identifying the location of children at risk and targeting data collection efforts at the identified locations***

Some categories of children at risk are separated from the society and do not live with their families. This is valid for children placed in specialised facilities due to various reasons (disability, bad behaviour, victimisation, lack of parents, etc.). These children could not be covered by a standard household survey, because, in most cases, they are not attached to any particular household and would appear in the sample. As evidenced by previous data collection efforts, a more effective approach toward this groups would be a targeted study carried out within the places where these children live. Data can be collected through face-to-face interviews and/or focus groups either directly with the children or indirectly with the personnel of the facilities or other responsible staff (e.g. teachers for the children going to school, relatives for those who have families, etc.).

***Suggested approach***

Children at risk are not a homogenous group and could not be monitored through a general household survey. In addition to that, surveying of children usually requires a different, customised methodology, corresponding the age of respondents. By way of exception, information on some vulnerability risks, such us violence, can be obtained from parents or other household members, but such an approach should consider the risk of respondents’ reluctance to admit they have personally witnessed or participated in such practices. Therefore, a different approach (targeted survey, in-depth interviews or focus groups) would be more productive for monitoring the different categories of children at risk.

For the full list of desirable instruments and indicators, see Annex 6: Group tables: desirable instruments, indicators and disaggregation categories, Table 2: Children at risk.

**3. People with disabilities**

There are two main challenges to national data collection indicators on persons with disabilities: (1) undefined target group; and (2) significant differences between different subgroups.

***Key recommendation: Precisely defining the target group***

Although there is legal definition of persons with disabilities (and persons with permanent disabilities) in the national legislation, data collection efforts at national level are based on different approach. Official statistics cover the persons who have a longstanding condition or disease, the social security system takes as a reference the issuance of disability certificates, while some surveys like the European health interview survey, rely on self-perception. To overcome this situation, a single definition of persons with disabilities for the purpose of data collection should be adopted and used for all data collection efforts.

***Key recommendation: Adjusting the data collection methodology to reflect the different vulnerabilities within the target group***

Persons with disabilities are usually monitored as a homogenous group, but such an approach excludes the specific vulnerabilities of the different categories of persons within the group. While some vulnerabilities, such as the risks of unemployment and poverty, could be considered common for the entire group, others, such as accessibility of services, depends to a great extent of the type and severity of the persons’ condition. Differentiating between physical, intellectual and psychosocial disabilities is the starting point for better understanding the situation within the target group. Further on, the monitoring of this group should take into account which aspects of the persons’ personal and social life are affected most by their specific condition, which is directly linked to the different vulnerability risks they could be exposed to.

***Suggested approach***

Persons with disabilities represent a significant share of the population and can be monitored through a general household survey. However, to better explore the internal diversity within the group, it is recommended to use specific questions to identify the type and severity of the persons’ condition and link this information to the other collected data.

**4. Youth (15-29 y.o.)**

Data collection on the age groups that comprise the NEET youth does exist and is relatively comprehensive in terms of monitoring problems around employment (unemployment rates, lack of qualifications, income, poverty related to unemployment, etc.) and education (secondary and tertiary educational attainment, life-long learning, informal learning, etc.). The data is also collected in a recurring and reliable manner by a number of actors. Therefore, there is no need of supplementing census and household observation surveys with additional categories and indicators. Instead, based on the national non-governmental and international/foreign data collection efforts and approaches, two key lessons can be outlined.

***Key recommendation: Undertaking data collection efforts in terms of feedback from the youth population not in education, employment or training on aspects of access and affordability of self-development***

The first conclusion pertains to the lack of consultation with the actual members of the NEET youth in addressing issues of impeded access to employment and education for various possible reasons, unaffordability of continued education, familial pressure, inefficiency of government efforts related to decreasing the number of NEETs nation-wide, etc. Following from the Romanian and Maltese examples of surveying the youth population, data collection instruments that are suited to engaging with the NEETs are online/computerised surveys or surveys based on face-to-face interviewing. Efforts that target a smaller pre-defined sample size and work along carefully tailored set of indicators are capable of providing in-depth data sets about currently unexplored aspects of vulnerability. Direct quantitative approaches also allow for the examination of the interrelatedness of the risk factors for NEETs such as the relationship between cultural values on family life and the larger proportion of female NEETs. It is thus vital that individual “stories” are elevated to the level of data collection as to improve the reach and efficiency of youth-targeting policy measures.

***Key recommendation: Quantitatively examining the underlying causality of young persons in Bulgaria becoming NEETs for the devising of preventative measures***

The second lesson is related to the need for examining the underlying factors for the incidence of NEETs among young people in Bulgaria. Currently, the data sets referred to in national policy documents are based on the monitoring of the repercussions of being part of the NEET group – for instance, poverty is seen as a direct result of being a NEET. Strategic documents, however, do not pay enough attention to the plethora of family, social and personal factors that may play an important role in pre-defining a young person as a NEET. Factors such as early deprivation of parental care, low educational status of the family, low support from the family in continuing education, pressure to start a family, inability to be supported financially in tertiary education, locational isolation of the residence, educational segregation (especially for Roma youths and young persons with disabilities), psychological conditions or mental illness, non-accessible working conditions (for persons with disabilities), etc., need to be explored to obtain useful data for policy measures aimed at the prevention of, not reaction to, Bulgarian youths falling out of education, employment and training.

***Suggested approach***

The group of very young persons is big enough to be successfully covered by a general household survey. However, since many aspects of young persons’ lives are already monitored on regular basis, data collection should focus on unexplored factors, which are relevant for studying the vulnerability risks within this group, but for which there is no sufficient data collected so far.

