

# Local subsidies for the elderly

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## 1. INTRODUCTION

Local governments can use “subsidies” for policymaking. In other words, they can rely on their spending power to achieve public policy objectives (Requero, 2002; Fernández, 2004). Subsidies are payments made by public authorities to public and private entities and individuals. Subsidies’ defining feature is that recipients do not pay any compensation in exchange for the subsidy. This does not mean, however, that subsidies can be defined as mere gifts. In fact, under the applicable legislation, subsidies qualify as (i) goal-oriented forms of financial aid (since they seek to advance the public interest); and (ii) conditional instruments (given that payment of subsidies is subject to the fulfillment of the aim pursued). In this regard, see Spanish Supreme Court Judgment (STS) no. 989/2018, legal basis 4.

Public authorities may grant subsidies regarding any matters falling within their scope of power. Note that public authorities need not be specifically empowered to grant subsidies, since these qualify as ancillary instruments (i.e., forms of financial aid) generally available to public authorities (Pomed, 2010; Aymerich, 221). Therefore, subsidies are one of many tools available to public authorities to address ageing and age-related challenges. This paper examines the use of subsidies by local governments for their elderly policies. We map and classify the various subsidies granted by municipalities in this domain. Our mapping seeks to (i) supplement this book’s overview of elderly policies; and (ii) enable a better understanding of subsidy schemes at a local level.

## 2. METHODOLOGY

We take a descriptive and classificatory approach relying on the information available on the National Subsidy Database (NSD). The NSD was created under Act 15/2014, of 16 September, Streamlining the Public Sector. Act 15/2014 modified Articles 18 and 20 of the General Act on Subsidies (*Ley General de Subvenciones*, LGS), requiring all public authorities to report to the NSD their calls for subsidies and final award decisions. Not all the information reported by public authorities ends up being publicly available. However, the NSD does disclose on the National Subsidy Disclosure Portal (NSDP) the key aspects of all

the reported subsidy programs or schemes. The NSDP has been in place since 1 January 2016. It is very useful to learn how public authorities allocate subsidies.

The scope of our study only covers NSD information regarding subsidies called or awarded by municipalities, i.e., we have disregarded the information on subsidies granted by other local authorities, such as provincial councils or *cabildos*. We have not examined national or regional subsidy schemes, even if local governments qualify as recipients or managing entities. Admittedly, the scope of our study entails leaving out some subsidy schemes related to elderly policies. However, we have decided to focus on municipalities, i.e., on local policymaking.

From a substantive standpoint, we have only considered subsidy schemes specifically related to the “elderly” or “older adults” and to “ageing.” Therefore, the study covers two types of subsidy programs: (i) subsidy schemes listing “ageing” as the main eligibility requirement, regardless that there may be additional eligibility requirements (e.g., income, wealth, health conditions or disabilities); and (ii) subsidy schemes promoting activities or the provision of services catering to the elderly, even if older adults are not the ultimate subsidy recipients. There was no need to set an age threshold to identify older adults. Instead, we considered all subsidy schemes addressed to “older adults” or “senior citizens,” which usually comprised seniors aged 60-65, although in a few cases the lower threshold was 55. We have disregarded all financial aid schemes and incentives for the hiring of employees aged 45 and older, because these schemes target persons who are still active.

As for the time frame, our study considers all subsidy schemes called during 2019, since it is the last year for which there is complete information. We added any subsidy programs called in 2018 to be granted for 2019 activities.

As a result, we came up with 189 subsidies or local subsidy schemes on which we relied to prepare the categorization provided below. Keep in mind that public authorities in general, and municipalities in particular, do not always fulfill their reporting obligations under the LGS (Lanza, 2019). It is difficult to estimate the number of subsidy programs that are either reported late or not reported at all, but there is no doubt that the NSD misses many of them and end up being undisclosed. On top of that, the NSD and the NSDP sometimes inaccurately record the purpose or aim of subsidies, so our search may have missed a few elderly-related subsidy schemes. Consequently, although the subsidies covered by our study reflect most local elderly-related subsidy programs, we cannot be sure that our categorization be comprehensive or completely accurate.

### 3. CATEGORIZATION

To prepare the categorization below, we examined the (i) calls (for subsidies awarded through competitive procedures or tenders); and (ii) agreements or arrangements (for subsidies that were directly granted, i.e., ad-hoc subsidies) posted on the NSD. As for (i), we also looked up the legal bases or rules governing the actual subsidies when these were not included in the call and we needed additional information. Our analysis has allowed to identify each subsidy scheme's main purpose our aim, which was the primary criterion to break down or categorize each subsidy scheme.

Note that the purpose attached to each subsidy scheme does not necessarily match the wording of the calls and agreements posted on the NSD. Public authorities do not always state the aims of the subsidy scheme as clearly and accurately as would be necessary for this kind of categorization. Thus, we have established the subsidy schemes' purposes and paired them with each scheme by examining the aims and programs globally, mostly considering eligibility requirements, the eligible/subsidizable activities and, regarding subsidies awarded through competitive procedures or tenders, the criteria and standards used to rank the applications and allocate the funds.

