



CENTER
for Interethnic Dialogue and Tolerance
„AMALIPE“

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about the implementation of the policies

for Roma integration in Bulgaria

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LIST OF ABBREVIATIONS

AFDC	Aid to Family with Dependent Children
CBOs	Community-based organization
CEI	Center for Educational Integration of Children and Students from the Ethnic Minorities
CoE	Council of Europe
CPD	Child Protection Directorate
CSJs	Community Service Jobs
DAP	Decade Action Plan (Decade of Roma Inclusion 2005 – 2015)
DG	Directorate General
EDI	Ethnic and Demographic Issues
EDID	Ethnic and Demographic Issues Directorate
EEEE	Educational Environment and Educational Integration Directorate, Ministry of Education and Science
EICs	Earned Income Credits
EU	European Union
FP	Framework Program for Equal Integration of Roma into Bulgarian Society
GED	General Educational Development
HRD OP	Human Resource Development Operational Program
HS	Health Strategy for Vulnerable Groups Belonging to Ethnic Minorities
MES	Ministry of Education and Science
MFIP	Minnesota Family Investment Project
MLSP	Ministry of Labor and Social Policy
NCCEDI	National Council for Cooperation on Ethnic and Demographic Issues
NCEDI	National Council on Ethnic and Demographic Issues
NGO	Non-governmental organization
NPILCRRB	National Program for Improving the Living Conditions of Roma in the Republic of Bulgaria
NSRF	National Strategic Reference Framework
OSCE	Organization for Security and Cooperation in Europe
PIU	Project Implementation Unit
RIE	Regional Inspectorate of Education
SAD	Social Assistance Directorate
SEI	Strategy for Educational Integration of Children and Students from the Ethnic Minorities
TANF	Temporary Assistance for Needy Families
ToR	Terms of Reference

SUMMARY

The report covers the period from January 2006 to December 2006 and examines the main strains of the process of Roma integration from its design to its implementation. The report is a result of an extensive survey carried out by Center for Interethnic Dialogue and Tolerance “AMALIPE”, Hot Line Agency, representatives of 8 Roma organizations and Roma experts. It was realized in 17 municipalities in different regions of Bulgaria.

The survey results and their analyses highlighted the following conclusions regarding the way Roma integration process was realized in Bulgaria during 2006:

First, it became evident that this process has not been steered by the documents designed to manage it and adopted by the Bulgarian government (we called them “Roma strategies.”¹) The ministries which have adopted “Roma strategies” (for example Ministry of Education and Science, Ministry of Health) were not so active as the ministries without “Roma strategies” (for example the Ministry of Labor and Social Policy). The fact that Bulgaria took the Presidency of the Decade of Roma Inclusion did not change anything in this direction – neither the Framework program for Roma Integration, nor the Action plan of the Decade were really implemented in 2006. In practice everything significant, that happened with the Roma integration in 2006 was undertaken outside of the engagements towards the so called “Roma strategies”;

Second, 2006 was marked by a significant decrease in the integration efforts of most of the institutions. The Ministry of Education and Science was an example in this direction as well as several other institutions. The debate concerning the integration was taken years back in time to the level

¹ We call with this name the Framework Program for Equal Integration of Roma in the Bulgarian Society, the Action Plan for the Decade of Roma Inclusion, the Strategy for Educational Integration of Children and Students from Ethnic Minorities, the Health Strategy for People in Vulnerable Position, Belonging to Ethnic Minorities and the National Program for Improving the Living Conditions of Roma.

at which the old controversies about the necessity of special efforts for Roma integration and whether these efforts were not discriminative against the majority were revived. Only the Ministry of Labor and Social Policy scored a significant progress and transformed itself into the institution working most actively for the social inclusion of Roma community;

Third, in 2006 the efforts for Roma integration continued to follow the scheme inherited from the previous years: symbolic actions without additional financing from the state budget (with only one possible exception: co-financing under the PHARE program) and without the additional engagement of new human resources (i.e. without establishment of authorities or structures in the authorities, whose basic responsibilities would be actions for Roma integration). To a high extent this scheme has been pre-determined by the low status of the so called “Roma strategies”: they have been just decisions of the Council of Ministers without any fixed financing. The year of 2006 did not show the presence of serious political will to change the designated scheme.

Within the period in question the Ethnic and Demographic Issues Directorate (EDID) and the National Council for Cooperation on Ethnic and Demographic Issues (NCCEDI) – two institutions with coordinating functions regarding the overall process of Roma integration – went through serious administrative changes. It was expected that Roma would be appointed as staff members and even at leading positions but this did not happen. The process missed the chance to engage the Roma community with the work of the EDID and to ensure Roma participation. Although the Directorate undertook steps for establishing open way of work with Roma NGOs several indicators marked that its structure contained the opportunity to become a tool for political interference and pressure on the independent Roma organizations.

The difficulties connected with the work of EDID and NCCEDI affected the implementation of the Framework Program for Roma Integration and the Action Plan for the Decade of Roma Inclusion. Their implementation was rather formal. It was formally composed by ordinary activities undertaken by different institutions within the frames of their ordinary budget and responsibilities and often initiated without any relation with the Framework program or the Decade. As a result 2006 did not

mark significant advance in the implementation of the two general “Roma strategies”.

In the previous years, education was the most advanced sphere in terms of Roma integration. Ministry of Education and Science established a certain degree of cooperation with Roma and other educational NGOs; it used to show signs for addressing Roma educational problem through combination of targeting and mainstreaming approach. During 2006 most of these assets were lost. The level of political commitment for actions directed to Roma educational integration was low. The main direction of Roma educational integration was changed: from desegregation of the so-called “Roma schools” to provision of social, administrative and technical measures for decreasing the high drop-out rate among Roma children and ensuring their presence at school. Although not abandoned the Strategy for Educational Integration of Children and Students from the Ethnic Minorities was not implemented and was not included into the mainstream documents that defined the development of education in Bulgaria. It seems that this Strategy would retain only nominal existence. Efforts for establishing institutional infrastructure dealing with Roma educational integration were undertaken; nevertheless, they were rather weak and did not provide visible results. The cooperation between educational institutions (especially at central level) and Roma NGOs was significantly worsened and it is problematic at present.

Although the efforts for Roma educational integration continued in 2006 the Ministry of Education and Science was not able to steer them or even to support them. This gap was only partly filled by other institutions (such as Ministry of Labor and Social Policy) and at present it puts serious doubts on the process of Roma educational integration.

Improving the living conditions of Roma in Bulgaria moved high up on the political agenda during 2006. Nonetheless, it is too early to judge whether a program like the National Program for Improving the Living Conditions of Roma in the Republic of Bulgaria (2005 – 2015) approved in May 2006 would contribute for solving the Roma living problems. The Program had serious assets compared with the previous Roma strategies: it was part of the National Living Strategy, significant financing was envisaged,

and so on. At the same time, the Program still had a great number of disadvantages on the account of its benefits. There were certain indications that the commitment of the local authorities and their capacity for coordinated action had been overestimated. The mechanisms for ensuring the state budget financing also looked unclear and doubtful. Serious alarming problem was the initial orientation of the Program only to the “urban” Roma although almost half of Roma in Bulgaria lived in rural areas and their living conditions were as harsh as the ones in Roma “urban” ghettos. A bizarre fact was also the priority for elaboration of strategies for local economic development without the inclusion of local NGOs and Roma community in its amplification, which once again doomed the Program to a failure. Alarming strategic problem was that measures for improving the living conditions of Roma were not included in Operational Program Human Resources Development.

During 2006 the implementation of the National Program for Improving the Living Conditions of Roma was limited to preparatory and technical activities. The investment actions were rather modest. This could change in 2007 since a special (although limited) amount dedicated to Program implementation was envisaged within the budget of Ministry of Regional Development and Public Welfare.

Before July 2005 the Ministry of Labor and Social Policy was not considered an institution with active engagement with Roma integration process. It did not develop its “Roma strategy” and did not participate actively in the preparation of the Action plans for the Decade of Roma Inclusion. During 2006 this situation changed. Gradually the Ministry started developing a tailored approach which took into account the specifics of the Roma community within its mainstream programs. For first time special programs targeting Roma were initiated. Some of the most aching problems like illiteracy and social exclusion at the labor market became the core of the activities of the MLSP towards Roma. For first time the MLSP undertook special actions (although still scarce and seemingly without a clear strategy) for overcoming the disadvantaged situation of Romani women.

Despite these efforts however there was still lack of a long-term targeted approach to the Roma community. There was no doubt that poverty and social exclusion remained serious issues for Bulgarian Roma. Social

programs promoted by MLSP lacked the mechanisms for engaging Roma organizations and Roma community as an active partner that sharply limited their efficiency and effectiveness and made their impact insignificant. The insufficient coordination between actions carried out in different ministries affected big programs such as the Program for Literacy and Qualification of Roma. In general, the MLSP's vision about Roma issue perceives it only as a social problem of a poor population rather than as a problem of the social exclusion of an ethnic community. The lack of good balance between mainstream and special targeted programs was clear during 2006.

The process of EU accession had the chance to change the situation and to enhance significantly the process of Roma integration. Since the Monitoring report about the advance of Bulgaria towards EU accession from May 2006 left Roma issues outside the so-called "red zone" (i.e. problems that required urgent measures) Roma organizations put efforts for advocating the incorporation of main points from the Roma strategies into the Operational programs (through proper operations, activities and indicators). During 2006 Center Amalipe and Open Society Institute, Sofia, started an advocacy campaign for including major issues related with Roma integration in the strategic documents regulating the EU Structural funds absorption in Bulgaria. In the following months 46 Roma NGOs and a number of Roma experts joined the campaign. Overcoming serious difficulties the campaign achieved many of its goals and brought to establishing the majority of the necessary preconditions for directing resources from the Structural funds to Roma integration activities in Bulgaria. The campaign continued during 2007 too. It is still too early to say whether the results achieved would be sustainable, nevertheless they were clear a sign for the opportunities of Roma movement and of the civic society as a whole, if they are really mobilized, to influence the decision-making process.

The report proved the necessity of civic monitoring and evaluation of the process of Roma integration as well as the necessity of using the point of view of Roma community as a basis for such a survey. The methodology used made it possible without pretending that this is the only possible one.

INSTEAD OF INTRODUCTION

Integration in the year of the accession

For Bulgaria (as for Romania) 2006 will be remembered as the year of the accession to the European Union. During the first nine months of 2006 institutions and the public sector directed efforts to achieve the common aim: the membership in the EU from 1 January 2007. The success of these efforts was marked by the Monitoring Report of 26 September, concerning the progress of Bulgaria and Romania for a membership in the EU.

The year of the integration of Bulgaria in the EU was related inevitably with Roma integration in Bulgaria. On the one hand this was the last year in which the European commission prepared a Monitoring report for the progress of Bulgaria; in 2006 the reports were even two. For everybody observing or participating in the efforts of Roma integration is well known that namely these Monitoring reports and the recommendations made in them for “further activities for social inclusion of Roma minority” provoked the modest actions of the Bulgarian institutions in this direction.

On the other hand in 2006 the strategic documents concerning the implementation of the European funds in Bulgaria were elaborated. Although this was not clearly understood by most of the people, including some points related to Roma integration in these documents was a serious chance to accumulate the necessary financial resources and an administrative engagement for the Roma integration process.

The monitoring reports of the European commission from October 2005, May 2006 and September 2006 highlighted the necessity of further actions for implementing the framework program for Roma integration in the Bulgarian society and for the complete inclusion of Roma minority.

The recommendations made in this direction have played the role of a positive stimulus for the Bulgarian institutions to undertake concrete actions. At the same time the Report from May 2006 did not put the Roma integration among the hottest problems facing the accession (the so-called “red zones”), i.e. the lack of stable and significant results in the integration

process was not defined as an obstacle facing the definite accession of Bulgaria to the EU.

The preparation of the strategic documents (the National Strategic Reference Framework, Operational Programs, etc.) as a whole had been taking place without broad civil participation. No representative of the Roma NGOs or expert engaged actively with the Roma community integration participated in the working groups preparing these documents. Nevertheless, the active position of the Roma organizations, especially in the second half of 2006, has brought to the inclusion of points related to Roma integration in some of the strategic documents. This process however has not been finished until the end of 2006.

Roma integration process in Bulgaria in 2006 will be remembered with several facts: Bulgaria took the Presidency of the international initiative Decade of Roma Inclusion in July 2006, the National Program for Improving the Living Conditions of Roma was adopted in March, Action plan for implementing the Framework Program for Roma Integration in 2006 was adopted at the end of June, and so on. The implementation of the Strategy for Educational Integration of Children and Students from Ethnic Minorities adopted in 2004 continued at least on paper, as well as the implementation of the Action plan for the Decade of Roma Inclusion 2005 – 2015 the adopted in 2005 and the Health Strategy for Persons Belonging to Ethnic Minorities. At the same time, a number of programs that had impact on the Roma community (the National Program for Acquiring Literacy and Qualification of Roma, and so on) have been implemented in 2006 in one way or another but without any relation to these “Roma strategies.”

The integration process in 2006 had several common characteristics. First, it has become evident that this process has not been steered by the adopted “Roma strategies.”¹ The ministries having “Roma strategies” (for example Ministry of Education and Science, Ministry of Health) were not so active as the ministries without “Roma strategies” (for example the Ministry of Labor and Social Policy). The fact that Bulgaria took the Presidency of

¹ We call with this name the Framework Program for Equal Integration of Roma in the Bulgarian Society, the Action Plan for the Decade of Roma Inclusion, the Strategy for Educational Integration of Children and Students from Ethnic Minorities, the Health Strategy for People in Vulnerable Position Belonging to Ethnic Minorities and the National Program for Improving the Living Conditions of Roma.

the Decade of Roma Inclusion did not change anything in this direction – neither the Framework program, nor the Action plan of the Decade were really implemented in 2006. In practice everything significant, that happened with the Roma integration in 2006 was undertaken outside of the engagements towards the so called “Roma strategies”.

Second, 2006 was marked by a significant decrease of the integration efforts of most of the institutions. For instance, the Ministry of Education and Science, as well as the Ministry of Health, the Ministry of State Administration and Administrative Reform and so on are examples in this direction. The debate concerning the integration was taken years back in time to the level at which the old controversies about the necessity of special efforts for Roma integration and whether these efforts were not discriminative against the majority were revived. Only the Ministry of Labor and Social Policy scored a significant progress and transformed itself into the institution, working most actively for the social inclusion of Roma community (although without having its own “Roma strategy”).

Third, in 2006 the efforts for Roma integration continued to follow the scheme inherited from the previous years: symbolic actions without additional financing from the state budget (with the only one possible exception: co-financing under the PHARE program) and without the additional engagement of new human resources (i.e. without establishment of authorities or structures in the authorities, whose basic responsibilities would be actions for Roma integration). To a high extent this scheme has been pre-determined by the low status of the so called “Roma strategies”: they have been just decisions of the Council of Ministers without any fixed financing. The year of 2006 did not show the presence of serious political will to change the designate scheme.

The present report is looking at the Roma integration in Bulgaria in the year of the integration of Bulgaria to the EU. It focuses on the basic events that happened or did not happen, on the trends and processes in this field, no matter whether they are conceived and undertaken with or without any relation to the Roma integration. The report is a result of a whole year’s observations of what has been happening in the fields of education, employ-

ment and living conditions at national and local level, on the work of the Ministry of Education and Science, Ministry of Labor and Social Policy, Ministry of Regional Development, National Council for Cooperation on Ethnic and Demographic Issues, “Ethnic and demographic issues” Directorate at the Council of Ministers and other institutions at national, regional and local level. Special attention has been paid to the inclusion/non inclusion of measures supporting the Roma integration in the national strategic documents regulating the European funds implementation in Bulgaria, since most probably namely these documents will define to a high extent the future development of economic, social and public life in Bulgaria.

The research does not include one of the important fields of integration – the health care, as it will be an object of a special report. The research does not include as well detailed analyses of the Bulgarian Presidency of the Decade of Roma Inclusion (July 2006 – July 2007) since a significant part of the activities undertaken by the Bulgarian Presidency have been happening in 2007; it will be fully analyzed in the Report for Roma integration in 2007.

The research has been organized by Center for Interethnic Dialogue and Tolerance “Amalipe”. Eight representatives of Roma NGOs and Roma experts from the whole country took part in it. The research was carried out in 17 municipalities in different regions in Bulgaria.²

The findings and conclusions have been discussed with a broad circle of Roma organizations and with the basic interested institutions. The assessment of the findings and especially the conclusions related to such complicated and multilateral process as the Roma integration could not claim the synonymy. The present research accepts the initial pluralism of the possible evaluations for the implementation of each public policy and does not claim to present the only and synonymous truth for the Roma integration in 2006.

It has rather different objective: broad and diverse circle of Roma community representatives (informal leaders, representatives of Roma NGOs, Roma experts, working in public administration and others) have taken place in it. The methodology stresses on the opinion of the local Roma communities in relation to which the researched programs and policies have

² Burgas, Kameno, Stara Zagora, Rakitovo, Plovdiv, Karlovo, Kyustendil, Sofia, Montana, Lom, Byala Slatina, V. Turnovo, Strazhitza, Targovishte, Razgrad, Shumen and Kaspichan.

been implemented. Therefore, the objective of this research is that it presents the point of view and the assessment of broad layers of the Roma community. Taking into account this point of view and assessment are extremely necessary for the analyses of what had happened with Roma integration in Bulgaria in the year of the integration of Bulgaria to the European Union.

Methodology

The methodology of the research follows the principles established in 2005 during a previous research evaluating the implementation of PHARE “Roma population Integration” project. Several modifications have been done to the methodology in terms of the evaluation of several programs and policies and not the implementation of just one project. The methodology takes into consideration the complex, multilateral and multi-aspect character of the phenomenon examined: the integration of Roma in Bulgaria.

The decision-making and the implementation of Roma integration policies is a process in which we differentiate at least four groups of stakeholders: state institutions, Roma community, other participants in the different activities (teachers, social workers, etc.) and the so called “mainstream society” that often can stimulate or impede every public policy.

Each of these groups is various and it influences, to lower or to higher extent, the policies carried out. For instance, part of the educational and social characteristics of the different Roma communities (*Yerlii, Kaldarashi, Rudari, Millet* and their subgroups) are different to such an extent that it makes it impossible and wrong the simple transfer of models of interaction from one group to another. It has been extremely important for the current research that each of the designated stakeholders and often the individual groups in it has required different methods of approach and research taking into consideration its specific characteristics.

The question of the formation and the implementation of Roma integration policies is further complicated by the fact that a significant part of these policies have their national and local dimensions. Often there are differences between the design of a given programme at the national level and the specific process of implementing it in the different municipalities and districts. This has determined the implementation of the present research both, at the national and at the local level (in 17 municipalities) and the coverage of representatives of the four stakeholders at national and local level, respectfully.

The described complex and multilateral character of the “Roma integration” process has determined the levels of the research, the basic factors studied in the research, the sources and methods of collecting information, as well as the basic participants in the research.

The research has been carried out at national and local level. The design of the basic programmes for Roma integration in 2006, the intentions and the ideas of leading representatives at the political and administrative levels of the national institutions, their assessment of the implementation of the researched programmes and policies have been studied within the research. In addition, the opinion of leading Roma activists who work on these issues at the national level has been studied. The basic methods used are desk review and individual interviews both at national and local level.

At the local level the research has been carried out in 17 municipalities situated in 10 districts. The requirement respected has been for a diversification of the settlements and communities included in the research: capital, district city, small town, village, as well as a variety of Roma groups. At the local level the implementation of the national programmes and policies orientated to Roma, the participants in the implementation and the achieved results – among Roma and the rest of the citizens have been researched.

In addition, the design, the implementation and the results of some local initiatives, even though that this has not been a guiding activity in the present research, have been examined. Different participants in the integration process – representatives of the local authorities, the local administration, the local structures of the national institutions (for instance the Local Labor Offices, the Social Assistance Agency), local Roma informal leaders, active members of Roma NGO, civil servants (Roma and non-Roma) in the relevant municipality, journalists, etc. have been interviewed. A great number of Roma, beneficiaries of the different programmes (for instance, participants in the literacy courses), non-beneficiaries of these programs, as well as other stakeholders responsible for the implementation of the programmes (teachers, social workers and others) have been included in the research at the local level. A broad spectrum of methods of collecting information: desk review, analysis, individual interviews, standard interviews, inquiries, focus-groups, questionnaires, and so on have been used in the research. Special attention has been paid to the correct collecting of information among the

local Roma communities where the relevant methods have been adapted according to their specifics.

The basic participants in the research at the local level have been the representatives of the Roma NGO working in the relevant municipality or local Roma experts. They have carried out the process of collecting field information and its primary processing. This has been found to be particularly important for the collecting of information among the Roma community. In addition, the Roma experts involved in the research have contributed with their knowledge and expertise about the local community which has had complete confidence in them. On the other hand, the leading role of the local Roma activists and experts caused some methodological impediments: impossibility to research in depth the relations between the local authorities and Roma NGO during the implementation of some of the programmes. This necessitated the use of some external experts, who examined exactly these problems.

The basic participants in the research at the national level have been specialists who have proved their expertise in the relevant field (education, employment, living conditions). Defining the scope of the research covering both, national and local level has been a mutual effort of the national and local experts bound up in the research.

A basic task of the whole research has been to follow the implementation and the impact of the integration policies on those to whom they have been oriented, to find out to the maximum possible extent their point of view and this to happen with their active participation. The methodology used allowed this to happen to a great extent.

Institutional and Normative Framework for Roma Integration Process

This chapter presents the institutional and the normative infrastructure related to Roma integration. It discusses two main questions. One is whether there is an adequate institutional and normative infrastructure to put effectively into practice the government commitments. The other is whether the institutional infrastructure is subordinated to one and the same principle and whether it forms a strong system. The same question is discussed with respect to the normative basis.

We outline three statements. First, there is no strong system of institutions aimed at developing and implementing Roma policies at present. There are different types of institutions, subjected to different principles, without clear subordination, that do not form a system. Second, as a whole the normative framework exists but it is not implemented in a way to influence the real trends of Roma integration process. Third, the institutional and normative infrastructure dealing with Roma integration follows the general perception that Roma inclusion is an additional task with no additional financing and human resources needed.

The general perception about the character of Bulgarian nation and the role of ethnic minorities shared by all significant political actors, media and NGOs as well as by huge majority of the Bulgarian citizens defines Bulgarian nation as homogenous and indivisible one or in essence as a civic nation. It is composed by different ethnic, linguistic and religious groups that are free to preserve their identity but these groups are not legislative entities and their being is outside the duties and responsibilities of the state institutions. According to this perception the State and its institutions should take care about the rights of all individuals, citizens, and private persons without concern of their ethnic origin and are not obliged to take care about collective rights.

This perception is running through the entire bulk of legal theory and practice. It is reflected by the Constitution and the other legislative acts. For example, the new Bulgarian Constitution (approved on July 11, 1991) does not appropriate the concept of “minorities” or of “ethnic community” and outlines the concept of “Bulgarian citizen”. Art. 25 (1) states that “Bulgarian citizen is everyone who... is born on the territory of the Republic of Bulgaria...” and art. 6 (2) declares that “All citizens are equal before the law. Any limits of the rights or privileges based on race, ethnicity, gender... are not allowed”. The Constitution reflects the vision of Bulgarian nation as civic nation stating Bulgarian language as the only official language (art. 3), the usage of Bulgarian language as obligation for every Bulgarian citizen (art. 36 (1))¹, prohibiting political parties based on ethnicity, race or religion (Art. 11 (4)), etc. Simultaneously, the Constitution implicitly recognizes the existence of ethnic minorities and protects the basic rights of people from minority origin: the right to use their language (Art. 36 (2)), to practice their religion (art 37 (1)), to develop their culture (Art. 54 (1)), etc.

This perception about the character of Bulgarian nation and the role of minorities does not stimulate the establishment of special administrative infrastructure dealing with minorities and particularly with Roma minority. Nevertheless, it does not necessary contradict such an establishment since the existence of different ethnic groups within the nation is recognized and protected.

Simultaneously, the ethnic and social reality in Bulgaria gradually requires institutional infrastructure for development and implementation of Roma policies. According to the last Bulgarian census Roma constitute 4.78% of the country population (or exactly 370 908 p.) According to scholars and observers their number is at least 800 000 or 10% of the entire population. In some regions (such us Vidin, Montana, Sliven) Roma are around one third of the population.² As a rule, these are backward and poor regions with numerous social problems and Roma live in sharp poverty and marginalization. The task for Roma integration is in the agenda of

¹ Although “The citizens for whom Bulgarian language is not mother tongue have the right together with the obligatory studying of Bulgarian language to study and use their own language”: art. 36 (2)

² For example, a survey carried out by the Ministry of Education and Science in 2002 revealed that in Montana region 44% of the students in first grade are Roma. In Sliven region the percentage is 40.

these regions and it requires the establishment of special institutional infrastructure: at local, regional and also at national level (since most of the problems could not be solved at local and at regional level).

At the same time, Bulgarian government is under permanent pressure by the side of international institutions (such as EU institutions, CoE, OSCE, etc.) to speed up the process of Roma integration. Although there is no requirement for establishing special institutional infrastructure for this purpose, it is obvious that this would facilitate the process.

Summarizing, since the beginning of the 1990s until now the Bulgarian government has been under pressure by international institutions and by the “ethnic reality” in Bulgaria to develop institutions for speeding up the process of Roma integration. At the same time, the institutional tradition in Bulgaria as well as the general vision of the character of Bulgarian nation and the role of minorities prevents the formation of special institutions dealing with Roma. As a result, the establishment of institutional infrastructure is non-consistent, ambiguous, and difficult process. As a whole, there is no strong system of institutions aimed at developing and implementing Roma policies with common principle, clear hierarchy and subordination at national, regional and local level. There are different types of institutions, subjected to different principles, without clear subordination that do not form a system. Their responsibilities often coincide (at least partly) which leads to controversies and conflicts. Simultaneously, there are no strong mechanisms for coordination of the institutions dealing with Roma at national and at local level.

Institutional framework for development and implementation of policy for Roma integration at the national level

The main principle of the institutional framework at national level is not to establish new special institutions but to make use of the existing system through adding some new competencies. There are only two types of possible exceptions from this principle. One is seen in introducing units at middle level of the administrative hierarchy that have no management functions but rather play a coordinating role among the institutions. Such middle-level coordinating body is the National Council for Cooperation on Ethnic

and Demographic Issues with its Ethnic and Demographic Issues Directorate. Another possible exception is forming small units (branches) at the lowest levels of the administrative hierarchy of different ministries. These units have Roma (and minority) integration as part of their main responsibility without special budget for special activities.

National Council for Cooperation on Ethnic and Demographic Issues and Ethnic and Demographic Issues Directorate:

The Council is a good illustration of a unit at the middle level in the administrative hierarchy that has no management functions but rather plays a coordinating role among the institutions. In fact, it is the only example in this direction at present.

The prototype of the Council was established in July 1994 with the name “Inter-institutional Council for Ethnic Problems within the Council of Ministers”. It was disbanded in June 1995 without having a single session. In July 1995 the National Council on Social and Demographic Issues was established. In 1997 this Council was replaced by the National Council on Ethnic and Demographic Issues within the Council of Ministers (NCCEDI). Its establishment was regulated by Decree N 449/04.12.1997 of the Council of Ministers. It had only consultative and coordinating competences with scanty staff that did not exceed 4 people. In the end of 2004, after unsuccessful attempts for raising its status to National Minority Agency (i.e. body with managing functions) the Council was transformed into National Council for Cooperation on Ethnic and Demographic Issues.

The existence of the NCCEDI and the EDID is regulated by Decree N 333/10.12.2004 of the Council of Ministers. According to it the National Council has only consultative functions and does not receive real power to develop and manage policies towards Roma (and other minorities). This is obvious from Art. 1 of the Internal Regulations on the Structure and Operations of the NCCEDI: “The NCCEDI... is consultative and coordinating body”³. It has also a dual function to work with the institutions and with the public organizations. From one side, the NCCEDI coordinates the efforts of different central institutions (within the executive power) directed to

³ *Internal Regulation on the Structure and Operations of the NCCEDI*. Available at: www.nccedi.government.bg

Roma integration that is clear from Art. 1 (1): “The NCCEDI... is consultative and coordinating body that helps the Council of Ministers in the implementation of state policy about ethnic and demographic issues”. From the other side, the Council helps the communication between state institutions and Roma NGOs (as well as other public organizations) that is clear from Art. 1 (2) “The Council assists the cooperation and coordination between state agencies and organizations of Bulgarian citizens from ethnic minorities...”.

According to these principles, the concrete NCCEDI's competencies are strictly limited. They are defined by Art. 2 of the Internal Regulations. It is not occasionally that five times one and the same phrase is repeated: “(The Council) discusses and suggests”. In fact, the Council could decide only about its certain internal questions, in all other cases it could only propose and coordinate. Another responsibility envisaged for the NCCEDI is to coordinate the implementation of pre-accession projects (mainly within Phare program) directed to Roma integration.

During 2006 Internal Regulations of the NCCEDI were prepared. They were approved with Decree of the Council of Ministers No. 351/20.12.2006. The Internal Regulations repeat the same statements for NCCEDI as “co-ordinating and consultative body” (Art. 1). A certain asset is that they establish possibility for the Council to take part in the so-called “co-ordinating procedure of normative acts issued by the Council of Ministers”: art. 1(3) requires all normative acts within the field of ethnic and demographic issues to be primary consulted with NCCEDI.