For the full list of desirable instruments and indicators, see Annex 6: Group tables: desirable instruments, indicators and disaggregation categories, Table 4: Very young persons.

**5. Older persons (≥ 55 y.o.)**

The review of national data collection efforts revealed two main gaps in the gathering and use of data on older persons. Based on the available, but unused indicators and data, and considering the international/foreign experience, two conclusions are brought forward.

***Key recommendation: Securing sufficient engagement with all available reliable and recent data sets to ensure the successful addressing of risk factors for the sub-groups within the general older population***

There is insufficient level of engagement with publicly available data sets on older workers and the elderly in general. There is limited attention afforded to some official statistics, such as the two modules of the European Health Interview or the EU-SILC modules that address specific areas throughout the years. Building on this, exhausting all reliable and recently collected data would be instrumental for the effective differentiation between the sub-groups within the general older population: the over-54-year-olds who are still economically active, and the over-64-year-olds who may be economically active or be retired. Currently, the strategic documents do emphasise on the fact that the two sub-groups are prone to different vulnerabilities and risk factors, yet this differentiation fails to grasp the aspect of cross-cutting vulnerabilities – there is more engagement with health indicators for the over-64-year-olds, which, for instance, fails to grasp the heightened effects of heavy physical work or poor working conditions on the health condition of over-54-year-olds.

***Key recommendation: Tailoring data collection instruments and the indicators used to yield data on the challenges, barriers and difficulties of access and affordability encountered by older persons***

While areas such as poverty, income, social exclusion, employment, life expectancy, and institutional care are fairly well addressed with strategic documents relying on a strong collection of indicators and reliable data, the international and foreign experience points to the need to monitor difficulties and challenges of access and affordability for older workers and elders. Direct approaches to data collection with instruments such as surveys and interviews, outside of the recurring household observations and census surveying, could be better suited to yielding data on the specific experiences of older persons in situations of difficulty in accessing healthcare, continuing education or vocational training, and life-long learning, in changing employment in the final ten years before retirement, in being able to afford prescription medication or medical specialist consultations, or in experiencing lack of in-house care and assistance, when such is needed, by family members or professional care-givers. Computerised surveys, on the other hand, could be suitable in assessing the ICT usage and the technical skills of older workers in relation to their current profession. Such online surveys have been utilised in international efforts to inquire into the daily life, free time, social and cultural engagement of older persons as well. Finally, the identification of predominant challenges and difficulties for elders can be supplemented by focus groups and structured discussions with professionals working with elder persons and care-givers in institutions and in in-house assistance.

***Suggested approach***

The group of older persons is big enough and easy to reach, which makes it a suitable target group for a general household survey. It is, however, recommended to avoid duplication with already existing data collection efforts in relation to this group and to explore new vulnerability risks and factors not covered by already existing instruments.

For the full list of desirable instruments and indicators, see Annex 6: Group tables: desirable instruments, indicators and disaggregation categories, Table 5: Older persons.

**6. People in precarious housing**

The national policy framework in this area is based upon the monitoring of housing conditions with regard to tangible indicators on the age and condition of dwellings and the existence of basic amenities, facilities and services in those dwellings. The policy framework, however, glosses upon the inherent relations between poor or absent housing and health issues, low quality of life, lower life expectancy, etc., which are all indicators recognised by international data collection as valid for the monitoring of the populations that dwell in subprime living conditions. Hence, two main lessons can be drawn from non-national data collection on persons in precarious housing.

***Key recommendation: Expanding the monitoring efforts from the tangible characteristics of dwellings to the underlying risk factors for the inhabitants or the homeless that are directly related to poor or absent housing***

The first conclusion is related to the need to expand monitoring efforts from collecting data about the tangible characteristics of dwellings to the wide spectrum of risks that arise from the lack of adequate housing. These include not only health risks and chronic morbidity, but also issues of personal safety, life satisfaction, access to social assistance and services related to housing, neighbourhood characteristics, ownership of items related to maintain household hygiene, financial indebtedness related to covering housing expenses, isolation and segregation (especially for ethnic communities), impeded access to services due to infrastructural issues at the place of residence, etc. Overcrowding of residential dwellings and the occupation of non-residential buildings are further categories worth considering. Suggested methods of data collection to address this challenge are both qualitative and quantitative and entail the structures observation and surveying of the population that has been pre-identified as living in precarious housing or experiencing homelessness. Individual risks related to poor or absent housing could also be identified through focus groups with service providers, such as workers in day centres, crisis centres, shelters, NGOs, and others, based upon their observations from engaging with beneficiaries of their services.

***Key recommendation: Gathering data for sub-groups within the population living in precarious conditions both separately, as to account for specific vulnerabilities, and in comparison, as to assist in the devising of effective overarching strategic measures***

There are differences in the experiencing of vulnerabilities by the different sub-groups within the group of persons in precarious housing. Sub-groups that need to be further explored include children, NEETs, Roma, elderly persons, disabled persons, women, etc. Gender analysis points to the fact that homeless women could experience higher health risks than homeless men, despite potentially having higher daily incomes. The Australian experience is indicative of the variations between risk factors for homeless persons when disaggregated by gender, age and social status. Sub-group divergences could be successfully grasped by means of fieldwork in specific locations (Roma quarters, day centres, communal kitchens, residential locations with low connectivity status), both observational an in terms of surveying and interviewing. Service providers and social workers could also be engaged in gathering data on the challenges and needs of different sub-groups within those living in precarious housing or experiencing homelessness.

