

In-Camp Electronic Voucher Programme Price Market Monitoring (PMM) and Post-Distribution Monitoring (PDM) Report Quarter 3: July - September 2017

HIGHLIGHTS

- Acceptable food consumption increased from 94% of households in Q1 to 96% of households in Q3 2017.
- Slight increase in adoption of stress and emergency coping strategies compared to Q1 2017, especially amongst female headed households.
- Almost all households (99%) reported having no problems in redeeming the e-voucher assistance.
- In 88% of households, women are involved in making the decision on how the assistance will be spent.
- In September, the average cost of the food basket in camps reached the lowest level of Q3, at 67.45 TL.
- The hand-over of camp shops to BIM chain has resulted in a decrease in the average food basket price.
- The main issue raised during shop monitoring was limited availability of fresh vegetables and fruits at BIM markets inside camps.



134: Number of shop visits



26: Number of WFP contracted shops visited in Q3

257: Number of households interviewed for Post-Distribution Monitoring

Q3 Context

- By the end of September, 228,785 refugees resided in 26 camps across Turkey. Of these, WFP/TRC assisted 63%, or 141,599 individuals.
- In Q3, WFP assisted 10 camps, including 5 container camps and 5 tented camps.
- In Q2, Adana camp was closed for refurbishment, though a small proportion of households (~600 individuals) remained there. The majority of camp residents were transferred to Malatya camp; in Q3 these households returned to Adana, which had been upgraded to a container camp.
- In August, Viransehir camp was closed for refurbishment. Beneficiaries were transferred to Adana and Suruc camps, while the Viransehir camp is being converted into a container camp.
- In May 2017, AFAD decided to hand over all camp shops to the national supermarket chain BIM. The first transition took place in June in Kahramanmaraş camp. In Q3, Osmaniye and Adana camps also switched to BIM shops.

Outputs

- Modality: Electronic Voucher
- WFP Assistance Amount: 50 TL per person*

*Beneficiary households receive additional transfers of 50 TL per person per month from AFAD on a separate e-voucher for unrestricted use at camp shops. The total amount of assistance is thus 100 TL per month per person.

| Outputs – Q3 2017 | July | August | September |
|---------------------------|-------------|-------------|-------------|
| Beneficiaries Reached | 138,721 | 121,796 | 141,599 |
| Total Value of Assistance | \$2,026,598 | \$1,777,566 | \$2,067,753 |

Q3 In camp report – Objectives & Structure

Objective: The Q3 in-camp report summarises all in-camp monitoring activities from July-September 2017. The market monitoring and post-distribution monitoring allow analysis of: 1) the performance of the e-voucher programme, 2) key issues noted and resolved during the reporting period, and 3) the current situation of beneficiaries, plus trend analysis comparing to previous periods.

Section 1: Price Market Monitoring and On-Site Monitoring: Every month, WFP/TRC visit the e-voucher programme contracted shops, and comparison shops. This activity allows for close monitoring of the programme, ensuring shops are honouring their contractual requirements, and prices are following local trends. Section 1 of this report summarises the findings of the shop visits, including issues noted by the field teams and price analysis of key commodities.

Section 2: Post-Distribution Monitoring: Every six months, WFP staff visit the camps to collect information from beneficiary households on key outcome indicators. These surveys allow insight into how the e-voucher assistance has affected households. In addition, beneficiaries are asked questions related to their perceptions of the assistance, and awareness of key programmatic features.



WFP Assisted Camps and Population Size

(as of end of September 2017)

| Province | Camp | Camp Population | % of total WFP assisted camp population |
|-----------------------|--------------------------|-----------------|---|
| Gaziantep | Islahiye Tent city | 6,408 | 4% |
| | Karkamis Tent city | 5,660 | 4% |
| Sanliurfa | Ceylanpinar Tent city | 18,083 | 13% |
| | Akacakale Tent city | 24,256 | 17% |
| Harran Container city | 11,380 | 8% | |
| Kahramanmaraş | Merkez Container city | 17,634 | 12% |
| Osmaniye | Cevdetiye Container city | 14,377 | 10% |
| Adiyaman | Merkez Tent city | 9,090 | 6% |
| Adana | Saricam Container city | 26,750 | 19% |
| Malatya | Beydaglı Container city | 9,680 | 7% |
| Total Camp Population | | 143,318 | 100% |

SECTION 1

MARKETS: ON-SITE AND PRICE MONITORING

1. Methodology

WFP monitoring teams visit the camps unannounced every month. During their monitoring visits, WFP staff check the shops for: overall shop condition; availability of food items; quality of food items; prices of food items; issuing of itemized receipts to beneficiaries; shop staff practices/behavior towards beneficiaries; visibility of WFP information material/posters; compliance with programme rules; programme awareness of shop employees; and beneficiary feedback.

| Number of Q3 shop monitoring visits | | | |
|-------------------------------------|-----------|--------------|------------|
| Month | WFP shop | Non-WFP shop | Total |
| Jul-17 | 25 | 17 | 42 |
| Aug-17 | 26 | 21 | 47 |
| Sep-17 | 23 | 22 | 45 |
| Total Q3 2017 | 74 | 60 | 134 |

In Q3 2017, WFP staff conducted a total of 134 shop visits. The table shows the number of WFP contracted and control group shops monitored during the reporting period.