The Regulations state also certain new limited spheres for NCCEDI: assisting methodologically the national and municipal institutions in case of ethnic conflicts, preparing an annual report about the NCCEDI activities and about the current state of multiethnic relations, etc.

Since the Regulations were approved in the end of 2006 it is still too early to judge whether they would improve the Council's work in significant degree. Nevertheless, it is hardly to expect a significant change since they obligatory fit within the general perception of the Council as “coordinating and consultative” body with managing functions. The Council's participation in the “co-ordinating procedure” within the Council of Ministers is defined in an unclear way. It is limited only to normative acts in the field of “ethnic and demographic issues” without reference what types of acts could be perceived as such. It does not envisage the Council's participation in the

“co-ordinating procedure” of normative acts in the other fields that have certain links with ethnic issues.⁴ Moreover, it is not clear who will prepare the NCCEDI statements about the normative acts consulted and whether NGOs will take part in this process. Most probably this would be done by the EDID officials without any NGO participation.⁵

The internal structure of the Council is in accordance with these limited functions. The Council does not have own permanent set of representatives but these are defined by institutions which deal with minority issues. Deputy ministers from 13 ministries, heads of 6 State agencies, representatives of Bulgarian Academy of Science and National Association of the Municipalities in the Republic of Bulgaria, and representatives of public organizations are members of the Council according to Art. 3. Chairman of the Council at present is Mrs. Emel Etem, Deputy Prime-Minister.

Within the Council a special Commission for Roma Integration is established (through Art. 5). Its structure is not functional and repeats almost completely the structure of the NCCEDI described above. Nevertheless, the existence of such a Commission stresses the importance of Roma integration process and is a precondition for engaging permanent staff dealing with Roma issues within the “Ethnic and Demographic Issues” Directorate.

Important asset that distinguishes the NCCEDI from similar consultative bodies (within Ministry of Labor and Social Policy and Ministry of Education and Science) is the establishment of a special Directorate “Ethnic and Demographic Issues” within the governmental administration. According to Art. 6 (4) the Directorate serves the NCCEDI’s activity. It has its own staff (approximately 20 persons) that has to raise the administrative and human potential of the NCCEDI in a certain degree. According to Order № H-1291/21.12.2004 of the Prime Minister the EDID has two branches: “Ethnic identity and integration, demographic development” and “Roma integration.”

It is hardly to expect that the NCCEDI and the EDID could influence the integration process in significant degree. They are not decision-making bodies: all decisions are left within the competences of the ministries and

⁴ For example, the National Program for Development of School Education is program within the educational field but it has certain connections with ethnic relations.

⁵ For the first half of 2007 only one draft for normative act was consulted with NGOs by the NCCEDI.

the state agencies. The NCCEDI and the EDID are not even executing agencies: they just “support the implementation” of the state policy; the overall implementation is responsibility of the certain ministries and state agencies. In this respect it is not strange that the responsibility to coordinate Phare projects for Roma integration (initially envisaged as a tool for better realization of the NCCEDI’s goals) become the basic NCCEDI and EDID responsibility.

Institutional bodies with managing functions

As described above ministries and state agencies are the institutions with managing functions in regard to Roma integration. They are defined to implement the policies in the respected fields (education, social affairs, health, and so on) including the policies for Roma inclusion. As a rule these institutions do not form special bodies for implementing Roma related policies within their administrative structures. This is designated as responsibility to a certain expert. Rarely this is his/her main responsibility: one expert in Ministry of Culture (Mr. Simeon Blagoev) and another in the Employment Agency (Mr. Kancho Kantardjüski) have Roma integration as their main task. In all other cases Roma related policies are additional responsibilities for one expert per ministry. His/her functions in this direction are limited to providing information for governmental reports and to taking part in meetings dedicated to Roma inclusion since as a rule these experts are supercharged with tasks within their main responsibilities.

There are only two cases that seem to be exceptions from this rule: “Integration through Intercultural Education” branch within “Educational Environment and Educational Integration” Directorate of the Ministry of Education and Science and “Equal Opportunities” branch within “Demographic Policies, Social Investment and Equal Opportunities” Directorate of the Ministry of Labor and Social Policy. Some common features could be outlined for both of them. From one side their opportunities to steer the implementation of Roma related policies and even to influence the decision-making process are higher than the ones of the NCCEDI. They could use the administrative apparatus of their ministries, to order them the implementation of certain decisions connected with Roma integration and to steer it. They could also prepare drafts for normative acts and to ask their ministries to adopt them. From the other side both structures (within MES

and within MLSP) are at relatively low administrative level. Their staff is at minimum (for example only two experts work in “Integration through Intercultural Education” branch) and they do not have special budget for the implementation of Roma related policies. In this way their real competences are limited.

Institutional framework for development and implementation of policy towards Roma integration at regional level

The regional level is the weakest level in respect to the institutional infrastructure dealing with Roma. Possible reason for this is that regional level is the weakest level in Bulgarian administration in general.

The only administrative structures dealing with Roma at regional level are the Regional Councils for Cooperation on Ethnic and Demographic Issues. Their establishment and function are regulated by Art. 7 of Decree N 333/10.12.2004 of the Council of Ministers. Like the NCCEDI, the Regional Councils are consultative and coordinating bodies without managing competencies. Their main functions are to elaborate and coordinate the implementation of regional strategies on ethnic and demographic issues. (Art. 7 (1)) They are composed of “deputy mayors which are responsible for ethnic and demographic issues in the municipalities on the territory of the district and representatives of NGOs of Bulgarian citizens of ethnic minorities... public culture house (chitalishte); the Regional inspectorate of education; regional healthcare centers; regional inspectorate for protection of environment and waters; the regional directorate of national construction control; regional labor office; regional social assistance office; the territorial statistical bureau; regional internal affairs directorate; regional directorate on Agriculture and Forests, and other public institutions.” (Art. 7 (3)). According to Art. 7 (2) chairman of the Regional council is the Regional governor or the deputy-governor nominated by the Regional governor.⁶ The secretary of the council is the expert on ethnic and demographic issues in the district administration. Unlike the NCCEDI, the Regional Councils do

⁶ According to the Internal Regulation of the NCCEDI the Chairman of the Regional Council should be the Regional governor.

not have their own administration. They are not engaged in Phare or other pre-accession programs. In this way their opportunity to influence Roma integration process are sharply limited to minimum.

At present, 26 Regional Councils are formed. According to many Roma, members of these Councils, it is difficult for the Councils to work successfully because of their limited competencies. The Councils and their members do not have any competencies to take decisions and to implement them. Their only functions are to discuss certain problems and to propose possible solutions. Nevertheless, the real solutions are in the hands of municipal mayors or regional governors. From the other side, the communication between the Regional Councils and the National Council is often difficult. All these obstacles demobilize the members to take active part in the Council's work.⁷

The local institutional framework and minority integration

The local level is the level where the integration and inclusion of the Roma community happens in the quickest and most efficient way. At present the Roma participation at the local levels happens within the following institutional framework.

➤ ***Municipal administration***

● ***Ethnic and demographic issues experts and other positions***

Increase in the employing of ethnic and demographic issues experts has been marked after the adoption of the Framework program in 1999. First, it happened at the regional level in the district administrations. These experts however have clearly defined job descriptions. The situation is not so clear however with the people working in the municipal administration. At present there are around 200 Roma working in public administration, half of them are women. Most of the experts are experts in ethnic and demographic issues. They however lack a clear job description. There are several reasons for this: lack of specific normative act to regulate their status; lack

⁷ Interview with Sasho Kovachev, expert in Ethnic and Demographic Issues in Kyustendil Regional Administration. 17 July 2005.

of a clear vision what their responsibilities should be; and lack of straightforward and coordinated program and policy for their employing.

A clear indicator for this is the variety of titles they are assigned: “work with minorities” (Yambol), “Specialist about Roma issues” (Sapareva banya), “Specialist in social, cultural and educational issues of the ethnic groups” (Shumen), “Specialist in minority integration” (Devnya, Kozloduy), “Specialist in the socio-demographic issues” (Lom), “Coordinator for the Roma issues” (Kavarna), “Expert in social inclusion” (Pestera), and even “Expert in demographic and sociological studies.”

There are two major concepts for the function of these experts. Decision-making level representatives of administration consider the Roma expert a person who should be responsible about all Roma related issues in the municipality, i.e. a mediator between the Roma community and the administration. The survey among municipal officials carried out in 2005 shows that this is the opinion of 34%. Often however the position of the Roma expert is misused and s/he turns into a “buffer” between the Roma community and micro-society. This is the case in one of the municipalities where the title of this person is “commandant for the minorities.” This creates a dangerous situation for additional segregation and isolation of the Roma community.

The second concept is defended by the Roma experts themselves, namely that Roma specialists should be integrated in the different branches of the municipality and their responsibilities and tasks should not be restricted only to minorities but majority as well. In this respect the position of the ethnic and demographic issues expert should be rather to redirect people to the relevant person in municipal administration, and not to solve all problems related to Roma.

- *Establishing a branch in the municipal administration dealing with minority integration*

Establishing a separate branch of the municipal administration dealing with minority integration is another approach. This branch can be placed within the general or the special administration. This is the case, for example, in the municipalities of Sliven and Botevgrad. Ethnic and Demographic Issues branch is established also in Septemvri municipality where seven Roma experts are employed. In other municipalities these structures

are at lower hierarchical level: in Cherven Bryag municipality, for instance, the Minority Integration municipal program is within the “Social activities” department of the municipality.

At the same time, establishing a separate department for Roma integration should not lead to the practice of segregating minority integration issues only within the activities of this department. It is a wrong perception that Roma issues should be dealt with only by Roma and that it should be only Roma employed in these structures. In this respect the Sliven case is a good example: there are both, Roma and non-Roma employed in the department.

- *Participation of Roma at the political level: mayors, deputy-mayors and neighbourhood mayor substitutes*

After the local elections in 2003 the Roma political participation has increased: there are five municipal deputy-mayors (Hayredin, Lom, Valchedram, Elin Pelin, and Provadia), more than 200 Roma city councilors, and several deputy-chairmen of the City Councils (Lom, Strazhitza, and so on). Unfortunately, this is still far from having a satisfactory representation of Roma. This however shows that there is already good self-organization of Roma at the local level and readiness for participation in the decision-making process. This in turn increases the possibility for a dialogue with the local Roma community through its representatives in the local authorities. Another practice implemented in the city with a huge concentration of Roma population is appointing Roma as mayor substitutes in the Roma neighbourhoods. Such is the case in Slatina (Sofia), Iztok neighbourhood in Kyustendil, and so on.

Significantly higher is the number of Roma elected village mayors although it is hard to point out an exact figure. Observations show that in many cases the mayors have been elected not only by the minority population in the village but also by a significant number of majority votes. Such is the case in Kaspichan (Shumen district). This already shows a higher level of integration at the local level.

- *City Councils*

Another approach for integrating Roma issues in the local institutional structures is within the City Council. Some of the city councils have established permanent commission dealing with integration issues: Cherven

bryag, Sliven, Dobrich, Strazhitza, and so on. This institutionalizes the integration policy within the activities of the local parliaments. Moreover, the decisions of the local parliaments have the role of local normative acts.

➤ ***Public and municipal councils for ethnic and demographic issues***

The public and the municipal councils for ethnic and demographic issues are two different structures for integration policies at the local level which are often wrongly perceived as one and the same structure. The public councils are a practice (in many cases positive) for establishing a broader civic forum for inclusion of the local community in the local self-government. A disadvantage in their work is that their status is often not regulated and not backed up by any municipal funds. Nevertheless, they are a good example for engagement of broader civil society segments in the local integration policies.

The municipal councils on ethnic and demographic issues are structures of the municipal administration. As such they follow to some extent the model established by the regional councils on ethnic and demographic issues. Chairman of the council is often the deputy-mayor responsible about integration or social issues. Their members are representatives of the local institutions: local labor office, police, educational institutions, social assistance department, and so on. The aim of the municipal councils is to define the local problems related to minority integration, to coordinate the activities of the different institutions in this direction and propose solutions to the local administration. There is no unified normative act to regulate these structures and as a result they differ from place to place. Therefore, each council is individually organized, following its own agenda which is more or less active depending on the municipality itself. Sometimes, there are hybrid structures combining elements from both institutions.

A good example for a quite active Municipal council on EDI is the council in Dupnitza municipality (Kyustendil district). The council was created in 2004 after the initiative of the municipal administration and the Roma expert working in the municipality. Its activities are regulated by a mayor's order.⁸ The council has its own budget (10 000 BGN ~ 5000 EUR) based on the municipal Program for development of the Roma community in Dupnitza. Budget items are agreed with

⁸ Information from Tzetzka Mihajlova, expert on EDI, Dupnitza municipality

the mayor which facilitates the administrative procedure for granting money for activities. The same principle is used for establishing similar structures in some of the other municipalities in Kyustendil district. To a high extent the good results are due to the active coordinating role of the ethnic and demographic issues expert in the district administration which shows a well-organized system for Roma integration policies including the different levels: local and regional.

Normative framework for Roma integration process at national level

Several national documents have been approved as normative framework for Roma integration process. Two of them – the Framework Program for Equal Integration of Roma in Bulgarian Society (FP) and the Action Plan for the Decade of Roma Inclusion (Decade Action Plan – DAP) pretend to define the main trends of Roma integration as a whole. The other three, namely the Strategy for Educational Integration of Children and Students from the Ethnic Minorities (approved in June 2004) (SEI), the Health Strategy for People Belonging to Ethnic Minorities in Disadvantaged Position (approved in September 2005) (HS) and the National Program for Improving the Living Conditions of Roma (approved in March 2006) (NPILCR) are designed to regulate the integration process in a certain field. All these documents we refer to as “Roma strategies”⁹. At present there is no Roma Strategy only in the field of employment and social issues that is one of the most important spheres for Roma inclusion.

It is a wide-spread opinion among many Roma activists that the normative framework is good enough but it faces three serious problems. The first is its low legal status. Almost all of these Strategies are only a Decision of the Council of Ministers. (The Strategy for Educational Integration is even a Decision of the Minister of Education). This means that any following government could abolish them. Only the Decade Action Plan was approved as Decision of the Parliament. In fact no Roma Strategy is a law¹⁰

⁹ See: Center “Amalipe” and Hotline Agency, *The Roma Strategies in Bulgaria in the Eve of EU Accession*, August 2006.

¹⁰ In September 2003 Bulgarian Parliament approved Law for protection against discrimination. Although this was an important positive step it is difficult to perceive it as a framework for Roma integration process.

and the only attempt to approve a law connected with one of the Strategies failed in October 2004.¹¹ The second problem is the lack of financial engagement from the state budget. Although the Action Plans for implementation of all these strategies prepared for certain periods contain budgets almost all amounts are envisaged as “contribution of foreign donors” or are amounts for ordinary activities undertaken without any connection with the strategy implementation. There are no special funds from the state budget. Only few exceptions could be observed and they are described below. The third problem is the lack of proper administrative infrastructure for implementing these strategies (see above). Many governmental officials and even politicians admit these problems. They however are conveniently explained with the “limited opportunities” of the state budget.

As a result it is difficult to conclude that the Roma strategies have steered the Roma integration process until now. From one side, it seems that most of the measures with significant influence on Roma inclusion have been undertaken without any connection with the Roma strategies. They are defined by the mainstream normative framework in the certain field. From the other side, the basic means envisaged in the strategies pointed are still not implemented. This outlines the necessity of establishing proper financial and administrative conditions for Roma strategies implementation as well as the necessity of mainstreaming the most important points from these strategies into the general normative framework.

The following chapters present the implementation of four “Roma strategies” (the Framework Program for Roma Integration, the Action Plan for the Decade of Roma Inclusion, the Strategy for Educational Integration, the Program for Improving the Living Conditions of Roma) as well as the development of Roma integration process in Bulgaria during 2006. It examines both issues (the strategies implementation and the integration process) looking for connections and disparities between them.

¹¹ In October 2004 the Parliament rejected the draft Law for establishing Fund for educational integration of children and students from the ethnic minorities with the argument that this is discrimination against the majority children.

Normative framework for Roma integration process at the local level

The normative policy at the local level is much more concrete and straightforward compared to the national level. This is defined by the fact that problems and their solutions are closer to the decision-making bodies. And while in the beginning the approach towards minority questions was rather dispersed and chaotic, often fostered by outside factors, now it is gradually getting systematic, guided by the realized necessity for sustainable solving the problems which leads to establish efficient and durable models. A tendency for mainstreaming Roma integration issues at all level is gradually increasing in the local self-governance practices, including the participation of minority representatives.

The first step for this however is articulating the problems and including them in local normative acts such as the different municipal strategies. They can be either a separate program for Roma/minority integration or part of the municipal development strategies. An overview of the different strategies is provided below with analysis on their efficiency with the regard to the municipal specifics.

➤ *Strategies/ Municipal programs for Roma/ minority integration*

A significant part of the strategies have been adopted in the period 2003 – 2004 after the last local election. Since it is still a new practice the strategies vary. Most of them follow the FP accepted in 1999. The information collected so far shows that around one forth of the municipalities in Bulgaria have adopted their integration programs: Bratzigovo, Vidin, Botevgrad, Tutrakan, Dolna Mitropolia, Yambol, Valchedram, Cherven bryag, Sofia, Sopot, and so on. Yet often the adopting of a municipal integration strategy is under the strong influence of external factors (usually a requirement for application for different EU projects).

Analyzing the municipal strategic documents, the first fact characteristic we should outline is the lack of clear understanding of the difference between a plan, a program, and a strategy, as well as the criteria each of these documents should meet for its effective implementation. As mentioned above almost all strategies take as a basis the FP; those elaborated after the end of 2005 are based also on the Decade Action Plan. As a result the topics they

usually cover are the four priority areas of the Decade, as well as protection from discrimination and culture development which in turn are promoted by the FP.

Following the FP has both, advantages and disadvantages. One of the latter is the mechanical copy-paste of the national document into the local strategy which makes it useless since it does not reflect the local specifics and problems. Unfortunately, still a significant part of the integration strategies are created following this approach. Many of them were created in the first half of 2004 to answer the formal requirement for one of the Phare application procedures, namely, existing of such a document. According to a NCCEDI representative this requirement was the sole reason for many municipalities to consider preparing such a document. This is the first step towards rethinking minority integration in the local context.

The participation of the Roma community in the elaboration of integration strategic documents is the next criteria for efficiency. Otherwise, the documents are perceived by the Roma community as an alien outside document which might not reflect the local specifics and problems.

A good example in this direction is the Program for the development of the Roma community in Dupnitza, Kyustendil district for 2005. The draft of the program was first discussed by the Municipal council on ethnic and demographic issues. Roma NGOs representatives and public figures were invited at the meeting; representatives of different public institutions were also present. As a result, the program covered the broad range of problems in the different spheres. The participation of the EDI expert in District administration provided the connection between local and regional level. After being discussed at the MCEDI the program was presented before the local Roma community prior to its finalization.

A serious misunderstanding of the perception of the local strategies which could lead to further “segregation” of Roma related issues is the separation of the strategy from the general municipal development plan and mainstream policy of the municipality.

Addition problem some of the municipal strategies face is the lack of concrete activities, dates, financing and clear distribution of roles and responsibilities. It is still a wide-spread belief among the local administration that Roma issues are outside issues which are not directly related to society

development and should be solved only with external financial resources. Municipal officials in this case tend to forget that Roma are citizens of the given municipality as anybody else and their problems are part of the municipal problems. Of course, there are a number of positive examples in this direction.

Cherven bryag municipality has gained significant experience in this direction. Its minority integration program is accompanied by a program implementation plan which is adopted and reported to the city council annually. With a decision № 258/30.03.2005 the city council has accepted the report for the program implementation for 2004, for example, and has approved the plan for activities and budget for 2005.

Another drawback of local strategies sometimes is the lack of sustainability and long-term vision of integration policy. Often only the solving of the most aching problems is targeted without addressing the reasons and attitudes causing these problems. In this respect the municipalities of Sopot and Galabovo are good examples. Sopot municipality has envisaged in her strategy an “ethnopage” in the local newspaper and thus fighting negative xenophobic attitudes, while Galabovo municipality stresses on the “active participation of local media in informing society about Roma issues.”

➤ ***Municipal programs for educational and cultural integration of children and students from the ethnic minorities***

The municipal programs for educational and cultural integration of children and students from the ethnic minorities predominantly follow the national Strategy for educational integration from 2004. In this respect they are more consistent compared to the local replicas of the Framework program. This poses several questions: first, municipalities are expected (according to MES experts) to implement the national educational policy at the local level by adopting a Plan for the implementation of the Strategy. This however means that municipalities would work mainly on the priorities defined by the National strategy which often leads to setting goals irrelevant for the local reality. For example, two of the most common objectives

in the municipal educational programs are desegregation of the Roma schools and prevention of discrimination without a clear understanding of what these two terms mean. There are examples of municipalities which define desegregation as priority and major activity when there is only one school on the territory of the whole municipality or there are no segregated schools. Therefore, prior to drafting a local strategy a thorough and detailed needs analysis is needed.

➤ ***Including Roma issues in the mainstream municipal development plans/strategies***

Including Roma issues in the Municipal development plan is another approach based on mainstreaming instead of targeting. This is partly the approach of Sliven, Strazhitza, Kuklen, Yambol and other municipalities. From one side it takes Roma issues from their isolation and mainstreams them in the general municipal policy. From the other hand, there is a threat to dilute them and lose their specifics within the general context. In this respect the Roma community is often depicted in the municipal strategy rather as a problem in general than as a part of solving the problem or an asset for enriching the cultural diversity of the given municipality.

The Framework Program for Roma Integration and the Decade of Roma Inclusion in 2006

Context

The Framework Program for Equal Integration of Roma in Bulgarian Society (FP) was approved in April 1999 (with a Decision of the Council of Ministers from April 22). It could be perceived as the document that expresses the will of the Roma community in the highest degree since it has been signed by more than 70 Roma organizations.

In June 2003 Bulgaria became co-founder of the initiative Decade of Roma Inclusion. The official launch of the Decade was in Sofia on February 2, 2005. The launch for Bulgaria took place on April 8, 2005. On April 14, 2005 the Council of Ministers approved a National Action Plan for the Realization of the Initiative Decade of Roma Inclusion (DAP) for 2005 – 2015. It was prepared by a working group that included officials and some Roma activists. It develops further most of the points in the FP putting the accent on education, health care, employment, housing, protection from discrimination and culture.

The implementation of both initiatives is designed as mutual task for all state institutions. At the same time two institutions have special coordinating role for the FP implementation: the National Council for Cooperation on Ethnic and Demographic Issues (NCCEDI) – according to Art. 2 (7) from its Regulations, and the Ethnic and Demographic Issues Directorate (EDID) – according to Decree of the Council of Ministers 333/10.12.2004. Furthermore, both institutions play coordinating role for the Decade of Roma Inclusion. From July 2006 Bulgaria has taken over the Presidency of the Decade for one year. Deputy Minister in the Ministry of Labor and Social Policy (MLSP) was appointed a Coordinator of the Decade with Decision of the Council of Ministers from May 25, 2006. In this way MLSP was also involved in the coordination of DAP implementation.

The implementation of the FP and the commitments of Bulgaria within the Decade of Roma Inclusion during 2006 occurred in different normative circumstances but in similar manner and had one and the same outputs. The Framework Program implementation did not follow an Action plan or similar document until July. Such an Action Plan was approved through Decree of the Council of Ministers No. 693/06.10.2003 but it covered only 2003 – 2004. In 2005 there was no Action Plan. A consortium lead by the European Institute (Sofia) won a tender for preparation of an Action Plan for 2006. Despite the ToR envisaged the end of December 2005 as a deadline for this activity, the process took more time and the Action plan for the FP implementation in 2006 was approved on June 29, 2006. Unlike the FP, the Decade of Roma Inclusion followed its National Action Plan approved in April 2005.

Despite this difference, the implementation of both initiatives followed similar patterns. They did not have any special financing from the state budget¹. As a result the implementation was rather formal. It was based on ordinary activities undertaken by different institutions within the frames of their ordinary budget and responsibilities and often undertaken without any relation with the Framework program or the Decade. In fact, one and the same actions could be formally perceived as implementation of both initiatives and the outcomes are also the same.

This pattern sharply limits the opportunities for extensive actions directed to the implementation of the FP and the Decade engagements. Two options appear as possible stimuli for actions. The first is the Phare program. Since the FP was defined as one of the short-term priorities in Partnership for accession, several Phare projects directed to the implementation of important aspects of the FP were initiated. As a rule, all these projects appoint the NCCEDI as a Project implementation unit (PIU). The second possibility is an active coordinating role of the EDID and the NCCEDI.

¹ The only special financing dedicated to the Decade of Roma Inclusion dates from June 12, 2006 when the Council of Ministers provided 128,000 BGN for the needs of Bulgarian Presidency of the Decade but it was for the period July 2006 – June 2007. The only special financing dedicated to key activities from both initiatives for 2005 was supposed to be 1,000,000 BGN for Center for Educational Integration but they were not absorbed because the Center was not established. During 2006 there was significantly less financing for the Center – 500,000 BGN was envisaged but it was not completely absorbed.

These institutions could require (within their competences, in soft and limited manner) the other state institutions to undertake actions for the FP and Decade implementation within their ordinary budgets as well as to realize their mainstream programs in a way serving the FP and the Decade implementations. Both options underline the role of the EDID and the NCCEDI for Roma integration.

Establishing the Ethnic and Demographic Issues Directorate: For Roma without Roma

The process of EDID formation began in July 2005 when Mrs. Maya Cholakova was appointed its Director. Three months later competition for appointing the other staff members was launched. The process took several months and continued during 2006. Two Heads of the EDID branches² and 10 specialists were appointed: seven of them in the “Ethnic identity and integration, demographic development” branch, three in the “Roma integration” branch. One more expert and one technical assistant were appointed outside the branches for the needs of the whole Directorate.³

For first time in Bulgarian history such a relatively big number of people were appointed in an administrative structure dealing with minority issues and with Roma integration in particular.⁴ This caused certain improvement in EDID work especially in steering the implementation of Phare projects directed to Roma. At the same time the process of EDID establishment missed the chance to engage the Roma community with the work of this structure and to ensure Roma participation. It was expected that Roma would be appointed as staff members and even at leading positions since the Government loudly pronounced the principle “For Roma with Roma” and since one of the major criticisms towards the NCCEDI was the low engagement of the Roma community with its work. Nevertheless, Roma presence in the EDID seems rather limited: only one expert in the whole Directorate.

² EDID has two branches established by Order № H-1291/21.12.2004 of the Prime minister: “Ethnic identity and integration, demographic development” and “Roma integration.”

³ <http://www.nccedi.government.bg/page.php?category=64&id=225>

⁴ the initial envisaged number of EDID staff was 20 people but in 2006 it was reduced to 17.

The reasons for the absence of Roma in the EDID are complicated. The requirements for the positions of Head of Branch were rather high for most of Roma who expressed interest, especially the one of nine years administrative experience. As a rule, Roma have been appointed in the administrative system mainly after 1999 when the Framework program was approved and even those who were among the first to start work in the administration did not have the required years of experience. Possible solution of this problem, proposed by Roma activists, was to equate the experience in the NGO sector with the administrative experience. This idea was not accepted and no steps were undertaken in this direction. As a result Roma candidates for the Head position were rejected for not meeting the formal requirements. At the same time, a number of Roma candidates who met the formal criteria applied for the positions of specialists. Nevertheless, only one was appointed; for the other places non-Roma candidates were engaged. Managing the competition, the governmental administration did not use the opportunity provided by the Law for Protection against Discrimination to foster the employment of Roma candidates. The Law allows and fosters the employer to give preference to candidates from disadvantaged groups when they have the same qualifications as the other candidates.

It seems that the leading principle in the process of appointing EDID staff has been the engagement of people with the highest possible administrative experience even if they did not have any experience in work with Roma, did not know Roma situation and were not familiar with the integration process.⁵ This raised two problems. The first one was the alienation of the Roma community from the work of the EDID. The second was the need for significant improvement of the knowledge and skills of the newly appointed staff about the Roma situation and the Roma integration process.

To cope with the alienation of the Roma community from the EDID its Director tried to establish open, transparent and cooperative style of EDID work. Roma NGOs were provided with information they required, many of EDID activities were preceded by consultations and meetings with NGOs, and so on. It is still early to judge how long this manner of work will last and what extend it will achieve. Nevertheless, it is a positive step and a clear improvement in the work of central administration with Roma organiza-

⁵ The last was not included in any way within the formal requirements.

tions. At the same time it is hardly to expect that this is the only necessary measure for overcoming the alienation of Roma community from the EDID. More and urgent steps are necessary.

To cope with the lack of knowledge and skills for successful work with Roma community of the new staff members, the EDID initiated a set of trainings. Trainings were one of the basic activities of the EDID during 2006. No doubt, this is needed since most of the staff has not worked with Roma and has completely different administrative experiences (for example, working in the Ministry of Interior and the Secret services). Most probably the training would help establishing skills and knowledge necessary for the work with the specific target group. Nevertheless, the process of acquiring such competences will take more time and will delay the work of the EDID.