***Suggested approach***

People in precarious housing is an undefined and relatively less studied group. The size of the population living in precarious housing depends to a great extent on the criteria used to define this group. If the definition is broad enough to include a bigger share of the population, a household survey can produce reliable results. Otherwise, a different data collection approach (targeted survey, in-depth interviews, focus groups) would be a better tool for obtaining relevant data. This is particularly valid for the homeless persons, who are difficult to reach due to their small number and high degree of mobility.

For the full list of desirable instruments and indicators, see Annex 6: Group tables: desirable instruments, indicators and disaggregation categories, Table 6: Persons in precarious housing.

**7. Third-country nationals**

The monitoring of third-country nationals in Bulgaria is limited in its time-frame (i.e. it mostly covers the registration and accommodation stages), and in its scope (i.e. it only relies on qualitative data on the movement of migrants and few other factors). The collected data are therefore not informative enough to have an impact on policy making. Based on the examined examples of non-governmental, international and foreign data collection efforts, two recommendations can be suggested.

***Key recommendation: Continued monitoring of the potential and internationally identified vulnerabilities of TCNs beyond the registration and accommodation stages***

The examination of the data collected by EU/OECD and Eurostat indicates that that poverty, unemployment, restricted access to social services and support, etc. can be ostensibly higher for third-country nationals due to a multitude of factors (such as the existence of a language barrier, the inability to access vocational training, the unawareness of support and assistance mechanisms available, to name a few). After obtaining their permits (long-term or permanent residence permit, work permit) migrants are considered equal in their rights as all Bulgarian citizens, which, however, is not a sufficient reason for not considering them as a specific target group for data collection. Official statistics are available only on the number of foreign nationals residing in Bulgaria, while data on poverty, unemployment, health risks, educational levels, access to and use of social assistance, etc. is not publicly available. The same is valid for gender-specific analysis of social inclusion and labour market integration, the situation of NEETs and the risks for third-country nationals falling into the NEET category, etc. It is therefore advisable to collect separate data on third -country nationals residing in Bulgaria.

***Key recommendation: Directly surveying the TCN community in Bulgaria, and the public generally, to continuously expand the strategic objectives of the policy framework***

International data collection efforts go beyond migration patterns, and research third-country nationals’ experiences in the economic, social and political sphere. The reliance on a combination of data collection instruments and methods is important, as it allows for the comparative analysis of official data and primary data sourced from surveying third-country nationals. Bulgarian strategic documents do not refer to data collected via surveys and fail to grasp important aspects of integration, such as barriers to accessing healthcare and education, impediments to securing housing, etc. Direct surveying of the third-country nationals community in Bulgaria could also be indicative of institutionalised and social discrimination, negative stereotyping, hate speech and hate crime, harassment, etc. In terms of monitoring the social environment, public perceptions studies would be instrumental, although there are existing efforts in this direction, which have not been mentioned in any strategic document.

***Suggested approach***

According to official statistics, the group of third-country nationals is very small to be covered by a general household survey. To obtain reliable information directly from this group, either a targeted survey with pre-defined sample selection criteria should be used, or methods such as focus groups and interviews should be employed. An important factor that has to be considered is the language barrier, as there is no reliable data on the proportion of third-country nationals speaking Bulgarian.

For the full list of desirable instruments and indicators, see Annex 6: Group tables: desirable instruments, indicators and disaggregation categories, Table 7: Third-country nationals.

**8. Children of emigrants**

There is an overall lack of reference to the household members of emigrants in national policy-making. The international experience, however, proves the importance of national data collection efforts in the monitoring of this group. On the basis of the reviewed data collection efforts, three key recommendations can be formulated as to the instruments for collecting data, the thematic scope to be covered and the reach of data collection efforts.

***Key recommendation: Utilising direct approaches to data collection and tailoring the methods of data collection for the different sub-groups of emigrant household members***

As there are no comprehensive data on children, elderly family members and spouses of emigrants in Bulgaria, indirect methods of research and analysis, similar to those used by UNICEF and the IOM, are not suited to the Bulgarian situation. Rather, instruments such as expanded household observation, in-school surveys for both students and teachers, focus groups with professionals working with the targeted sub-groups, and other types of surveys are capable of yielding. Additionally, targeted surveys can be used for collecting primary data on sub-groups such as children, spouses, older persons or other dependants of emigrants, etc.

***Key recommendation: Expanding the thematic scope of data collection efforts into intangible challenged and difficulties encountered by emigrant household members***

The data collected by NGOs and international and foreign illustrate the need to expand the monitoring of emigrant household members beyond the observation of remittance flows and into areas such as emotional and psychological wellbeing, challenges to education and social participation, and daily-life difficulties faced by children, elderly household members and spouses. Inquiring into gender-specific differences such as the work-childcare balance or the higher risk of poverty for elderly women would also be beneficial for the development of efficient policies for those sub-groups.

***Key recommendation: Including all emigrant household members sub-groups in future policy efforts to address the issue of invisibility for emigrant spouses and elderly left behind***

The current legal and policy framework, as far as it exists, is mostly focused on the children of emigrants (children left behind) and tends to disregard emigrant spouses and elderly persons that rely, whether financially or not, on emigrated family members. Those two groups are virtually invisible in the available data, but their vulnerability to specific risks makes it necessary to include them in future data collection efforts.