In doing so we barely had any issues finding the ultimate purpose of each subsidy scheme. However, we had some trouble concerning the following aspects. First, subsidies may pursue several objectives at the same time. For instance, a subsidy aimed at functionally adapting homes of vulnerable older adults can be both an "ageing at home" program and a form of financial aid for disadvantaged citizens regardless of their age. Since our study focuses on elderly policies, we have stuck with the purpose most closely related to elderly policymaking. Second, many calls and agreements/arrangements provide for various "facilities." For example, a single subsidy scheme may include a facility for older adults along with funding for dependent persons. In that case, we separated the facility related to the elderly. Also, the same scheme may provide different ageing-related lines of funding, e.g., (i) housing refurbishment; and (ii) financial aid for elders in need. When this occurred, we picked and examined the facility providing the largest funding.

So we broke down all local subsidies for the elderly in 2019 into four categories: (i) local subsidies aimed at promoting active ageing (130 subsidy schemes, i.e., 68.8% overall); (ii) local subsidies to promote ageing at home (24 schemes accounting for 12.7% of all cases); (iii) local subsidies for financially vulnerable seniors (19 subsidies, i.e., 10% overall); and (iv) other local subsidies mostly aimed at promoting the autonomy and integration of senior citizens (12 schemes, representing 6.3% of all cases).

#### 4. LOCAL SUBSIDIES PROMOTING ACTIVE AGEING

The most widely spread local subsidy schemes are, by far, those aimed at promoting leisure and cultural activities, training and therapeutic and sporting activity. These subsidy programs can be categorized together, since they all seek to promote active ageing. These funds are allocated to a myriad of activities, thus being somewhat useless to categorize the subsidies based on that criterion. Also, local subsidy schemes often finance numerous (and diverse) activities. Therefore, it is sometimes complicated to pair every scheme with a single activity.

We have found three types of local subsidies promoting active ageing. First, we included under this category all subsidy schemes aimed at providing financial aid to the activities held at local elderly centers and associations. Second, we also included subsidy schemes providing financial support to the outsourcing agreements concluded by local authorities with third parties providing services and holding activities to promote active ageing at a local level. Finally, this category also comprised aid schemes covering the costs of activities for older adults (e.g., membership fees or monthly payments).

##### 4.1. Subsidies for local elderly centers and associations

A large share of local subsidies promoting active ageing are granted to local centers and associations.

The calls and arrangements used to grant or award these subsidies are worded differently. Some of the award decisions or otherwise the resolutions granting the subsidies include detailed and accurate definitions of the eligible activities. For instance, there are many local subsidies partially financing a specific senior trip, a given social event or workshops. In these cases, the total amount of the subsidy is stated as a lump sum and there is a cap on the prices payable by the recipients (i.e., the price paid by the older adults involved is partially subsidized). Usually, the provider is only required to provide proof that the activity actually took place.

**Table 1. Subsidies for local elderly centers and associations - examples**

NSD	Municipality	Province	Summary	Recipients	Procedure	Funds/Amount (€)
453793	Torrejón de Ardoz	Madrid	“Telebiblioteca” (“Remote library”) project for home library services	<i>Fundación INLADE</i>	Agreement/Arrangement (ad-hoc subsidy)	4,000

453109	Quart de Poblet	Valencia	Maintaining the <i>Coral de Mayores</i>	<i>Coral de las Personas Mayores</i>	Agreement/Arrangement (ad-hoc subsidy)	5,000
477214	Sagunto	Valencia	Cultural visit and tour around Monreal del Campo (Teruel)	<i>Asociación MURBITE</i>	Agreement/Arrangement (ad-hoc subsidy)	1,000
438748	Pájara	Tenerife	Trip to Lanzarote	<i>Asociación de Mayores El Jibito</i>	Agreement/Arrangement (ad-hoc subsidy)	11,083

Source: own elaboration.

There are other cases where the calls and agreements are not related to such specific activities. Indeed, many subsidy schemes are either allocated to active ageing projects previously submitted by elderly centers and associations or subject to the submission of those projects (i.e., the funds are only paid if the relevant center or association submits the project). Either way, the point is to partially or totally finance the local centers' and associations' activities. The calls and arrangements often (i) state the amount of the subsidy as a lump sum; and (ii) establish that the subsidy shall not exceed the cost of the provided activities. Nevertheless, given the broad definition of activities in this context, we highly doubt that there be a close oversight or strict checks in practice.

**Table 2. Subsidies for local elderly centers and associations - examples**

<b>NSD</b>	<b>Municipality</b>	<b>Province</b>	<b>Summary</b>	<b>Recipients</b>	<b>Procedure</b>	<b>Funds/ Amount (€)</b>
448287	Alcobendas	Madrid	Programs aimed at promoting involvement of older adults in local communities and social life	Locally-based elderly associations	Competitive procedure/Tender	50.000
472066	Palma de Mallorca	Balearic Islands	Programs, projects and activities aimed at promoting active ageing and intergenerational solidarity	Locally-based elderly associations and groups with a local scope	Competitive procedure/Tender	17.500
453506	Irún	Guipúzcoa	Preventive, cultural and leisure activities along with training for the elderly	Non-profit associations with a local scope	Competitive procedure/Tender	33.500

484020	Puerto Llano	Ciudad Real	Cultural activities for the elderly	<i>Asociación Cultural y Recreativa del Centro de Mayores I de Puertollano</i>	Agreement/Arrangement (ad-hoc subsidy)	3.000
482947	Coslada	Madrid	Sociocultural activities, leisure and trips	Entities and associations cooperating with the Governing Boards of local elderly centers in Coslada	Agreement/Arrangement (ad-hoc subsidy)	58.000

Source: own elaboration.