NCCEDI - expecting coordination and cooperation on ethnic issues

Although the establishment of the NCCEDI was formally envisaged in the end of 2004 (replacing the National Council on Ethnic and Demographic Issues) through Decree 333/10.12.2004 it was not established until the beginning of 2006. Formally, there was sole invitation for nominations of NGOs to become NCCEDI members but it was not accompanied with concrete steps for establishment of the Council by the governmental institutions. As a result no interest was expressed by NGOs. In January 2006 the Prime-Minister Emel Etem (Chairperson of NCCEDI) issued an order for nomination of candidates by NGOs and state institutions. After a short selection procedure, the members of the Council were appointed by order P-21/27.02.2006 of Mrs. Etem. The first meeting of the Council took place on March 1, 2006. Until the end of 2006 two other meetings took place: on August 2 and November 27.

The Commission for Roma Integration (within the Council) did not hold meetings with all its members (representatives of institutions and Roma NGOs). Four meetings were held with representatives of Roma NGOs-members of the Commission.

It is still early to conclude whether the Council will influence the state policy on ethnic and demographic issues and the implementation of the FP

in particular or will function only formally as the preceding National Council on Ethnic and Demographic Issues. Nevertheless, it is clear that during 2006 the NCCEDI met four serious problems that are still available. The first one was its limited competencies. The Council has only consulting and coordinating functions and no managing role (Art. 1 (1) from the Council's Regulations). It could advise the state institutions for actions for Roma integration and could require information but not to oblige them for actions or to undertake actions on its own. During 2006 the Council more often followed the initiatives undertaken by other institutions instead of inspiring them or taking part in them. For example, one of the most important documents connected with Roma integration – the National Program for Improving the Living Conditions of Roma was approved by the Council of Ministers without being discussed by the NCCEDI. Moreover, sometimes the Council and its members were even not informed for significant initiatives connected with Roma integration. The activities connected with the launch of Bulgarian Presidency of the Decade of Roma inclusion (July 4, 2006) as well as the other activities of the Decade during 2006 were an example in this direction. Obviously the Council has been meeting problems with strengthening its authority among the other institutions.

This problem appropriated a concrete dimension during 2006: the exclusion from the so-called “harmonizing procedure” within the Council of Ministers. Since NCCEDI has not been a ministry or a state agency it did not have the right to present position about normative acts elaborated within the Council of Ministers or to cease one. This has sharply limited NCCEDI opportunities to influence the decision-making process. For example, the Council was not able to react to several points from the National Program for Development of School Education that harmed the Roma educational integration although Mrs. Cholakova expressed readiness to do it. As pointed in “Institutional and Normative Framework for Roma Integration Process” Chapter, the NCCEDI was partly included in the “harmonizing procedure” in the end of 2006 but this related only to limited number of normative acts: those defined as “acts in the ethnic and demographic field” and did not relate to acts in the other important fields, such as education, health, and so on.

The second problem has been the inefficient structure of the Council. In 2006 the NCCEDI had more than fifty members (representatives of 22 institutions and 31 NGOs). This made the efficient work impossible. The

Commission for Roma Integration within the Council had also inefficient structure: its members were 35 (19 institutions and 16 NGOs). In fact it repeated the structure of the Council that did not make significant sense. This was one of the possible reasons for not having meetings of the Commission in 2006.

Third problem has been the lack of serious engagement of the Roma community with the NCCEDI. The level of Roma representation has been rather low. Although 16 Roma NGOs were members of the Council in 2006 many significant organizations with proved capacity did not apply for membership. Some of them perceived the Council as an institution without competencies and expressed doubts about the necessity of its existence.⁶ Even those who were members did not participate actively in the Council's work. As a whole the level of confidence towards the NCCEDI and its work was and still is very low. During 2006 it slightly raised: the number of Roma NGOs that applied for NCCEDI membership in January 2007 is an indicator in this direction. Nevertheless, the problem still exists and serious steps are necessary. Most probably a possible start of NCCEDI efficient and effective work as well as ensuring the real participation of NGOs-members in the Council's work would attract Roma NGOs.

The fourth problem, closely connected with the previous one, has been the distribution of responsibilities within the Council. Although it was composed of two types of actors: institutions and NGOs, its agenda and final decisions were defined by the institutions. There was no mechanism for NGOs to impose agenda and to shift decisions. Sometimes this provoked serious tensions. For example, the suggestions of Roma NGOs for incorporating certain points connected with Roma integration within the Human Resources Development Operational Program were not discussed by the NCCEDI. Moreover, during meetings of the working group engaged with the preparation of this Operational program the Council's representatives appointed solely by the chair of the Council Minister Emel Etem expressed disagreement with these suggestions and tried to obstruct their approval speaking in the name of the National Council. Furthermore, the appointment of these "representatives" has been never discussed at a meeting of the National Council.

⁶ Such opinions were often published also in the Roma newspaper *Drom Dromendar*.

This problem strengthened the feeling that the NCCEDI is rather a tool for control over the Roma movement by the side of state institutions than a channel for consultations between equal partners. This feeling could have been overcome through real steps for ensuring NGO participation in the decision-making process within the Council, such as:

- equal participation of NGOs in defining NCCEDI representatives in commissions and working groups,
- equal participation of NGOs in preparing NCCEDI projects,
- equal participation of NGOs in preparing NCCEDI position for normative acts within the “harmonizing procedure”, and so on.

Until the end of 2006 all these key issues were decided by the political body of the NCCEDI and by the EDID. NGO members were not even informed for most of these decisions.

Actions for implementation of the National Action Plan for the Decade of Roma Inclusion (DAP - Decade Action Plan)

The National Action Plan for the Decade of Roma Inclusion (DAP) contains numerous aims, tasks and activities divided into six areas: education, health care, employment, living conditions, protection from discrimination and culture. Responsible institutions, time, financing (amount and source) and indicators are envisaged for the fulfillment of all aims, tasks and activities. For the period 2005 – 2006 129 actions for achieving of 45 tasks and 23 aims were planned.

The existence of such a Plan was a significant asset: in the period 2005 – July 2006 it was the only document directed to the whole process of Roma integration.⁷ The presence of responsible institutions and financial figures was a precondition for concrete steps and actions. At the same time, the Plan contains three significant disadvantages that sharply limit its possibility for influence. The first one was the lack of special financing for the Plan’s implementation. Every institution had prepared a plan of activities that could be financed only within its ordinary budget.⁸ This scheme had

⁷ The Action Plan for Implementation of the Framework Program for Roma Integration for 2006 was approved on June 29, 2006.

⁸ The only exception was the establishment of Center for Educational Integration that ought to receive special financing from 1,000,000 BGN from the State budget.

proved to be inefficient by the Action Plan for Realization of the FP (2003 – 2004) and during the years after the FP approval. Nevertheless, it fitted within the general scheme for Roma integration in Bulgaria: lack of special financing outside the ordinary budgets of the institutions with only Phare co-financing as possible exception. This disadvantage set limitations for all possible future actions.

The second disadvantage was the lack of clear criteria what types of actions were actions for Roma integration and could be included in the Plan. The Plan contained two different types of activities. The first were usual activities of different institutions undertaken without connection to the Roma integration process. Roma were part of the beneficiaries; within the beneficiary group their position could vary from insignificant (for example, in the Training for start of own business, Preparing program for consulting the family business, and so on), through significant (for example, Transformation of special schools for mentally disabled children into mainstream schools, and so on) to almost 100% (for example, Reconstruction or construction of infrastructure in regions populated by Roma). The second type was actions that could be defined as positive actions for Roma integration since they were planned to enhance this process (for example, Establishing Center for Educational Integration of Children and Students from the Ethnic Minorities). The presence of the second type was obviously reasonable unlike the first one which distracted and dispersed the efforts in the Plan.

The third disadvantage was the modest financial engagement with the Action plan implementation. The overall amount envisaged for the Action Plan implementation for 2005 – 2006 was around 1,745,550 BGN (around 900,000 Euro) and 3,446,659 euro (within 2 Phare projects). For a country with more than 800,000 Roma this amount seemed symbolic and far from sufficient for real actions. Most of the activities did not have defined amount of financing: only 29 out of 129 activities had concrete sums in the column “amount”. For the other 100 activities the column was empty or filled with “No additional financing is needed.” There were whole fields with no financing envisaged: employment and living conditions, for example. The reasons for the missing amount of financing for the vast majority of activities could be different: some of them were usual activities and no additional financing was necessary, the others seemed to be just ideas with no concrete parameters. Nevertheless, it was hard to judge how realistic the engagement with activities with no financing envisaged was.

Even more limited was the financial engagement of the state budget. 1,230,000 BGN was the share for activities financed only by the state budget; 270,000 BGN were envisaged as financing by “State budget and donors”. The other 145,000 BGN and 3,446,659 euro were provided by donors (the biggest share was Phare financing⁹) or the source was not indicated. This symbolic financial commitment defined the limited scope of actions and the practical lack of outcomes.

Practically only few actions within the Action Plan were undertaken for the period 2005 – 2006. Almost all of them were usual activities of different institutions initiated without connection with the Action Plan and with the Roma integration process in general. For example, the biggest financial share was for reconstructions of 5 streets in Roma neighborhoods in different towns. This activity could be hardly perceived as the Action plan implementation: hundreds of streets are reconstructed every year in Bulgaria and this is part of the ordinary duties and responsibilities of different institutions; moreover, it is alarming that only five of the reconstructed streets are in Roma neighborhoods.¹⁰ The other actions fell within different Phare projects initiated years before the Action plan preparation.

The share of realized actions undertaken deliberately for Roma integration and envisaged in the Action plan was insignificant. Their financing was close to zero. For example, none of the four actions in the field of education with envisaged financing of 1,080,400 BGN from the state budget were realized: the Center for Educational Integration was nominally established but until the end of 2006 it did not start working and did not use the state subsidy envisaged. The Ministry of Health provided only 30,000 BGN out of the envisaged 500,000 BGN for realizing activities within the Action Plan and only 26 613 BGN were absorbed¹¹. In the fields of living condi-

⁹ In 2005-2006 several Phare projects directed to Roma integration have been realized. It is not clear why only two of them are included in the Action plan. A possible reason is the lack of clear criteria what activities could be included in the Action plan by different ministries and institutions.

¹⁰ Most probably more streets in areas populated with Roma were reconstructed but the information was not provided to the EDID since these were not actions undertaken because of the Action plan implementation.

¹¹ 23 980 BGN were paid to Medical Center “Ascendent” for screening of Romani women in Burgas, Vidin and Montana Districts as well as 3500 BGN for transport and per-diem expenses.

tions and employment there were no actions with envisaged financing. The actions within Prevention of discrimination field were backed up with 105,150 BGN and within Culture – with around 50,000 BGN. In this way, the overall amount of financing provided for actions undertaken deliberately for Roma integration and envisaged in the Action plan was insignificant and does not exceed 200,000 BGN or around 100,000 euro.

Despite all the disadvantages mentioned above, a number of actions directed to Roma integration have been undertaken in the period in question: they will be analyzed in the following chapters. In general, they were not included in the Action plan and were not undertaken because of the Decade of Roma Inclusion. This is not by accident: it seems that the Action plan has rather limited opportunities to influence the process of Roma integration. Unlike its intention, it seems to have more formal and bureaucratic character rather than to be a general framework for enhancing and fostering the Roma inclusion.

Following the challenge of Bulgarian accession to EU high-level officials from the NCCEDI and the EDID raised a discussion for significant changes in the National Action Plan for the Decade of Roma Inclusion and in the Framework Program for Roma Integration. It is desirable the new documents to avoid the mistakes pointed above. It is also strongly desirable the documents are prepared with the active and equal participation of Roma NGOs and Roma community that would guarantee the engagement of Roma with their implementation.

The modest implementation of the Action plan for 2005 – 2006 and its lack of significant influence to the process of Roma integration indicate the limited possibilities of the model for Roma integration in Bulgaria. ***Roma inclusion is still perceived as additional task with no additional financing and institutional infrastructure.*** The only possibility for special actions provided so far for Roma integration is through project based activities financed by foreign donors or by European funds combined with Bulgarian co-financing.

Since the Phare program is close to its end, the only significant factor that could enhance the process of Roma integration (and the implementation of the Decade of Roma Inclusion and FP) seems to be its linkage with the European structural funds. Human Resources Development Operational

Program, Regional Development Operational Program, Administrative Capacity Operational Program, and the National Plan for Development of Rural Areas seem to have close links with Roma integration problems. Envisaging operations, measures and indicators connected with Roma integration in these documents as well as initiating programs and projects financed within them are urgent and necessary steps for continuing and enhancing the Roma integration process.

Another possible option is shift in the general scheme of Roma integration in Bulgaria. Raising the legal status of the so-called “Roma strategies” (approving them as Decision of the Parliament or as a law, for example), defining financing for their implementation from the state budget and extending the competences of the institutions engaged in their implementation could be elements from such a shift. This would require strong political will by the side of the Bulgarian political elite that seems rather problematic at the moment.

Social Policy and Social Programs for Roma

The government undertook a set of measures in the social field during the last year of preparation for accession. These measures affected to the highest extent people who were in the system of social assistance and employment. The focus was explicitly on children and the Roma community where for a short period of time a number of projects and programs had been implemented; some of them have been additionally introduced into the new social legislation. In this respect a number of events and activities were organized: seminars, local labor market meetings, and so on.

All these changes in the social policy had been planned, implemented and monitored by the state structures of the Ministry of Labor and Social Policy (MLSP), the Agency for Social Assistance and the Employment Agency. It has turned out that the MLSP and its structures are among the most active actors working for the social inclusion of vulnerable groups unlike the other ministries which have inclusion and integration of vulnerable groups among their key responsibilities.

A significant part of the implemented activities and measures (the Roma labor markets, the social investments in children, the integration additives for disabled people, the measures in respect to Roma literacy and employment, the “cup of warm milk” program and others) have been pointed out as some of the most significant and successful state projects in the public sphere. On the other hand, however, there was a set of skeptical moods concerning the effect achieved and the actions undertaken. As a whole, serious analyses and discussions among the professional community about the different programs have never taken place. The debate concerning the effect and the efficiency of the programs was locked within the administration of the MLSP and the outcomes of the programs were presented mainly in a positive aspect without giving an account of the difficulties, the challenges and the lessons learned from the program implementation.

This trend of lack of professional discussions was criticized to a high extent by many NGOs and experts. With his entering upon a second man-

date, the President of the Republic of Bulgaria has also criticized the conducted social policy, as he pointed the lack of efficient dialogue and the absence of sustainable decisions concerning some of the vulnerable groups. At the same time the administration of the MLSP is overloaded with a number of changes and pressure by the social workers for wage-increase, the latter being one of the lowest in the public sector.

During the last years of transition, the Bulgarian society has gained significant experience working in the Roma community and leading role for this has been played by the Roma NGOs. Most of the successful achievements in the educational field as the introduction of intercultural education (for example through the free-elective subject “Roma folklore”), of the Roma teacher-assistant position, the desegregation of the Roma schools, etc., has been achieved mainly by NGOs. Besides this, Roma NGOs and Roma leaders are those who support the implementation of the state programs; they are the leading partners of the Local Labor Offices, the Inspectorates of Education, the Social Assistance Directorates, the municipal administrations, etc. The efficient partnership with working Roma organizations is often used when it is necessary for the institutions to get into and work with the Roma community. The case however is that these organizations do not receive resources for this because it is not provided by the existing legislative basis. It is obvious that the efforts of the different institutions must be structured to start the efficient social inclusion of Roma in the social sphere. Therefore, discussions, expert analyses and financially backed-up strategies with resources which are to the disposal of those who are closer to the vulnerable groups are needed.

The present chapter focuses on some of the programs managed by the MLSP with impact on the Roma community. For the purposes of this report quality and quantity research has been carried out including processing and analyzing of different documents for the implementation of four programs by the MLSP in 2006:

- **National program for literacy and qualification courses for Roma**, which is carried out in all regions of Bulgaria;
- **Local Labor markets for Roma** implemented in 10 regions organized in the context of the Decade of Roma inclusion;
- **Seminars with the Roma community of MLSP** – Shumen, Blagoevgrad and Velingrad

- **Social investments in children** – pilot program, that is realized in seven municipalities and afterwards applied into practice since January 01, 2007, through the law for family benefits.

Undoubtedly the research of these four programs has been a serious challenge for the team. The challenge has been provoked by the implication of state institutions that the programs are unconditionally successful. This implication has been channeled from the media campaign of the government, so it was difficult to put in doubt the words of ministers and state officials. The research methodology is based on four major criteria:

- Degree of **satisfaction** of the basic participants in the program;
- Possibility for active **participation**;
- **Relevance** of the program/project in respect to the basic needs of the community and the target groups;
- **Impact** of the program implementation.

Two reasons defined the choice of the criteria pointed above: 1) it is extremely important to know the motivation of people included in development programs, as well as the approach of involvement and participation has been applied; 2) the evaluation of the relevance and the impact of the programs is an essential element which reflects whether the concrete needs of the participants in these programs have been met and what the overall impact on the community has been.

The research has been carried out in the municipalities of Simitli, Karlovo, Veliko Turnovo, Rakitovo, Shumen, Razgrad, Biala Slatina, Burgas, Stara Zagora, Kaspichan, Targovishte, Varbitza, Kustendil, Hairedin, Kameno and Velingrad.

Mid-term evaluation of the National program for literacy and qualification courses for Roma

In the course of the research interviews, focus groups and standard questionnaires in 10 municipalities have been carried out. This has provided us with the possibility to see the concrete difficulties and achievements of the program on the basis of analyzing quality and quantity data. The pilot

character of the program and the small number of participants allowed all its clients from the target research places to be practically covered.

The research has been carried out by representatives of Roma NGOs working in the given community. This approach gives the possibility to see the concrete dimensions of the program impact. At the same time a number of direct participants for carrying out the terrain research were engaged. This was imposed by the fact that the number of the Roma active members who can cooperate for the organizing, as for the assessment of the carried programs, directed to the Roma community, is rather limited at some places. We consider that this combination of the functions could lead to a certain distortion of the data only in direction of a positive assessment of the programs.

Entry of the program

The target group of the national program for literacy and qualification courses for Roma are unemployed people, registered at the local Labor Office, self-determined as persons of Roma origin, illiterate or with low level of literacy. The program gives priority to the inclusion of illiterate young people up to 29 years, registered in the local Labor Office. Moreover a possibility for people of other ethnic origin answering the same requirements is also available.

The program had to start at the end of June, but because of the impossibility to form such a group, the program started at the end of July. The basic reason for the late start of the program was the summer season. Usually during this season people are engaged with the collecting of mushrooms, wild fruit and herbs. Almost everybody is in the forest. After several attempts and with the cooperation of “Future” foundation a group of 10 women and 2 men was formed. Two days after the start of the program two persons refused to participate but ten left.

During the questioning at the beginning of the program we had to question all people because otherwise those who were not asked to fill the questionnaire felt neglected. At the moment the program is going on and will finish at the end of December. **Eight women and one man participate.**

The participants were divided into two groups: a group that had never attended school and a group that had a certain educational level.

Official from the Municipality of Rakitovo

The data from the research shows that the bigger part of the participants entered the program with the hope to find a better job and to learn something new. These were 45% of the participants, who pointed out a personal motivation for self-realization and more effective inclusion on the labor market. On the other hand however, not a small part from the researched group of people pointed out that they had been forced to join the program by the measures, applied by the Social Assistance Department. Being asked what made them participate in the program, 32% from the inquired answered that they had been afraid for the payment of the family benefits if they would not participate in the program.

A force approach for gathering participants was used in some municipalities. Not a small part of the people questioned within this research pointed out that they had been forced to join the program because they had been intimidated with ceasing the benefits. This statement is confirmed by the quantity and quality data received. The entry by force in the program and the fear from limiting the income of the unemployed incontestably increased the resistance to the approach applied by the Labor Offices. Sometimes this resulted in even more serious contradictions which practically lead to the failure of the realization of the literacy courses at some places. It is obvious that only 9% of the people questioned pointed the grant received during the course as a basic stimulus to join the program. The data from the quality research as well confirms that the grant does not play a significant role for the people motivation to enter the program. This result is interesting, compared to the significantly higher number of participants, who are afraid to lose the income from various social transfers that assure a long term stability of life standard while the grant is a temporary possibility. This difference can be perceived also as an indicator for the lack of opportunity dispositions and unwillingness by the program participants to take risks.

Most of the participants stated that if they had not been intimidated by the Labor Office to stop their benefits, they would not participate in the course. The basic reason for this is that only in the summer season the people from our neighborhood can help themselves with some financing going out to collect mushrooms and herbs in the mountain. The opinion is that "these 3 leva per day cannot help me anyway". The grant resources are utterly insufficient and only in summer season the people could help themselves with financing for the whole year.

From the report of analyses of primary data from municipality center with compact Roma population

I think that something has to be done and it should be more than their inclusion in such programs, because this is not enough to cover their needs which are rather different. They need to feel equal and useful and not to do something only because they are Roma because this does not encourage them, but contrarily – discourages them.

An official from the Labor Office

The programs have to be consistent with the people needs. It is not enough just to be registered in the Local Labor Office. Programs can be implemented in the different villages, consistent with the people needs because in every populated area the needs are different, more or less.

An official from the Labor Office

The conditions for selection are what have to be changed. There are people who respond to some of the requirements and others do not; so all people in need cannot be covered. This is ridiculous because there are people who really want to work and I'm sure that they want to keep their work rather longer than the others because they have a bigger need to keep this work, while the others, in one way or another, earn enough money without these programs and maybe this is one of the reasons not to keep the same job longer enough. Maybe the conditions for selection of participants should be more flexible and thus it would be more successful.

An official from the Labor Office

As a man who works long time in the Roma community I should say that as a result from my experience with the two programs (Overcoming the poverty and the National program for literacy and qualification courses for Roma) I have realized that before elaborating a certain program, the Employment agency has to examine the needs and the possibilities of the given region. If such an examination cannot be realized everywhere, so this examination should be done through projects and employment projects should be financed. In our community the women do not want to attend the course because a man is the teacher and there are jealousy and quarrels at their homes although the man is very good. I am sure however, that this problem does not exist in Kyustendil because there the Roma are different. The same relates to the season when these programs are implemented. We can not literate them during a period when there is nobody in the neighborhood. Nevertheless, I am satisfied with the program here. It is useful...it just should be reconsidered better and implemented!

Representative of a small Roma organization in a small municipality

As a whole the involvement of the participants in the program is necessary to be fulfilled on the basis of a clear methodology. The simple determination of the participation criteria (for example educational level and ethnic self-identification) is not enough if the selection of participants with similar characteristics is carried out with the use of a variety of approaches with a different motivating effect: for example, through “intimidating” and/or providing with incorrect information. One of the basic tasks of the Employment Agency should be to search for stimulating measures to attract the people and the local communities by provoking their initiative and not by imposing sanctions and menaces. Some Labor Offices have used exactly these approaches which have brought to a failure of the program and to lower results. In other municipalities however, the results have been rather positive since the local people combined the efforts of the people from the community with the program possibilities.

The data collected shows that the sustainability remains a serious challenge for the program. For this purpose it is necessary to strengthen the work in the Roma community yet at the level of program elaborating through involving all interested stakeholders. Space for more initiative by the local Labor Office and local organizations working in the Roma community should be provided to develop more efficient services that would activate the labor supply among Roma.

Satisfaction and participation in the program

The intermediate assessment shows that almost all participants are satisfied from the literacy courses. In the opinion of a number of local experts working in the Roma community the implementation of such programs is an important and well-timed step. About 40% of the participants pointed that they are satisfied with the program, 14% pointed that they are not satisfied with it. About 23% are hesitant probably referring to the vagueness concerning their following realization and inclusion in the labor market.

Everybody impatiently expects to be included in the qualification courses. This is very important for them and the people count on this. I hope that they will not remain deceived.

Leader of a Roma community in a big town

According to almost all participants in the program, the next stage of the program connected with qualification is very important. A significant part of the people became program clients to receive an additional qualification and assistance for job finding. 36% of the participants are convinced that as a result of the participation in these courses they would easily find a job.

Other significant disadvantage of the program is that the expectations of the social workers and the Labor Offices' officials, as well as (most probably) of the authors of the program for free and long-term support by the Roma leaders and NGOs have not been realistic. They could not count on the permanent support and aid by the community organizations if the latter were not provided with human, financial and material resources for this extra work. On the other hand the influential people from the Roma community are under pressure from a number of crises problems within the community that have to be resolved every day: health, educational, social, of everyday life, etc. Even a well developed nongovernmental organization, working on other projects also, could not realize profound work in the employment field without additional resources which requires special preparation and additional efforts by the staff. According to data from the research almost everywhere respected people from the Roma community have been involved more or less to help the program implementation but this with no exceptions was voluntarily and with no payment, only with investing personal time and energy.

A big problem turned out to be the support by the Roma leaders; they helped with the organization and the popularizing of the program, but from there on neither they were interested in what happens nor they even called us.

Director of a Labor Office in a small municipality

Local NGOs, as well as Roma leaders helped us for popularizing the program. After this there was a selection based on a level lower, than the primary education level from the data we had. The active people from the neighborhood helped us a lot, with whatever they could.

Director of a Labor Office in a small municipality

But I cannot understand what the Labor Office wants from us. We have selected their people, motivated them, spoken with them, the group is assembled

and now they study. Now they want something else. They do not attend the course... But we have something else to do. They receive money to organize all this. We never will give up and will help, but more work should be done...

Representative of a Roma organization in a big district town

Almost 100% of the people questioned respond that the program is useful for them, because people will be able to help their children who attend school. People are even more convinced that such programs should be continued in future.

One of the serious recommendations to the program pointed out by 63% of the participants questioned is that the selection of teachers should be improved and more appropriate teachers should be involved in the program. Another significant recommendation refers to the quality. According to 29% of the participants the demands and requirements towards them during the courses should be more serious and harder. The next recommendation concerns the duration of the courses which according to the participants is rather short to have a real effect on the acquiring of literacy.

The data from the quality research confirms the opinion of the participants expressed in the questionnaires that the time of the courses is rather limited. Furthermore, according to some of the participants these courses should be bound with the general educational system so that those who want could continue their education to graduate an educational degree after finishing the course. At the moment the certificate issued upon graduation of this course do not have any value in the Bulgarian educational system: it does not give an educational degree and does not provide a possibility for acquiring a professional qualification degree. According to the people working in the Roma community a similar program is a possibility for the young people from the community to continue their education. Unfortunately the school educational system still does not offer enough flexible approaches that can be integrated in a modern educational system for adult education and lifelong learning.

The participants in the courses for acquiring literacy living in my neighborhood told me that they had been explained that after this course for acquiring literacy they would obtain a document, stating their graduation of fourth grade. I do not know if it is true. They have expressed an opinion that if the course

continues until the eighth grade, the things would be rather different and better for them. Graduating fourth grade does not suit them.

Representative of the Roma community

As a whole the participants in the National Program for Literacy and Qualification Courses for Roma are satisfied with the implementation of the program and namely with the literacy part. This is considered also by the bigger part of the Roma leaders interviewed.

Nevertheless, the sustainability of program results and long-term impact remain a significant problem. The disadvantages pointed above (duration of the program, lack of connection with the educational system, and so on) make the program incomplete and unable to achieve the basic needs of the community; it leads to achieving rather limited results in this field.

Higher involvement of the Roma leaders and NGOs working in the community could not be expected having in mind the lack of resources invested in direct work in the community. The results are obviously better at places where the NGOs were involved. Delegating more responsibilities for program planning and implementation to Roma NGOs should be considered regarding future implementation of the program; moreover, financial support for such activities is needed. If additionally an effective monitoring system is introduced the program will repay through more sustainable results from the implementation of the literacy courses. The local Labor Office should rather play the role of a contracting agency, consulting and a monitoring body than a project implementation agency. In this way the local specifics and needs would be better respected and taken into consideration.

At the moment the big expectations of all participants in the program are oriented to the next stage of the program – the qualification courses.

Program implementation process

We can conclude from the data collected that the implementation of the program in the part of the literacy courses was left completely in the hands and the enthusiasm of the local people without providing them with mechanisms to influence resources distribution or reorganization of activities. The program has determined who is going to train the teachers, how

the resources are going to be distributed and how all this is going to be organized at a local level.

For the more active officials in the system of the Employment agency this program has provided a possibility for more profound work in the Roma community with the sincere wish to help the unemployed people with low education and qualification from the community. For the others however, the program has been a burden that has generated an additional unwillingness to work with this target group. The data from the quality research shows that at a number of places in the structure of the Employment Agency there are still negative and even discriminatory attitudes by some of the officials. The motivation of both, the officials in the Employment Agency structures, and the participants has been the basic motor of the program and will continue to determine its results in the field. We are deeply convinced that the sole implementation of such programs requires an additional training of the social workers engaged with the program implementation and of the Roma community active members.

... What has discouraged me was that from the very beginning I knew that nothing would happen, since I knew that they had much more than us, but they pretended to be very poor ...this is simply not true and I don't know why they do it.

... but I do not..., frankly speaking, because they are used not to work to earn their living honestly, but the other way. How to see the sense of these programs when they come here and fill in documents in which they declare that in their houses there are one TV, two beds, one table and one wardrobe and if you go in the houses, they live much better than me and you. We cannot have even their houses...Everything about them is a lie, so no matter how much we want integration and to help them, this is a task which is impossible in practice. It happens that instead of us looking down on them, they are looking down on us and making fun of us.