***Suggested approach***

Emigrant household members are among the least studied groups of the population. Yet, according to various estimates, their number is significant and could be easily captured by a general household survey. The lack of precise data on emigration makes it difficult to assess the exact size of this group, which is a gap that can be bridged by including such questions in a household survey or census. Once the group is properly identified, the specific vulnerability risks of different subgroups can be further studied by instruments such as targeted surveys or focus groups and in-depth interviews.

For the full list of desirable instruments and indicators, see Annex 6: Group tables: desirable instruments, indicators and disaggregation categories, Table 8: Emigrant household members.

**9. Victims of domestic violence**

Data collection efforts suffer from considerable deficiencies when it comes to monitoring the vulnerabilities of victims of domestic violence. Those deficiencies can be outlined in two main groups: lack of comprehensive data collection methodology to grasp both reported and unreported instances of domestic and gender-based violence and reluctance on the part of policy-makers to expand the definition of domestic and gender-based violence to better cover the different manifestations of violence (both physical and non-physical).

***Key recommendation: Inclusion of recurring public perceptions monitoring, and engaging service providers and victims in the preparatory stages of policy-making***

The international and foreign experience relies heavily on the surveying of public perceptions, which is generally absent in the Bulgarian policy framework. Probing the public on the topic of domestic and gender-based violence can be instrumental for assessing the effects of preventative campaigns, the general public awareness, and the relationships between cultural specificities and human rights. The Albanian and Bosnian examples delineate the opportunity to incorporate such efforts into existing census and household surveys by including nonmandatory questions on family dynamics and domestic violence. Bulgaria is often criticised for not collecting relevant data on domestic violence. At the same time, NGOs have accumulated considerable experience in gathering data from in-depth interviews and observational field work, e.g. to monitor the re-integration of victims or collect feedback from service providers and victims on policies and measures. The expertise of NGOs in protecting, consulting and reintegrating victims of domestic and gender-based violence is rarely utilised at the policy-planning stages.

***Key recommendation: Expanding both the number of categories covered under the term “domestic and gender-based violence” and the groups sampled in data collection efforts***

Currently, domestic violence includes the acts of physical, sexual, psychological, emotional, and economic abuse, as well as coercive restrictions on privacy, personal freedom, and personal rights. The methodologies used internationally by FRA, OSCE and other actors differentiate between categories of violence such as stalking, sexual harassment, male refusal to use contraceptives, even female genital mutilation. Those categories are increasingly relevant in the context of labour relations, body autonomy rights, and negative cultural practices. Unlike international and foreign data collection efforts, in Bulgaria there is no data on the link between domestic violence and other criminal offences. It is important for national policy-makers to also be informed about the interrelations between domestic and gender-based violence and human trafficking, prostitution, child pornography, etc. The increased vulnerability of minority communities (Roma women and children, migrants, Muslim women and children, fundamentalist religious communities) or the situation within other groups (cis boys and men, same-sex couples, transsexual men and women, intersex and gender-fluid persons) are also unexplored. Since such group are high on the “difficulty to reach” scale, they can be monitored through qualitative methods such as in-depth interviews of focus groups.

***Suggested approach***

Due to the lack of reliable data, the group of victims of domestic violence could not be precisely defined in terms of size and profile. The data, ranging from several thousand (cases reported to the police) to more than half a million (survey data) reveals the significant level of unreported incidents and makes the assessment of the group characteristics particularly difficult. A household survey can, in principle, capture some data on victims of domestic and gender-based violence, but the figures would need to be interpreted carefully due to the variety of reasons for victims not to openly share their experiences. Qualitative approaches such as interviews and focus groups could produce more reliable information, but, on the other hand, the data obtained through such methods would not have any quantitative value.

For the full list of desirable instruments and indicators, see Annex 6: Group tables: desirable instruments, indicators and disaggregation categories, Table 9: Victims of domestic violence.

**10. LGBTQ+ persons**

The almost complete exclusion of LGBTQ+ persons from any national policy framework in Bulgaria explains the complete lack of reliable data on this particular group. Besides, the spread of homophobic hate speech (often on the part of politicians as well), the prevailing negative public opinion (evidenced by a handful of sociological surveys) and the gaps in legislation (e.g. in terms of defining the rights of LGBTQ+ persons) makes it more difficult, even for NGOs, to generate reliable survey data and advocate for the adoption of specific policies. Nevertheless, three key recommendations in terms of data collection can be suggested.

***Key recommendation: Focusing data collection efforts on gathering data from the LGBTQ+ community as a whole, from sub-groups within the LGBTQ+ community, and from the public at large***

Data collection should differentiate between the opinions and perceptions of members of the LGBTQ+ community and the public at large. This would allow for the gathering of data on the particular difficulties that LGBTQ+ people face in their contact with institutions, access to services, private and family life, etc. as well as on the more general social environment with respect to tolerance, safety, freedom of expression, hate speech, hate crime, harassment, etc. The vulnerability of LGBTQ+ people to risks such as inequality, discrimination in employment, limited access to some healthcare services (sexual and reproductive healthcare), bias in education, social exclusion, physical safety, etc. remain overwhelmingly unexplored, especially when it comes to some less known subcategories within this group (e.g. transsexual, queer, intersex, gender-fluid, non-binary, or other such groups).

***Key recommendation: Tailoring data collection instruments to the needs of the interviewees with regard to anonymity and expert opinions***

The international experience points to the fact that anonymity is an important aspect to consider when gathering data on the LGBTQ+ community. That is why electronic surveys are often preferred to face-to-face interviewing. Observational approaches are also rarely used, as it is generally difficult to come across non-integrated LGBTQ+ groups. Focus groups, on the other hand, have been prominently used in data collection due to the instrumental value of collecting data from civil society activists and experts in LGBTQ+ rights (such as lawyers). Institutional and media monitoring can also be used to obtain data on the existing gaps in legislation and reporting patterns.