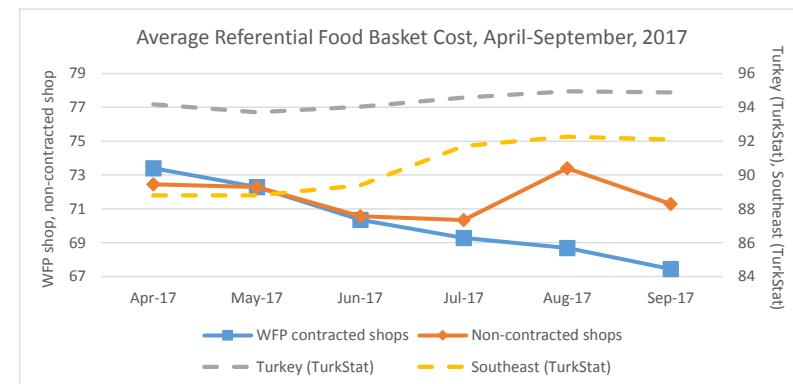
2. Price Monitoring

During Q3, the average value of the referential food basket in WFP contracted shops was 68.48 TL, with some small variation: the highest prices were observed in July at 69.28 TL, and the lowest in September at 67.45 TL.

For the reporting period, in-camp food basket cost trends were quite different from the Turkish national average and the Southeast average. Figure 1 presents the trends in the cost of the referential food basket for WFP contracted shops (blue line), non-WFP comparison shops (orange line), with national and southeast average prices collected from the Turkish Statistical Institute. While the TurkStat prices are always higher than the WFP prices, the trend analysis is insightful.¹ The

data clearly demonstrates that the official TurkStat prices are relatively steady, showing slight increases. The WFP contracted shops show a very clear decrease in average prices; this can be attributed to the low-priced market chain BIM becoming operational in Kahramanmaraş, Osmaniye and Adana camps. In particular, the BIM market in Adana camp was the location where beneficiaries could get most value for their assistance in August and September.

Figure 1: Average Value of Referential Food Basket, April-September 2017



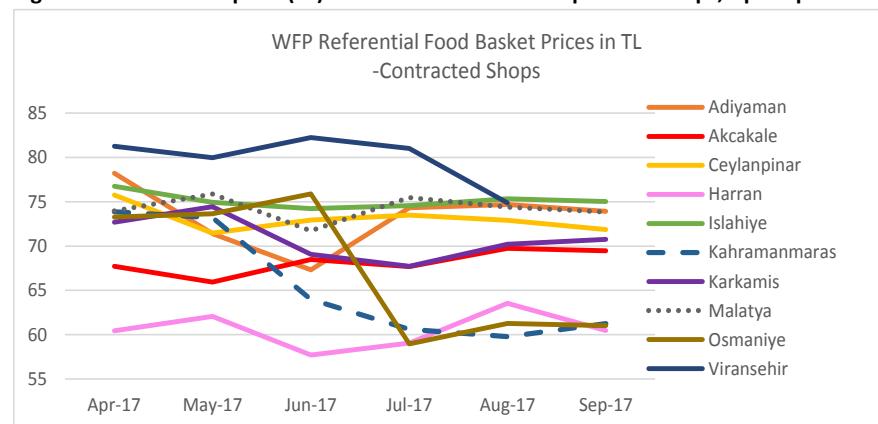
The September decrease in the average cost of the food basket in contracted shops can also be attributed to the temporary closure of Viranşehir camp for refurbishment and the subsequent exclusion of this camp from the price monitoring; Viranşehir had previously been one of the most expensive camps.

A similar pattern for food basket cost was observed in non-contracted shops during Q2 and Q3 except for the month of August. The August average increase was driven by the non-contracted shops in Malatya and Adiyaman. However, the absolute value of this August increase was only around 3 TL.

¹ TurkStat data is collected for higher quality products/brands, reflecting Turkish preferences. WFP price data is collected for the commodities selected by refugees - usually the cheapest brands.

Figure 2 presents the same data disaggregated per camp. It illustrates significant cost decreases in Kahramanmaraş and Osmaniye camps starting from June 2017, when BIM opened. The average food basket costs in Malatya, Ceylanpınar, İslahiye, and Adiyaman camps were among the highest between July and September. As noted above, the highest in-camp prices were consistently observed in Viranşehir camp throughout Q2 and Q3, with prices in this camp's shop plunging to the lowest level at 74.87 TL in August— just a month before its closure. It is also worth noting that basket costs in Harran and Akçakale were unusually high in August and September 2017 when compared to their historical trends.²

Figure 2: Food basket price (TL) trends in contracted shops in all camps, Apr-Sep 2017



Across locations monitored, prices differed significantly. Considering in-camp prices between January 2016 and September 2017, the most volatile cost of the food basket was observed in Osmaniye.³

For more details on the price analysis, including specific commodities driving changes in the cost of the referential food basket, please refer to the Annex of this report.