... they do not have will for work and prefer the benefits. We have implemented only Poverty overcoming program and the participants most often are appointed as common workers. Since they cannot work anything else... The other program was implemented in the neighboring municipality.

Interviews with officials in the local Labor Offices

The data from the quality research shows that due to enough negative attitudes the program has not worked everywhere. To some extent this is because in some Roma communities illiteracy does not exist or if it exists, it is rather limited. Moreover, even when there are appropriate clients for the program, its announcement in a stigmatic way and the generalizing of the negative attitudes regarding the Roma community have not contributed to the higher motivation of the potential and real participants.

Furthermore, the data from the research shows that another rather delicate issue has also an impact on the successful implementation of the program: the issue of the dignity of people involved in the program. It has turned out that the participants in the program are very sensitive to the opinion of the community and especially of their closest relatives and the children. Usually our participants are parents and going to the literacy courses puts them in the delicate position of the “failed parent”.

One should bear in mind people’s dignity and respect all circumstances which potentially could harm it during the implementation of the program. Even the name of the program has a certain shade of underestimation as the message is for the “illiterate Roma”.

Our participants are mostly affected by the fact that the literacy course is held in the segregated Roma school “Hristo Botev” and the children from the school make fun of them. This has to be changed.

Representative from the Roma community

Half of the participants in the program assess themselves as more skillful after the successful participation in it and definitely consider that due to the program now they can write and read better. Almost half of the interviewees consider that the literacy course helped them to improve their own literacy. About 15% of the participants point that before they could write and read well. Another 15% point that they still cannot cope with the writing and reading.

For the people who did not know anything from the alphabet and the numbers, the literacy course was something useful and necessary, so that they could be useful to them themselves. For them it doesn’t matter that the program started during the season for gathering herbs and mushrooms. For them it’s more im-

portant to learn how to write and read. The scholarship also does not matter that much to them, independently that it is utterly insufficient to cover their elementary needs. The important for them is to be useful to them themselves. Thanks to this course they already can write and read to a certain degree. They can orientate how to read the inscriptions at bus stations, bus stops, shops and so on.

Representative of the Roma community in a small town

Yes, I am very pleased and to tell you the truth I have expected this effect. The people who participated in the program are very pleased with this; they are even proud that they can fill in documents on their own and they are happy that it's not necessary to ask someone to help them, which already is a big progress.

Director of a Local Labor Office

As a whole the program name has a stigmatic effect and it is recommendable to be changed during eventual new cycles of the program. During the elaboration of such programs it is necessary to show sensibility regarding the choice of a name since at some places this has lead to a reformulation of the objectives and has questioned the dignity and the authority of the participants in their own communities. The program has definitely lost a certain number of clients, who did not participate in it due to underestimating this fact.

It is necessary to organize some basic trainings on how to work in the Roma community for the officials in the different structures of the Employment agency. Officials lack competence and knowledge about the basic groups and subgroups in the Roma community and without this carrying out an efficient social policy is impossible. Furthermore, a number of discriminatory attitudes and stereotypes that not only impede the program implementation, but harm seriously the relationships of the institutions with the Roma community, as well as the relationships within the Roma community exist.

“Social investments in children” Program

The pilot program “Social investment in children” is orientated to the poorest families where the children need more support. Usually these are families from Roma origin with low incomes, who has received social ben-

efits for long time and the social workers consider that the social benefits given for their children could be used better. Practically “the investments in children” is taking away part of the benefits and reallocating them by the social authority for paying tuitions, buying of foodstuff, etc.

According to the social workers, much more profound social work is required for the implementation of such a program and also much bigger resource that will help the children and families. The data from the research shows that in the program project stage there has not been a significant improvement of the quality of life. Even in some aspects the program makes the families dependent on the decisions of the social services and the perception that the “State knows better my needs and my children’s needs” is encouraged.

According to you how the parents accept this program?

The parents accept the program, but there is no change in the direction of changing their way of thinking and their value system. That’s why I think that the approach of work with parents is not enough efficient because of the limited human and financial resources. Another way to stimulate the parents take care about their children should be worked out, and not to make it State responsibility.

Social worker

Very often the parents perceive the program as a punishing measure against them because of their inability to cope with their children’s needs. Having in mind that to a higher extent these families count on the social benefit as an only (or basic) source for the family budget, every deduction from the payment or redirection is accepted negatively. In some cases the parents stopped their children from the kindergartens to be able to receive the complete amount of the benefit. There are cases from the pilot municipalities with significant resistance by the families against the program implementation; therefore, the necessary outcomes were not achieved.

According to you how the parents accept this program?

Several families accept the program and are pleased, but the bigger part of them is not pleased because of the deductions from the social benefits. There are cases when parents who had found out about the program wish to be included in it on their own; and we include them.

Social worker

How much money do you receive from the social services?

200.85 leva. I give everything for food... it's not enough... Since I have seven children and the eighth is on the way, for two of them the State takes care completely; the social worker came and told me that in their judgment we needed the money for the children to be redistributed. That's how all happened ...

Are the children contented that their breakfast, tuition, clothes and so on are paid?

The children are contented that they have regime and have what to eat, and that they play with other children. I'm not satisfied because the social workers stop my money and I don't send my children to kindergarten anymore. I pay the utilities with difficulty. The money is not enough.

Parent

The program has practically a rather punishing than educating and motivating effect on the families how to distribute family budget efficiently. Some parents wish to participate in the program on their own, but they also suggest that this would not be on the expenses of the benefits received since this injures the other members of the family.

I found out from my sister that the money for the kindergarten is deducted from the benefits and I expressed a wish to be paid for my child. The children are happy, they like the kindergarten because they learn songs and poems. These 89.25 leva are not enough. What to pay first. It's necessary the benefits money to be increased. It's very hard.

Parent

The tendency for voluntary inclusion in the program is accepted by some of the social workers as a sign for its success. On the other hand, however, this shows the impossibility of some of the families to cope with the family budget and to escape the trap of the low income.

Investments in children without investments

Practically, the program social investments in children is implemented without any special investments. It is implemented on the basis of internal redistribution of the social benefits and creating of the additional organiza-

tion of the Social assistance Directorate (SAD) that will assess and redistribute the resources. The limited financing and the lack of a methodological approach based on the modern social work, lead to inefficiency of the social services and on the other hand – to pressure, feeling of inferiority and sensation that they were injured by the supported people.

Not everybody succeeds to allocate resources from the granted benefit for the concrete needs of the child, but in this way the benefit goes as planned. The child is fed, dressed. The negative examples ... the benefit is small, and if it is for example 50.00 leva and 30.00 leva are deducted from it as fee, the sum becomes even smaller. To invest in children, the benefit should be upgraded: in kind and in cash, not from the money of the family, but with additional resources.

Director of the Social assistance Directorate (SAD)

... the amount of the benefit is small but this is true and for our wages...there is not enough human resource of social workers who would execute more consultations and explanations for the parents about the usefulness of the program. The assessment for entering the program is complex, but it is good if more trained and methodologically prepared people participate in it... More families and children should be covered; there should be more financing and eventually broadening the Social Assistance Agency structure through employing more social workers.

Social worker

Is there anything that should be changed in this program? If yes – what should be changed?

This is valid not only for this program. The income of these people is small and with the children of Roma ethnic origin this fact is the most visualized because of the low social status. The concrete benefit should be simply in a bigger amount for these children. Maybe I could have done trainings for these parents how to better distribute their financial resources. I would stake on more social workers involved in the program for an individual assessment of the child and work with the family.

Director of a Secondary School

Apart from being forced to cope within the frames of rather limited human and material resources, the social workers often do not use methods which are efficient enough to influence the family. The family is assessed on the basis of how the benefit is redistributed. All this however remains in the

field of support without the implementation of really efficient programs for fostering the families to be more active and exit the crises situation, and to be able to cope on their own with the difficulties in front of them. The lack of a plan for such programs and activities, as well as the lack of well trained and experienced in the work with the most marginalized families in the Roma community human resources do the objectives of the program unrealizable.

Please, describe how do you personally imagine the social work with these families, which are included into the program?

I cannot imagine this, and we are working exactly with such families.

Social worker in Child Protection Department of the Child (CPD)

The human and the financial resources are limited; in order to help we need to be in constant contact with all the institutions that have any relation to the children, a number of consultations with parents and so on is required. The parents have to be convinced that the investment is in child's favor, and that the State does not do try to impose its own point of view through the social workers. It is necessary to invest more resources: human, material and financial.

How do you personally assess the pilot program “Social investment in children”?

There are positive and negative aspects: the positive aspects are well-known; but there is a negative aspect in the program as well. Some parents feel uncomfortable because in this way they are considered incapable to take care of their children.

Social worker

The directors of the kindergartens are the most contented with the introduction of the program. It is a “relief” for them, since there is no need now to be so insistent in collecting the fees. Almost all interviewees point the collecting of the fees as one of the most positive effects from the program. At the same time, the directors further state that a broader group of parents should be covered by the program.

How would you assess as a whole the program Social Investment in Children? Would you point out its successes if there are any? Would you point out its weaknesses if there are any?

I assess the program positively. Providing the monthly fees is a relief. It is a big problem to confess. Now it is not necessary to go around and to collect them. And we still have a lot of fees which had not been collected in the previous years. I, as a director of a kindergarten, would like the program to continue and to cover more parents in order to increase also the attendance in the kindergartens. Most of the parents who are refused social benefits stop their children from attending the kindergarten.

Director of a kindergarten

The integration of the poorest Roma families cannot be realized solely by applying a social assistance of the Bulgarian model without a real inclusion and participation of the community itself. Applying only social assistance without accompanying it with a proper development approach for influencing the poor families is in contradiction with the modern postulates in the social work with vulnerable communities. These “old” and low efficient programs are based on wrong and discriminative assumptions and conclusions for the attitude of and the motivation as a whole of the poor families and the Roma community as a whole. For this purpose the research team has made a study of the successful practices implemented in other countries in respect to poor families with low incomes. It turns out that first of all it is necessary to decentralize the efforts and have a sufficient work in the community itself where to develop integration services for the families. In addition, the practice shows that there is need for better coordination between the different institutions and authorities at the local level and development of additional services that will serve the citizens with low income.

The research team has outlined two basic professional opinions on the approach that has to be used. They contradict each other and are incompatible to a high extent.

- **First** – some of the experts consider that the deprivation of the benefits and their complete payment in nature, under the form of payment of bills, food vouchers, fees for the children is the only pos-

sibility and the most appropriate scheme for increasing the quality of life of these families. The supporters of this concept have the least confidence in the families and their ability to cope with problems. Namely for this reason they consider control and sanctions leading factors for programs implementation.

- **The second** professional opinion is that it is necessary to strengthen the social work among these families on the basis of more professional and tutorial work with them. The accent should be put on the establishment of social skills in a number of fields as 1) management of family budgets; 2) activation of family members to participate on the labor market; 3) skills for growing up and education of children; 4) encouraging these family members to improve the community infrastructure since they will make use of it directly; 5) development and functioning of groups that will raise the common culture and the social status of people, and so on. This expert opinion does not exclude the social assistance in kind or with financing, but this is bound with the implementation of the social programs close to the people and consistent with the need of every place and every family.

The two expert opinions have their own reasons. The combined efforts from the first and the second approach can lead to sustainability of the outcomes. According to the two opinions there is a clear position by the side of experts in the social field that at this level the social workers from the “Social assistance” Directorate do not have the necessary human and financial resource to implement these programs efficiently. All this shows that it is necessary to develop modern social-oriented approaches, that are used long years in the work with poor communities. Something more necessary is attracting the local NGOs, working in the Roma community as full partners in their fight against poverty and social exclusion. For the purposes of the present research, the team presents two practices, realized in America in respect to the families with low incomes, that include several integrated measures for encouraging the employment, increasing the income and the quality of life of children and their families.

Conclusions and recommendations

There is clear lack of human resource for the efficient assessment, selection and the efficient social work with the most marginalized Roma families. There is a lack of plans for care and systematic efforts that would lead to the independence of the families so that the biologic parents would be able to grow up their children. The support of these Roma families with clear objectives and program efforts will lead to prevention of leaving children in institutions and will create bigger perspectives for family development in their own community. It is necessary to elaborate a program directed to achieving a sustainable change in the attitudes and approaches to escape poverty by the supported people.

The accumulated experience is not used efficiently enough by the NGOs working in the Roma communities. In almost every Roma community in the country there are Roma NGOs which work in the community. It is necessary to encourage these organizations to register in the Social assistance Agency for providing of social services. The efforts in this direction need to be supported with structured programs for education and human resource development prepared for the implementation of social activities. This program is necessary to be implemented in collaboration with Social Assistance Directorates, schools, kindergartens and so on. There are NGOs which have proved their efficiency in the Roma communities and their experience often has been used by the Labor Offices, SAD and the other state institutions.

The biggest investment in children is the investment in their families. This conception, however, is strange for the program which does not really offer any investments in spite of its name; the program simply takes away from the parents the management of a part of the social transfers intended for their children: a conception that sharply contradicts the modern conceptions to cope with poverty through authorizing and granting responsibilities and not through creating dependence. There should be special financing bound not only with the social benefit but with the whole income of the family in order to have real investment in children. It is necessary to stop the reallocation of family income from the social benefits towards other services in the community. The allocation of special resources for invest-

ment in the child welfare through habituation of the parents to assume their responsibility for searching realization on the labor market will lead to establishment of social resource in the community. For this purpose special programs for delegating part of the social activities to NGOs and private suppliers should be elaborated.

The financial security and efficiency of the programs should be assessed also by independent evaluators. The necessary additional financing and reallocation of the resources could be realized at low efficient humanitarian programs expense and in favor of the programs that develop the human potential.

The integrated efforts to cope with the poverty in the Roma community cannot be realized only by the State. The efforts should be directed also to the development and the professional specialization of NGOs working in the Roma neighborhoods and providing educational and mediating activities. Finding of the most appropriate approach can be realized through an inclusive dialogue and work with the different stakeholders. A mechanism of delegating more resources, rights and responsibilities in the Roma community should be introduced to increase the social capital and to raise steadily the welfare of the most vulnerable families.

Almost all interviewed officials who have been working in the Roma community have searched support and help from the NGOs working in the Roma community. On the other hand, however, the representatives of these organizations express disapproval and disagreement regarding the approach of “using Roma organizations” without providing them with financial and human resources for their work on these large-scale programs. According to these organizations it is necessary to elaborate a mechanism to access financial resources for work in the community, establishment of social capital and social inclusion of Roma.

The New Hope Project

New Hope offered low-income workers in two areas of Milwaukee an opportunity to use a comprehensive set of integrated program services, designed to address longstanding problems associated with the low-wage labor market and delivered in a small-scale, friendly, and respectful environment. The program had broad eligibility rules, applying to any adult in the target areas (two zip codes) whose income was below 150 percent of the federal poverty level and who was willing to work full time. It was not limited to welfare recipients or families with children. The program had four components, which could be used separately or in any combination suiting program participants. For persons who worked at least 30 hours a week, New Hope provided the following:

- **Earnings supplements**, which were designed to complement the state and federal Earned Income Credits (EICs) — refundable tax credits for low-income working families — in order to raise the income of full-time workers to the poverty level. In designing the structure of these supplements, program developers tried to make sure that additional work effort or higher wages would always increase participants' overall income. This was done by reducing the proportion of each additional dollar earned that is lost to taxes or reduced benefits. In other words, program participants were able to keep more of their earnings gains, giving them an incentive to increase their hours of work and look for better-paying jobs. At the same time, the supplements raised their income to the poverty level. On average, the 78.0 percent of program group members who received any earnings supplements received \$1,165 over the two-year follow-up period. (The average for all participants was \$911.)

- **Affordable health insurance**, which was available to any participant who did not already have access to such coverage through an employer or government-provided health plan. Lack of such insurance is a continuing source of concern for low-wage workers, one they often cite as an impediment to their trying to leave welfare for work. New Hope required a copayment, increasing with income. This service was used by 47.6 percent of participants. (New Hope spent an average of \$1,464 per program group member over two years.)

- **Child care subsidies**, which were available to parents of children under age 13. The cost of child care is a major concern to low-income workers and their families. Although there are public child care subsidies for welfare recipients who go to work, the programs that provide these subsidies sometimes have long waiting lists. Low-income workers who have not recently received welfare have an even harder time accessing such subsidized child care. New Hope allowed participants to find their own licensed child care arrangements and then paid most of the expenses involved (the copay increased with a family's income). This service was used by 27.9 percent of New Hope participants (38.8 percent of program group members with children). (New Hope spent an average of \$2,376 per participant over two years.)

For those willing to work 30 hours a week, but unable to find such full-time employment, New Hope provided:

- **Community service jobs (CSJs)**, which were wage-paying positions with local nonprofit organizations, available to those who wanted to work full time, but could not find a full-time job on their own. CSJs were not automatic: Participants had to apply for them and could lose their CSJ if their attendance or performance on the job was poor. Each CSJ was limited to six months in duration, but participants could work in CSJs for a total of 12 months. CSJs were used by 32.0 percent of all participants. On average, participants who worked in a CSJ earned \$3,000 during the two-year follow-up period. (The average for all participants was \$945.)

Program Context

The New Hope evaluation unfolds in the context of rapidly changing labor markets and welfare environments, both in Milwaukee and across the United States. In many ways, the New Hope Project foreshadowed some of these changes, and in some instances it directly influenced state and local welfare policy. During the years covered by this evaluation, active social policy and a generally vibrant economy combined to make work easier to find and more rewarding for many low-income people in Wisconsin. Since New Hope was first conceived, unemployment in Milwaukee County has fallen from 6.5 percent to as low as 3.6 percent, the minimum wage has increased from \$4.25 to \$5.15, and the state and federal EIC programs have

been expanded twice. Since the end of the two-year follow-up period covered in this report, state Medicaid programs are being expanded to include low-income working adults even if they do not receive public assistance.

At the same time, the state's welfare system has been dismantled, replaced with a work-based system of public assistance called Wisconsin Works (W-2). It began during the last four months of the period covered in this report. More relevant to the findings presented here was a program preceding W-2, entitled Pay for Performance, which required work and work-related activities of every welfare recipient in Wisconsin. All these changes in state welfare policy took place within the larger context of federal welfare reform. The landmark 1996 federal welfare law ended the 60-year-old Aid to Families with Dependent Children (AFDC) program and its entitlement to cash welfare assistance, placed a five-year limit on most families' receipt of federally funded cash welfare, and required states to place an increasing share of their caseload in work or work-related activities. States now have major responsibility for designing programs for the poor, and they receive block grants of federal Temporary Assistance for Needy Families (TANF) funds.

The Milwaukee economy, and the policy changes that affect the supports available to members of both the program and control groups, makes this a conservative test of New Hope. The changes have diminished the difference between what New Hope offers and what is available outside New Hope, making it more difficult for the project to create a net difference.

Policy Lessons: What Can We Learn from New Hope?

The New Hope Project offers an opportunity to learn about relevant and innovative approaches to the ongoing problems of low-income workers. Following are some of the questions that are particularly important in the current post-AFDC policy debate about helping families, supporting work, and increasing self-sufficiency:

- **With supports that make work pay, will low-income people work their way out of poverty?** How much will various incentives induce people to work? Is the problem that people need some support, or are they just unable or unwilling to work?

- Can such supports foster full-time work? Many low-income people work part time or intermittently. With better supports, will they work full time?

- **Is it possible to make work pay without reducing work effort?** The New Hope program supplemented the earnings of its participants, which in theory is a good way of providing financial support to low-income families because it rewards work instead of idleness. However, past research involving income subsidies for low-income workers (implemented without providing work incentives like those in New Hope) has left a legacy of discouraging findings, showing that such subsidies reduced work effort. Could New Hope do better?

- **Should interventions like New Hope be targeted at those not already working full time?** Inclusiveness was an important aspect of the New Hope program, seeking to serve not just welfare recipients or people with poor work histories. However, what is the price of inclusiveness? Does it dramatically increase program cost? Do those already employed benefit from the program? Does being inclusive have other benefits?

- **Does subsidized employment work?** New Hope provided CSJs to participants who could not find full-time work on their own. This is another promising approach to helping low-income workers who may have a hard time finding their way into the labor market. But does it work? Do these jobs increase employment or do they just offer an easy alternative for people who otherwise would have found a regular job on their own? Did they set up and maintain a pool of public service jobs that are more than “make work”?

- **How much do health insurance and child care subsidies matter?** New Hope offered health insurance and child care subsidies. The need for these services is widely documented and proclaimed. But would low-income workers use them? Would they appreciate these benefits as making a difference in their lives?

- **How important is the nature of staff-participant interactions?** New Hope operated on a small scale and was based in the target areas it served. Staff developed a more positive relationship with participants and interacted with them more frequently than is typical in welfare offices. Does such an approach affect the quality of program operations and the use of program services?

● **If more people work and their income increases, is their family life improved?** Poverty and low-wage work can be stressful for families. Is it possible to improve family life by supporting employment and increasing available income? Could increased employment have negative consequences for family well-being?

● **How do make-work-pay policies affect children?** The American public wants those parents who can work to do so. But the public remains concerned about the children in poor families. How might these children be affected by policies that support work?

Limitations of This Evaluation

In this demonstration, the New Hope offer was available to program participants alongside the existing welfare system. While New Hope designers thought of the program as an alternative to this system, many participants continued to use public assistance or Medicaid, either along with or instead of New Hope benefits. Therefore, the demonstration does not fully answer the question: What if we replaced the current welfare system with a work-based set of supports like those available in New Hope? Rather, it addresses the question: What if we added the supports available in New Hope on top of existing policies and programs? In addition, the demonstration provides a definitive answer to that question only for persons like the volunteers who enrolled in New Hope and who live in labor markets like Milwaukee.

Minnesota Family Investment Program

A long-standing dilemma in welfare policy is that while cash benefits reduce poverty, they can also discourage low-income parents from supporting their families through work. Conversely, work requirements like those introduced in the 1996 federal welfare law encourage employment but — given that many welfare recipients command only low wages — can also leave families in poverty.

Policy Framework

The Minnesota Family Investment Program (MFIP), piloted from 1994 through 1998, was an attempt to break loose from the historical tradeoff between encouraging self-sufficiency and reducing poverty by combining financial work incentives and employment mandates. MDRC's evaluation of the initiative, conducted under contract to the State of Minnesota, was unusual for its extensive analysis of the program's effects on families' and children's well-being as well as its economic impacts. Because more than 40 states have incorporated the "make work pay" approach — coupled with work requirements — into their welfare programs since 1996, the study's findings have widespread implications for current welfare policy.

Agenda, Scope, and Goals

The MFIP evaluation addressed four major issues that remain on the minds of decision-makers:

- What can states do to minimize the chances that long-term welfare recipients reach a welfare time limit without any way to support themselves?
- How should policymakers help low-income workers stay in their jobs and provide for their families?
- How can social policies avoid penalizing marriage?
- How have the kinds of policy changes states have made since the 1996 federal welfare reforms affected families and children?

Integrating policies that would become the backbone of Minnesota's current statewide welfare program, MFIP was distinguished from the traditional welfare program by these key features:

- A requirement that long-term recipients work or participate in employment-focused services
- Financial work incentives for recipients who worked
- Payment of working recipients' child care costs directly to providers (rather than reimbursement of recipients later)
- Simpler public assistance rules and procedures that combined different programs into one and provided food stamps as part of the cash welfare grant.

MDRC's evaluation of MFIP examined the program's implementation, costs, and effects on economic, family, and child outcomes.

Design, Sites, and Data Sources

The MFIP evaluation included more than 14,000 welfare recipients and applicants, most of them single parents. Starting in 1994, each one was randomly assigned to MFIP, which made them eligible for the program's services and benefits, or to Aid to Families with Dependent Children, the traditional welfare program. Because the two groups did not differ at the outset, any differences between them that later emerged can be attributed to MFIP.

MFIP was implemented in seven Minnesota counties, three of them urban (Anoka, Dakota, and Hennepin, which encompasses Minneapolis) and four of them rural (Mille Lacs, Morrison, Sherburne, and Todd).

The evaluation relied on data from myriad sources, including unemployment insurance records, public assistance benefit records, and client surveys.

What's Next

Striking findings at the three-year follow-up point — including improvements in children's outcomes and increases in marital stability among two-parent families — inspired MDRC and the evaluation's original funders to follow study members over an additional five years. An update was released in July 2005 that looks at MFIP's six-year effects on work, income, marriage, childbearing, and children's school performance.

Six-Year Impacts on Parents and Children from the Minnesota Family Investment Program

The Minnesota Family Investment Program (MFIP) originated, in 1994, as a new vision of a welfare system that would encourage work, reduce reliance on public assistance, and reduce poverty. The program differed from the existing Aid to Families with Dependent Children (AFDC) system in two key ways: It included financial incentives to “make work pay” by allow-

ing families to keep more of their welfare benefit when they worked, and it required longer-term welfare recipients to work or participate in employment services.

This report updates the MFIP story in two ways. First, it examines whether the program's effects held up in the longer term, through six years after study entry (earlier studies reported on effects after three years). A primary question of interest is whether MFIP, after it effectively ended in its original form in 1998, provided families with a permanent advantage, increasing their employment or self-sufficiency in the long term, or whether its effects faded after the program ended. Second, the report presents new findings on MFIP's effects on outcomes that were not available or that could not be reliably measured at the three-year point, such as school records data to measure children's school achievement. Results are presented separately for single-parent families and for two-parent families.

Key Findings

- For the full sample of single-parent families, MFIP increased employment, earnings, welfare receipt, and income up through Year 4 of the follow-up period, after which MFIP's effects on economic outcomes dissipated. In two-parent families, through Year 4 of the follow-up period, MFIP reduced employment among second earners, usually women; however, the reduction in family earnings was offset by higher welfare benefits, resulting in no effects on family income.

- MFIP's economic effects persisted up until Year 6 for several of the most disadvantaged groups of single parents, including those with little employment history, long-term welfare receipt, and no high school diploma or General Educational Development (GED) certificate and those with a combination of these characteristics.

- Among the full sample of single-parent families, MFIP had no overall effect on the elementary school achievement of very young children, but, in line with results for parents, positive effects did occur for several subgroups of young children for whom data are available — notably children of long-term recipients and of the most disadvantaged families. The program had no effect on elementary school achievement of young children in two-parent families.

- By Year 6, marriage rates were similar for MFIP and AFDC single-parent families overall, but the small positive effect MFIP had at the three-year point did persist for some subgroups of single-parent families. For two-parent families, MFIP's effects on divorce varied by the prior welfare history of the two-parent family, with small reductions occurring among recipient families and an opposite pattern occurring among newer applicants, leading to no overall effect.

By using welfare payments to supplement the low earnings of welfare recipients who took jobs, Minnesota was able to increase employment, income, and children's school performance in the three-year period during which the MFIP program operated. Encouragingly, these efforts may persist even after the program ended for the most disadvantaged, who would have been less likely to work in the absence of MFIP. However, to achieve these gains, Minnesota spent somewhat more than it would have under the AFDC welfare system.

The Educational Integration of Roma Pupils and Students in 2006

During the previous three to four years education was the leading sphere in the process of Roma integration. Initial steps for implementation of the educational part of the Framework Program for Equal Integration of Roma in Bulgarian Society (FP) were undertaken by the Ministry of Education and Science (MES) and by several Roma NGOs. The MES established a certain degree of cooperation with Roma and other educational NGOs; it used to show signs for addressing Roma educational problem through combination of targeting and mainstreaming approach.

During 2006 most of these assets were lost. At present, the level of political commitment for Roma educational integration as well as for implementation of the educational part of the FP is low: it is perceived as an additional task aside from the process of modernization of Bulgarian education and aside from the mainstream educational processes as a whole. The main direction of Roma educational integration was changed: from desegregation of the so-called “Roma schools” to provision of social, administrative and technical measures for decreasing the high drop-out rate among Roma children and ensuring their presence at school. Although not abandoned the Strategy for Educational Integration of Children and Students from the Ethnic Minorities was not implemented and was not included into the mainstream documents that defined the development of education in Bulgaria. It seems that this Strategy will retain only nominal existence. Efforts for establishing institutional infrastructure dealing with Roma educational integration were undertaken; nevertheless, they were rather weak and did not provide visible results. The cooperation between educational institutions (especially at central level) and Roma NGOs was significantly worsened and it is problematic at present.

Although the efforts for Roma educational integration continued in 2006 Ministry of Education and Science was not able to steer them or even to support them. This gap was only partly filled by other institutions (such

as Ministry of Labor and Social Policy) and at present it puts serious doubts on the process of Roma educational integration.

Context: The educational status of Roma in Bulgaria is sharply low and significantly worse compared with the average for the country. About 63% of Roma have only basic or no education¹, 32,2% complete primary school, 4,6% – secondary school and less than 0.2% have a university degree, compared to 16,3%, 25,7%, 41,8%, and 16,1% respectively from ethnic Bulgarians.² The Roma illiteracy rate is 15 times higher than the rate for the non-Roma population. A recent study of Roma literacy found that 64% of Roma over the age of 15 were illiterate, while only 25% of Turks and 9% of ethnic Bulgarians could not read.³ This disadvantaged educational situation deepens the social exclusion, poverty and unemployment of Roma community.