Finally, certain operating costs or general expenses incurred by recipients can be subsidizable. These subsidies could be assigned to their own category, their purpose being to foster the creation of associations in line with Article 72 of the Spanish Local Government Act (*Ley de Bases del Régimen Local*, LBRL), providing that local governments should foster that local associations be created to safeguard the local residents' interests. This is why these subsidies barely impose any requirements on their recipients. However, we have placed them under this category because these expenses (when subsidized) are ancillary to the subsidy for active-ageing-related activities. Following our line of reasoning, these clauses would be opposite to the subsidies for specific activities, insofar as they qualify as a payment, with barely any requirements, made to elderly associations.

**Tabla 3. Subsidies for local elderly centers and associations - examples**

NSD	Municipality	Province	Summary	Recipients	Procedure	Funds/ Amount (€)
471654	Plasencia	Cáceres	Financial aid for the operation of elderly associations	Elderly associations registered in local registries	Competitive procedure/Tender	2,500
440056	Orense	Orense	Rental of premises for elderly associations	Associations and non-profit entities registered in regional and local registries	Competitive procedure/Tender	27,000
454595	Bilbao	Vizcaya	Financial aid for refurbishment and equipment	Bilbao elderly associations	Agreement/Arrangement (ad-hoc subsidy)	99,000

490695	Cartagena	Murcia	Financial aid to purchase furniture, IT systems and for refurbishment of the association's premises	Senior clubs listed in the annex	Agreement/Arrangement (ad-hoc subsidy)	25,000
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Source: own elaboration.

In addition to promoting active ageing at a local level, all of these schemes have in common that they are mostly sources of financial support for local elderly centers and associations. Thus, these schemes qualify as a way of supporting the local network of elderly centers and associations operating within the broader field of ageing-related policymaking. In fact, even for subsidies awarded through competitive procedures, applicants must be locally-based non-profit associations or entities. In smaller municipalities, this kind of clauses almost turn the tenders or competitive procedures into a direct grant of subsidies.

#### 4.2. Subsidies for third parties

This second category comprises a set of ancillary subsidies included in broader agreements or arrangements entered into between local governments and specific entities, other than local elderly centers and associations, so that such entities provide active ageing services and activities. Therefore, these are ad-hoc subsidy schemes subject to agreements or arrangements and directly granted to the eligible recipients. The main difference between these schemes and the subsidies examined in section 4.1 above is that the activities funded by these schemes are not connected in any way with the leisure and cultural activities offered by local elderly centers and associations.

This category can comprise a wide variety of programs, the paramount example being the agreements between local governments and universities under which universities offer college courses (either free or at a subsidized price) to local seniors. These arrangements for the establishment of an elderly “university” or “classroom” usually require that local authorities directly grant an ad-hoc subsidy to the relevant university or college. This category could also include subsidy schemes granted to university schools or research groups focused on ageing-related topics, since such schemes cover the design and implementation of active ageing activities in the municipality.

**Table 4. Subsidies for third parties - examples**

NSD	Municipality	Province	Summary	Recipients	Procedure	Funds/Amount (€)
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480606	Guadalajara	Guadalajara	College Courses for Older Adults ( <i>Programa Universidad de Mayores</i> )	Universidad de Alcalá	Agreement/Arrangement (ad-hoc subsidy)	6,000
438484	Elche	Alicante	College Courses for Older Adults ( <i>Programa Universidad de Mayores</i> )	UNED	Agreement/Arrangement (ad-hoc subsidy)	7,000
477512	Almería	Almería	College Courses for Older Adults ( <i>Programa Universidad de Mayores</i> )	Universidad de Almería	Agreement/Arrangement (ad-hoc subsidy)	15,000
443609	Cabra	Córdoba	College Courses for Older Adults ( <i>Programa Universidad de Mayores</i> )	Universidad de Córdoba	Agreement/Arrangement (ad-hoc subsidy)	12,000
494083	Móstoles	Madrid	College Courses for Older Adults ( <i>Programa Universidad de Mayores</i> )	Universidad Rey Juan Carlos	Agreement/Arrangement (ad-hoc subsidy)	12,000

Source: own elaboration.

### 4.3. Subsidies directly granted to the elderly

Finally, there are also local subsidies that qualify as direct payments to the elderly for them to cover the price or fee (or part thereof) of certain active ageing activities. These subsidies are subject to competitive procedures, and their amount is expressed as a percentage of the eligible activity's price or fee. However, these schemes are uncommon. We have only found three.

**Table 5. Subsidies directly granted to the elderly - examples**

NSD	Municipality	Province	Summary	Recipients/Eligibility requirements	Procedure	Funds/Amount (€)
458897	Hoyo de Manzanares	Madrid	Payment of membership or monthly fees for elderly courses and programs provided by the THAM partnership	Seniors over 65 regardless of income	Competitive procedure/Tender	1.800
469466	Guía de Isora	Tenerife	Financial aid for active, cultural and age-friendly trips and senior tours	Seniors over 55 including additional income requirements (i.e., recipients)	Competitive procedure/Tender	60.000

				must not have an income exceeding a certain amount)		
476844	Salamanca	Salamanca	Financial aid for IMSERSO trips and tours	Unemployed or retired seniors and pensioners over 60	Competitive procedure/Tender	18.000

Source: own elaboration.