***Key recommendation: Expanding the scope of data collection efforts beyond the general categories of employment and education into such that hold higher risks for the LGBTQ+ community in particular***

Data collection efforts, to the extent they exist at all, tend to focus on education, employment and judicial proceedings leaving unexplored other important aspects of LGBTQ+ persons’ daily life. The studies of FRA, UNDP and ILGA have identified a wide spectrum of potential areas to be monitored. Those include mental, sexual and reproductive health, discrimination and unacceptance within the family, social exclusion, personal safety, poverty and unemployment statistics for same-sex families with and without children, access to social services, etc. The monitoring of these factors is even more important considering the lack of a clear legal framework.

***Suggested approach***

The complete lack of data indicating the size of the LGBTQ+ population and the sensitivity of many issues related to the persons’ sexual orientation makes it unadvisable to approach this group by a general household survey. A nonmandatory set of questions on sexual orientation (similar to those on ethnicity) can be considered for inclusion in next census. This would produce some reliable data on the size and profile of this group, which, in turn, can inform future data collection efforts. For the time being, however, qualitative approaches, such as in-depth interviews, seem the only appropriate way of approaching this group. Such approaches would not generate data that can be used for implementing a regular monitoring of the group, but will rather help identify key areas of inequality and discrimination.

For the full list of desirable instruments and indicators, see Annex 6: Group tables: desirable instruments, indicators and disaggregation categories, Table 10: LGBTQ+.

**11. Energy-poor persons**

Energy poverty is mentioned in several policy documents, but there is no established criteria for defining the threshold of energy poverty. Because of that, the size of the group of energy-poor persons remains undefined, which is the main barrier to reliable data collection. Additionally, with a few minor exceptions, there is no information either on the profile of the group (age, ethnicity, residence, etc.) or the link between energy poverty and other vulnerability risks.

***Key recommendation: Defining the target group***

To effectively monitor the group of energy-poor persons it is necessary to elaborate a precise definition of energy poverty and specify the criteria for setting the energy poverty threshold. There are a number of examples from foreign and international data collection efforts on how to measure energy poverty, which can be used to solve this problem. A precise definition of energy poverty would allow to use already available data to assess the size of the group and, based on that, select the most appropriate approach for further data collection.

***Key recommendation: Exploring the link between energy poverty and other vulnerability risks***

The international research efforts provide sufficient evidence on the direct link between energy poverty and other vulnerability risks such as health problems, restricted access to education or services due to inability to cover costs, etc. These links have not been thoroughly studied in Bulgaria, which is a gap that has to be bridged to inform future policy making in the area of energy and energy poverty. Additionally, it is necessary to also explore the profile of energy-poor persons in terms of age, ethnicity, residence, household type, etc. in order to better target policies and measures aimed at preventing and reducing energy poverty.

***Suggested approach***

According to various estimates the share of energy-poor persons is significant and can be covered by a general household survey. This approach is capable of producing reliable results on both the size and the profile of the group. However, it is advisable to pre-define the threshold of energy poverty to ensure that the collected data correspond to the scope and objectives of future policies and measures.

For the full list of desirable instruments and indicators, see Annex 6: Group tables: desirable instruments, indicators and disaggregation categories, Table 11: Energy-poor persons.

**12. Undeclared workers**

There are various studies estimating the level of undeclared work based on elaborated data collection and data analysis methodologies. The main deficiency of these data collection efforts is that they are focused on the economic impact of undeclared work rather than on its effects on the undeclared workers. With the exception of access to healthcare, the link between undeclared work and other vulnerability risks is generally unexplored.

***Key recommendation: Defining the target group***

Undeclared work is a broad category encompassing a variety of practices ranging from working without a contract to receiving higher payment than the one fixed in the contract. To ensure the collection of reliable data corresponding to the objectives of the policy framework, it is necessary to precisely define the scope of the target group by using clear criteria. Without such a definition the data collection efforts cannot produce relevant and informative data on the number and sociodemographic profile of undeclared workers.

***Key recommendation: Exploring the full scope of vulnerability risks***

Apart from the barriers to accessing healthcare due to unpaid health insurance contributions, undeclared work is linked to other vulnerability risks such labour exploitation, poverty, inequality and discrimination, etc. These risks are not sufficiently explored and this gap deprives policy makers of evidence-based justification for future policies and measures. The collection of data on the full scope of potential vulnerabilities associated with undeclared work would facilitate the design and implementation of targeted policies corresponding to the actual problems existing in practice.

***Key recommendation: Using victimisation survey approaches to capture data on illegal practices***

One of the challenges to data collection on undeclared work is the illegal nature of such practices and the resulting reluctance of respondents to admit their involvement due to fear of potential negative consequences. One way to overcome this problem is to use perception surveys and collect data on the public perceptions on the size and scope of undeclared work. A more accurate approach, however, would be to use a victimisation survey methodology and collect data on the actual participation of respondents in practices related to undeclared work. Such an approach can produce more reliable data, but needs to be accompanied with an adequate data protection measures to convince the respondents that their anonymity is guaranteed and the information shared will not be used for other purposes not related to the research.

***Suggested approach***

According to various estimates, the share of workers participating in undeclared work practices is significant and can be easily captured by a general household survey. It is important, however, to precisely define the scope of the group to ensure that the collected data corresponds to the objectives of the monitoring. It is also advisable to collect data disaggregated by economic activity, sex, age and location, to identify the industries, regions and groups of the population that are most vulnerable to the risk of undeclared work. Additional vulnerability risks, such as labour exploitation and poverty, should also be covered.