² Deviations from historical trends are based on standardized values of food basket costs. The historical trend is calculated based on data from Jan 2016 to Sept 2017.

3. On-site issue tracking

In the majority of camps, the contracted shops are working in accordance with programme rules and beneficiaries are satisfied with the WFP e-voucher. In general, minor issues reported by the field teams, such as lack of ID cross-checks, limited products and missing visibility items or price tags, were raised immediately with the shop management and resolved on the spot. This immediate resolution highlights the importance and efficacy of regular on-site monitoring.

In Q3, a total of 5 issues that require follow-up were recorded into the WFP Turkey online M&E database. One of the issues reported were complaints by beneficiaries about the lack of fresh produce in BIM shops, which forces beneficiaries to purchase these products from outside the camp with cash money. This is particularly difficult for female headed households, because women often face more difficulties leaving the camps by themselves.

In Malatya camp, complaints about low hygiene standards in the shop were raised by beneficiaries and WFP staff followed up with the shop manager. It was detected that the deterioration in standards at the shop was caused by a change in the shop management and a decrease in the number of shop staff. This unfortunately coincided with an increase in the camp population because of the temporary transfer of beneficiaries from Adana. WFP staff is following up to ensure improvement in the situation.

In Adiyaman camp, the variety and availability of products in the camp shop deteriorated after the current shop managers were informed of the upcoming take-over by BIM. WFP field staff continue to follow up on the situation and advocate with shop management for improvement in supplies, ensuring beneficiaries receive good services, regardless of changes in shop management.

Karkamış camp shops were showing continuous low hygiene and product quality standards, which has been reported and addressed with the shop and camp management of Karkamış during WFP monitoring visits. The situation will be followed up in future visits.

³ Relative standard deviation is used as a basis for volatility comparison

SECTION 2: POST-DISTRIBUTION MONITORING

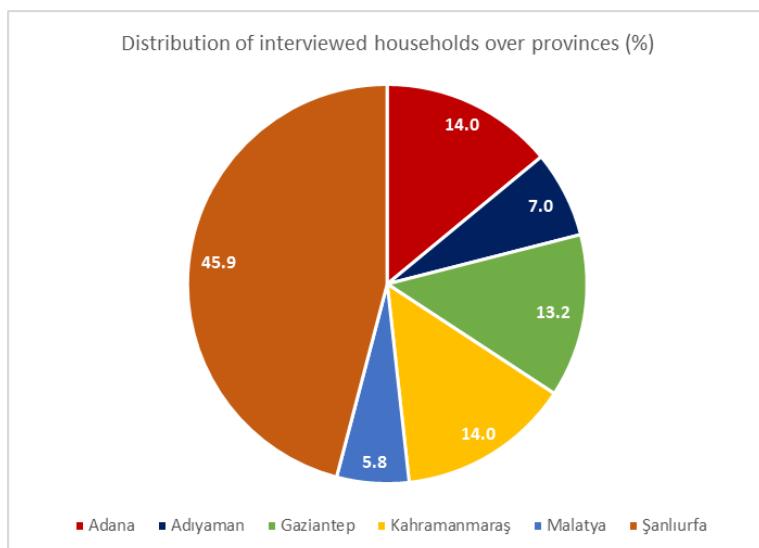
1. Methodology

The third quarter (Q3) in-camp Post Distribution Monitoring (PDM) surveys were conducted using a random sample of beneficiary households receiving e-vouchers in 11 camps assisted by WFP in South East Turkey.⁴

Trained WFP staff conducted the PDMs in face to face household interviews across all assisted camps. A total of 257 interviews were included in the Q3 2017 PDMs.

2. Limitations

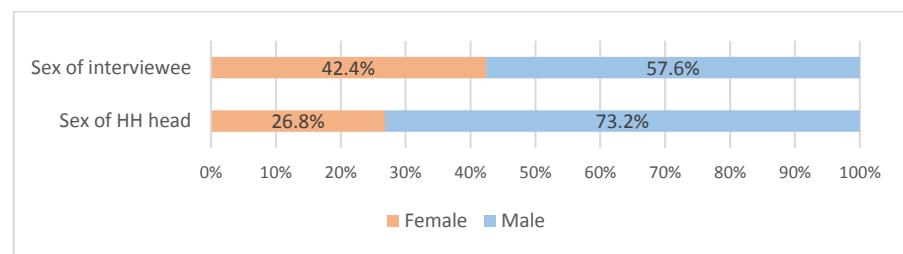
No PDM data was collected in Osmaniye camp, as WFP teams were not granted access during Q3 due to tighter AFAD regulations on camp access in this location. WFP is working with AFAD to resolve this issue and obtain necessary permissions.