The school presence of Roma pupils is also connected with serious problems. High drop-out rate is one of them. Survey conducted by MES in 2002 – 2003 school year showed that two thirds of Roma pupils drop-out of school even before acquiring primary degree.⁴ Around 90% of Roma pupils could be classified as “drop-outs” since they leave school before completing 16 years age: according to Public educational act education is compulsory for everyone until age of 16. This percentage is even higher in the rural areas because of the absence of high-schools (normally 16 years age means 10th grade that requires presence in high-school).

Another big problem is the lack of intercultural education. Bulgarian educational system does not contain preconditions for pedagogical integration of minority children as such. It is still centered only on the culture and way of being of the ethnic Bulgarians. As a result it is incapable to work effectively with Roma children and Roma community continues perceiving school as an alien institution.

School environment is also unfavorable for Roma integration. Vast majority of Roma children study in monoethnic environment: a survey shows that at least 70% of Roma pupils attend classes with only (or mainly) Roma students. In many of the cases this is result of segregation: there are Bulgarian children in the same settlement but they study in different schools or classes. This process is

¹ i.e. they do not have educational degree since the first degree is received after completing 8 grade – primary education.

² Source: National Statistic Institute (01.03.2001).

³ *Study by ASSA-M, December 2005*

⁴ According to Bulgarian legislation primary degree is the first educational degree. It is acquiring by completing 8th grade.

promptly developing nowadays: many new schools become “Roma” because Bulgarian parents move their children from them.

The FP stresses education as one of the basic means for Roma integration. It perceives Roma educational problems not only as social ones but also as problems of a discriminated ethnic group: access to quality education, educational segregation, lack of intercultural education, and so on. The Program envisages six areas of actions and five tasks for achieving educational integration. The main accent is put on the desegregation of the “Roma” ghetto schools situated in the biggest cities in Bulgaria.

In June 2004 MES issued Strategy for educational integration of children and students from the ethnic minorities (SEI). It was designed as a main political document conducting the governmental efforts for minority educational integration. The Strategy develops further the FP. It envisages a set of tasks and measures for achieving Roma educational integration centered on access to quality education, desegregation and intercultural education. In June 2005 the Minister of education signed a five-year Action Plan for Implementation of the Strategy.

The Action Plan (as well as the Strategy itself) is based on the idea that the financial mechanisms for implementation of the SEI will be provided not by the state budget but by a specially established Center for Educational Integration that will raise funds from foreign donors operating also with “supplementary financing from the state budget”.⁵ In accordance with this the Council of Ministers issued Decree 4/11.01.2005 for establishing Center for Educational Integration. It states that the Center will be “secondary distributor of budget credits ... and supports the MES for carrying out policy for educational integration of children and students from the ethnic minorities” (Art. 1 (2)). The budget of the Center is composed of donations from foreign and Bulgarian donors as well as by subsidy from the budget of the MES; the latter should be spent only as supplementary financing for the activities financed by donors’ donations (Art. 9 (2)). The Decree envisaged 1,000,000 BGN as state subsidy for 2005 and stated that the Internal regulations of the Center should be prepared in two months.

⁵ The initial idea in 2003-2004 when SEI was drafted envisaged establishment of special Fund for Educational Integration operating as independent juridical body. The Draft-law for such a Fund was rejected by Bulgarian Parliament on October 6, 2004.

Despite this, the Internal regulations were not approved by the Council of Ministers and the Center was not established until the end of 2005.

Political commitment for Roma educational integration: withdrawal and change of priorities

Roma educational integration in 2006 was marked with three important tendencies:

1. Gradual change of priorities: from desegregation of the so-called “Roma schools” to provision of social, administrative and technical measures for decreasing the high drop-out rate among Roma children and ensuring their presence at school;
2. Low level of political commitment for implementation of the Strategy for Educational Integration of Children and Students from the Ethnic Minorities;
3. Diversity of institutions dealing with educational or semi-educational activities: 2006 marked serious withdrawal of actions for Roma educational integration by MES and quite an active behavior of the Ministry of Labor and Social Policy.

Ministry of Education and Science: Roma educational integration left aside from the main trends in education

During 2006 the main efforts of the MES were directed to modernizing Bulgarian educational system. “Elite” schools with high concentration of students, qualified teachers and modern technical equipment situated mainly in the biggest cities, seldom in smaller towns and never in villages were seen as basic motor for this process.

Together with the main efforts for modernizing Bulgarian education MES dedicated concern to the equal access to education of certain vulnerable groups: “children who do not have good command of Bulgarian language, children with special educational needs, children from poor families, and others.”⁶ Equal access was seen as way for overcoming the troubles

⁶ *Natzionalna programa za razvitie na uchilishtnoto obrazovanie i preduchilishtnoto vazpitanie i podgotovka (2006-2015)* (National Program for Development of School Education and Pre-School Education (2006-2015)), p.8. Available at: http://www.minedu.government.bg/opencms/export/sites/mon/documents/programa_obrazovanie.pdf

provoked by these groups to the process of modernization. Ensuring equal access was perceived as providing compensatory measures (mainly social and administrative ones) for getting these groups able to attend mainstream schools.

Roma educational integration was not perceived as a mean for fostering the modernization of Bulgarian education. As a result the political commitment for active measures directed to Roma educational integration was low. As the Minister of Education and Science Daniel Valchev stated before representatives of Center “Amalipe” and Interethnic Initiative for Human Rights in May 2006 “Majority children have enough problems to speak about the problems of minority children.”

Limited space for Roma children targeted actions was left within the sphere of ensuring equal access. MES associated Roma children only with the problem of high drop-out-of-school rate. Roma children were included in the group of “children who do not have good command of Bulgarian language”. As a result the only possibility for targeted measures for Roma educational integration was left for additional training in Bulgarian language, putting Roma children in ethnically mixed environment in which they could speak Bulgarian and stressing the pre-school education.⁷ Social and administrative measures (such as free textbooks, free transportation, fines for parents who do not care about children’s presence in school, etc.) were also perceived as possible measures for Roma educational integration: in principle they were directed to all children (including Roma) as way of preventing drop-out process.

On June 7, 2006 Bulgarian Parliament adopted the National Program for Development of School Education and Pre-School Education (2006 – 2015). It was prepared by MES and approved by the Council of Ministers.

The significance of this document could not be underestimated: it intends to define major priorities for development of Bulgarian education during a relatively long period of time. The intention of MES is to follow this Program in all program and normative documents prepared or proposed by the Ministry and to convert it into a sustainable policy. Until now this intention is strictly followed: the Program defines entire educational part of Human Resources Development

⁷ *Natzionalna programa za razvitie na uchilishtnoto obrazovanie...*, p. 23.

Operational Program, all Decrees issued by MES after June 2006 follow the Program, changes in Public Education Act are prepared at the moment, and so on.

The Program puts two basic objectives: qualified education and equal access to education.⁸ It also establishes numerous possible measures for achieving every of the objectives.

None of the measures directed to qualified education within the Program could be connected with the efforts for Roma educational integration. For example requiring changes in the school curricula, textbooks, etc. the Program stresses computing, foreign languages study, vocational training, and so on but does not even mention incorporating multicultural and intercultural knowledge and skills.

Roma children are partially concerned in certain measures directed to ensuring equal access to education. It is mainly done for overcoming the sharp problem with the drop-out process: "In Bulgaria could be seen a dangerously high percentage of children in age compulsory to education⁹ who do not attend school or have dropped out of school. Children from risk groups and particularly Roma children compose the biggest share among them."¹⁰ Economical, social, cultural, administrative and personal troubles were recognized as major reasons for the high drop-out of school rate.¹¹ Three types of measures are envisaged for overcoming this problem: "change in the administrative structure, social measures and measures directed to children for whom Bulgarian is not mother tongue and children with special educational needs".¹² Further explaining the measures directed to children for whom Bulgarian is not mother tongue the Program mentions additional training in Bulgarian, pre-school education and putting these children in ethnically mixed environment.¹³

It seems that the Program does not pay attention to the ethnic and cultural specifics of the children and students; at least these specifics are not considered influential for the process of Bulgarian education development. The document uses the word "Roma" only once: at p. 4 explaining that Roma have the biggest share among school drop-outs. It does not use the word "minorities" at all despite the existence of Strategy for Educational Integration of Children and Students from the Ethnic Minorities. Instead of "ethnic minorities" the Program

⁸ *Ibid.*, p.p.8-9.

⁹ According to Public Educational Act all children from 7 to 16 are in "age compulsory to education".

¹⁰ *Natzionalna programa za razvitie na uchilishtnoto obrazovanie...*, p. 4.

¹¹ *Ibid.*, p. 17-18

¹² *Ibid.*, p. 18.

¹³ *Ibid.*, p. 23.

uses “ethno-cultural groups” once, at p. 17 explaining the reasons for the drop-out process. The only similar term used in the program is “children who do not have good command of Bulgarian language”: p. 18 and p. 23.

Roma educational integration is not mentioned in the Program. The main priority of the integration efforts undertaken before 2006 by MES and Roma NGOs, namely desegregation of the so-called “Roma schools” is also not mentioned in the Program.

Connected with the new limited space left for Roma children targeted actions the Ministry of Education and Science gradually changed the main direction of Roma educational integration: desegregation of the so-called “Roma schools” was abandoned and replaced with ensuring the presence of Roma children at school. At the same time MES did not develop a set of concrete measures for achieving the new priority. In this way Roma integration efforts undertaken by MES in 2006 did not follow strong direction that affected seriously the entire process of Roma educational integration.

Up to September 2005 when the new government was established the main direction promoted by MES and most of the Roma NGOs was desegregation of the so-called “Roma ghetto schools” situated in the Roma neighborhoods in the biggest cities and towns. This was defined by the Framework Program for Equal Integration of Roma in Bulgarian Society (FP) and was reflected in the Strategy for Educational Integration of Children and Students from the Ethnic Minorities (SEI).

After September 2005 certain signs that this direction would not be remained appeared. No provision for desegregation was included in the Program for Development of School Education (2006 – 2015). Moreover, the Program contradicts (although implicitly) the idea for desegregation.

For example, promoting the principle “money follows the student” it determines most of the segregated schools to receive highest amounts budget subsidee since they have many pupils. The limited space left by the Program for Roma children targeted actions, namely efforts for their keeping at school, does not include the idea of desegregation: Roma children could be kept not only in mixed but also in segregated schools. In this way the Program rather helps segregated schooling than contradicts it. This was pointed out by Center “Amalipe”

during the discussions that preceded the Program's approval but was not taken into consideration by MES.¹⁴

At the same time Minister Valchev or members of the political cabinet have not even mention the word “desegregation” in any interview or speech. At opposite, during meetings with school principals and with Roma activists Deputy Minister Kircho Atanasov expressed his opinion that desegregation of the neighborhood Roma schools is not desired by most of Roma parents and it is not effective and possible.¹⁵

Indicative sign for a possible change could be seen in the description of responsibilities of the “Educational and Cultural Integration” Directorate: the administrative structure within MES that deals with Roma integration. For a long time one of its main tasks was “developing strategies for implementing the European requirements in the field of integration of children and students from the minority ethnic communities through ensuring equal educational opportunities and **desegregation of the Roma schools.**”¹⁶ In the end of 2006 the name of the Directorate was changed to “Educational environment and Educational integration”. One of its main tasks was reformulated as “developing strategies for implementing the European requirements in the field of integration of children and students from the minority ethnic communities through ensuring equal educational opportunities”¹⁷, i.e. “desegregation of the Roma schools” was left.

Mr. Assen Petrov, Director of Educational environment and Educational integration Directorate within MES explained the gradual abandonment of desegregation with a “hierarchy of priorities” and the impossibility to apply desegregation in a nation-wide context. “For us the most important task (connected with Roma educational integration) is to ensure the presence of Roma children at school. Whether these schools are predominantly Roma or mixed is a secondary question. In some cases they will be

¹⁴ *Center Amalipe Newsletter: Special Issue on Education, April 2006.* Available at: www.geocities.com/amalipe2002

¹⁵ Meeting with Kircho Atanasov, Deputy Minister on Education and Science, 01.02.2006.

¹⁶ http://www.minedu.government.bg/opencms/opencms/left_menu/ministry/structure/ds_oki.html. Last access: 27.10.2006

¹⁷ http://www.minedu.government.bg/opencms/opencms/left_menu/ministry/structure/ds_osoi.html. Last access: 27.02.2007

“Roma”, in other – mixed (school). It depends on the local circumstances... Desegregation is a rather limited tool. It could be applied only in some cases. In many other cases it is better to preserve the neighborhood (Roma) school and to invest in the quality of education in this school. Otherwise many Roma kids will drop out. For example, it is impossible to close the Roma school in Fakulteta neighborhood without losing at least 10% of the students...”¹⁸

Most probably the gradual abandonment of desegregation as one of the MES priorities does not mean that desegregation will be completely left aside. There are signs that the Ministry is open for supporting efforts of NGOs, municipalities and schools for desegregation: through methodological and logistical help, through the Center for Educational Integration, etc. Nevertheless, it becomes more and more obvious that MES will not undertake special actions for desegregation in national-wide context as it seemed before.¹⁹

At the same time MES did not develop a set of concrete measures for ensuring the presence of Roma children at school that seemed to be the new top-priority. Paradoxically MES was less active than the Ministry of Labor and Social Policy that also undertook steps in this direction. This opened the door for predominance of social measures and absence of pedagogical ones in the entire process of Roma educational integration.

Other institutions performing semi-educational activities

During 2006 the Ministry of Labor and Social Policy began implementing programs closely connected with Roma educational integration: National Program for Literacy and Qualification of Roma, a program for training of Roma teaching assistants (component within Teachers for Ex-

¹⁸ Interview with Assen Petrov, Director of Educational environment and Educational integration Directorate, Ministry of Education and Science, 21.02.2007.

¹⁹ In September 2002 Ministry of Education and Science issued Appendix 10 about the educational integration of minority children to its Annual Instructions about the Organization of the School Process in 2002/2003 School Year. Appendix 10 envisaged desegregation of the neighborhood schools and that these schools would not have students in first grade from the next school year. In this way for 8 years all segregated schools would be closed. Nevertheless MES did not continue this initiative and the neighborhood Roma schools continued welcoming students in first grade.

tra-class activities and Vacations Project), and so on. Developing these programs MLSP followed the National Action Plan on Employment – 2006. It targeted Roma as one of its main target groups and was a good example for combining targeting and mainstreaming approaches. The National Action Plan considered education as one of the basic means for better realization on the labor market. In accordance with this it stressed the importance of professional qualification, vocational training and literacy as ways for better employment of Roma.

Simultaneously MLSP managed also the biggest component within the “Program for better inclusion of students compulsory to education”. This program was approved by Bulgarian Parliament in 2005 and its implementation for 2006 was divided between MLSP and MES.²⁰ The Program contained mainly social and technical measures designed to stop the drop-out process and to return children to school. MLSP managed the biggest component within the Program: providing free breakfast for all students from first to fourth grade.

Although these semi-educational activities steered by MLSP did not pretend to form policy for Roma educational integration their extent tended to shift the accent from pedagogical to social and technical measures within the process of Roma educational integration. The passive behavior of MES rather facilitated this shift.

Ethnic and Demographic Issues Directorate also performed semi-educational activities in 2006. It steered the implementation of two Phare projects in the field of Roma education: BG2003/004-937.01.03 „Educational and Medical Integration of Vulnerable Ethnic Minorities with Special Focus on Roma” and BG 2004/016-711.01.03. “Improving the Situation and Inclusion of Vulnerable Ethnic Minorities with Special Focus on Roma”. The role of EDID in these projects was quite a technical one. The political priorities of the projects mentioned were defined before 2006 by MES. In some degree they did not fit within the new priorities of MES without confronting them. This position limited without preventing their possible impact on the process of Roma educational integration.

²⁰ In 2005 Ministry of Transport also managed one of its components.

Political commitment for implementation of Strategy for Educational Integration of Children and Students from the Ethnic Minorities (SEI) – lack of mainstreaming

During 2006 the political commitment for implementation of the SEI was low. From one side, although the Strategy was not abolished active measures for its implementation were not undertaken. From the other side, there was a clear resistance for mainstreaming tasks and measures envisaged in the Strategy into the basic documents prepared by MES. Moreover, the latter contradicted important points of the Strategy.

The most indicative example in this direction is the National Program for Development of School Education and Pre-School Education (2006-2015). The Program does not contain any of the tasks and measures for educational integration of Roma children envisaged in the SEI. Desegregation and intercultural education – the main accents in SEI – are not even mentioned in the Program. There is no reference to the Strategy itself. As pointed above the Program treats minority issues partially and at a very low level. The measures envisaged for their integration are mainly social, administrative and ones connected with providing opportunities for better learning of Bulgarian language. This is a sharp difference from the Strategy for Educational Integration where all measures for school integration are educational ones and are connected with the intercultural education. As a result, the Program contains elements that would raise the number of drop-out Roma children and would result in deterioration of the educational level of the Roma community.²¹

The SEI is only partially mainstreamed also in the Operational Program “Human Resources Development”. Two of its Priority Axis were developed by MES and dealt with education (Priority Axis 3 and 4). Despite that Priority Axis 4 “Access to education” contains special operation directed to educational integration of minority children it includes only few indicative activities and indicators from SEI. All of them were included after an active advocacy campaign steered by Center “Amalipe” in which more than 30 Roma NGOs took place.

Three serious problems obstructed SEI implementation in 2006. The first one was the lack of financial back up. Both Strategy and its Action Plan were based on the idea that the financial engagement from the state

²¹ See: *The Roma Strategies in the Eve of EU Accession*. Report of Center “Amalipe” and “Hot Line” Agency. Available at: <http://www.geocities.com/amalipe2002/frameeng.html>

budget would be modest and “supplementary” to the financing from foreign donors. This financing should be raised by the Center for Educational Integration. The “false start” of the Center for Educational Integration” in 2006 (see below) put on doubts this problematic scheme. Second problem was the lack of institutional infrastructure: no person within MES and its administration has SEI implementation as his/her main responsibility. Additional problem was the misunderstanding about the necessity of SEI implementation shared by many officials.²² As a result mainstreaming SEI into the basic documents prepared or issued by MES was the only realistic option for SEI implementation. The lack of mainstreaming put on doubt the future of the Strategy itself.

Institutional Infrastructure for Implementation of SEI: Head without Body

After September 2005 when the new government was established, the implementation of the SEI and the efforts for educational integration in general were delegated to Deputy Minister Mukaddes Nalbant. For first time the issue of educational integration become one of the main tasks of a deputy minister.²³ This opened the door for strengthening the administrative capacity and administrative infrastructure for realizing activities for educational integration.

Two different target groups were perceived as object of “educational integration” by MES: children with special educational needs (mentally disabled children and children from the institutions) and children from minority origin. The level of commitment for their integration, the tools used for it and the advance of the integration process differed for both groups. Concerning children with special educational needs there was strong commitment for gradual deinstitutionalization and integration in the so-called “mainstream schools”. MES (and its regional branches – Regional Inspectorates of Education) managed and coordinated this process. It is

²² Interview with Assen Petrov, Director of Educational environment and Educational integration Directorate, Ministry of Education and Science, 21.02.2007.

²³ Nevertheless, it is hardly to judge whether this occurred owing to deep realizing of the educational integration importance or owing to complicated scheme for responsibility distribution among the three parties from the governing coalition in every ministry.

relatively advanced now: in 2005/2006 school year 1277 children with special needs were integrated in the mainstream schools, the percentage of students in the special schools declined with 8% compared with the previous school year, 70 classes less were approved in the special schools, 9 special school were abolished in June 2006, and so on. The level of political commitment for active measures directed to educational integration of children from minority origin was much lower as pointed above. Until now this process is implemented mainly by non-governmental organizations and the engagement of MES with it was and still is unclear. It tended to acquire rather coordinating than managing functions.

In respect with this the institutional infrastructure for both target groups was established in a different way. At central level they were subject to a common Directorate (named “Educational and Cultural Integration” before mid-2006 and “Educational Environment and Educational Integration” at present). Up to 2006 the Directorate was composed of two branches: “Educational integration of children and students from the ethnic minorities” and “Integration of children with special educational needs”. At regional level there were experts in “Integrated education” in several Regional Inspectorates of Education. The assignment of such experts in the other RIE was envisaged and expected. All of them were responsible for the educational integration of children with special educational needs. No expert responsible for the educational integration of Roma children and for SEI implementation was assigned in RIE. This structure existed before 2006. The clear intention of Deputy Minister Nalbant was to strengthen it through engaging more people.

During 2006 the institutional infrastructure dealing with Roma integration was not changed significantly and infrastructure dealing with SEI implementation was not established. At central level could be observed a slight decrease of the institutional infrastructure dealing with Roma integration: the branch dealing with minority integration numbered 7 experts in 2005 and 3 experts in the end of 2006.

In mid-2006 the administrative structure of “Educational and Cultural Integration” Directorate was changed. The previous two branches (“Educational integration of children and students from the ethnic minorities” and “Integration of children with special educational needs”) were reorganized into

three branches: “Integration of children with special educational needs”, “Educational Environment” and “Integration through Intercultural Education”. Only the last one deals with minority integration at present. It is composed by Head and two experts. In this way although the staff of the Directorate increased from 16 to 19 people the staff engaged with minority integration decreased from 7 to 3 people.

At regional level no expert was assigned in any Regional Inspectorate of Education to coordinate the implementation of SEI and the educational integration of the students from the ethnic minorities. According to the Director of EEEI Directorate there is no real option assigning such REI experts in the next few years.²⁴ To start establishing administrative capacity in this direction MES undertook two steps during the first half of 2006. The first one was to define experts responsible for the implementation of SEI in every RIE. This was done in April 2006 but the effectiveness of this measure could not be overestimated. All of them were experts whose main responsibilities remained different from the issue of Roma educational integration – elementary education, arts, history, mother tongue, integrated education (i.e. integration of children with special needs), etc. The implementation of SEI was an additional (“extra”) task for them. Most of them were overburdened with different responsibilities and it was hardly to expect that they would leave a lot of time and efforts for SEI implementation.

Second step was the appointment of students as internee assisting the SEI implementation in RIE. This was done for the period April – June 2006. The internship was designed for students graduating from the Pedagogy departments. Their main responsibility was to assist the implementation of SEI. Although financial opportunity for internship was provided in all 28 RIE only 14 of them realized it. It is hard to say whether this step led to real improvement in the administrative capacity of RIE for SEI implementation – the term of internship was too short (3 months) and as a whole the Inspectorates were not prepared for it. Nevertheless, this was the first time when special person in RIE has had SEI implementation as main responsibility.

²⁴ Interview with Assen Petrov, Director of Educational environment and Educational integration Directorate, Ministry of Education and Science, 21.02.2007.

Center for Educational Integration of Children and Students from the Ethnic Minorities

Both the SEI and the Action Plan for Implementation of the SEI are based on the intention for decentralized way for minority educational integration: MES will play rather coordinating than executing functions; municipalities, schools and RIE will be the active players in the process. That is why a new executive agency was necessary for the Roma educational integration. As pointed above both Strategy and its Action Plan are based on the idea that the financial engagement from the state budget will be “supplementary” to the financing from foreign donors. That is why a fundraising agency was necessary.

Decree 4/11.01.2005 of the Council of Ministers envisaged the establishment of Center for Educational Integration of Children and Students from the Ethnic Minorities as fundraising and fund-providing agency for the process of minority educational integration. It is a juridical body subordinated to the Minister of Education who is the Chairman of its Board and appoints the Board members as well as the Center’s Director. Although it is not explicitly mentioned in the Decree, it seems that the Center will be the only way for financing the process of Roma educational integration by MES.

Despite the crucial necessity of the existence of this body and the provisions of Decree 4/11.01.2005 for establishing the Center in 2 months the Council of Ministers did not approve Center Regulations in 2005. As a result 1,000,000 BGN envisaged in the Decree for Center’s functioning in 2005 was not used and the process of Roma educational integration was left without substantial financing. Low commitment to Roma educational integration, lack of administrative capacity and the parliamentary elections in June 2005 were some of the possible explanations for this delay.

The establishment and the successful start of the Center was top-priority for the work of Ministry of Education and Science for 2006.²⁵ It was envisaged that the Center would be established with its Director, Board and staff, that 3 years Program for its work and 1 year Action plan would be prepared and approved and that first call for proposals from schools and

²⁵ Meeting with Mukaddes Nalbant, Deputy Minister of Education and Science, 15.02.2006.; Interview with Assen Petrov, Director of Educational environment and Educational integration Directorate, Ministry of Education and Science, 21.02.2007.

municipalities would be announced. Five hundred thousands BGN was dedicated from the state budget as “supplementary financing” for the Center’s work in 2006.

During 2006 the Center for Educational Integration was established but did not start working. The Center’s Regulations were approved by the Council of Ministers in the end of April 2006²⁶. In June 2006 Minister Valchev appointed Nikolay Kirilov as Director of the Center. Two months later the Center’s Board was established with Order of the Minister of Education. Staff was appointed without the necessary competition procedure.

At the same time it is difficult to say that the Center did start working. Until the end of 2006 the Center’s Director, staff and Board did not succeed to produce 3 years Program and 1 year Action Plan as it was required by the Center’s Regulations. Center’s staff was not assigned with competition. In December 2006 Nikolay Kirilov resigned from the position of Director and at present the accountant Mr. Kavardjikov operates as Center’s Director. And what is the most important, call for proposals was not announced and the Center did not start its fundraising and fund-providing activity.

The “false start” of the Center in 2006 provoked suspicions and mistrust among Roma NGOs dealing with education. All Roma NGO activists interviewed expressed discontent from the lack of transparency and publicity connected with the Center’s work. The Director of the Center as well as the Center’s Board were appointed without any public procedure and competition. Although Decree 4/11.01.2005 of the Council of Ministers and the Center’s Regulation allow this, it was a sign that the new structure would not search cooperation with the civic sector. Despite 3 places in the Board were reserved for NGO representatives they were chosen by the Minister of Education without any public procedure, competition and criteria. Some of the Roma activists expressed suspicions for strong political interference in the Center’s establishment and work and illustrated them with the fact that people and organizations assigned were close to the ruling parties. The slow speed of everything connected with the Center is another source of mistrust for Roma activists who deals with education. It is much slower than the ordinary manner of work of Bulgarian administration and provokes suspicions for lack of political commitment for real start of the Center’s work.

²⁶ Published in *State gazette* 40/16.05.2006.

Besides the “false start” of the Center in 2006 it does not seem that CEI will change seriously the situation with the Roma educational integration even if it starts working successfully. As stated above, most probably the Center will be the only way for financing the process of Roma educational integration by MES. The ways for this financing is through support of projects prepared by schools, municipalities or RIE (Art. 20 from the Regulations of the Center)²⁷ or through developing own projects (Art. 19). This scheme has two important assets. First, it provokes the active engagement of important players (such as municipalities and schools) that will receive financing for their efforts. Second, it opens the door for projects that take into account the real local needs and propose working local solutions since the main players will be local actors. At the same time, the scheme defines three disturbing disadvantages. First, it creates the real possibility for realizing no actions for educational integration at many places. If the local institutions (municipalities and schools) are not active enough or do not have commitment for Roma educational integration they would not prepare projects and would not realize actions. There is no mechanism that could make them get engaged with the process of educational integration. Second, the financial engagement by the state budget for Roma educational integration seems to remain insufficient. It could be only “supplementary financing” (500,000 BGN or 256,410 euro for 2006). Most of the funding is expected by foreign donors. Having in mind that the donor’s financing is always for limited pilot initiatives and that with the EU accession most of the donors leave Bulgaria the level of financing is determined to be limited and insufficient. Moreover, there is no sign that MES intends to connect the Center’s work with EU structural funds and EU accession as a whole: for example, CEI is not legitimate beneficiary in any operation within Operational Program “Human Resources Development”. Third, the scheme denies the opportunity of NGOs to realize projects independently or as leading partner. Having in mind that for the past years the process of Roma educational integration was realized mainly by NGOs, this provision would seriously affect the process.

It seems that although the Center could help and speed the SEI implementation but it could not convert it into policy. The process will continue

²⁷ NGOs are not eligible to apply for financing unless as partners of the institutions mentioned above.

as a set of small projects, limited in scope and number, and realized by more and diverse actors on the basis of their good will and capacity. Most probably it will help the advanced municipalities and schools with accumulated experience and capacity and will leave aside the other municipalities and schools (those with less will and capacity for actions). If the Center's work is not connected with the structural funds and replaces the necessary substantial activity of MES for Roma educational integration, SEI would remain a "paper tiger" – good document without significant implementation.

Partnership with Roma NGOs

During the previous years Roma NGOs proved themselves as significant players in the process of Roma educational integration. The fact that most of the achieved results presented in the educational part of "Bulgarian contribution to the monitoring report of the European Commission" (February 2006) were achieved by Roma NGOs²⁸ is a clear sign for the role of Roma NGOs. In 2003 MES established Consultative Council for Education of Children and Students from the Ethnic Minorities as tool for institutionalized dialogue among MES, minority NGOs and donors. One third of its members were representatives of NGOs chosen after clear public procedure.

During 2006 the cooperation between most of the Roma NGOs and MES gradually deteriorated and remained only at regional level (with RIE). MES stopped its logistical support for successful initiatives undertaken by Roma NGOs. All Roma activists interviewed shared that their contacts with MES significantly worsened during 2006 without explanation by the side of the Ministry. Three of them were even expelled from a meeting with MEP Elly de Groen by Deputy Minister Nalbant that provoked a scandal.²⁹ It is indicative that none of the Roma activists interviewed shared the opinion that MES cooperates successfully with the Roma civil society.