For the full list of desirable instruments and indicators, see Annex 6: Group tables: desirable instruments, indicators and disaggregation categories, Table 12: Undeclared workers.

1. Summary table: data collection instruments and gaps (Annex 1)

The summary table is annexed to the report as a separate file.

1. Summary table: vulnerable populations to be surveyed (Annex 2)

The summary table is annexed to the report as a separate file.

1. Group tables: national-level indicators utilised in the Bulgarian policy framework (Annex 3)

The list of national-level indicators utilised in the Bulgarian policy framework is presented in a separate file, which includes a table for each vulnerable group.

1. Group tables: national-level data collection efforts and instruments not utilised in the Bulgarian policy framework (Annex 4)

The list of national-level data collection efforts and instruments not utilised in the Bulgarian policy framework is presented in a separate file, which includes a table for each vulnerable group.

1. Group tables: international/foreign data collection efforts/instruments (Annex 5)

The list of international and foreign data collection efforts and instruments is presented in a separate file, which includes a table for each vulnerable group.

1. Group tables: desirable instruments, indicators and disaggregation categories (Annex 6)

The list of desirable instruments, indicators and disaggregation categories is presented in a separate file, which includes a table for each vulnerable group.

1. The national policy framework on Roma does not define the term ‘vulnerability’. Instead, it only notes that the situation of the Roma population in Bulgaria is characterised by ‘inequality, vulnerability to social risks and manifestations of discrimination which lead to poverty and social exclusion’. Although most strategic documents seem to make a difference between inequality and vulnerability, there no explicitly defined criteria differentiating the two concepts. The concept of deprivation, on the other hand, has not been utilised by the national policy framework. For example, see Bulgaria, Council of Ministers (*Министерски съвет*) (2010), Framework Programme for Integration of Roma into Bulgarian Society (2010 – 2020) (*Рамкова програма за интегриране на ромите в българското общество (2010-2020 г.)*), 12 May 2010, p. 2, <http://strategy.bg/StrategicDocuments/View.aspx?lang=bg-BG&Id=609>. [↑](#footnote-ref-2)
2. Bulgaria, Council of Ministers (*Министерски съвет*) (2005), Health Strategy for Disadvantaged Persons belonging to the Ethnic Minorities 2005-2015 (*Здравна стратегия за лица в неравностойно положение, принадлежащи към етнически малцинства, 2005 - 2015 г.*),[www.strategy.bg/StrategicDocuments/View.aspx?lang=bg-BG&Id=658](http://www.strategy.bg/StrategicDocuments/View.aspx?lang=bg-BG&Id=658), operationalised in an action plan for 2011-2015. The strategy includes indicators from a 2002-2003 sociological study by Fact Marketing in the form of a Roma Health Interview. [↑](#footnote-ref-3)
3. Bulgaria, Council of Ministers (*Министерски съвет*) (2005), Health Strategy for Disadvantaged Persons belonging to the Ethnic Minorities 2005-2015 (*Здравна стратегия за лица в неравностойно положение, принадлежащи към етнически малцинства, 2005 - 2015 г.*),[www.strategy.bg/StrategicDocuments/View.aspx?lang=bg-BG&Id=658](http://www.strategy.bg/StrategicDocuments/View.aspx?lang=bg-BG&Id=658), operationalised in an action plan for 2011-2015; Bulgaria, Council of Ministers (*Министерски съвет*) (2010), Framework Programme for Integration of Roma into Bulgarian Society (2010 – 2020) (*Рамкова програма за интегриране на ромите в българското общество (2010-2020 г.)*), 12 May 2010, <http://strategy.bg/StrategicDocuments/View.aspx?lang=bg-BG&Id=609>. [↑](#footnote-ref-4)
4. Bulgaria, Council of Ministers (*Министерски съвет*) (2006), National Programme for Improvement of the Housing of Roma in the Republic of Bulgaria in the period 2005-2015 (*Национална програма за подобряване на жилищните условия на ромите в България 2005 - 2015 г.*),[www.strategy.bg/StrategicDocuments/View.aspx?lang=bg-BG&Id=433](http://www.strategy.bg/StrategicDocuments/View.aspx?lang=bg-BG&Id=433); Bulgaria, Council of Ministers (*Министерски съвет*) (2010), Framework Programme for Integration of Roma into Bulgarian Society (2010 – 2020) (*Рамкова програма за интегриране на ромите в българското общество (2010-2020 г.)*), 12 May 2010, <http://strategy.bg/StrategicDocuments/View.aspx?lang=bg-BG&Id=609>. [↑](#footnote-ref-5)
5. Bulgaria, Council of Ministers (*Министерски съвет*) (2013), Strategy for Reducing the Share of School Drop-outs 2013-2020 (*Стратегия за намаляване дела на преждевременно напусналите образователната система (2013-2020)*), [www.strategy.bg/StrategicDocuments/View.aspx?lang=bg-BG&Id=870](http://www.strategy.bg/StrategicDocuments/View.aspx?lang=bg-BG&Id=870); Bulgaria, Ministry of Labour and Social Policy (*Министерство на труда и социалната политика*), ‘The Human Resources Development Operational Programme 2014-2020 is the first operational programme to start in Bulgaria’ (*‘Оперативна програма „Развитие на човешките ресурси” 2014-2020 е първата оперативна програма, която стартира в България’*), Press release, [www.mlsp.government.bg/index.php?section=PRESS2&prid=65](http://www.mlsp.government.bg/index.php?section=PRESS2&prid=65). [↑](#footnote-ref-6)