⁴ Adıyaman, Akçakale (Şanlıurfa), Beydağı (Malatya), Cevdetiye (Osmaniye), Ceylanpınar (Şanlıurfa), Harran (Şanlıurfa), İslahiye (Gaziantep), Karkamış (Gaziantep), Kahramanmaraş, Sarıçam (Adana), Viranşehir (Şanlıurfa).

3. Household Characteristics

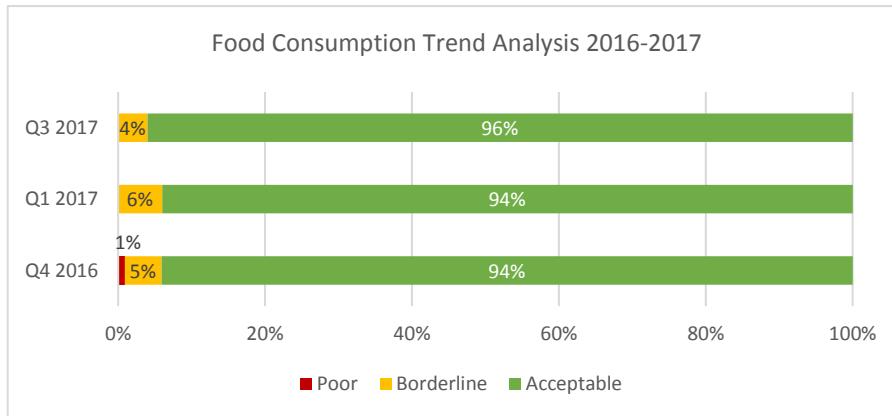
The average number of members per household in camps was 6. The majority of households are headed by men (73.2%) which is also reflected in the distribution of interviewees.



4. Outcomes

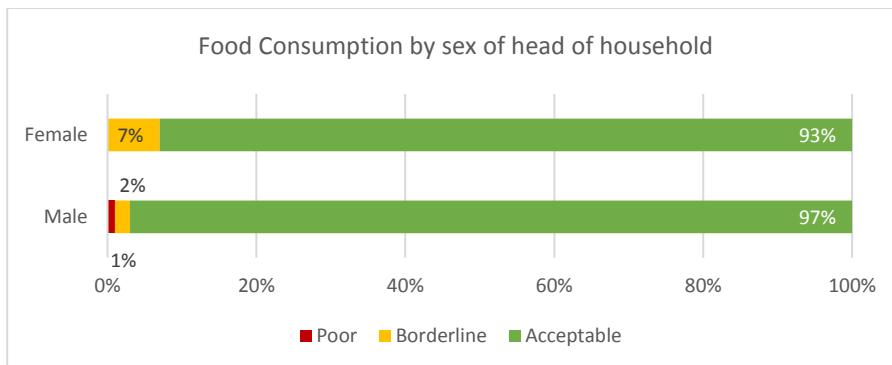
PDM surveys collected key WFP indicators related to food consumption, dietary diversity, consumption coping, livelihoods coping and expenditure patterns. The following section summarises the Q3 outcome data and presents trend analysis where possible or relevant.

4.1 Food Consumption Score



Since Q4 2016, in-camp food consumption remains very good. The Q3 2017 results continue to demonstrate improvements, with 96% of households with acceptable consumption and only 4% of households with borderline consumption. This 4% of households were all located in the camps in Şanlıurfa - however Şanlıurfa also represents almost half of the total sample.

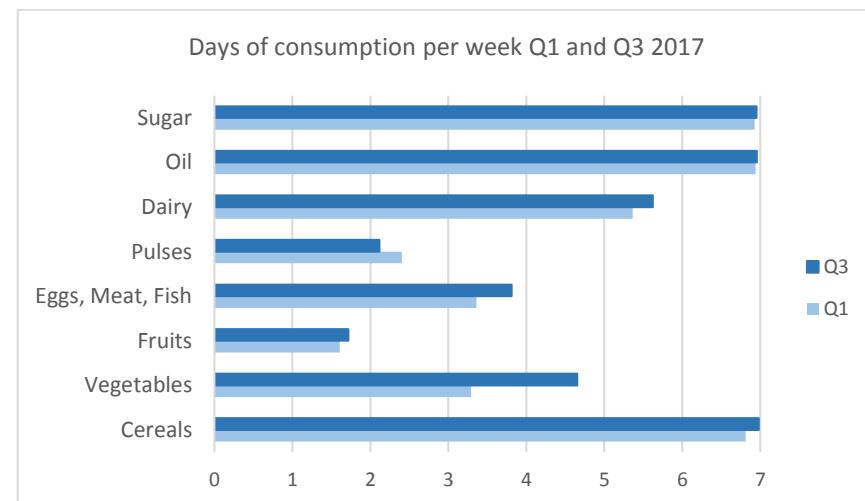
When disaggregated by the sex of the household head, 93% of female-headed households had acceptable food consumption, slightly lower than male headed households (97%). Overall, the results show stabilization of household diets, likely due to continuous WFP and AFAD assistance.