The Consultative Council for Education of Children and Students from the Ethnic Minorities did not function in 2005 and the first half of 2006. In June 2006 it was re-established with a different structure. The new Council

²⁸ For example 3,500 Roma children study in mixed schools as a result of 7 NGOs supported by OSI-Budapest. 5,000 students study Roma folklore as a result of the efforts of Center "Amalipe", and so on. See: "Bulgarian contribution to the Monitoring Report of the European Commission, February 2006."

²⁹ Interview with Vassil Kadrinov, advisor of MEP Elly de Groen, 16.05.2006.

did not fulfill its task to become a bridge among MES, civic sector and donors because of two reasons. The first one was that its new structure allowed the presence of only one organization for a minority. This left Roma without real representation since there was several but not one Roma NGO with proven expertise in the field of education. The second reason was that no public criteria were pronounced for selecting Roma NGO for Council's member. The choice was done by the Minister of Education without any public procedure. This further alienated Roma civic sector from the idea for cooperation with MES.

Governmental actions for Roma educational integration and SEI implementation

During 2006 Roma and other NGOs continued to play major role in realizing actions for Roma educational integration and SEI implementation. Ministry of Education and Science also undertook activities in this direction. Nevertheless, they were limited in scope and extent, their efficiency and effectiveness were modest and no sustainable impact from them could be observed and proved. Ministry of Labor and Social Policy implemented certain activities that facilitated Roma educational integration too. Their extent was quite larger and the results achieved seemed positive.

Actions steered by Ministry of Education and Science

Besides the efforts for establishing CEI (see above) MES steered several other actions directed to Roma educational integration. In September 2005 it ordered the Regional Inspectorates on Education to prepare Regional Plans for Implementation of SEI. This step was necessary to fill the existing gap at the regional level: up to this moment national Strategy and Action Plan and numerous municipal Strategies for educational integration and Action Plans existed without any regional documents. The Regional Action Plans for SEI implementation 2005 – 2006 were prepared in September-October 2005. Nevertheless, the effectiveness of this step could hardly be appreciated too high. There are no evidences that these Plans have fostered the process of educational integration. They were not financially backed-up since there were no funds available (there was no subsidy from the budget of MES; the Center did not exist yet) As a result the Plans summarized mainly

activities of NGOs and limited other number of activities that did not require financing, as well as ordinary activities of RIE realized in no connection to the existence or not-existence of Action Plans. Moreover, the way of their preparation was not efficient: they were prepared without serious consultations with the municipalities. Therefore, they did not reflect the needs of the local Municipal Strategies and did not serve as a bridge between the national Strategy and the municipal ones.

Although MES did not make the reports for Regional Plans implementation popular and denied to provide them for the needs of this survey there are enough evidences to judge that the implementation of the Regional Plans was quite formal, inefficient and ineffective. They did not fulfill their major tasks: to organize and steer the implementation of SEI at regional level, to inspire its implementation at local level and to support the efforts for Roma educational integration managed by NGOs, municipalities and schools.

The implementation of the Regional Plans was defined as “formal” and criticized by Iossif Nounev, state expert in MES during the session of the Consultative Council for Integration of Children and Students from the Ethnic Minorities. Assen Petrov, Director of EEEI Directorate also defined it as “formal and inefficient” stating that “nevertheless the existence of these plans was a positive fact”.

Another action steered by MES was a survey about the percentage of Roma students in different schools and their school success. The information for this survey was collected through Regional Inspectorates of Education. The existence of such a survey is a positive and important fact since the last similar research was done in 2002. Nevertheless the survey did not follow any clear methodology and the RIE experts who carried it out were not trained how to do it. Disappointing fact is that the results are still not published or made public in any way. It is not clear whether MES will allow their usage by civic experts and organizations.

Positive step initiated by MES was the tender for providing “Training of administrative and pedagogical staff for applying Bulgarian and European legislation in the field of educational integration of students from the ethnic minorities”. It was announced in November 2006 (Decision P – 01-72/06.11.2006 of the Minister of Education). Its aim was to establish a system with requirements for development of school, municipal, and regional policies for educa-

tional integration and a system with indicators for measuring the implementation of these policies as well as the school readiness to integrate Roma children. Training of 200 teachers and school principals in these requirements and indicators as well as publishing manual were envisaged.

This project will be implemented in 2007 and it is impossible to judge about its efficiency, effectiveness and impact now. Nevertheless the relevance of its design is obvious. Until now there were no common criteria and indicators for applying the national SEI at regional, municipal and school level. Moreover, teachers and school principals were not trained and even were not systematically got familiar with the Strategy. These were some of the reasons for the Strategy lack of implementation. The tender has the chance to raise the awareness about SEI and to prepare human resources for its implementation.

Pointing MES activities one should have in mind that the Ministry did not use its big mainstream programs for promoting Roma educational integration and SEI implementation. In contrast with the limited action for Roma educational integration MES implemented huge mainstream programs for modernizing Bulgarian education during 2006. They were not connected with the task of SEI implementation. For example, the component for providing bus transportation from the National Program for Better Inclusion of Students Compulsory to Education (component managed by MES) was not used for free transportation of Roma students who want to study in mixed schools instead of the neighboring segregated schools. None of the 219 busses provided by MES was used for this purpose and bus transportation necessary for the process of desegregation (one of the main accents in SEI) remained a task of the Roma NGOs. MES did not use the program for computerization for the needs of intercultural education, and so on.

Actions steered by MLSP

At the same time other institutions undertook actions that serve the process of Roma educational integration far better. MLSP was a good example in this direction. It initiated and realized several semi-educational Roma targeted programs: training of 50 Roma teaching assistants (component from Teachers for Extra-class activities and Vacations Project), National Program for Literacy and Qualification of Roma, and so on. Fur-

thermore, the MLSP managed a number of programs that did not target Roma children but had effect on Roma educational integration. For example, the component for free breakfast within the National Program for Better Inclusion of Students Compulsory to Education (component managed by MLSP) significantly helped keeping Roma children at school.

Most of these programs are evaluated in chapter “Social Policy and Social Programs for People from Roma Community”. Below I provide a brief analysis about their relations with and impact on Roma educational integration.

1. These programs were not directed to Roma educational integration as such but to removing educational barriers before Roma employment. They perceived training and professional qualification as tool for more jobs. That is why we call these programs “semi-educational”.

2. Unlike the initiatives steered by MES, they were provided with serious financial back-up and institutional infrastructure that carried them out. For example, National Program for Literacy and Qualification of Roma was financed with 827,030 BGN (424,118.00 euro). Its implementation was managed by the Employment Agency at national level and its regional and local branches. Hundreds of experts working in dozens of Labor Offices steered the Program implementation.

3. The programs had real implementation and achieved certain results. Their efficiency and effectiveness differed seriously from place to place and could be evaluated in different ways. Nevertheless it is clear that the programs had non-formal implementation unlike other initiatives in the field of Roma education.

4. A vast variety of actors were included in the programs: schools, Roma NGOs, and so on. Weak point was that the participation of Roma NGOs was not institutionalized and left on the good will of the local Labor offices experts. There was no mechanism for paying the expertise of Roma NGOs. This was not the case with the school participation: school principals and teachers were institutionally included and paid within the programs.

The lack of Roma NGO participation injured seriously the efficiency and effectiveness of the programs.

5. The lack of coordination between MLSP and MES in designing and implementing these programs was obvious. It provoked serious difficulties. For instance, neither MES, nor its regional branches helped methodologi-

cally or logistically the National Program for Literacy and Qualification of Roma with the argument that this was not MES program. This provoked a bulk of difficulties: lack of educational curriculum, pedagogical tests, etc. Paradoxically, the regional branches of the Employment Agency looked for the support and cooperation of Roma NGOs to cope with these problems. It provoked also the biggest problem of the Program: the certificate for literacy edited in it did not have any legitimacy within the system of Bulgarian education.

6. These programs could not be perceived as implementation of the SEI although their connection with the process of Roma educational integration is obvious. From one side, as a document of the MES the Strategy for Educational Integration did not engage the MLSP. From the other side, many of the MLSP actions had only social character that did not fit within the intention of SEI where the social measures were closely connected with the pedagogical ones. In this way the passive behavior of MES could lead to shift in the overall process of Roma educational integration – from pedagogical to only social measures as pointed above.

Actions steered by NCCEDI and EDID

During 2006 the National Council for Cooperation on Ethnic and Demographic Issues (NCCEDI) and Ethnic and Demographic Issues Directorate (EDID) began implementing two Phare projects with educational components within Phare 2003 and 2004. Both projects aimed at fostering SEI implementation through significant material support for ethnically mixed schools where Roma children were integrated (building reconstructions, technical equipment supplies, supplies of educational materials, etc.), training of teachers and teaching assistants in intercultural skills, elaboration of curricula for intercultural education, etc. The implementation of both projects is at an early stage and it is still impossible to evaluate it in regard to the SEI implementation. (For example, the implementation of Phare BG 0104.01 “Roma Population Integration” in 2004 rather disturbed than fostered Roma educational integration). Nevertheless, there are positive signs that the mistakes from Phare BG 0104.01 will be avoided. It seems that the NCCEDI and MES has taken into account most of the recommendations from “Evaluation Report for Phare BG 0104.01 realization” (prepared by Center

“Amalipe” with the support of Roma experts all over the country)³⁰. The role of the teaching assistant is elucidated: it is clearly defined in the project fiche of Phare 2004 – “mediators – social workers with educational knowledge.”³¹ Roma NGOs play significant role in the process of defining schools that will be supported, there are mechanisms for monitoring the project implementation at local level and Roma NGOs play a decisive role in them, the procedure follows high transparency, and so on.

Non-governmental initiatives for Roma educational integration

For many years Roma education has been a field of numerous actions and projects. Some of them are initiated by donors and civil society organizations. In fact almost all Roma NGOs operate in education as well as many non-Roma organizations. The other actions are undertaken by active teachers, school principals or municipal administrators who work with Roma children and search certain ways for solving their educational problems.

There is no statistic about the non-governmental actions in this field during 2006: how many of them were realized, what extent they achieved, what their results were, and so on. Ministry of Education and Science collected information about active NGOs in January-February 2006 but it did not follow special methodology and could be taken into account only as basic orientation. According to this survey around 82 projects for Roma educational integration were implemented in 2005. Most probably the situation in 2006 did not change dramatically.³²

At the same time there are enough evidences to say that non-governmental actions for Roma educational integration in 2006 engaged vast number of people and efforts, achieved certain results and provided valuable ideas and models. The fact that most of the achievements pointed by Bulgarian

³⁰ Deyan Kolev, Teodora Krumova, Boyan Zahariev, *Evaluation Report for the Implementation of Phare BG 0104.01. “Roma Population Integration”* (Sofia: Center “Amalipe”, 2006), 74-81.

³¹ Standard Project Fiche. Improvement of the Situation and Inclusion of the Disadvantaged Ethnic Minorities with a Special Focus on Roma, BG 2004/016-711.01.03, p.6.

³² Meeting with Mukaddes Nalbant, Deputy Minister of Education and Science, 04.04.2006.

This survey of MES was not published like most of the results from the other MES actions in the field of Roma integration.

government in its regular reports before the European Commission were achievements of different NGO projects is a good indicator.

For example 8 achievements in the field of Roma educational integration are pointed in the report “Bulgarian contribution...” approved by Council of Ministers on March 1, 2006. Four of them are achievements of NGOs – desegregation of 3500 students (managed by several Roma NGOs), assignment of 106 teaching assistants (assigned by NGOs working for desegregation or by their municipality-partners)³³, inclusion of 5000 students and 172 schools in the program for entering “Folklore of the ethnoi – Roma folklore” subject (managed by Center “Amalipe”) and training of 220 teachers to teach “Folklore of the ethnoi – Roma folklore” (managed by Center “Amalipe”).

The number and range of teacher reports presenting practices for Roma integration during the municipal conferences “School – desirable territory of the student” organized in March 2007 is another indicator. Although there was no section dedicated to Roma educational integration within these conferences dozens of teachers presented their successful practices in this field. Around half of them showed good practices accumulated within “Folklore of the ethnoi – Roma folklore” program, some of the others presented their efforts supported within the projects for desegregation of the so-called “Roma schools”, and many others displayed their own efforts that were not part of any project or program.

Most of these actions and projects were and still are local ones. Roma folklore program (initiated by Center Amalipe) and the program for desegregation of Roma schools (financed by Roma Educational Fund) are the only non-governmental programs that operated at national level.

During 2006 the non-governmental efforts for Roma educational integration did not achieve significant support (financial, methodological, and so on) from MES and its structures. They remained on the expenses of foreign donors, municipalities, and people who undertook these efforts.

³³ Only 6 out of 106 teaching assistants appeared to be trained within Phare BG 0104.01 “Roma Population Integration” project that had relatively big financing but unsuccessful implementation steered by National Council on Ethnic and Demographic Issues.

COMMENTS:

1. The general decrease in the political commitment of MES for Roma targeted actions and actions directed to Roma educational integration is not relevant to the contemporary educational situation in Bulgaria and contradicts previous engagements of Bulgarian government and MES. This decrease will cause serious problems both to the educational level of Roma community and to entire Bulgarian educational system.

The gap between the educational level of Roma community and the one of the majority is enormously deep and could not be overcome without special Roma targeted actions. This gap becomes even deeper: the number of segregated schools (i.e. schools where Roma children constitute vast majority of the students and another school with predominantly Bulgarian students is situated in the same settlement) is growing with every school year, the level of education among Roma living in the rural areas sharply decreases, the percentage of illiterate Roma doubled between two census of the population, and so on. At present thousands of teachers work with Roma children and meet specific problems without receiving systematic support and means from the system of MES for coping with these problems. In this context the decreasing commitment for Roma targeted actions contradicts sharply the real needs of Bulgarian education.

It also contradicts previous engagements of MES and Bulgarian government. Both Framework Program for Roma Integration and Strategy for Educational Integration (signed respectively by Council of Ministers and MES) engaged the government with a number of Roma targeted actions. Such commitment was done also in Joint Inclusion Memorandum and the Report on the Strategies for Social Protection and Social Inclusion 2006 – 2008.

Most probably the decrease in the political commitment will facilitate enlarging the educational gap between Roma minority and Bulgarian majority. It could not help overcoming the backward educational situation of Roma. In this way it will cause serious damages to the entire educational system leaving vast groups of pupils out of modern quality education.

2. The space left for Roma targeted action by the National Program for Development of School Education is narrow and not relevant to the depth of the educational problems faced by Roma. It could not guarantee Roma educational integration and even the fulfillment of the minimal tasks set by the Program.

It seems questionable to link Roma children only with the aim of access to education as the National Program does. The integration of such a numerous group of children³⁴ possessing specific culture is impossible without relevant changes in the entire educational system (school curricula, content of the educational materials, methods used, and so on) and without applying the principles of intercultural education. In this way Roma educational integration is deeply linked also with the other aim set by the National Program, namely the quality of education.

Even more questionable is to link the high drop-out rate among Roma only with language and social problems and to expect that this problem will be solved through training in Bulgarian language and provision of free textbooks, breakfast and other social measures. Most of Roma children have a good command of Bulgarian language; moreover many of them speak it at home.³⁵ There are regions in which Roma children speak only Bulgarian language (such as Vratza district) but the drop-out rate is as high as the one in the other regions. It seems that Bulgarian is not fluently spoken only by youngsters from *Millet* group (i.e. Turkish speaking Roma) and from Roma ghettos situated in the biggest cities.³⁶ Language problem is a possible reason for the high drop-out rate but not the main one.

The same is valid for the social problems faced by many Roma families. Obviously they make many Roma children to leave school but the drop-out rate is extremely high among Roma groups that do not meet serious social problem: *Kaldarashi* and *Burgudjii*, for example.

It seems that stronger reasons lie behind the social and language ones. Most probably the deep alienation of Roma community from the school as an institution and the inability of contemporary educational system to build

³⁴ According to data provided by MES around 20% of students who attend first grade in 2002/2003 school year were Roma. Most probably their percentage has even slightly increased during the following years. See: Yosif Nunev, *Analiz na aktualnoto sastoinanie na uchilishtata, v koito uchat romski detza* (Analysis of the situation of schools where Roma children are educated); *Strategii, 2002. Specialen broi Obrazovatelna politika i kulturni razlichia (Strategies, 2002. Special Issue Educational policy and cultural differences)*, p. 143.

³⁵ Survey "Roma Schools in Bulgaria 2005" carried out by Prof. Dimitar Denkov showed that more than 300 out of 550 Roma children interviewed spoke Bulgarian language at home.

³⁶ Deyan Kolev, Teodora Krumova, Boyan Zahariev, *Evaluation Report for the Implementation of Phare BG 0104.01. "Roma Population Integration"* (Sofia: Center "Amalipe", 2006), 12.

a bridge to Roma community as such are the most important reasons for the high drop-out rate among Roma children. The National Program does not envisage any measures in this direction. It is highly questionable whether even the limited tasks for decreasing drop-out rate among Roma set by the National Program could be achieved by the social, administrative and language measures envisaged.

3. The lack of mainstreaming of SEI into the main programs managed by MES combined with the lack of financial back up and administrative infrastructure for SEI implementation determines Strategy (and the efforts for Roma educational integration as a whole) to an only nominal existence and practical non-implementation.

Unlike the semi-educational programs managed by MLSP the Strategy for Educational Integration does not operate with special financing from the state budget and its implementation is not main responsibility of any administrative structure of MES. That is why it is difficult to say that SEI has a real implementation.

Mainstreaming the most important actions of SEI into the big programs implemented by MES is a certain way for providing financing and administrative engagement. Until now this did not happen.

Ideally the best possible solution for SEI implementation is combining targeted actions (financially and administratively backed up) with mainstreaming. Having in mind the low level of political commitment of MES and the weakness of Roma movement it is difficult to expect a vast range of targeted actions for SEI implementation in the near future. Mainstreaming of SEI into the big programs of MES as well as into the Operational Program “Human Resources Development” seems to be the only realistic option now.

4. The active engagement of MLSP in semi-educational activities should be highly appreciated. Nevertheless it could not fill the gap in Roma educational integration and SEI implementation opened by the passive behavior of MES.

In fact almost all of the implemented actions directed to Roma education in 2006 were realized by MLSP. Thousands Roma passed literacy courses, 50 Roma teaching assistants were trained and work as teaching assistants at present, and so on. These facts could not be underestimated.

At the same time it is impossible to say that MLSP's actions replaced the work that should be done by MES. They did not follow the Strategy for Educational Integration and tended to shift the direction of Roma educational integration from pedagogical to social measures. Such a shift could cause serious troubles.

5. Non-governmental actors (teachers, municipalities and CBOs) produce a vast range of successful practices for Roma educational integration. Nevertheless, there is no mechanism for supporting their efforts by state and for taking into account their achievements.

In this way the process of Roma educational integration is left in a disadvantaged situation. From one side, there is not strong political commitment, financing and administrative capacity for managing this process "from above". From the other side, there are enough good models and practices produced by non-governmental actors but they could not foster significantly the process of integration "from below" because of the lack of proper mechanisms for supporting their efforts and for taking into account their achievements.

RECOMMENDATIONS:

Roma educational integration is a complex task that requires complementarity of approaches, resources and efforts. It could not be achieved only with "efforts from above" (by state institutions) or only with "efforts from below" (by non-governmental actors). It seems that educational integration could not be achieved only by mainstreaming or by targeting approach. That is why efforts for establishing cooperation among different actors in this process (institutions at central, regional and local levels, NGOs, teachers, Roma authorities and so on) and for establishing proper basis for coordinated mainstreaming and targeting approach are necessary.

Concrete steps in this direction could be:

1. Mainstreaming the Roma educational integration within the general programs steered by MES: MES should raise the issues of Roma integration as integral part and mean for modernizing Bulgarian education. This includes usage of main programs managed by MES (the component for providing bus transportation from the National Program for Better Inclusion of Students Compulsory to Education, the program for supporting

extra-class and extra-school activities, and others) for support of Roma educational integration and SEI implementation.

2. Connecting Roma educational integration with EU structural funds.

Roma educational integration, SEI implementation and the work of the Center for Educational Integration should be connected with the process of Structural funds absorption. It is a subject of urgent activities to include important points connected with Roma educational integration in the Operational Program Human Recourse Development. Developing system for support of project for Roma educational integration within Priority Axis 3 and 4 of the Operational Program Human Resources Development is another necessary activity. This system could include establishing revolving fund for schools and NGOs and so on.

3. Establishing proper administrative infrastructure for SEI implementation. This includes strengthening the infrastructure at national level (within MES) and establishing regional one. Special experts whose main responsibilities would be Roma educational integration and SEI implementation should be appointed. Their Roma origin would be an asset.

4. Establishing proper forms for cooperation between Roma NGOs and MES. The Ministry of Education and Science should work more for establishing cooperation with NGOs active in the field of Roma education. Logistical support to successful NGO initiatives and cooperation in their implementation are necessary. Changes in the structure of the Consultative Council for Education of Children and Students from the Ethnic Minorities directed to allowing Roma NGOs to take part in its activity are also necessary. It is important a mechanism for proper Roma representation in the Council to be established. Clear and democratic procedures for defining the Roma representatives in the Council are necessary. The same is valid for selecting Roma representatives in the Board of the Center for Educational Integration.

5. Establishing cooperation between MES and other institutions working for Roma educational integration (NCCEDI, MLSP, etc.)

6. Establishing mechanisms for support of initiatives of NGOs, schools, and municipalities by MES and other central institutions. The Center for Educational Integration could be one of these mechanisms. It is important its real start as well as the transparent way of its functioning to be fostered. Special steps for establishing confidence and cooperation of Roma NGO

sector are necessary. For example, it will be a good sign the next Director to be assigned after a competition procedure. Consultations with active NGOs about the Center's 3-years Program and 1-year Action plan are another possible step.

A revolving fund for support of school and NGO projects approved within OP HRD is another good mechanism. School projects linked with intercultural education and Roma educational integration should be supported also within the main programs managed by MES.

7. Promoting intercultural education as frame for Roma educational integration: MES should raise intercultural education as one of the basic means for modernizing Bulgarian education and as frame for the efforts for Roma educational integration. Intercultural education as pedagogical tool would fulfill the existing set of social and administrative measures promoted until now and will provide variety of approaches in respect to diversity of conditions in which Roma children study. At the same time intercultural education is directed to all children that would avoid the further segregation of the Roma integration efforts.

8. Normative and legislative measures: Further development of the National Program for Development of School and Pre-school Education (2006 – 2015) directed to incorporation of the main SEI points as well as to avoiding those points from the Program that would deteriorate the educational level of Roma community is necessary. This could be realized in the process of preparing the new Public Education Law that is in its beginning.³⁷ It is important for this Law to foster and not to further disturb the process of Roma educational integration.

³⁷ At present MES works on preparing draft for new Public Education Law that would follow the Program for Development of School Education.

National Program for improving the living conditions of Roma (2005 - 2015)

Context

According to the 2001 census, about 46% of Roma live in villages and 54% in cities. Most of the Roma, living in cities, reside in inner-city neighborhoods either in the capital Sofia, or in regional centers, such as the cities of Plovdiv, Burgas, or Sliven. The living conditions, even in community housing, are usually abhorrent. Often, these settlements are walled to prevent the public from seeing them.

After 1990, the massive unemployment and dependency on social benefits forced many Roma to move to large cities, where such benefits were paid more regularly. Many of these newcomers were drawn into existing Roma neighborhoods, where often utility bills did not have to be paid and building of illegal housing was relatively easy. As a result particularly of the illegal building the municipalities and the state abandoned such neighborhoods and they gradually transformed into shanty towns and city ghettos with decrepit basic infrastructure. With the privatization of utility companies these neighborhoods declined further as water and electricity became available for only a few hours per day, as companies were trying to minimize losses. The enforcement of these limitations is regularly carried out with the assistance of the police, which is called on to protect utility workers from the protests of the residents. This has led to further deterioration of the relationship between the police and the Roma minority, as they increasingly find themselves in situations of conflict.

Roma neighborhoods are characterized on the basis of two groups of buildings: those supplied with electricity only and those supplied with water supply and electricity but without a sewerage network. In one extensive survey, 92% of urban houses including those of the Roma had the full range of services, while for the Roma alone this was 46%.¹

¹ *“National Program for improving the living conditions of ethnic minorities in urban areas”, UNDP Bulgaria, 2005*

Such figures, however, usually conceal irregular operation and in some cases damaged and unusable services. Significant shifts in household sharing and locational preferences are discernible. Overcrowding within the dwelling among extended family households is causing extreme social stress. The living conditions of the Roma and the opportunities for improvement are embedded within a general housing context, in which many aspects are far from favorable. Municipal transportation networks do not reach many Roma settlements. Buses often stop at the edge of Roma neighborhoods. Where there is public transportation, the buses often do not run as frequently and are of lower quality than those that serve other neighborhoods. In some Roma communities, people are even forced to drink contaminated water, to share one source of water among dozens of families, or to travel considerable distances to reach the water source. This is the situation in one of the largest Roma ghettos in the capital Sofia – “Filipovtzi”. Local Roma are forced to share one source of water due to the lack of adequate sewerage and water supply system in the neighborhood.

Some Roma slums have evocative nicknames; for example, “Abyssinia” and “Cambodia” are extremely impoverished areas within Bulgaria’s Roma ghettos. A household survey data show that Roma living quarters are smaller than others, have larger households, and are consequently more crowded. 95.4% of Roma household have electricity supply, 9.4% of them have access to hot water in comparison to 39.4% of Non Roma in Bulgaria and 36.7% of Roma are using earthen floor to sleep in comparison to 7.9% of non Roma.²

Surveys record around 25% of Roma housing without legal status. Although lacking clear criteria this is likely to be grossly underestimated.³ Especially among central and local government officials, legalization is considered the most critical obstacle to the integration and development of Roma neighborhoods. Up to date cadastre mapping with accurate property registration is rare. Questions about the legality of property ownership have arisen with land as well.

The relative poverty and weak labor market position of people from minority ethnic communities restricts their choice in the housing market

² Source: Yale dataset; Revenga et al. 2002, “Roma in an Expanding Europe”, *Breaking the poverty cycle*, World Bank, 2005.

³ “National Program for improving the living conditions of ethnic minorities in urban areas”, UNDP Bulgaria, 2005

and constrains their ability to be residentially mobile in order to improve their housing situation. It is indicative that more than 1' of Roma have never lived outside of the city or village where they were born. Legal status and ethnic origin are key factors affecting access to housing. For Roma, racial discrimination and harassment play an important role in the disproportionate housing exclusion they experience.

National Program on improving the living conditions of ethnic minorities in urban areas

The National Program for improving the living conditions of ethnic minorities in urban areas was initiated by United Nations Development Program as part of an advisory and programming support to the Government of Republic of Bulgaria in 2005. The advisory service has been aimed at supporting the Ministry of Regional Development and Public Works as well as the National Council for Cooperation on Ethnic and Demographic Issues at the Council of Ministers in addressing an urgent need for developing the extensive opening in the National Housing Strategy adopted by the Council of Ministers on 14 May 2004.

The Program was targeting ethnic minorities living in urban areas with special focus on Roma population. Extended consultations were held in several municipalities with compact Roma inhabitants: Sofia, Sliven, Stara Zagora, Plovdiv, Pazardzhik, Lom and Kyustendil, Roma and non Roma NGOs operating on the territory of these cities, national and local representatives of state administration.

UNDP support to the formulation of the National Program was based on an integrated and multi-sectoral approach, which resulted in the preparation of a technical and operational plan for the eradication of Roma ghettos based on international best practices and tailored to the specifics of the Bulgarian context. And the design of a financial mechanism to facilitate implementation of the National Program, including specification of the first steps needed to make it an operational mechanism.

The Program is comparable to the currently implemented Urbanization and social development of areas with predominant minority population project in its scope and ambition, as well as in the integrated approach

it assumes to address the complex problems of underdeveloped Roma communities. Unfortunately, it is also an example of the discrepancy between the ambitious policy commitments of the government and the capacity of its administration to design and implement those policies. Assuming that the Bulgarian decision makers are genuinely concerned with this situation, UNDP has seen an opportunity to provide the missing expertise in terms of designing a comprehensive National program for improving the living conditions of Roma in the period 2005 – 2015. Therefore this intervention was timely and highly relevant to the identified needs, on the one hand, and to the announced policy priorities, on the other.

The extensive document, prepared by UNDP, is an example of evidence-based comprehensive approach to policy making. An impressive amount of data has been gathered and processed and a variety of factors has been profoundly analyzed: the divergent trends in the Roma communities, the dynamics of the labor market and the market of real estate, the structure of household income generation and expenditure, the existing legal and institutional framework, the technical aspects of the project, etc. A special effort has been made to gear the capacity and the interests of the various potential stakeholders and to math different sources of funding (savings, bank loans, municipal budgets, state subsidies, etc.) to come up with a workable scheme for co-financing this ambitious undertaking. A review of the existing good practices is provided, a number of predictable risks and shortcomings are identified and taken under consideration and adequate procedures for monitoring and evaluation are envisaged. Another merit of the program is the participatory philosophy, embodied in a set of concrete and interrelated measures for involvement of the Roma at individual, family and community level. The supportive components, accompanying the major construction activities, form a coherent ensemble of activities, informed by the best practice of community development. The document builds on the experience of UNDP with other Roma related projects such as Beautiful Bulgaria and JOBS, thus providing a model for a learning organization.