## 5. LOCAL SUBSIDIES TO PROMOTE AGEING AT HOME

Although they are not as widespread as the subsidies discussed before, it is worth examining a second type of local schemes, i.e., those aimed at enhancing older adults' housing and living conditions. In particular, the purpose of most local programs included under this category is to allow older adults to stay at home, in line with ageing at home policies. Subsidies seeking that seniors live in nursing homes or similar facilities are far less common. These schemes are usually addressed to very specific social emergencies or critical situations, and thus they are included under the category discussed in section 6 below (subsidies for financially vulnerable seniors).

There are three types of local schemes related to older adults' housing needs. The most common and heavily financed one is the program aimed at covering any remodeling or refurbishment costs to adapt homes to seniors' functional needs. The second scheme seeks to mitigate the costs of housing for older adults and, more specifically, local property taxes. Although the calls do not often specify it, these subsidy schemes could also be considered part of a stay-at-home-policy, since they seek to mitigate older adults' tax burden. Finally, we will also examine a more uncommon type of subsidy: local schemes covering the costs of home assistance for the elderly.

### 5.1. Subsidies (financial aid) for the functional adaptation of elderly housing

The most widespread age-friendly local subsidies are financial aid schemes provided by many municipalities allowing older adults to enhance their homes by making them more functional and accessible. This fosters that senior citizens stay at home even if they have mobility impairments, thus preventing them from going to a nursing home or at least delaying the need to do so.

These subsidies are awarded through competitive procedures or tenders, and the recipients are the eligible seniors. The eligibility requirements are (i) being at least 60, 65 or 70, depending on the scheme; and (ii) having a deed showing that the applicant either owns or

rents the home. Also, most schemes include additional requirements. Applicants (iii) must not exceed a certain level of income or wealth; and (iv) should have certain sensory or mobility impairments. These schemes do not usually require that the applicant have a minimum degree of disability, but it can be an additional criterion to assess or rank the applications. Moreover, note that these subsidies often supplement other programs with a broader scope that provide specific aid schemes for persons with disabilities or mobility impairments regardless of age.

Keep in mind, however, that these schemes do not only cover the expenses incurred to functionally adapt or update the home. They also include additional expenses to purchase special pieces of furniture or specific tools to enhance older adults' mobility (such as wheelchairs or orthopedic equipment). Since this equipment can be used outside of the home, these subsidies could be categorized as aid schemes seeking to foster autonomy of the elderly, thus having a broader scope than the one considered herein.

**Table 6. Subsidies (financial aid) for the functional adaptation of elderly housing - examples**

NSD	Municipality	Province	Summary	Recipients/Eligibility requirements	Procedure	Funds/Amount (€)
445141	Alcorcón	Madrid	Aid for housing refurbishment	Seniors over 65 Being a registered resident and having a yearly income not exceeding €18,200 (special rules for families apply)	Competitive procedure/Tender	40,000.00
443585	Moncada	Valencia	Aid for technical equipment (e.g., hearing aid) and for equipment used for the functional adaptation of the home or motor vehicles	Seniors over 60 Sensory and mobility impairments. Being a registered resident and actually living in the relevant municipality.	Competitive procedure/Tender	90,000.00
446452	Orihuela	Alicante	Aid to purchase accessibility equipment and for the functional adaptation of the home	Seniors over 60 Recipients of retirement pensions, survivors' pensions or permanent disability benefits. Local authorities must certify that applicants are in need. Applicants with permanent disabilities and the spouses if (i) the latter are economically dependent on them and (ii) live in Orihuela	Competitive procedure/Tender	300,000.00

449257	Carlet	Valencia	Aid for equipment used for the functional adaptation of the home or motor vehicles	Seniors over 60 Sensory or mobility impairments	Competitive procedure/Tender	140,000.00
452663	Fasnia	Tenerife	Aid for housing refurbishment, for purchasing orthopedic equipment and for covering transportation expenses incurred going to health centers and other specialized facilities	Seniors over 60 Spanish nationals having been registered as residents for at least 1 year and with an income not exceeding twice the Public Income Indicator (IPREM)	Competitive procedure/Tender	12,000.00
440006	Los Realejos	Tenerife	Aid for food and housing refurbishment and for purchasing equipment to functionally adapt the home. Aid for prosthetic equipment and for transportation as well as aid for additional, non-specified expenses to be assessed by the relevant authority	Seniors over 60 Not having any source of income and that the income <i>per capita</i> of the family not exceed the minimum wage	Competitive procedure/Tender	25,000.00
460199	Granollers	Barcelona	Aid for elderly housing refurbishment	Seniors over 65 Being a registered resident. Persons with mobility impairments or disabilities aged 80 or older living alone and having financial issues will be prioritized	Competitive procedure/Tender	23,310.00
474706	Santpedor	Barcelona	Aid for elderly housing remodeling	Seniors over 65 Seniors with a 33% disability or in a vulnerable situation. This eligibility requirement does not apply to seniors aged 80 or older	Competitive procedure/Tender	16,800
484556	San Cristóbal de la Laguna	Tenerife	Aid for housing remodeling and for purchasing furniture and equipment aimed at enhancing older adults' living conditions	Seniors over 65 Income not exceeding the IPREM	Competitive procedure/Tender	Not recorded
460385	Alcobendas	Madrid	Aid for home remodeling and adaptation to facilitate older adults' mobility, communication and personal autonomy	Seniors over 70 Having been registered as residents for at least 1 year regardless of income	Competitive procedure/Tender	100,000.00