4.2 Dietary Diversity

When considering dietary diversity, Q3 data demonstrates that households consumed a relatively varied diet. Compared to Q1, households' consumption patterns remained stable, with a slight increase in the frequency of vegetable and eggs/meat consumption. Cereals, oil, sugar and condiments are consumed on a daily basis, regularly complemented with vegetables and dairy products. Fruits and pulses are consumed less frequently, most likely due to comparatively higher prices of these products and seasonality.

The increase in consumption of vegetables and animal proteins aligns with the above stated increase in the overall Food Consumption Score (FCS).

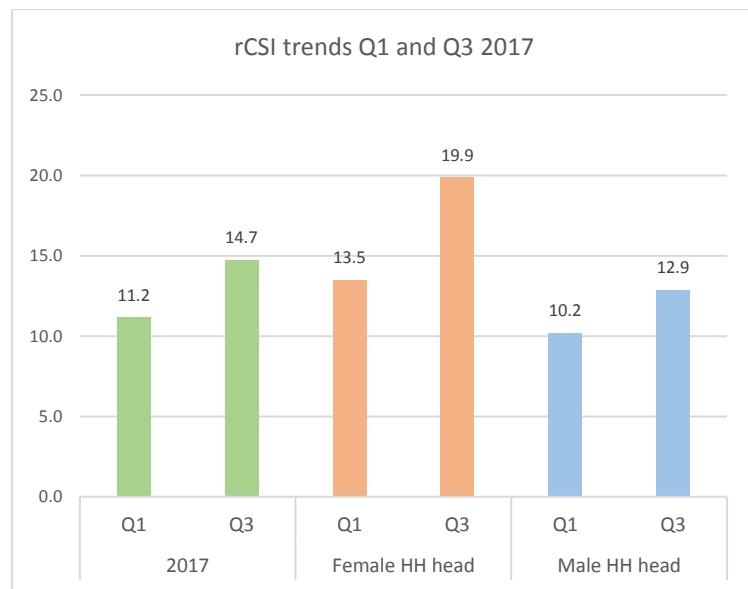


A dietary diversity score is constructed for a household through a simple sum of the food groups consumed at least once per week, ranging from zero to seven. The trend analysis demonstrates that household dietary diversity was almost the same in Q1 and Q3. Overall, the data demonstrates that in-camp households have very high dietary diversity, with an average of 6.4 of 7 food groups consumed per week. The data above shows that the gap for some households may be eggs/meat, fruit or pulses.

4.3 Consumption Coping Strategies

The reduced Coping Strategy Index (rCSI) measures the frequency and severity of five consumption coping strategies. A lower rCSI score indicates a household that is able to better meet its food needs without changing patterns in daily food consumption.

The average rCSI for in-camp beneficiary households in Q3 showed an increase from Q1, indicating more frequent use of coping strategies.

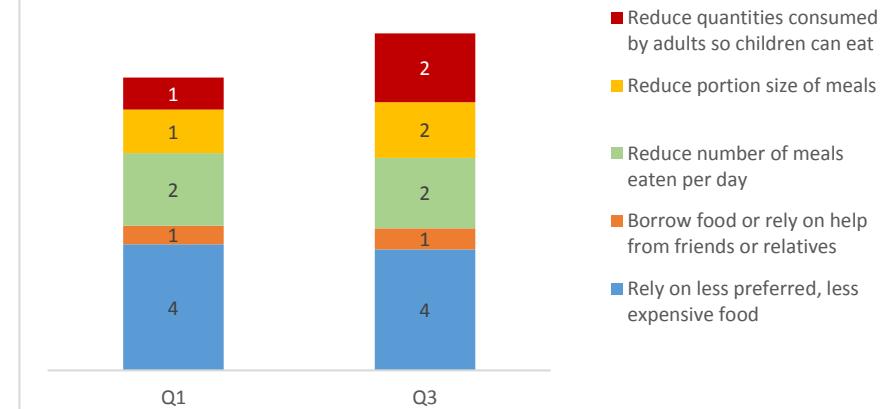


Disaggregation of results by the sex of the head of the household shows that the overall increase in consumption coping strategies is driven by female headed households.⁵ The highest proportion of female headed households was found in Şanlıurfa province – as Şanlıurfa represents almost half of the overall sample, this

⁵ While interpreting the results, it must be considered that the Q3 sample does not allow for statistically representative disaggregation of results by sex of HH head. Results can only serve as indication for general trends and patterns.

drives up the average. It is important to note that all of those households with unacceptable FCS were also located in Şanlıurfa, corroborating the increase in rCSI.