The vulnerability of the program is paradoxically inherent in its own complexity and sophistication, which presupposes coordinated and complementary activities to be carried out in synchrony by a variety of actors. The integrated approach, underlying the program design, can hardly work un-

less a certain level of synergy is attained. As long as the program relies on the commitment and voluntary participation of the different stakeholders, its success is kept hostage on the fragile consensus of the local actors, undermined by rivalries.

As an example of this statement is the consecutive effort of UNDP Bulgaria to start pilot project for improving the living conditions of Roma in “Iztok” neighborhood, Pazardzhik municipality. However due to the lack of capital financial resources of the local municipality the project failed to start. Although positive circumstances were in place, under the PHARE program eleven houses were built and Roma families were placed to live there against modest monthly rent. The conclusion was that there is support and willingness by the local Roma NGOs, local community, but the municipal authority could not afford large investments in the neighborhood. Another substantive reason for the pilot project’s failure was the existing discrimination attitude shared and expressed by the majority of ethnic Bulgarians.

National Program for Improving the Living Conditions of Roma in the Republic of Bulgaria (2005 - 2015)

In March 2006 the government of Bulgaria adopted a National Program for improving the living conditions of Roma in Bulgaria for the period 2005 – 2015, as part of the National housing strategy of the Republic of Bulgaria. The Program is a result of the joint efforts of experts from the Directorate of Ethnic and Demographic Issues at the Council of Ministers, Ministry of Regional Development and Public Works, Ministry of Finance, Ministry of Labor and Social Policy, representatives of the National Association of Municipalities in the Republic of Bulgaria, UNDP Bulgaria, municipal representatives and Roma non-governmental organizations.

The Program is envisaging the implementation of the following measures:

- Infrastructure investments for Roma neighborhoods;
- Assigning of new areas for the location of part of the Roma population;

- Construction of new dwellings with public financial resources, which afterwards shall be available for Roma against monthly rent payment;
- Changes in the spatial development in areas with predominant Roma population.

The program is also foreseeing the construction of 30 065 houses. In a period of ten years the living conditions of 412 500 Roma shall be improved or 85 900 Roma households, inhabitants of 100 neighborhoods in 88 cities of Bulgaria. The expected expenditures for the next ten years are estimated at 1,26 billion BGN, funded by the Bulgarian government, EU and the local government's budgets. The correlation is as follows 40% contribution by the government, 30% by EU Structural and Cohesion funds, 17% contribution by local government; the other financing will be provided by the beneficiaries themselves and by other financial institutions.

At this early stage of implementation of the Government's Program it is difficult to say to what an extent this approach will prove to be efficient and sustainable. Several serious Program's advantages are obvious. First, it is integral part of the National Housing Strategy, i.e. targeting approach is combined with mainstreaming one that is a precondition for serious concern about Roma housing problems and for sustainability of the actions undertaken. Solving Roma housing problem is seen as necessary precondition for improving the overall housing situation in Bulgaria. This approach is missing in the other "Roma strategies" (such as the Strategy for educational integration and the Framework Program for Roma Integration as a whole). Second, the financial engagement from the state budget seems significant. The Program does not rely on the good will of foreign donors (perceiving EU structural funds in this way would be a mistake) unlike the other "Roma programs". Third, there are certain indications for connecting the Program with the EU structural funds. If this is backed-up in the Operational programs, the Program would receive serious financial support. Fourth, one of the basic Program's principles is the participation of Roma community and civil society.

At the same time several problems could be seen even at this early stage. There are certain indications that the commitment of the local authorities and their capacity for coordinated action has been overestimated. This problem should not be disparaged since municipalities are seen as main initiating force: without their initiative nothing connected with improving

the living conditions of Roma in the certain municipality could happen.⁴ The reluctance of the local municipalities to contribute with own funding in the pilot phase of the indicative program creates considerable obstacles, a municipal contribution towards such a pilot scheme should be at least 17% of the total project amount, which could be also in kind – assigning municipal terrains. While the district administration, supposedly responsible for the implementation of national policies, has distanced itself from the problem and shifted the responsibility to the municipal authorities.

In fact, the Program does not contain any mechanism for ensuring that the intended results would be achieved in all municipalities and that in all municipalities with harsh living problems any actions would be undertaken. The initiative is left solely within the responsibility of the certain municipality. In this way serious problems could be left without solutions if municipal authorities do not intend to undertake actions and prepare projects for their solution. There are no mechanism for requiring actions from municipalities with harsh Roma living problems.

What is more alarming is the mechanistic reading of the document, prepared by UNDP Bulgaria by the administration, which has produced misunderstandings. The official document presents nothing but a selective copy and paste version of the Program, where important aspects have been lost. Unsurprisingly what has been willingly or unwillingly omitted in the official document is precisely the logic of interdependence among the various actors. This apparently minor fact discloses alienated and formalized attitude on the part of the state administration and foretells ongoing difficulties in the implementation phase. Another significant omission in the government's strategy is the lack of demonstrative projects that would've served as verification of the model.

The mechanisms for ensuring the state budget financing also look unclear. According to the Program this would happen through the budget of the Ministry of Regional Development “on dependency of the opportunities of the budget” and “in the context of the expenditure limits and the other programs within the budget of the Ministry”.

⁴ “Municipal authorities have the main responsibility for the implementation of the National Program. They are empowered to define and implement the policy for municipal development...” See: *Information about the Implementation of the Action Plan 2006 - 2007 to the National Program for Improving the Living Condition of Roma*. Available at: www.nccedi.government.bg

A bizarre fact is also the priority for elaboration of strategies for local economic development without the inclusion of local NGOs and Roma community in its amplification, which once again dooms the Program to failure.

Serious alarming problem was that the Program is oriented only to Roma who live in urban areas. The same is valid for UNDP Program. Both aim at solving the harsh living problem in 100 ghettos situated in 88 cities and towns. At the same time the housing problems of Roma who live in the rural areas are not concerned at all. Almost half of Roma in Bulgaria live in villages. They are even poorer than the “urban” Roma and their living conditions are as harsh as the ones in Roma ghettos situated in the cities.

This problem is partly overcome. After prompt reaction of many municipalities and Roma NGOs Ministry of Regional Development declared that the Program is open for all Roma neighborhoods without matter whether they are situated in cities, towns or villages. The first indicative list of projects within the Program prepared in 2007 contained several villages (such as Kamenar in Varna Municipality, Ledenik and Vodoley in Veliko Turnovo Municipality, and so on.)

Another alarming strategic problem is that measures for improving the living conditions of Roma were not included in Human Resources Development Operational Program. As pointed above financing from European Structural Funds composes significant share of the financing planned for the implementation of the National program for Improving the Living Conditions of Roma. Roma NGOs made concrete suggestions for incorporating Roma issues in the Regional Development Operational Programs within the campaign undertaken by Center Amalipe and supported by dozens of Roma NGOs. Nevertheless, these suggestions were not taken into account and at present Regional Development OP does not contain any special measures for improving the living conditions of Roma. This makes questionable the deduction of Structural Fund amounts for implementation of the NPILCRRB.

Action Plan for Implementation of the National Program for Improving the Living Conditions of Roma 2006 - 2007

For the start of the Program’s implementation an Action plan for 2006 - 2007 was approved by the Council of Ministers in May 2006. It provoked

new questions about the future implementation of the Program. The first is about the real financing that would be provided for the Program. The overall amount of the Program is 1,26 billion BGN until 2015; 500 million of them are from the state budget. The financing envisaged in the Action plan is rather modest: 5,747,610 BGN (from them – 2,991,260 from the state budget) for 2006⁵ and 18,488,351 BGN (from them – 14,238,350 BGN from the state budget) for 2007. This means that for 8 years the Program should accumulate more than 1,23 billion, or more than 97,5% of its overall amount. The financial engagement of the state budget for these 8 years should be 483 million BGN, or more than 60 million BGN per a year. There is no logical explanation why the financial weight is shared in so non-proportional way through the years. Since the Program is adopted with a Decision of the Council of Ministers, it is not clear whether the next governments would engage to carry out more than 90% of it.

The second problem of the Action plan is the type of municipalities where actions would be undertaken. For 2006 and 2007 most of the activities are preparatory which is logical. Nevertheless, these activities are concentrated only in “municipalities with more that 10% Roma population”. Although this looks justified and fair, it shifts the accent from the real problems. Most of the municipalities with sharp Roma housing problems and big and numerous Roma ghettos are with less than 10% Roma: Sofia, Plovdiv, Varna, Burgas, Pazardjik, and so on. These are big cities with numerous population and where many Roma declare themselves as Turks or Bulgarians; therefore, the share of Roma in them is less than 10%. In this way, almost all cities with harsh Roma living problems will be left aside – at least in 2006 and 2007.⁶ It is an alarming fact since it puts under doubt how and when these cities will be included in the Program.

This problem became extremely clear during 2006 when all activities (preparatory ones) for the Action Plan implementation were concentrated in municipalities with Roma population more than 10%. Nevertheless, there are certain indicators that the Ministry of Regional Development has thought

⁵ In fact, 5,227,610 BGN (2,486,350 BGN from the State budget) of them are for a project co-financed by the Bank of the Council of Europe that was started long before the Program.

⁶ Only Sliven, Lom and other smaller towns could be included in this way.

over this position and from 2007 on it is open to implement activities in all other municipalities.⁷ This is reflected also in the first indicative list of projects within the Program prepared in 2007 that contained settlements in different types of municipalities.

The third problem is the extremely small amount envisaged in the Action plan for building of new “social houses” – 186,600 BGN. It is strange because the Program envisages more than 520 million for “social houses”. When this amount will be provided remains unclear.

The Action Plan was approved in May 11, 2006. Until the end of 2006 its implementation was based on preparatory activities and modest investment actions. As preparatory activities the following could be pointed:

- methodological help of experts from the Ministry of Regional Development and Public Works to municipalities for incorporating measures from the National Program in the Municipal Plans for Development: as a result 59 municipalities (out of 60) with more than 10% Roma population included measures for improving living conditions of Roma in their Municipal Plans for Development;

- organizing awareness seminars with municipal officials and Roma NGOs about the National Program;

- preparing legislative changes: the Ministry of Regional Development and Public Works prepared drafts for two laws (Law for Amendment of the Law for the Status of the Territory and Law for Inhabitant Associations) in which certain points linked to the Program are included;

- preparing new cadastre plans for several Roma neighborhoods: according to Ministry of Regional Development and Public Works the Agency for Cadastre prepared cadastre plans of 22 settlements with significant Roma neighborhoods. The overall amount dedicated to this activity until June 2007 was 2 621 578 BGN, 405 139 BGN of them paid until the end of 2006.⁷

The investment actions undertaken during 2006 were rather modest. They did not exceed 252 000 BGN spent for reconstruction of streets in Roma neighborhoods in Razgrad, Kotel and Tzenovo.

The bottom line is that the Action plan is an eye-wash exercise without the inclusion of the targeted audience in its implementation or commit-

⁷ *Information about the Implementation of the Action Plan 2006-2007 to the National Program for Improving the Living Condition of Roma.* Available at: www.nccedi.government.bg

ment of sufficient financial and human resources for it. The analysis shows that the Action Plan implementation during 2006 was only at its preparatory stage. This could be changed in 2007 since within the budget of MRDPW there is special amount dedicated to Action Plan implementation. It is composed by 10 000 000 BGN for pilot projects in different municipalities and 4 085 275 BGN for co-funding of activities paid with Loan from the Bank for Development of the Council of Europe. Although the amount dedicated is rather modest it is a positive sign that for first time there is special financing for improving the living conditions of Roma from the state budget.

It is clear that improving the living conditions of Roma in Bulgaria has moved high up on the political agenda and the main reason for this is the forthcoming EU membership of the country. Nonetheless, such programs as the above mentioned has a great number of disadvantages on the account of its benefits. A successful implementation of such a complex, specifically time-bound Program would greatly depend on the principle of constructive partnership and mutual support from all participants. In the process of Program implementation a broad public support should be sought, as well as participation of the Roma civil associations. Without strong and well-informed communities working in close partnership with the authorities and linked into a national network for exchange of experience, there is a grave risk of getting the activities ordered from the higher levels, without being properly understood and targeted, which would result in fragmentation and financial impossibility and, ultimately, would alienate them from the people, thus barring any willingness for participation and commitment within the target group.

Recommendations

1. The Ministry of Regional Development and Public Works in cooperation with the National Council for Cooperation on Ethnic and Demographic Issues should develop a concept for the establishment of a special "Directorate" for implementation of the National Program for improving the living conditions of Roma in Bulgaria, involving Roma professionals;
2. The Ministry of Regional Development and Public Works should establish a Steering Committee composed of representatives of all concerned

ministries and state institutions involved in the Program implementation, as well as representatives of local Roma communities and leading Roma NGOs with proven record of activities in addressing housing issues in order to bring transparency and build credibility of the Program;

3. The Ministry of Regional Development and Public Works should implement a wide information campaign amongst the public society and the Roma community about the Program and its implementation on ongoing basis;

4. The government should develop in joint collaboration with local NGOs and respective institutions a stronger policy framework and sustainable settlement of legal and property issues that also corresponds to the understanding and respect of the ethnic diversity;

5. The government should provide the availability of financing instruments and cease the wrongful practice of delegating the responsibility and stay put only to the EU funds;

6. The so-called “Program extensions” of OP Regional Development should develop system of measures and indicators for improving the living conditions of Roma and for supporting the implementation of the Program for Improving of the Living Condition of Roma

7. The government should cease the discrimination practice of evicting Roma slums and instead develop concrete housing projects with the support of technical expertise and monitoring mechanisms of EU Commission, World Bank, EBRD, UNDP Bulgaria, Roma NGOs, etc.

8. Solving the housing problem of Roma living in rural areas should become an object of special concern and actions

9. Solving the housing issues of Roma in Bulgaria has to be set as priority and urgent need to be addressed, however other problems have to be also tackled and solutions provided – provision of employment, improvement of access to quality education and health care services.

Roma integration and Structural funds

The following chapter discusses the incorporation of measures favorable for Roma integration within the national strategic documents that regulate the absorption of European funds as well as the establishment of preconditions for binding the absorption of European funds with the Roma integration. Having in mind the long-term tendency of Bulgarian institutions to not dedicate special financial and human resources for implementation of the so-called “Roma strategies” the absorption of European funds appeared to be the only real opportunity for fostering Roma integration.

The chapter analyses the Advocacy campaign for incorporation of measures connected to Roma integration in the national strategic documents that took part from April 2006 to June 2007. In fact most of the achievements in this direction were result of the advocacy campaign initiated by Center “Amalipe” in which 46 other Roma NGOs took part.

The Campaign

In May 2006 Center Amalipe and Open Society Institute, Sofia, started an advocacy campaign for including major issues related with Roma integration in the strategic documents regulating the EU Structural funds absorption in Bulgaria. In the following months 46 Roma NGOs and a number of Roma experts joined the campaign. Overcoming serious difficulties the campaign achieved almost all its goals and brought to establishing the majority of the necessary preconditions for directions resources from the Structural funds to Roma integration activities in Bulgaria. The success of the campaign and its importance for the development of the civil society in Bulgaria in general has been acknowledged by the Bulgarian Minister of Finance Plamen Oresharski during the ceremony for signing the National Strategic Reference Framework, as well as in a special letter by Thomas Bender, head of unit “ESF, Monitoring of Corresponding National Policies I, Coordination Bulgaria, Croatia, Hungary, Netherlands, Employment, Social Affairs and Equal Opportunities DG

Results achieved

As a result of the advocacy campaign important strategic documents contain the necessary preconditions for binding European funds resources with the process of Roma integration, for devoting significant financial resource and political and administrative engagement for activities directed to Roma integration and for the participation of the Roma community and the civil society in general in managing, implementing, and monitoring activities financed by the European funds.

Human Resource Development Operational Program

This program has been of highest interest for the campaign and at present it contains practically all suggestions made by the Roma organizations. At present this is the Program which contains measures and indicators for Roma integration in the most consistent way.

Within the campaign the following has been achieved:

1. Roma are defined as specific target group in three priority axes of the Program related to employment, health care, and social protection;
2. There are six operations where Roma are a specific target group which is the main target group of the operations: two in the field of employment, one in education, two in social protection, and one in health care.
3. The Program contains a specific chapter “Areas of assistance with regard to the Roma community”.
4. The Program contains qualitative and quantitative indicators for assessing the impact on the Roma community; the table of indicators is part of the chapter “Areas of assistance with regard to the Roma community”.
5. NGOs are included as beneficiaries in all operations directed to Roma integration.
6. NGOs are included as possible leading beneficiaries in the “program extensions” which are being prepared now.
7. A number of concrete and accurate texts connected with the socio-economic and educational situation of the Roma community in Bulgaria are included in the Program.
8. A representative of the Roma organizations (Deyan Kolev) is included in the Monitoring Committee of HRD OP and participated in the preliminary meeting of the Committee on June 18, 2007.

The National Strategic Reference Framework

The Framework is a broader strategic document compared to the sector Operation programs. It tracks the most serious problems of the social and economic development of the country and the general trends for their solving for the next seven years. In this respect the inclusion of the most aching issues concerning the Roma community and directions for their solving was a must in order to have them as concrete detailed operations and measures in the specific Operational programs.

The final version of the NSRF satisfactory reflects the major problems before Roma integration in Bulgaria and provides opportunities for targeted actions in the detailed Operational programs.

The following results have been achieved within the campaign:

1. Including a special chapter “Roma community”.
2. Including Roma as a specific target group of intervention and objective reflection of the situation and the problems of the Roma community (recognizing also the discrepancy between official census data and real situation).
3. Taking into consideration the most aching problems of the Roma community and mainstreaming them in all spheres: education, health, social sphere, housing, IT, and so on.
4. Acknowledging all the key documents directed to Roma integration and adopted by the Bulgarian government (the Framework program for equal integration of Roma in Bulgarian society, the National Action Plan for the Decade of Roma Inclusion, the National program for improving the housing conditions of Roma and so on).
5. Explicit acknowledgment within the document of the efforts of Center Amalipe and the other Roma organizations which have organized and carried out the campaign.

“Written comments were received on the NSRF from Roma organizations such as Amalipe, especially contributing to the sources of information used. In addition over 45 Roma organizations have provided formally and informally comments on the different parts of the text of the Human Resources Development Operational Programme. In conformity with the partnership principle the comments and recommendations have been reviewed and about 90% of them have been accepted and integrated in the programme.” (p. 195)

National Report on the Strategies for Social Protection and Social Inclusion

Similar to the NSRF the document has a high level of abstractness. It draws the major directions of development for the social inclusion. Applying the requirement for consistency characteristic for the EU strategic documents all national strategic documents (the NSRF, OPs, etc) should follow the direction drawn by the National report on the strategies for social protection and social inclusion.

At present the National report on the strategies for social protection and social inclusion satisfactory reflects the major problems before Roma integration in Bulgaria combining targeting and mainstreaming approach and provides significant resources for solving some of the most aching problems of the Roma community

Within the campaign the following has been achieved:

1. Including vulnerable ethnic minorities (with special focus on Roma) as a major target group;
2. Defining the “Social inclusion of vulnerable ethnic minorities” as one of the four major priorities; including the problems of Roma community in two other priorities (“equal participation on the labor market” and “equal access”);
3. Including proper and adequate measures and indicators in the field of employment and social protection, education, health care and living conditions in the priority “social inclusion of the most vulnerable minority groups”;
4. Including of detailed and correct information about Roma community issues in the analysis of the overall situation
5. The results achieved in the National report have been successfully used later in the campaign for including Roma issues in the NSRF and HRD OP on the basis of the requirement for consistency.

Strengthening the Roma Participation and the Influence on Roma Movement

Within the campaign the following has been achieved:

1. Broad Roma representation of more than 30 organizations working together for elaborating a common Roma platform has been created.

2. There is already a precedent: the requirements of a coalition of Roma organizations which are not politically engaged have been accepted by the institutions – 90% of the suggestions of the campaign have been included in the NSRF (this is pointed also in the document itself) and HRD OP which proved that Roma organizations and activists could influence the decision-making process.

3. The Roma organizations included in the campaign turned to be the most active representatives of the civil society in Bulgaria participating in the process of preparation of the strategic documents. The example of the Roma NGOs has been taken over by other groups such as gender organizations, disabled people, and so on.

4. The active role and the constructive position of the Roma organizations have been acknowledged by the Bulgarian institutions

Weaknesses

1. A significant part of the Roma suggestions have not been included in the *Regional Development Operational Program, Administrative capacity OP and the National Plan for Development of Rural Areas* have not been taken into consideration: within the campaign requirements for including measures and indicators directed to Roma have been proposed to the strategic documents pointed above.

2. Some of the Roma organizations stayed indifferent to the process: although a significant number of the active Roma NGOs joined the campaign, some did not realize the importance of this process and preferred to stay aside;

3. Decree of the Council of Ministers 182/21.07.2006 г. for defining the members of the Monitoring Committees does not open space for active involvement of NGO representatives: The decree was adopted in July 2006 and was not object of the campaign. It allows limited functions of the NGOs (only observers with advisory voice); it does not imperatively require the participation of NGO representatives and does not point out clear mechanism for electing such representatives. Nevertheless, the Decree provides opportunity for participation of NGOs in the Monitoring Committees and within the campaign the Roma organizations united around seven nominations for the Monitoring Committee;

4. Up to now the campaign has not concentrated on improving the financial scheme for project implementation within the Structural funds. Small amounts of advance money would be provided for project implementation. This, together with the lack of a Revolving fund for projects where the NGOs are leading applicants strongly limits the possibility for such projects. Up to now this issue has not been discussed

Opportunities

1. The program extensions to the different OPs provide more concrete activities directed to Roma integration. The program extensions are documents elaborated by the intermediate bodies and provide concrete types of activities for each OP. Regarding HRD OP they could provide concrete activities for Roma integration. Regarding the other OPs they could complement what is lacking so far in the operational programs themselves: defining target activities for Roma integration.

2. Including Roma representatives in the Monitoring Committees of the OPs and the NSRF: this would provide opportunity for efficient defending what has been achieved so far within the campaign. It will provide also possibility for permanent monitoring on behalf of the civil society to what extent the opportunities achieved so far by the civil organizations are being used. Finally, it could lead also to correcting some of the operations and measures on the basis of the results from the monitoring. This however will be an opportunity only if these representatives are vocal enough and well acquainted with the strategic documents and EU procedures. If they are just passive observers the results achieved so far regarding the representation in the Monitoring Committees will be lost

Building regional centers supporting projects of NGOs and other beneficiaries: they would provide opportunities for the Roma NGOs, as well as other possible beneficiaries to take advantage of the opportunities achieved during the campaign – opportunities for large-scale targeted activities and activities and projects for Roma integration.

3. Establishing a Revolving Fund for advance financial support of projects of NGOs and other beneficiaries directed to Roma integration and approved for financing from the Structural funds. It would allow NGOs to

participate as equal beneficiaries when applying for EU funds despite the hard financial scheme (small prepayments, need for investment of significant own resources, both human and financial). Thus they will be able to use the opportunities created in the development of the campaign. This will allow the involvement of the highest possible range of civil society actors/experts in the field of Roma integration.

4. Operation 2.3. in Administrative capacity Operational Program is directed completely towards development of human potential in NGOs for applying for Structural funds projects. Beneficiaries of this operation could be only NGOs. It answers one of the major weaknesses registered by the program itself regarding the civil society in Bulgaria: the lack of capacity to design and implement projects within the Structural funds. After the access of NGOs to Structural funds project and the development of capacity are technically provided, their participation as leading beneficiaries and partners should be clearly regulated also in the instruction for applying for the different operations prepared in the Monitoring committees of the different OPs. Additional precondition is the provision of financial resources for NGOs when applying for Structural funds projects.

Threats

1. Dividing the Roma movement and contradicting the Roma organizations to each other: usual practice following the appearance of formal or informal alliance of Roma NGOs is the efforts to divide it or to establish alternative alliance. The campaign created significant informal alliance of Roma NGOs that would provoke efforts for its demolition or division;

2. Political pressure and institutional pressure when defining Roma representatives for the Monitoring Committees – although the Steering Committee members do not have significant competences their activeness and capacity could influence the implementation of the Operational programs in significant degree. Ordinary practice in Bulgaria is not to allow politically independent activists to occupy positions with decision-making opportunities. That is why pressure could be expected for incorporation of only “politically-correct” Roma in the Monitoring Committees;

3. Setting additional limitations through the program extensions: the Program extensions could enter concrete limitations for certain Calls for proposals. Such an attempt was done by Ministry of Education and Science through Call for proposals within 4.1. and 4.2. measures (Operational program “Human Resources Development”) that did not allow NGOs to be beneficiaries. The Roma representative in the Monitoring Committee managed to convince the other members that this should be changed and NGOs were allowed to be beneficiaries but there is no guarantee that this would happen in the future;

4. Introducing limitations through the financial system of project payment: financial schemes that envisage small pre-payment and reimbursement of the expenses done after the end of the project would lead to practical exclusion of most of NGOs;

5. Limitations due to the low capacity for preparing and implementing projects with EU financing.

Major participants

The campaign was initiated by Center Amalipe in May 2006. Gradually 46 Roma organizations and significant institutions like Open Society Institute – Sofia joined the campaign (see the list of organizations attached in Appendix 1). A number of Roma experts also joined the campaign. Some of them have been nominated representatives in the Monitoring Committees (see the list below).

A number of international organizations and activists also joined and supported the campaign.

Supporters

The campaign was financially supported by Open Society Institute, Sofia, and Cordaid, the Netherlands;

Our statements within the campaign have been supported by prominent international activists and organizations (Livia Járóka, MEP, EPP-ED, Minority Rights Group International, European Roma Grassroots Organizations, MINE, Cordaid, Spolu IF Netherlands): they expressed their

support through special letters and petitions sent to the Bulgarian Ministry of Labor and Social Policy and DG Employment, Social Affairs, and Equal Opportunities in the European Commission

2. DG Employment, Social Affairs, and Equal Opportunities in the European Commission fully supported the campaign and the constructive dialogue between the NGOs and the Bulgarian institutions. This support was expressed in two letters by Thomas Bender, Head of Unit, DG Employment.

The final approval of the strategic documents is done in the DGs responsible for their elaboration; they participate (through sending recommendations and discussions) in the elaboration of the documents themselves. As a result of the permanent contacts of Roma NGOs (and particularly Center Amalipe) with experts from the relevant DGs, as well as the professionalism of these experts most of the recommendations (and especially those sent by DG Empl.) contained most of the suggestions of the Roma NGOs. This fostered their accepting by the Bulgarian institutions.

3. The campaign however did not find support from some of the Bulgarian institutions (the National Council for Cooperation on Ethnic and Demographic issues, Ministry of State Administration, Ministry of education, etc): some of the institutions mentioned above reacted against the including of Roma as a target group in the strategic documents. Others reacted against the involving of NGOs as beneficiaries in the operations with the argument that there were not enough mechanisms guaranteeing transparency in the financing of the NGOs.

The negative attitude of many of the Bulgarian institutions towards involving the NGOs in general, as well as their negative reaction towards including Roma as a target groups in the operations created serious difficulties within the campaign.

At the same time the campaign met the constructive and cooperative attitude and behaviour of the European Funds and Programs Directorate of the Ministry of Labor and Social Policy

Stages of the campaign

The campaign included a number of different types of advocacy activities in several directions:

1. Uniting Roma organizations around a common platform: the process was initiated by Center Amalipe together with elaborating the first suggestions to the strategic documents. The development of the Roma NGO platform went through several stages:

- A meeting of Roma NGOs on 19 and 20 May 2006 in Veliko Turnovo: at this meeting the participants united around suggestions for changes of the present draft of HRD OP;

National working meeting of Roma NGOs on October 8-9, 2006 in Sofia. The representatives of the NGOs elaborated suggestions for changes in four OPs and the NSRF; they created working groups for further development of these suggestions and turned with letters to the relevant Bulgarian and EU institutions for taking into consideration these suggestions;

- Second national working meeting of Roma NGOs on December 9-10, 2006 in Sofia. At the meeting the participants discussed and approved the suggestions already elaborated to four OPs and the NSRF; discussed criteria for possible representatives in the Monitoring committees and prepared joint statements to the Bulgarian and EU institutions. Representatives of the Ministry of labor and social policy and the Ministry of State administration were also present at the meeting.
- Expanding the platform of Roma NGOs: during the following months the coalition of Roma NGOs involved in the campaign extended to 47 organizations including the most active Roma organizations and activists.

