

STOCKTAKING OF GOOD PRACTICES WITH ROMA INCLUSION INTERVENTIONS

REPORT

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LIST OF ABBREVIATIONS

CEICSEM	<i>Centre for Educational Integration of Children and Students from the Ethnic Minorities</i>
EMHPPF	<i>Ethnic Minorities Health Problems Foundation</i>
EU	<i>European Union</i>
FET	<i>Free Elective Training</i>
FRA	<i>European Union Agency for Fundamental Rights</i>
GP	<i>General Practitioner</i>
GPA	<i>Grade Point Average</i>
HESED	<i>Health and Social Development Foundation</i>
HM	<i>Health Mediator</i>
HRDOP	<i>Human Resources Development Operational Programme</i>
MH	<i>Ministry of Health</i>
MLSP	<i>Ministry of Labour and Social Policy</i>
MoEYS	<i>Ministry of Education, Science and Youth</i>
NCCEII	<i>National Council for Cooperation and Integration Issues</i>
NGO	<i>Non Governmental Organization</i>
NMHM	<i>National Network of Health Moderators</i>
NSI	<i>National Statistical Institute</i>
OPRD	<i>Operational Programme Regional Development</i>
OSI	<i>Open Society Institute</i>
REF	<i>Roma Education Fund</i>
RIE	<i>Regional Inspectorate of Education</i>
SEICSEM	<i>Strategy for Educational Integration of Children and Students from the Ethnic Minorities</i>
UNDP	<i>United Nations Development Programme</i>

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FOREWORD

This study is assigned by the Open Society Institute's making the Most of EU Funds for Roma (MtM) initiative and the World Bank to support the Bulgarian Government in formulating a successful policy for Roma inclusion, in a moment of intense efforts to identify workable strategies and approaches with regard to the equal integration of Roma.

This study is meant to serve the development of better policies for the integration of the Roma and in particular to inform the planning for the use of EU structural funds.

The methodology of the study includes a preliminary review of documentation and rapid appraisal methods – focus groups and semi-structured interviews with representatives of the local authorities, non-governmental sector, governmental institutions, experts and citizens from the Roma suburbs in Plovdiv, Peshtera, Perushtitsa, Kaspichan, Shumen, Novi Pazar, Kavarna, Razgrad, Kyustendil and Sofia ¹.

The team carried out the study, expresses its sincere gratitude to all government officials, experts and NGO representatives, who have participated in the discussions in the work groups for identification of good practices and to all respondents for the kindly provided materials and valuable advices. The good practices described in this document are selected by the team and submitted for review and

evaluation of experts and citizens interested in the development of the policies for Roma integration. Some of the best practices were recommended by experts from the public administration, local authorities and NGOs.

The team realizes that despite recent broad consultative process for the selection of additional good practice, perhaps there are other existing or completed projects, programs and practices, including projects financed by EU Structural Funds, which deserves to be described and to take their place in this study. Our idea was not to make an exhaustive catalogue of the good practices, but only to point out several convincing examples that such practices exist, that may and should be invested in the future.

The stocktaking will provide policy-makers with a body of knowledge about what has worked well in the past either in Bulgaria and Slovakia or other member states, and where challenges still lie. The overall aim of this assignment is to) help countries prepare their national Roma integration strategies based on the EU framework and ii) help them in better programming and using the structural funds.

As one of the most vulnerable, marginalized and probably most important – the largest ethnic minority in Europe, Roma have been recognized as targeted by a number of development initiatives by non-governmental organizations, the European Commission, national authorities and international bodies. The Decade of Roma Inclusion, launched in 2005 with

¹ For the rendering of Bulgarian names into Latin the rules of the Transliteration Law have been followed (SG 19 from March 13th 2009).

sponsorship from a number of donors (including and initiated by the Open Society Institute and World Bank), and the Roma Education Fund have reported for successful initiatives that have increased access to and/or quality of non-segregated education, employment, housing and health for Roma groups. At the same time, many of these initiatives have

neither become part of sustainable programs nor have been mainstreamed into strategic inclusion policies.

This study contains overview and analyses of existing Bulgarian good practices for Roma inclusion in the areas of Housing, Employment (Income generation), Health care, Education, Good governance.