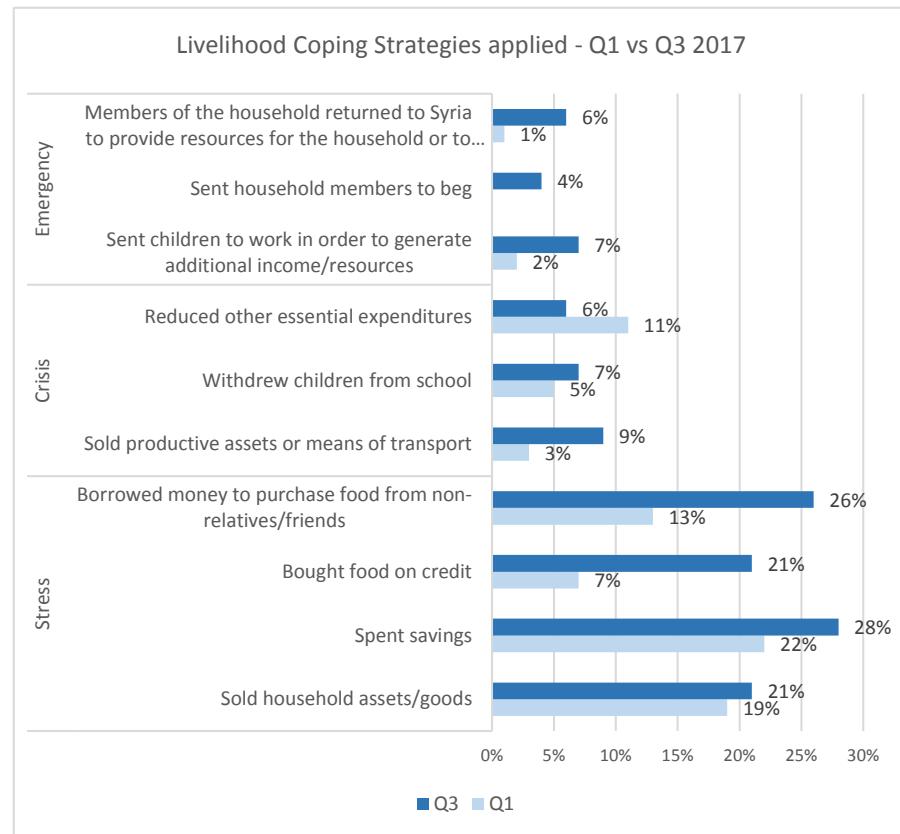
Frequency of Consumption based Coping Strategies
(average # of days per week applied)



In examining the specific coping strategies used, it is clear that reliance on less preferred or less expensive foods is the most commonly used. Reducing the number of meals per day, portion sizes and the consumption of adults are the next most frequently used, reportedly employed around 1.5 to 2 days per week. This data indicates that in order to maintain a diverse diet (acceptable FCS, as noted above) some households – particularly female headed households, were forced to employ more coping strategies in Q3 2017.

4.4 Livelihoods Coping Strategies

The Q3 PDM shows continued reliance on livelihoods coping strategies, particularly on stress strategies, including borrowing money to cover basic needs, buying food on credit, spending savings and selling household assets. The percentage of beneficiaries not adopting any coping strategies decreased from 55% (Q1) to 49% (Q3).

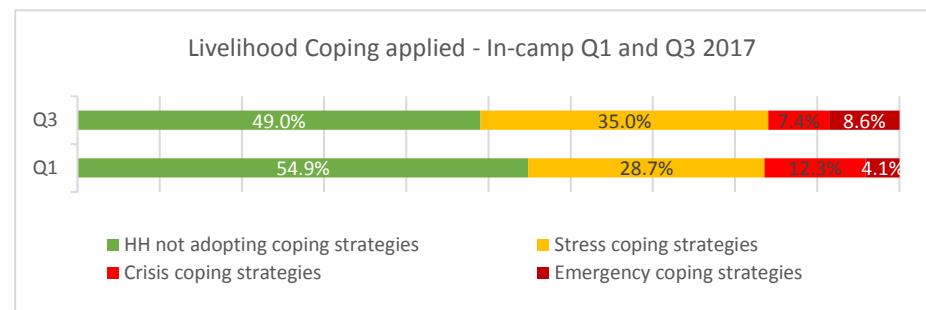


From Q1 to Q3 the data demonstrated a slight increase in the reliance on stress strategies from 29% to 35%. The proportion of households reporting having had to borrow money or buy food on credit almost tripled compared to the previous quarter. WFP field staff indicate that although BIM taking over some camp shops has lowered overall prices, a common complaint from beneficiaries is that BIM shops have limited availability of fresh vegetables and fruit. As a result, beneficiaries shop outside the camps for these products, which requires borrowing money or taking credit – hence the increase in use of these strategies. Further qualitative data collection is planned in the camps to understand better the use of coping strategies and any contextual changes that may be driving these trends.

The proportion of households resorting to emergency coping strategies, with more severe effects on households' future productivity and resilience to further shocks on their livelihoods, also increased from 4% to 9%.