485572	Formentera	Balearic Islands	Aid for purchasing, updating and/or installing mobility and security equipment for older adults (e.g., wheelchairs and functional adaptations for the home)	Seniors over 65 Monthly income below €880	Competitive procedure/Tender	16.000,00
482961	El Sauzal	Tenerife	Aid for removing architectural barriers, for purchasing household goods and homeware as well as prosthetic/orthopedic equipment	Seniors over 65 Average income is used as an assessment standard or criterion. Older adults aged 70 and older will be priority applicants	Competitive procedure/Tender	Not recorded
464986	San Andrés y Saucos	La Palma	Aid for remodeling, furniture, prosthetic equipment, glasses, hearing aid and other equipment for personal use	Seniors over 60 Income not exceeding the IPREM	Competitive procedure/Tender	1.500,00
451574	El Puig de Santa María	Valencia	Aid for the functional adaptation of homes and vehicles and for purchasing equipment for personal use	Seniors over 60 Sensory or mobility impairments	Competitive procedure/Tender	3.600,00

Source: own elaboration.

## 5.2. Subsidies to mitigate the impact of local property taxes for the elderly

Although they are fairly uncommon, financial aid schemes to cover a share of local property taxes for the elderly qualify as a distinct category of subsidies. These subsidies are expressed as a share of the Land Value Tax (in Spanish, *Impuesto sobre Bienes Inmuebles* or IBI) or other local taxes payable by older adults. These aid schemes cover 25%-90% of the payable tax amount.

This study only includes age-related tax aid schemes. However, many municipalities provide additional subsidy schemes aimed at mitigating the local tax burden. These “tax relief subsidies” or, better said, that subsidies be allocated to “pay taxes,” may seem ironic to say the least. The point of having them is just to bypass the restrictions imposed on local governments by the Local Tax and Treasury Act (*Ley Reguladora de las Haciendas Locales*) regarding the provision of tax relief and tax benefits. This is why many have argued that the said “tax relief subsidies” are often unlawful (Moreno, 2019).

All of these subsidies posted on the NSD are awarded through competitive procedures to older adults. The eligibility requirements are as follows: being (i) 65 or older (at least this was the case in all the subsidies examined herein); and (ii) subject to the subsidized local tax. Additional eligibility requirements include minimum income levels or being unemployed.

**Table 7. Subsidies to mitigate the impact of local property taxes for the elderly - examples**

NSD	Municipality	Province	Summary	Recipients/Eligibility requirements	Procedure	Funds/Amount (€)
484014	Olot	Gerona	Tax relief for the Land Value Act or IBI	Seniors over 50 that have been unemployed for a long time	Competitive procedure/Tender	4,000.00
457022	Cuervo	Sevilla	Tax relief for the Land Value Act or IBI	Seniors over 65 that do not own any property (other than the eligible one) worth more than €30,000	Competitive procedure/Tender	8,000.00
448353	Santa Coloma de Gramenet	Barcelona	Tax relief for the Land Value Act or IBI	Seniors over 65 living on their own and having an income not exceeding 1.5 times the IPREM	Competitive procedure/Tender	25,000.00
454063	L'Escala	Gerona	Tax relief for the Land Value Act or IBI	Seniors over 65 being economically or financially vulnerable	Competitive procedure/Tender	10,000.00
474399	Valldecavalls	Barcelona	Tax relief for the Land Value Act or IBI	Seniors over 65 and pensioners with an income not exceeding 1.06 times the minimum wage	Competitive procedure/Tender	4,000.00
468735	Fuengirola	Málaga	Tax relief for the Land Value Act or IBI and the waste management tax	Pensioners	Competitive procedure/Tender	20,000.00
438311	Carlet	Valencia	Financial aid for the waste management tax	Seniors over 65 with a yearly income equal to or greater than €10,000	Competitive procedure/Tender	10,000.00

Source: own elaboration.

### 5.3. Subsidies for home assistance

Finally, we also found certain local subsidy schemes aimed at covering the cost (partly or in full) of home assistance services for the elderly provided by non-profit organizations. Insofar as the availability of these services enables the elderly to stay at home, we can consider that the ultimate purpose of these schemes is the same as that of the previously discussed subsidies.

This category comprises, on the one hand, ad-hoc subsidies directly granted to non-profit organizations and associations to cover part of the cost of the home assistance services provided thereby. As could be expected, these schemes do not provide very detailed descriptions of these services' end users. The actual services entail taking care of and supporting older adults living alone and their caregivers.

On the other hand, this category includes many ancillary aid schemes. The calls for these subsidies usually cover additional aid schemes to cover different expenses, such as the costs of transportation to the health center, food or essential goods.