2. Elaborating suggestion for changes in the strategic documents: this has been a multi-stage process; the proposal elaborated have been updated several types with the updating of different drafts of the strategic documents. The process has been highly transparent and participatory: representatives of 47 organizations, as well as Roma experts and civil servants working in public administration participated in. The suggestions made by the different organizatiuons and experts were systematized by Roma experts as follows:

- National report on the strategies for social protection and social inclusion – Deyan Kolev
- National Strategic Reference Framework – Teodora Krumova
- Human Resource Development Operational program – Deyan Kolev

- Administrative capacity OP – Sasho Kovachev, Viktoria Borisova, Spaska Mihajlova, Teodora Krumova
- Regional development OP – Maria Metodieva, Milen Milanov
- National plan for development of rural areas – Lili Makaveeva

3. Advocacy activities before the Bulgarian institutions: a broad range of activities regarding the Bulgarian institutions responsible about the elaboration of the documents discussed above have been undertaken for including the Roma requirements in the documents. This activities included:

Organizing a meeting “The Operational programs and the Roma inclusion” with the institutions preparing the documents. The meeting was organized with the help of the deputy minister of labor and social policy at that time and national coordinator of the Decade of Roma Inclusion Yavor Dimitrov. The meeting took place on October 13, 2006 in the Ministry of labor and social policy. Representatives of five ministries, organizations part of the campaign (Center Amalipe, Open Society Institute, Sofia, the National association of Roma working in public administration, Integro Association, and Hot Line), as well as Roma organizations which did not join the campaign (representatives of the Roma educational fund in Bulgaria). At the meeting the institutions were acquainted with the proposals of the Roma organizations; the Roma participants insisted again for the inclusion of these proposals in the documents;

- Working meetings with the institutions responsible for the elaboration of the documents: a number of working meetings of Roma experts with institutions representatives took place. Such meetings were organized with representatives of the Ministry of labor and social policy (7 working meetings), Ministry of finance (two meetings on October 13, 2006 and October 31, 2006), Ministry of state administration and administrative reform (December 1, 2006) and so on.

- Participation in the working groups preparing the drafts of the strategic documents: no Roma representatives was included in the working groups on HRD OP and the NSRF. Nevertheless, as a result of the successful campaign representatives of Center Amalipe and Open Society Institute were invited to take part in the meetings of the working group preparing the HRD OP. As a result of their participation the working group finally accepted the Roma requirements for the Operational program.

4. Advocacy activities before the European institutions: these activities have been realized by Center Amalipe with the support of Cordaid, the Netherlands, and Minority Rights Group International UK. Within the campaign the following activities were realized:

- Public discussion in the European parliament in Brussels on the Roma inclusion in Bulgaria and Romania and the EU Accession process. The meeting took place on October 6, 2006. Deyan Kolev was one of the participants at the workshop. His presentation focused on the Operational programs and the opportunities they provide for Roma inclusion.

- Working meetings in DG Employment, social inclusion, and equal opportunities: on October 7, 2006 Deyan Kolev and Georgi Bogdanov held meetings with Walter Wolf, Dimo Iliev, Resa Koleva, and Bistra Valchanova from DG Employment, social inclusion, and equal opportunities. Several meetings were organized also in the following months. Roma representatives got the EU experts acquainted with the essence of the Roma proposals and the importance of the European funds (and particularly HRD OP) for the real integration of the Roma community in Bulgaria..

5. Elections of Roma representatives in the Monitoring committees

- Art.10 of MC Decree 182/21.07.2006 allows the participation of NGO representatives in the work of the Monitoring committees. Using this opportunity on June 16, 2007, 30 Roma organizations gathered at a meeting in Sofia organized by Diverse and Equal Association and elected their representatives:

National Strategic Reference Framework

1. Maria Metodieva, Roma Program Director, Open Society Institute – Sofia – member
2. Georgi Parushev, Support for Roma Foundation, Sofia – substitute

Administrative capacity OP

1. Dimitar Dimitrov, Open Society Institute, Sofia – member
2. Spaska Mihajlova, New Road Association, Hayredin – substitute

Regional development OP

1. Milen Milanov, Diverse and Equal Association, Sofia – member
2. Georgi Golov, United Roma union – Sliven – substitute

Human Resource Development OP

1. Deyan Kolev, Center for Interethnic Dialogue and Tolerance “Amalipe”, Veliko Turnovo - member
2. Milen Milanov, Diverse and Equal Association, Sofia - substitute

Environment OP

1. Gancho Iliev, World without Borders Association, Stara Zagora – member
2. Zlatko Mladenov, Kupate Roma Public Council, Sofia – substitute

Competitiveness of Bulgarian Economy OP

1. Kiril Paganinov, Equal Opportunities Initiative Association, Sofia – member
2. Varban Marinov, Regional Center for European Development. Pleven – substitute

National plan for development of rural areas

1. Lilia Makaveeva, Integro Association, Razgrad – member
2. Georgi Golov, United Roma union – Sliven – substitute

The Roma organizations sent letters with the names and CVs of the elected people to the responsible ministries, the Prime Minister, and the relevant DGs in the European Commission.

Steps ahead

1. Establishing of the elected Roma representatives in the Monitoring Committees

Significant advocacy activities still need to be done in order the Roma representatives to be included in all Monitoring committees:

- *Plan-minimum*: including the Roma representatives in the Monitoring Committees with the status of observers (according to art.10 of Decree 182/21.07.2007)

- *Plan-maximum*: including them with the status of members. This would be possible only if the representatives elected are proposed also by the Council of Ministers. We have sent a request for this to the Prime Minister.

Realizing this step one of the things that will be watched out is avoiding and preventing political and administrative pressure.

Realizing this step one of the things that will be watched out is avoiding and preventing political and administrative pressure on Roma representatives, as well as avoiding contradicting one organization to another.

2. Adopting program extensions which would support the Roma integration process

After the adopting of the Operational programs (which is expected by the end of September 2007) the efforts of the advocacy campaign will be directed toward preparing good program extensions and including concrete actions for Roma integration in them. The role of the Roma representatives in the Monitoring Committees will be also to monitor the application process and ensure that Roma organizations also apply

The start of this part of the campaign was on June 18, 2007 when the preliminary meeting of the Monitoring Committee on HRD OP took place. The Roma representative Deyan Kolev managed to defend the right of NGOs to be beneficiaries of projects directed to minority educational integration although the suggestions of the Ministry of education tried to completely exclude NGOs and allow only municipalities to apply for projects.

3. Raising the capacity of Roma NGOs, municipalities and other beneficiaries for designing and implementing projects directed to Roma integration and financed with European funds: the scheme of EU funds, design and implementation of projects is different from the scheme applied with the pre-accession funds or other donors programs. Therefore, it is necessary to invest in raising the capacity of Roma NGOs.

4. Establishing sustainable partnerships between Roma NGOs and municipalities for realizing joint projects directed to Roma integration.

5. Establishing a Revolving fond for advance financial support of NGO projects directed to Roma integration. Additional advocacy activities need to be undertaken before the Ministry of Finance for opening a Revolving fund for NGOs (at present such a fund has been agreed for the support of municipalities). Such activities need to be undertaken also before private donors proved to be supportive of the process of Roma integration.

Organizations which have participated in the elaboration of the proposals to the National strategic reference framework, the Operational programs and the National plan for development of rural areas

1. Center for Interethnic Dialogue and Tolerance “Amalipe” – Veliko Turnovo
2. „Diverse and equal” Association, Sofia
3. Integro Association - Razgrad
4. ROMA Youth program
5. United Roma Union “Sliven”, Sliven
6. District Roma Union - Burgas
7. World without Borders Association, Stara Zagora
8. Lozenetz Foundation, Stara Zagora
9. “O Romano Drom” Association, Pernik
10. Most Association – Kaspichan
11. Savore Foundation, Samokov
12. Roma Initiative Foundation, Sofia
13. Civil Initiative for the Development of Hristo Botev Neighbourhood, Sofia
14. Roma integration Foundation, Sofia
15. Simona 2002 Chitaliste, Sofia
16. Support for Roma Foundation
17. Vita Romano Foundation – 2001, Sliven
18. New Life for Roma in Bulgaria Foundation, Sliven
19. Future Foundation – Rakitovo
20. Nevy Cherhen – New Star Association, Kyustendil
21. Amalipe – Friendship Association, Kyustendil
22. SHAM Resource Center Foundation – Montana
23. New Road Association – Hajredin
24. European Center for education and qualification – Sofia
25. Public Foundation – Kozloduy
26. Minority Integration and Development Foundation, Yambol
27. Kamala Alternative center for personal development – Vratza
28. Embers and Light Association – Vratza
29. National Association of Roma Working in Public Administration

30. Roma Program, Open Society Institute Foundation – Sofia
31. GORD Civic Union for Roma Movement
32. Members of GORD Integro Association, Razgrad
33. Amare Phala Foundation, Seslav
34. DROM Association, Kubrat
35. Roma Zavet 2003 Association, Zavet
36. Integro Association, Senovo
37. Karmen Association, Razgrad
38. Fenix Association, Razgrad
39. Neve droma Foundation, Shumen
40. Roma Community Center – Vazovo,
41. Isparih Municipality
42. Roma Community Center – Rakovski, Razgrad municipality
43. Roma Community Center – Sevar
44. Roma Community Center – Vetovo
45. Roma Community Center – Marchevo
46. Ternipe Association – Simitli
47. “Good Mother – good children” Mother center – Sandanski
48. Roma solidarity – Petrich
49. Integro Foundation – Ognyanovo
50. Roma information center – Ivanski

APPENDIX 2

Organizations which participated in the election of Roma representatives in the National strategic reference framework, the Operational programs and the National plan for development of rural areas

	ORGANIZATION	PLACE
1.	Amalipe Center for Interethnic Dialogue and Tolerance	Veliko Turnovo
2.	Diverse and Equal Association	Sofia
3.	Future – 2006 Foundation	Rakitovo
4.	New Road Association	Hayredin
5.	Integro Association	Razgrad
6.	O Romano Drom Association	Pernik
7.	Jar i svetlina Association	Vratza
8.	Kamala Alternative center for personal development Association	Vratza
9.	Integration and development of minorities Foundation	Yambol
10.	District Romani Union	Burgas
11.	Roma Integration Foundation	Sofia
12.	Simona 2002 Chitaliste	Sofia
13.	United Roma Union	Sliven
14.	Savore Foundation	Samokov
15.	Open Society Institute Foundation	Sofia
16.	World without Borders Association	Stara Zagora
17.	Gyulchay Foundation	Sofia
18.	Support for Roma Foundation	Sofia
19.	Roma Initiative Foundation	Sofia

	ORGANIZATION	PLACE
20.	Simona - 2000 Chitaliste	Sofia
21.	Vita Romano - 2001 Foundation	Sliven
22.	Equal Opportunities Initiative Association	Sofia
23.	Good People Association	Sofia
24.	Sham Foundation	Montana
25.	Yordan Tzvetkov - Public council	Sofia
26.	Yovka Vasileva - Public council	Sofia
27.	Emil Mihaylov - Public Council	Sofia
28.	Alexander Dimitrov - Public Council	Sofia
29.	R.O.M.I Youth Program	Sofia
30.	Youth network for development	Simitli
31.	Ethnocultural dialogue Foundation	Sofia
32.	Aver Foundation	Sofia
33.	Civic development of Hristo Botev neighbourhood Association	Sofia
34.	Sveti Georgi National Roma Center	Sofia
35.	Kupate Roma Public Council	Sofia
36.	Regional Center for European Development	Pleven
37.	National association of civil servants working on Roma issues in public administration	Vratza

Gender equality in the Roma oriented policies

One of the major horizontal policies of the EU is gender equality. Bulgaria, as a member of the EU would have to apply this principle in all its public policies including those orientated to the Roma community. Nevertheless, the overall solution of the specific problems of Romani women is not perceived as an integral part of the integration process. The gender perspective is still perceived rather as something imposed from outside, than as a need. The gender equality is rarely reported in the documents directed to Roma integration; moreover, it is almost absent as result-orientated actions even in initiatives like the Decade of Roma Inclusion where it is declared as a horizontal policy.

The present chapter provides an evaluation on the gender sensitivity in the policies directed to Roma inclusion, as well as on some special activities, orientated to the problems of Romani women.¹

Ministry of Education and Science

The policy of Ministry of Education and Science concerning Roma integration and gender equality is guided by the principle that “the children should not be divided into girls and boys and the policy towards Romani women is included in the common policy of MES for educational integration”² The problem with the early drop-out of girls from schools is implicitly recognized, but this does not lead to result-orientated actions in the policy of the Ministry to solve this problem. The strategy for educational

¹ Part from the analyses of the documents has been prepared by Teodora Krumova for the Report of OSI Joint Romani Women Initiative with a preliminari title “*The Romani and non-Romani policies through gender equality eyes*”, which will be published at the end of 2007 or the beginning of 2008. The information for the separate states is prepared from the National focal points of the network in every country.

² Interview with Asen Petrov, director of Educational Environment and Educational Integration Directorate, Ministry of Education and Science

integration of children and students from ethnic minorities approved in 2004 considers the educational problems faced by the different ethnic minority groups. Special focus is put on Roma. Nevertheless, it does not explicitly point out the problems with the early drop-out of Roma girls and respectively does not offer measures to solve this problem. There is no gender aspect in the National program for development of school education, adopted in June 2006 either.

An obvious fact is that during the collecting of data about the percentage of children from ethnic minorities in Bulgarian schools in 2006 and their school achievements, the gender aspect was not taken into account and it was not a category in the data collection.

Ministry of Health

The Ministry of Health is one of the institutions which has been developing specific activities directed to Romani women. It is difficult to say that these activities form a whole policy for achieving equality of the Romani woman since they treat Romani women rather as a subject of empiric field work than as participant in designing and implementing these policies. This of course could contribute to solving some of the health problems of Romani women in various settlements but not to result in long term improvement of Romani women access to a consistent health care. The activities mentioned above are basically oriented to diagnostics and prevention of Romani women health: preventive gynecological, oncological and mammography examinations. The Ministry of Health reports that in 2006 in the districts of Vidin, Montana and Burgas 1111 women passed through preventive gynecological examinations carried out in the mobile units provided by several different projects. 968 gynecological detailed check-ups and 968 secondary examinations were carried out.³ After the examinations the Ministry of Health concludes that Roma woman should be put into a more active position through organizing groups of more educated women. We are about to see whether this recommendation will be turned into actions. Its implementation would

³ Ministry of Labor and Social Policy, *Government activities within the initiative Decade of Roma inclusion 2005 – 2015*, presented during the 10th conference of the International managing committee of the Decade of Roma inclusion, Sofia, 12 – 13 June 2007.

be a significant step to form and fulfill a whole policy for providing an equal access to health care for Romani women.

The second category of actions implemented by the MH is directed to the practical introduction of the position of the “health mediator” which has given Romani women more active role. The present report however does not aim at assessing the role, functions and activities of the health mediators since this should be an object of a more detailed separate survey.

Romani women issues and the National strategic documents

During the process of accession to the European Union, Bulgaria had to adopt a set of strategic documents determining the policies in different fields for the next seven years (2007 – 2013) according to the regulations of the European community. This provides a serious chance not only for addressing of the harshest problems of the Roma community, but for inclusion of Romani women problems in the agenda since gender equality is one of the basic European horizontal policies. At present Bulgarian institutions are finalizing the national strategic documents. The National Strategic Reference Framework (NSRF) was signed on June, 20, 2007. The signing of the Human Resource Development Operational Program (HRDOP), the Regional Development Operational Program (RDOP), the Operational Program for Administrative Capacity (OPAC), the National Plan for Developing of Rural Areas (NPDRA) etc.

The review of the national strategic documents reveals that only the HRDOP addresses, more or less explicitly, the Romani women problems. HRDOP offers significant possibilities for fulfillment of activities that can lead to solving special problems of Romani women in the field of education, employment and health care. Furthermore, in “Areas of assistance with regard to the Roma community”, the Program includes a table of particularly measurable indicators where gender equality is a horizontal indicator. This will allow the measurement of the progress (or the lack of progress) about Romani women situation in Bulgaria.

On 30 July 2007 MLSP announced the first calls for tenders under the HRDOP. Two of the operations are directed to the educational integration of children from the Roma community. The applicants should answer in

the application forms how their projects would contribute to the horizontal principles: gender equality, prevention against discrimination, partnership and empowerment. This guarantees to some extent the gender aspect in the preparing of project activities. The problem here is that although the normative framework provided neither applicants, nor the expert committees which will evaluate the project proposals are still prepared and sensitive enough to recognize the existence/lack of gender equality mechanisms.

Ministry of Labor and Social Policy

The policy of the MLSP regarding Romani women inclusion cannot be assessed synonymously. On the one hand the MLSP is the institution that has the most active and result-oriented policy for achieving equality of Romani woman and addressing her specific problems. This active policy dates from the end of 2005 – the beginning of 2006. when for first time specific actions for addressing Romani women problems were undertaken. The fact that the Romani woman started to appear in the documents elaborated by the MLSP is an indication for already having this issue in the agenda. On the other hand however the policy of the MLSP for Romani women equality is still rather sporadic, non systematic and occasional. In addition, this policy often repeats some of the existing stereotypes about Romani women and does not reach the character of an entire and clearly rationalized policy.

A clear example in this direction is the **National Strategy for Demographic Development of the Republic of Bulgaria (2006 – 2020)**. The Strategy was adopted by the Bulgarian government in 2006. It is directed to the demographic crisis that Bulgaria faces during the last years and covers a period of 14 years. Although its relatively big bulk however, the analyses, strategies and activities are concentrated basically around the average ethnic Bulgarian population. The demographic problems minorities face are only vaguely mentioned. Furthermore, the minority woman is almost completely isolated. She is mentioned only in the chapter concerning family planning, sexual culture, risk sexual behaviour and mother health, but she is completely absent in the chapters concerning the higher (professional) realization of women on the labor market. Thus the Strategy reasserts again the

stereotypes about Romani women just giving birth to children and growing them up. Regarding gender equality the Strategy refers to minority women only in the poverty section, but it omits them in the discussion about housework, domestic violence and gender mainstreaming.

The National Action Plan on Employment in turn shows the sustainable tradition to encourage the equality between men and women. For the last three years it has included a set of sustainable measures for increasing women participation on the labor market. The Plan for 2007 includes Roma as a target group and especially unemployed Roma. At the same time the plan does not take into account the gender differences regarding

unemployment within the Roma community and does not propose measures to overcome the higher unemployment among Romani women in comparison to the men.

The efforts of the MLSP in its minority gender policy are directed to “encouraging the new social role of the Romani woman and responsible parenthood”.⁴ Implementing this policy in 2006 the MLSP carried out five regional seminars with the participation of about 160 Romani women in settlements and neighborhoods with compact Roma population: Omurtag, Dulovo, “Faculteta” neighborhood in Sofia, Velingrad, Kazanlak. The objective of the seminars was, as pointed by the MLSP, “to encourage the new social role of the Roma woman and responsible parenthood, to undertake measures for reducing the early drop-out of children from the educational system and to return and keep children in school”.⁵ These efforts undoubtedly should be welcomed. The practical actions as well as the rhetoric of the MLSP on the topic however shows up to now that the new social role is perceived only in the family context, without encouraging more active position and inclusion of Roman woman in social and political life.

⁴ Emilia Maslarova “I do not want advises from Roma with brilliantine and shining necklaces”, interview of Liliana Filipova for the newspaper *24 hours*, 7 July 2006; NCCEDI, *Report for the implementation of the Action Plan 2006 of the Framework Program for Equal Integration of Roma in the Bulgarian Society*, June 2007; Ministry of Labor and Social Policy, *Report of Mr. Baki Hyuseinov, Deputy minister of Labor and Social Policy and national coordinator for the Decade of Roma inclusion 2005 – 2015*, 12-13 June 2007.

⁵ NCCEDI, *Report for the implementation of the Action Plan 2006 of the Framework Program for Equal Integration of Roma in the Bulgarian Society*, June 2007.

“Romani women, you are an incredible force, say stop to the irresponsible, careless parenthood, send your children to school.”

Statement of Ms. Emilia Maslarova, Minister of Labor and Social Policy, during a seminar with Romani women

20.03.2007, www.mlsp.government.bg

“You took upon the task to transform Roma into responsible parents. How will this happen?”

When we change the Romani woman’s role. Now it is rather limited and crashed. It is not that she wants to be a machine for giving birth to children and making money of this. The Romani woman is a mother like every other woman. The problem is that the man is still rather patriarchal.

Emilia Maslarova, Minister of Labor and Social Policy,
“I do not want advises from Roma with brilliantine and shining necklaces”,
interview of Liliana Filipova in 24 chasa newspaper, July 7, 2006

Something more, up to now the MLSP has not shown proactive role to foster the more active and broader participation of Romani women. No educated Romani women with the relevant expertise were invited as lecturers to the above mentioned seminars. The agenda of seminars includes topics as “responsible parenthood”, reproductive health, child education in the family environment, early drop-out of children from school, hygiene issues, issues of family planning in general, participation of the woman on the labor market. Most often the lecturers during the seminars were officials from the Ministry who were not aware of the specifics of the Roma community and could not find the proper language to be understood by the participants.

On the question of the lecturer [*expert in the MLSP – author reference*] why Romani women give birth to so many children, there was a loud reaction by all the female participants. We could not come to a dialogue and the seminar was to about to come to a failure. The community leader however managed to decrease the tension. Gradually the discussion was shifted to the forthcoming literacy course.

*Roma leader about the MLSP seminar with Romani women
Velingrad, 20 July 2006*

The inclusion of the Romani woman is perceived only as participation in the seminars. Thus the Romani woman is put only in the role of an audience which is explained how to organize her life and family.

There is no way the Romani woman who has not worked a day in any administration to participate as a lecturer in these things. We provide high level lecturers and they [Romani women] simply listen."

Interview with the Deputy minister of Labor and Social Policy

The outcome and the impact of the seminars with Romani women carried out up to now from the MLSP can be hardly estimated. The single-time two-hour meetings with Romani women during which they are put in the passive position of listeners can hardly change to a significant extent their concepts and attitudes. It is hard to expect that a similar seminar can even start such a process having in mind that the lecturers are not aware of the specifics of the Roma community and can hardly find common language on the rather delicate personal and family topics which are being discussed at the seminars. Furthermore, the topics included in the seminar agenda, namely, birth-rate, family and unemployment, and the lack of a topic concerning participation of the Romani woman in the social and political life very much resembles the socialist models we were used to twenty years ago: the pattern of the woman a mother and a worker.

This does not mean however that the activities and policies concerning Romani woman started by the MLSP should be denied or abandoned. We can not deny the fact that the MLSP is the first institution with a result-orientated policy in this direction. This policy however should not put Romani women only in the passive position of consumers. They should participate actively in its preparation and implementation. This would lead to the improvement of the outcomes and to the achievement of more sustainable impact.

Recommendations

The Roma integration process in Bulgaria in 2006 was accompanied by negative long-term tendencies. First, it was not a straightforward policy-oriented process but often happened independently of the documents adopted in the field, and independently of the efforts of the official institutions. Second, the Roma community was included as a real partner in the policy of the official institutions for Roma integration.

The Roma integration process in Bulgaria in 2006 faced four serious problems inherited from the previous period. First, there was no proper normative and administrative infrastructure favoring this process. Second, the financial resources were far below the needed with insufficient engagement from the state budget. Third, the institutions engaged with the process of Roma integration (especially at the central level) did not create mechanisms and practices for real inclusion of the Roma organizations and the Roma community as a real partner and active participant. Forth, the Roma movement did not succeed to propose a serious alternative and to lobby for it. The Roma organizations continued to be rather alienated from each other and easy to be manipulated; their behavior was rather passive.¹

Activities within a broad spectrum with all stakeholders engaged are needed to overcome these drawbacks. Recommendations for this follow below:

I. Recommendations for converting Roma integration into a straightforward and policy-oriented process:

1.1. Raise the normative status of the so-called “Roma strategies”

1.2. Mainstream the integration issues (and the major points from the so-called “Roma strategies”) in the documents and programs directed to the development of the whole society and all Bulgarian citizens

¹ The only exception is the advocacy campaign carried out by Roma organization for including Roma issues in the elaboration of the national strategic documents which achieved significant results.

- 1.3. Allocate appropriate concrete financing from the state budget for Roma integration activities and for the implementation of the so-called “Roma strategies”*
- 1.4. Use resources from the European funds to support the Roma integration process*
- 1.5. Establish proper administrative infrastructures to foster the Roma integration process after a broad public debate with the participation of the Roma community*
- 1.6. Ensure that all policies directed to Roma integration are gender sensitive and are prepared with respect to their impact on Romani women situation*

II. Recommendations for including the Roma organizations and the Roma community as a partner and an active participant in the Roma integration process

- II.1. Elaborate appropriate mechanisms for including the Roma organizations in the decision-making process; stimulate the participation of Romani women in the process*
- II.2. Elaborate appropriate mechanisms for including the Roma organizations and the Roma community in general in the implementation of the Roma-oriented policies; stimulate the participation of Romani women in the process.*
- II.3. Raise the capacity of the administration for work with the Roma community and the Roma organizations; build the capacity of the Roma organizations to work with administration*
- II.4. Create appropriate mechanisms to guarantee the independence of the Roma organizations and to prevent the interference of state institutions in their work*
- II.5. Stimulate the uniting of the Roma organization and the appearance of a legitimate representative body of the Roma civil society*

The general recommendations presented above are further detailed below with concrete recommendations for the different stakeholders in the integration process. The list of recommendations does not pretend for exhaustiveness.

RECOMMENDATIONS TO THE INSTITUTIONS OF THE EXECUTIVE POWER

1. Prepare and submit to the Bulgarian Parliament a project act (a project law or a project decision) for adopting the Framework program for equal integration of Roma into Bulgarian society (I.1.) with a clearly defined budget (I.3.); ensure that Romani women issues are also addressed by the document (I.6). Roma organizations and experts, and all interested actors should be actively engaged in the elaboration of this process (II.1.)

2. All decisions of the Council of Ministers and the different ministries in the field of education, health, social sphere, living conditions, culture and so on should consider the impact they would have on the Roma integration process; they should be gender sensitive, include special measures for alleviating the situation of Romani women, consider the impact they would have on Romani women situation (I.6), special clauses should be included to foster this process and the implementation of the so-called Roma strategies. (I.2.);

3. Include special budget items referring to so-called Roma strategies in the budgets of the Ministry of education and science, Ministry of regional development, and Ministry of Health (I.3.)

4. The Ministry of Labor and Social Policy should elaborate its own strategy/program for overcoming the social exclusion of the Roma community. This document should be elaborated with the active participation of Roma NGOs and experts, as well as other interested stakeholders (II.1.) Adopt the document as a Decree of the Council of Ministers with a separate budget (I.1. and I.3.)

5. The Ministry of Labor and Social Policy should include Romani women in designing, implementing, monitoring and evaluating its programs and policies directed to Romani women (II.1 and II.2)

6. Include as observers in the Monitoring Committees of five Operational programs and the national Strategic Reference Framework the experts nominated by the independent Roma organizations on June 16, 2007 for their representatives (I.4.) and prevent any form of political and administrative pressure on them (II.4.)

7. Create working groups on integration issues at the Monitoring Committee of Human Resource Development Operational Program, Regional Development Operational Program,, Administrative capacity, the National

Strategic Reference Framework and the National Plan for Development of Rural Areas. The working groups should be compiled of representatives of independent organizations with proven capacity in the given field. The working groups should discuss in advance and elaborate statements on all project decision of the Monitoring Committees with reference to Roma integration process. (I.4., II.1. and II.4.)

8. Create branches in the MES, MH, MRD, and MLSP which responsibilities should be directly related to planning and implementing activities for Roma integration (including the implementation of the Roma strategies) (I.5.). These branches should establish mechanisms for permanent consultations with independent organizations and experts with proven expertise in the field (II.1. and II.3.)

9. Undertake serious structural and human resource changes in Ethnic and Demographic Issues Directorate at the Council of Ministers and the National Council for Cooperation on Ethnic and Demographic Issues to prevent any political pressure from their side upon the Roma organizations and to guarantee the **real** participation of the Roma civil society in these structures (I.5. and II.4.)

10. Extend the practice for opening tenders for state financial resources for Roma integration activities where NGOs could apply and participate as main beneficiaries. (II.2.)

RECOMMENDATIONS TO THE BULGARIAN PARLIAMENT

1. Adopt the Framework Program for Equal Integration of Roma into Bulgarian Society as an act of the Bulgarian Parliament: a Decision of the Parliament or a Law (I.1.), with an appropriate budget for its implementation (I.3.); ensure that Romani women issues are also addressed by the document (I.6)

2. Include provisions fostering the Roma integration process in key laws in important spheres of public and social life, for example the Public education law and so on. (I.2.)

3. Initiate permanent parliamentary control over the executive institutions in regard to the implementation of the integration policies

RECOMMENDATIONS TO THE PRESIDENT OF BULGARIA

1. Initiate a debate with the participation of all interested stakeholders (including Roma NGOs and other civil society organizations) about the model of the administrative infrastructure which could ensure the Roma integration process (I.5.)

RECOMMENDATIONS TO THE ROMA ORGANIZATIONS

1. Create a mechanism for a legitimate representation of the Roma NGOs or a platform/family of Roma organizations (the so-called “umbrella organization”) (II.5.)

2. Develop expertise in the major fields of integration (education, employment, living conditions, health, preserving cultural and ethnic identity) as well as skills for work with the administration (II.3.) and lobby activities.

3. Continue the successful advocacy campaign for binding the European funds with Roma integration (I.4.) and reject all political and administrative pressure (II.4.)

4. Activate advocacy activities before the different institutions for speeding the Roma integration process and the inclusion of Roma organizations in the drafting, implementing, monitoring and evaluation of public policies (II.1. and II.2.).