The data shows a higher proportion of female headed households forced to employ more serious livelihood coping strategies, such as sending children to work or members of the household moving back to Syria.⁶ These results are in line with the results for the other food security indicators (FCS, rCSI) stated above.

The higher incidence of coping strategies amongst female headed households is most likely linked to the fact that women in the camp setting have less opportunities than men to generate additional income through employment outside the camps.



⁶ While interpreting the results, it must be considered that the Q3 sample does not allow for statistically representative disaggregation of results by sex of HH head. Results can only serve as indication for general trends and patterns.

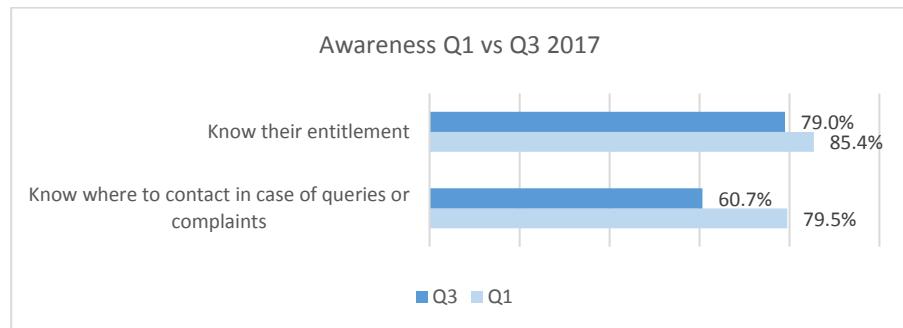
5. Process Indicators

The PDM surveys collected a variety of indicators linked to the assistance process, beneficiary perceptions and awareness, in addition to protection related indicators. These key indicators are summarised below.

5.1 Awareness and Sensitization

- Beneficiary awareness of feedback and complaints mechanisms:*

In Q3, 61% of households stated that they knew how to contact WFP/TRC to seek information or to complain. This is a 19% decrease in comparison to Q1 (79.5%). Awareness of the available feedback and complaints mechanisms is higher amongst female respondents (69%) versus males (55%).



- Sensitization and information provision:*

The proportion of households who reported having been told how much assistance they were entitled to receive also decreased to 79% in Q3, from 85% in Q1 2017.

WFP programme staff, particularly the Accountability to Affected Populations (AAP) team, will follow up on these results; a joint VAM/M&E and AAP mission will be scheduled to explore the results and identify appropriate measures to increase the awareness levels amongst in-camp beneficiaries.

5.2 Safety and Protection

In Q3, only one household reported any safety or protection concerns, against 1.2% (four households) in Q1 2017. The one concern reported was an isolated incident relating to accidental harm of a beneficiary inside a camp shop.

5.3 Utilization of Assistance and Satisfaction

- Decision Making:*

As in the previous quarter, for the majority of households, women are widely involved in the decision making process over the use of the assistance provided (88%). In 44% of households both men and women take the decision over the use of the assistance together, while in the other 44% the women alone are the decision makers.

- Satisfaction with assistance amount:*

The question on the satisfaction of in-camp beneficiaries with the amount of the assistance provided was answered positively by only 28% of respondents. There is no significant difference in the responses by male (26% yes) and female (30% yes) interviewees.

This results represents a slight decrease in satisfaction compared to Q1, when 35% of interviewees stated that the assistance they received was sufficient to cover their basic food needs. Overall it shows that while the amount seems to be sufficient to ensure households' food security, the perception of families is that they need more money to cover also other essential household needs.

6. Programme Implications

Similar to previous quarters, the food consumption results are strong in camps, demonstrating that almost all households have acceptable food consumption and diverse diets. There has been a significant improvement since Q1 2016, which has been maintained, likely through ongoing and increasing assistance. However, the data shows some increases in the adoption of food consumption and livelihoods coping strategies, which may be linked to changes in the camp shop management.

The price data demonstrates that overall prices for the referential food basket have decreased – this is primarily driven by the new BIM operated camp shops, which have much lower prices than the previous shops. Beneficiaries are pleased with the lower prices, and WFP field staff indicate that hygiene and cleanliness standards are high. The one common complaint is a lack of fresh vegetables and fruit in the BIM shops. As a result, many beneficiaries are purchasing vegetables and fruits outside of the camp shops, which requires borrowing money or relying on credit.

Female headed households showed consistently worse results than their male headed counterparts. Their food consumption was slightly worse, and the use of coping strategies was also higher – particularly the reduction of adult consumption so children could eat, and sending children to work. This is likely due to the difficulties for women to find income generating opportunities outside the camps. In Akçakale camp, for example, women are not allowed to leave the camp without a male guardian.

The concerning results related to beneficiary awareness of entitlement and feedback and complaints mechanisms are currently being used to design an action plan; WFP/TRC will gather additional information and identify appropriate solutions to increase beneficiary awareness about key programme aspects.

For More Information



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These monitoring findings further highlight the importance of ongoing assistance provision to in-camp populations. These beneficiaries have extremely limited access to income opportunities and are primarily limited to the camp shops to cover their basic needs; the data shows these constraints are particularly relevant for female headed households.