**Table 8. Subsidies for home assistance - examples**

NSD	Municipality	Summary	Recipients	Procedure	Funds/Amount (€)
462711	Móstoles	Project for providing emotional support to older adults living alone	<i>Fundación Amigos de los Mayores</i>	Agreement/Arrangement (ad-hoc subsidy)	10,500.00
455860	Madrid	Volunteer project to avoid unwanted loneliness of older adults	<i>Fundación Amigos de los Mayores</i>	Agreement/Arrangement (ad-hoc subsidy)	25,000.00
456892	Madrid	Volunteer program to prevent abuse and social isolation of older adults	<i>Fundación Desarrollo y Asistencia</i>	Agreement/Arrangement (ad-hoc subsidy)	35,000.00
452688	Granada	Project for supporting families taking care of older adults or dependent persons	<i>Asociación Adultos Cartuja</i>	Agreement/Arrangement (ad-hoc subsidy)	30,000.00

Source: own elaboration.

## 6. LOCAL SUBSIDIES FOR FINANCIALLY VULNERABLE OLDER ADULTS

Another priority for local subsidy schemes is to meet the special needs of financially vulnerable older adults. One could argue that ageing itself creates vulnerability and thus all local subsidies examined herein could be included under this category. Nonetheless, this category only comprises schemes aimed at addressing challenges affecting older adults

although not related to age. The rationale for implementing these subsidies is that the causes of vulnerability become particularly challenging when combined with the ageing process. Thus, our sample only includes programs specifically targeting elders, and not subsidy schemes catering to the needs of vulnerable groups regardless of age. However, there is still a blurry line between this category and others. Given that the eligibility requirements for other subsidy programs are financial vulnerability or mobility impairments, many of those programs (assigned to other groups) could be listed under this category.

We have found two main types of schemes. Their purpose is to address the issues faced by financially vulnerable older adults, but there is a major difference between them. The first set of subsidies entails payments to the recipients, whereas in the latter type the recipients are associations or entities delivering services to vulnerable seniors or taking care of them. Finally, we also created a miscellaneous category comprising subsidy schemes aimed at addressing non-financial vulnerability needs.

### **6.1. Subsidies (financial aid) that entail payments to financially vulnerable older adults**

This category includes local subsidies that entail direct payments to the most disadvantaged or financially vulnerable older adults. All of these aid schemes are subject to the same procedure (a competitive procedure or tender) and have the same eligibility requirements, i.e., age (recipients must be at least 65) and being financially vulnerable (the recipients' income must not exceed a certain amount based on certain standards or benchmarks like the minimum wage or the IPREM). Regarding the income requirements, these subsidies sometimes require that the applicants do not own property worth more than a certain pre-established amount.

Note, however, that the range of eligible or subsidizable expenses is really broad. Some subsidies cover the costs of specific services provided to the elderly—e.g., food expenses at a given nursing home. Other subsidy schemes specify the type of eligible expenses to be subsidized—housing or daily life expenses, for example—without attaching them to a specific center or service provider. In this case, the calls usually require that there be proof of the expenses incurred. This cost breakdown is then used to calculate each recipient's individual payment applying, where appropriate, the relevant references and caps. Finally, there are subsidy schemes where the eligibility requirements are so broadly stated that the actual aid qualifies as a mere transfer of income subject to no conditions or a “non-conditional payment.”

**Table 9. Subsidies (financial aid) that entail payments to financially vulnerable older adults - examples**

NSD	Municipality	Province	Summary	Recipients/Eligibility requirements	Procedure	Funds/Amount (€)
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440233	Cambrils	Tarragona	Aid for essential housing expenses	Seniors over 65, pensioners or retired adults with an income not exceeding 1.75 times the minimum wage. The recipient's property must not be worth more than a certain amount	Competitive procedure/Tender	20.000,00
459806	El Paso	La Palma	Aid for enhancing older adults' homes	Seniors over 65 with an income not exceeding 75% of the IPREM	Competitive procedure/Tender	24.400,00
469376	Hermigua	La Gomera	Aid for daily life expenses	Seniors over 65 not receiving social security pensions	Competitive procedure/Tender	20.000,00
468812	Granadilla de Abona	Tenerife	Social aid for older adults	Seniors with an income not exceeding 1.25 times the minimum wage	Competitive procedure/Tender	40.000,00

Source: own elaboration.

## 6.2. Subsidies (financial aid) to meet the residential needs of financially vulnerable older adults

The purpose of these subsidies is to ensure appropriate and dignified housing (nursing homes and residential facilities) for financially vulnerable older adults. To understand these schemes' underlying rationale, one should consider that providing nursing homes and other residential facilities to older adults in need is usually on regional authorities, since regional governments are responsible for managing public nursing homes and overseeing the private network thereof. However, some municipalities implement their own programs to facilitate the access of older adults in need to nursing homes and residential facilities.

These subsidies are mostly granted directly, by concluding an agreement with the associations or non-profit entities managing the relevant nursing homes or residential facilities. Therefore, these residential facilities fall outside the scope of the regional public network. They are owned and managed by charitable organizations or non-profits that either safe certain places for older adults as required by local authorities or use the subsidy payments to cover their expenses and provide their services for free. Nevertheless, there are some programs including subsidies awarded to older adults through competitive procedures seeking to partially cover the cost of a private nursing home for those applicants that have been unable to access a public residential facility.