6. Bulgaria, Council of Ministers (*Министерски съвет*) (2010), Framework Programme for Integration of Roma into Bulgarian Society (2010 – 2020) (*Рамкова програма за интегриране на ромите в българското общество (2010-2020 г.)*), 12 May 2010, <http://strategy.bg/StrategicDocuments/View.aspx?lang=bg-BG&Id=609>; Bulgaria, Ministry of Education and Science (*Министерство на образованието и науката*) (2015), Strategy for Educational Integration of the Children and Students from Ethnic Minorities 2015-2020 (*Стратегия за образователна интеграция на децата и учениците от етническите малцинства (2015-2020)*), [www.mon.bg/bg/143](http://www.mon.bg/bg/143); Bulgaria, Council of Ministers (*Министерски съвет*) (2013), Strategy for Reducing the Share of School Drop-outs 2013-2020 (*Стратегия за намаляване дела на преждевременно напусналите образователната система (2013-2020)*), [www.strategy.bg/StrategicDocuments/View.aspx?lang=bg-BG&Id=870](http://www.strategy.bg/StrategicDocuments/View.aspx?lang=bg-BG&Id=870). [↑](#footnote-ref-7)
7. Bulgaria, Council of Ministers (*Министерски съвет на Република България*) (2005), Health Strategy for Disadvantaged Persons belonging to the Ethnic Minorities 2005-2015 (*Здравна стратегия за лица в неравностойно положение, принадлежащи към етнически малцинства, 2005 - 2015 г.*)*,* [www.strategy.bg/StrategicDocuments/View.aspx?lang=bg-BG&Id=658](http://www.strategy.bg/StrategicDocuments/View.aspx?lang=bg-BG&Id=658), operationalised in an action plan for 2011-2015. The document refers to a nationally representative study under the leadership of Yale University, USA. [↑](#footnote-ref-8)
8. Bulgaria, National Assembly (*Народно събрание*)(2012), National Strategy of the Republic of Bulgaria for Roma Integration 2012-2020 (*Национална стратегия на Република България за интегриране на ромите (2012 - 2020)*)*,* 1 March 2012, p. 1, [www.strategy.bg/StrategicDocuments/View.aspx?lang=bg-BG&Id=726](http://www.strategy.bg/StrategicDocuments/View.aspx?lang=bg-BG&Id=726). [↑](#footnote-ref-9)
9. Bulgaria, National Assembly (*Народно събрание*)(2012), National Strategy of the Republic of Bulgaria for Roma Integration 2012-2020 (*Национална стратегия на Република България за интегриране на ромите (2012 - 2020)*)*,* 1 March 2012, [www.strategy.bg/StrategicDocuments/View.aspx?lang=bg-BG&Id=726](http://www.strategy.bg/StrategicDocuments/View.aspx?lang=bg-BG&Id=726). [↑](#footnote-ref-10)
10. Bulgaria, Council of Ministers (*Министерски съвет*) (2005), Health Strategy for Disadvantaged Persons belonging to the Ethnic Minorities 2005-2015 (*Здравна стратегия за лица в неравностойно положение, принадлежащи към етнически малцинства, 2005 - 2015 г.*)*,* [www.strategy.bg/StrategicDocuments/View.aspx?lang=bg-BG&Id=658](http://www.strategy.bg/StrategicDocuments/View.aspx?lang=bg-BG&Id=658), operationalised in an action plan for 2011-2015. [↑](#footnote-ref-11)
11. Bulgaria, Council of Ministers (*Министерски съвет*) (2010), Framework Programme for Integration of Roma into Bulgarian Society (2010 – 2020) (*Рамкова програма за интегриране на ромите в българското общество (2010-2020 г.)*), 12 May 2010, <http://strategy.bg/StrategicDocuments/View.aspx?lang=bg-BG&Id=609>. [↑](#footnote-ref-12)
12. Bulgaria, Ministry of Education and Science (*Министерство на образованието и науката*) (2010), Strategy for Educational Integration of the Children and Students from Ethnic Minorities until 2015 (*Стратегия за образователна интеграция на децата и учениците от етническите малцинства до 2015 г.*), [www.strategy.bg/StrategicDocuments/View.aspx?lang=bg-BG&Id=396](http://www.strategy.bg/StrategicDocuments/View.aspx?lang=bg-BG&Id=396). [↑](#footnote-ref-13)
13. Bulgaria, Council of Ministers (*Министерски съвет*) (2005), Health Strategy for Disadvantaged Persons belonging to the Ethnic Minorities 2005-2015 (*Здравна стратегия за лица в неравностойно положение, принадлежащи към етнически малцинства, 2005 - 2015 г.*), p. 3,[www.strategy.bg/StrategicDocuments/View.aspx?lang=bg-BG&Id=658](http://www.strategy.bg/StrategicDocuments/View.aspx?lang=bg-BG&Id=658). [↑](#footnote-ref-14)
14. Bulgaria, Ministry of Education and Science (*Министерство на образованието и науката*) (2015), Strategy for Educational Integration of the Children and Students from Ethnic Minorities 2015-2020 (*Стратегия за образователна интеграция на децата и учениците от етническите малцинства (2015-2020)*), [www.mon.bg/bg/143](http://www.mon.bg/bg/143). [↑](#footnote-ref-15)