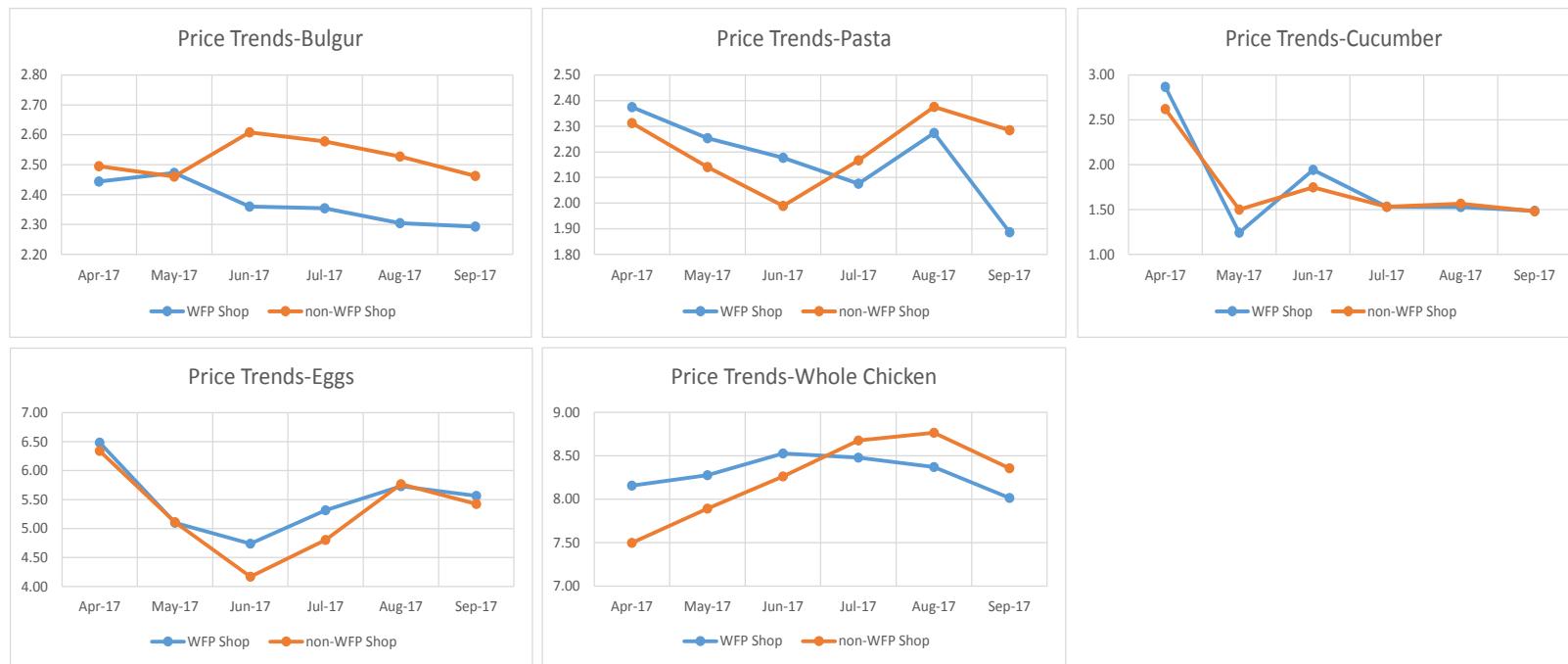
WFP/Deniz Akkus

ANNEX: WFP Referential Food Basket Commodity Prices, Q2 & Q3 2017

In September and August, the prices of rice, sunflower oil and whole chicken— which all have a significant influence in the overall food basket cost— were unusually high in Harran camp. In Akçakale camp, prices for rice, bulgur, sunflower oil, and whole chicken were observed to be deviating from their historical averages, resulting in higher food basket costs in August and September.

Figure 1 below shows that throughout Q2 and Q3, prices of many commodities are following similar patterns in WFP contracted shops and non-contracted comparison shops. Price trends in the five commodities bulgur, pasta, cucumber, eggs, and whole chicken, align most closely between contracted and non-contracted shops.

Figure 1: Similar Price Trends (TL/kg) for WFP Referential Food Basket Items in Q2 and Q3, Contracted and non-Contracted shops



While the previous commodities display very similar price trends in contracted and control shops, there are divergences in price patterns for some other commodities such as rice, sunflower oil, red lentils, cheese, sugar and salt. However, absolute differences between prices in contracted and non-contracted shops are not very large, ranging from 0.01 TL to 0.7 TL per kg. This is unlikely to affect purchasing power of the beneficiaries significantly. WFP field staff will continue to collect price data on a monthly basis, and the trends will be closely tracked over time.

Figure 2: Divergent price trends (TL/kg) for WFP Referential Food Basket items in Q2 and Q3, contracted and non-contracted shops