**Table 10. Subsidies (financial aid) to meet the residential needs of financially vulnerable older adults - examples**

NSD	Municipality	Province	Summary	Recipients	Procedure	Funds/Amount (€)
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480507	Getafe	Madrid	Aid to cover the cost of private residential facilities	Seniors over 65 Unable to live at home, with no family support and with an income not exceeding 1.5 times the minimum wage. Applicants should have applied for a Madrid regional nursing home	Competitive procedure/Tender	Not recorded
454021	Madrid	Madrid	Project to take care of homeless adults that are ineligible for a public nursing home for being younger than 65	<i>Asociación edad dorada Mensajeros de la Paz</i>	Agreement/Arrangement (ad-hoc subsidy)	240,000.00
473981	Molina de Segura	Murcia	Reserving a place at an assisted living facility for the recipient picked by the municipality	<i>Asociación Hogar Compartido</i>	Agreement/Arrangement (ad-hoc subsidy)	20,000.00
466154	Valencia	Valencia	Social support program at assisted living facilities for the elderly	<i>Asociación Hogares Compartidos</i>	Agreement/Arrangement (ad-hoc subsidy)	10,000.00
478881	Santa Cruz de Tenerife	Tenerife	Maintenance and support for the residential facility for seniors over 65 and/or persons with disabilities over 55	<i>Fundación Canaria Hogar Santa Rita</i>	Agreement/Arrangement (ad-hoc subsidy)	50,000.00
437885	Vandellòs de l'Hospitalet	Tarragona	Aid for older adults to be able to stay at day care centers and nursing homes	Seniors over 65	Competitive procedure/Tender	35,000.00
472614	Barakaldo	Vizcaya	Aid for older adults to be able to stay at nursing homes	Seniors over 60 that own assets worth less than €6,000	Competitive procedure/Tender	131,314.29

Source: own elaboration.

### 6.3. Subsidies to meet the needs arising from other causes of vulnerability

Last but not least, we found some subsidy schemes aimed at addressing causes of vulnerability other than financial trouble. This category comprises a wide array of programs, including an aid scheme for LGBT older adults, schemes related to health disorders and a program intended to cover the costs incurred by entities that take care of persons who have been declared legally incompetent that otherwise would be taken care of by local employees. All of the subsidies listed under this category qualify as ad-hoc subsidies granted directly to non-profit associations and foundations.

**Table 11. Subsidies to meet the needs arising from other causes of vulnerability - examples**

NSD	Municipality	Province	Summary	Recipients	Procedure	Funds/Amount (€)
486856	Málaga	Málaga	Memory and dementia workshops for the elderly	<i>Asociación de Actividades Malagueñas Jabega</i>	Agreement/Arrangement (ad-hoc subsidy)	95,000.00
483079	Madrid	Madrid	Program to provide psychosocial care to LGBT seniors	<i>Fundación 26 de diciembre</i>	Agreement/Arrangement (ad-hoc subsidy)	85,000.00
463489	Rivas Vaciamadrid	Madrid	Project to end stigmatizing behaviors towards mental illnesses	<i>Fundación Manantial</i>	Agreement/Arrangement (ad-hoc subsidy)	200.00
465313	Vitoria-Gasteiz	Álava	Healthy ageing program for down syndrome adults: cognitive, emotional, psychological and behavioral intervention	<i>Asociación Down Araba Isabel Orbe</i>	Agreement/Arrangement (ad-hoc subsidy)	10,000.00
465492	Palencia	Palencia	Caretaking and guardianship for older adults over 65 that were currently taken care of by local employees	<i>Fundación Castellano Leonesa para la Tutela de Personas Mayores</i>	Agreement/Arrangement (ad-hoc subsidy)	2,000.00

Source: own elaboration.

## 7. OTHER LOCAL SUBSIDIES FOR THE ELDERLY

Additionally, see below a miscellaneous category of elderly subsidies that did not fit in any of the previous categories. These schemes have in common that they seek to promote social integration and older adults' personal autonomy. Yet again, these are cross-cutting objectives, also pursued to a certain extent by the subsidies included in the previous groups. However, this miscellaneous category only comprises subsidy schemes whose primary aim is either of the two aforesaid objectives.

This category comprises three types of subsidy programs or schemes. First, there are schemes mostly found in the Autonomous Region of Madrid, namely those used to subsidize (either totally or partially) public transportation costs and fares for the elderly, thereby increasing their autonomy and their ability to move around whilst facilitating their social integration. Second, there are subsidies that, within our sample, (i) are only implemented in two Basque municipalities; and (ii) have very distinct features: aid schemes used to provide subsidized legal counsel for the elderly. Finally, this miscellaneous category also comprises a set of subsidy programs to foster the social integration of older adults. They are applied to senior

citizens, but even more so to the remaining age groups: subsidy schemes to raise awareness about ageing and age-related issues.

### 7.1. Subsidies to cover public transportation costs and fares for the elderly

Subsidies subject to these programs cover part of the cost of regional travel cards. These subsidies are awarded through competitive procedures, and the recipients are older adults, i.e., public transportation users aged over 60 or over 65, depending on each specific program. There are also socioeconomic eligibility requirements, e.g., maximum income levels or, more specifically, being a recipient of a non-contributory pension. In addition, some of these subsidies require that applicants with the lowest income levels be ranked first. We found a subsidy that did not have any of these requirements and another one requiring membership in a local elderly association in order to be eligible.