15. Bulgaria, Council of Ministers (*Министерски съвет*) (2010), Framework Programme for Integration of Roma into Bulgarian Society (2010 – 2020) (*Рамкова програма за интегриране на ромите в българското общество (2010-2020 г.)*), 12 May 2010, <http://strategy.bg/StrategicDocuments/View.aspx?lang=bg-BG&Id=609> . The document uses 10-year-old data without critically accounting for temporal limitations and variables of change. [↑](#footnote-ref-16)
16. Bulgaria, Council of Ministers (*Министерски съвет*) (2010), Framework Programme for Integration of Roma into Bulgarian Society (2010 – 2020) (*Рамкова програма за интегриране на ромите в българското общество (2010-2020 г.)*), 12 May 2010, <http://strategy.bg/StrategicDocuments/View.aspx?lang=bg-BG&Id=609>. See indicator R2.12. [↑](#footnote-ref-17)
17. Examples of such include educational structures, economic activity structures, assessments of economic inactivity, poverty and unemployment rates. [↑](#footnote-ref-18)
18. Strategic documents on integration focus more on economic and labour market integration, rather than on social integration and participation in cultural life: [www.nsi.bg/en/content/4669/participation-population-aged-25-64-cultural-activities-and-events](http://www.nsi.bg/en/content/4669/participation-population-aged-25-64-cultural-activities-and-events); the ones on education and employment merely brush upon issues such as lack of e-skills, thereby marginalising that factor in the estimation of risks of exclusion from higher-level technological economic sectors and professions: [www.nsi.bg/en/content/6096/ict-usage-households](http://www.nsi.bg/en/content/6096/ict-usage-households). There is also a lack of attention to “novel” problems such as the rising share of financially illiterate persons within the viable workforce pool: Financial Literacy Initiative Foundation (2015), *Analysis “White Paper of Financial Literacy in Bulgaria”*, Sofia, EEA Grants, [www.financialiteracy.eu/bg\_BG/projects/proekt-bg-karta-na-finansovata-gramotnost-464.html](http://www.financialiteracy.eu/bg_BG/projects/proekt-bg-karta-na-finansovata-gramotnost-464.html). [↑](#footnote-ref-19)
19. Bulgaria, National Assembly (*Народно събрание*)(2012), National Strategy of the Republic of Bulgaria for Roma Integration 2012-2020 (*Национална стратегия на Република България за интегриране на ромите (2012 - 2020)*)*,* 1 March 2012, [www.strategy.bg/StrategicDocuments/View.aspx?lang=bg-BG&Id=726](http://www.strategy.bg/StrategicDocuments/View.aspx?lang=bg-BG&Id=726); Bulgaria, Council of Ministers (*Министерски съвет*) (2010), Framework Programme for Integration of Roma into Bulgarian Society (2010 – 2020) (*Рамкова програма за интегриране на ромите в българското общество (2010-2020 г.)*), 12 May 2010, <http://strategy.bg/StrategicDocuments/View.aspx?lang=bg-BG&Id=609>; Bulgaria, Council of Ministers (*Министерски съвет*) (2005), Health Strategy for Disadvantaged Persons belonging to the Ethnic Minorities 2005-2015 (*Здравна стратегия за лица в неравностойно положение, принадлежащи към етнически малцинства, 2005 - 2015 г.*)*,* [www.strategy.bg/StrategicDocuments/View.aspx?lang=bg-BG&Id=658](http://www.strategy.bg/StrategicDocuments/View.aspx?lang=bg-BG&Id=658). [↑](#footnote-ref-20)
20. National Social Security Institute (*Национален осигурителен институт*) (2017), *Accidents at Work: Numbers, Variables, Indicators*, Sofia, National Social Security Institute, [www.noi.bg/aboutbg/st/statistic/304-tzpb/infotz](http://www.noi.bg/aboutbg/st/statistic/304-tzpb/infotz); National Social Security Institute (*Национален осигурителен институт*) (2017), *Recognised Work-related Medical Conditions*, Sofia, National Social Security Institute, [www.nssi.bg/aboutbg/st/statistic/305-tzpb/infoprob](http://www.nssi.bg/aboutbg/st/statistic/305-tzpb/infoprob). [↑](#footnote-ref-21)
21. National Commission for Combatting Trafficking in Human Beings (*Национална комисия за борба с трафика на хора*) (2017), Annual Report for the Implementation of the National Programme for Combatting Trafficking in Human Beings and for Protecting the Victims of Trafficking, <https://antitraffic.government.bg/en/about#reports>. This is an example of not exploring the Roma population, even though it is mentioned as a vulnerable group. [↑](#footnote-ref-22)
22. National Assembly (*Народно събрание*) (2008), National Strategy for the Child 2008-2018 (*Национална стратегия за детето* *2008-2018 г.*), 31 January 2008, [www.strategy.bg/StrategicDocuments/View.aspx?Id=464](http://www.strategy.bg/StrategicDocuments/View.aspx?Id=464). A new national strategy for the period 2019-2030 was drafted, but not adopted, due to a heated and highly politicised public debate in relation to some of its provisions, including accusations of undermining ‘traditional Bulgarian values’. For the full text of the draft and the official statement of the main stakeholders, see Bulgaria (2019) Draft National Strategy for the Child 2019-2030 (*Проект на Национална стратегия за детето 2019-2030 г.*), 10 January 2019, [www.strategy.bg/PublicConsultations/View.aspx?lang=bg-BG&Id=4012](http://www.strategy.bg/PublicConsultations/View.aspx?lang=bg-BG&Id=4012). [↑](#footnote-ref-23)
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