**Table 12. Subsidies to cover public transportation costs and fares for the elderly - examples**

DBNS	Municipality	Province	Summary	Recipients	Additional eligibility requirements	Procedure	Funds/Amount (€)
441649	Móstoles	Madrid	Aid for the 1-year travel card	Seniors over 65	Being a recipient of a non-contributory pension	Competitive procedure/Tender	25,000.00
435545	Las Rozas	Madrid	Aid for the 1-year travel card	Seniors over 65	Membership in a local elderly association	Competitive procedure/Tender	108,375.00
474147	Moncada	Valencia	Aid for the 1-year travel card	Pensioners over 60 and retired adults over 65	Having been a registered resident for at least 1 year	Competitive procedure/Tender	16,000.00
475261	Pozuelo de Alarcón	Madrid	Aid for the 1-year travel card	Seniors over 65	Maximum income	Competitive procedure/Tender	40,000.00
415996	Pozuelo de Alarcón	Madrid	Aid for the 1-year travel card	Seniors over 65	Having a yearly income not exceeding €15,039.18	Competitive procedure/Tender	47,000.00

Source: own elaboration.

## 7.2. Subsidies to provide legal counsel for the elderly

We have only found these subsidies twice. One of them is in place in Vitoria and the other one in Bilbao. They are both ad-hoc subsidies granted to the relevant provincial bar association. The agreements implementing these subsidy schemes require that both bar associations host talks and lectures to raise awareness and explain the legal issues faced by older adults. Also, the Vitoria and Bilbao bar associations must provide legal counsel to seniors over 60 as long as it is legally required that the matter be handled by a lawyer.

**Table 13. Subsidies to provide legal counsel for the elderly - examples**

NSD	Municipality	Province	Summary	Recipients	Procedure	Funds/Amount (€)
464268	Vitoria-Gasteiz	Álava	Legal counsel for the elderly	Álava Bar Association	Agreement/Arrangement (ad-hoc subsidy)	10,000.00
458753	Bilbao	Vizcaya	Legal counsel for the elderly	Vizcaya Bar Association	Agreement/Arrangement (ad-hoc subsidy)	22,500.00

Source: own elaboration.

## 7.3. Subsidies to raise awareness about ageing and age-related issues

This category comprises subsidies seeking to raise awareness towards older adults, ageing and age-related issues. Thus, the eligible (i.e., subsidized) activities covered by the scheme do not specifically or exclusively target the elderly. Rather, they intend to impact society as a whole.

Broadly, this group includes two types of subsidy schemes. On the one hand, several municipalities have an ongoing ad-hoc subsidy scheme funding ageing-related university research projects. Admittedly, these programs pursue other objectives, such as having an impact on policymaking, but they remain under this category because they emphasize awareness-raising and dissemination. These schemes qualify as ad-hoc subsidies and they are directly granted to the universities and colleges carrying out the abovementioned research. On the other hand, this category includes subsidy schemes primarily aimed at closing generational gaps by implementing projects involving younger and older adults. These are also ad-hoc subsidies directly granted to the eligible associations or entities.

**Table 14. Subsidies to raise awareness about ageing and age-related issues - examples**

NSD	Municipality	Province	Summary	Recipients	Procedure	Funds/Amount (€)
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487405	Salamanca	Salamanca	Research program on conditioning, physical activity, muscle reeducation and occupational therapy for the elderly	Universidad de Salamanca	Agreement/Arrangement (ad-hoc subsidy)	24,670.90
488588	Ponferrada	León	Ageing Chair at the Universidad de León	Universidad de León	Agreement/Arrangement (ad-hoc subsidy)	10,000.00
439911	Cardedeu	Barcelona	" <i>Interactúa</i> " program to promote intergenerational relationships between younger and older adults	Instituto Pla Marcell	Agreement/Arrangement (ad-hoc subsidy)	18,700.00
486120	Burgos	Burgos	Program to close generational gaps between older adults and university students	Universidad de Burgos	Agreement/Arrangement (ad-hoc subsidy)	3,000.00
481871	Palencia	Palencia	Program to close generational gaps between older adults and university students	Universidad de Valladolid	Agreement/Arrangement (ad-hoc subsidy)	600.00
441267	Segovia	Segovia	Program to close generational gaps between older adults and university students	Universidad de Valladolid	Competitive procedure/Tender	1,000.00

Source: own elaboration.

## 8. CONCLUDING REMARKS

The comprehensive overview and categorization provided in this study evidenced that, regarding elderly policymaking, the main purpose of local subsidies is to promote active ageing. Within this context, subsidies are primarily aimed at allowing local governments to cover the costs (partly or in full) of all leisure and cultural activities carried out by elderly associations at a local level. However, there are certain subsidies included as ancillary schemes in agreements concluded with third parties or non-local entities, such as universities or colleges that agree to offer subsidized activities and training programs for older adults.

It is worth noting that there are also subsidies used to cover elderly associations' operating expenses. These schemes implement the requirement of Art. 72 LBRL that local governments foster the creation of associations, but they are also a useful instrument for age-related policymaking. These subsidies are widespread, and their defining feature is that they barely limit the eligible expenses. The granting of these subsidies is not subject to the performance of specific activities or to the achievement of pre-established objectives. Therefore, they should be considered flexible or "non-interfering" instruments.

Finally, our study has also evidenced that local age-related subsidies are not only aimed at promoting active ageing. There are significant and commonly found subsidy schemes related to housing, financial and social vulnerability of the elderly and the promotion of older adults' autonomy and integration.

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