SUMMARY

The EU, and Bulgaria in particular, has a wide spectrum of policy tools and mechanisms, including legislation, coordination and funding, that could be further developed and activated with the purpose to promote the social inclusion of Roma. There is a common agreement among different stakeholders and key players that in spite of the high political attention to the issue, European policies both at the EU and national level do not seem to have impacted Roma communities to the intended scope. Hence there is an urgent need to bring together existing actors, institutional means and existing pools of experience with a view to elaborating coherent strategies and viable instruments.

Despite the variety of national and international strategic and operational documents, a comprehensive policy for integration of Roma is still missing: the approved documents are a solid ground for such a policy, however adequate targeted actions for its implementation are still not in place. The systematic documents in most cases remain with no action because of different reasons, most of them due to lack of financial instruments available, capacity on behalf of institutions at national and local level, negative majority attitude towards affirmative actions, lack of will and resources on the side of the Roma community itself. Official authorities should be explicit and definitive when developing and adopting documents for integration of Roma, especially when it comes to financial back-up for the implementation of the

intended activities.

Roma integration initiatives should not be done without the active involvement of the Roma themselves. This is not only to make the Roma more aware or responsible while having a sense of ownership, but also to reflect their opinion and make them equal participants at all stages of planning and implementation.

There is a lack of continuity/succession between political role players. Every new government – national or local, is hardly recognizing the work that has been done by the previous one and everything starts from the beginning, disregarding the achieved results and the lessons learnt. Strategic documents and operational plans should be recognized by each and every government that comes into power. It is not very practical to develop and redevelop new strategic and operational documents each 4 years, unless this is being done by intention with the purpose to imitate awareness and political will. In this respect long-term initiatives like the Roma Decade have played a positive role insisting on multiyear planning and commitment to the achievement of strategic targets. But it will be an exaggeration to say that they have brought real continuity in Roma integration policies and commitments continued to be too general, their implementation inconsistent while monitoring was non-systematic and without much stake. The hope now is that the EU driven National Roma Integration Strategies will change the picture.

Despite the fact that central authorities are the ones who are only able to fund

large national programme that could affect in a tangible way the situation of the Roma this has not yet happened. This is the reason why most of the described good practices are driven by NGOs and are tied to a specific location. It appears also that initiatives where the NGOs and local authorities are partnering are more successful, despite the fact that partnership may be difficult to maintain.

In „Iztok“ Roma residential district of the town of Kyustendil, for a period of 8 years, the ADRA Foundation has accommodated Roma households in a total number of 27 single family houses. This initiative began in 2002 and unfolds in several waves in accordance with the available resources and opportunities. Last 6 houses were opened in 2010.

At the stage of selecting the households which are to be accommodated in the houses, a Neighbourhood council of local activists was created who discuss the criteria for selecting beneficiaries. When selecting the newcomers, there prevails the opinion that not necessarily the most marginalized families are most suitable for accommodation in the new homes, but those who are more likely to follow the rules, i.e. to pay the rental regularly and to protect the property. This is one of the major limitations of the practice, which doesn't reach (and has no ambition to reach) to the most vulnerable members of the Roma community. A key role in this approach plays the proper selection process, which has been delegated to the community leaders.

The selected tenants are obliged to work on the construction of the houses. The Neigh-

bourhood council is committed to supervise also the regular payment of the rental and the management of the property. The community pressure to "observe the rules" is strong, as evidenced by the fact that there are families who are forced to leave the inhabited house due to breach of the agreed conditions. ADRA Foundation strives to minimize these risks, while continuing to provide comprehensive support by various forms to the accommodated families.

The majority of the population of the "Iztok" Roma residential district is members of a protestant denomination, which representative is also the ADRA Foundation. The shared values that contribute for creation of a strong sense of community identity and high levels of social capital are probably one of the reasons for greater stability of the pilot practice in Kyustendil in comparison with other similar initiatives ². ADRA Foundation, through its permanent representatives in the community, manages to compensate also the lack of concomitant social work, which explains the failures in other similar initiatives.

The health mediators' practice is a typical example of mediation, which is a broad generic concept applicable in many different fields. The mediator in the most general sense is somebody bridging gaps between agencies or service providers and their clients due to communication problems including language barriers, low access to information, discrimination, disempowerment or any other reason. Mediation can be a relief to some disadvantages but generally is un-

² For the strong socializing and uniting role of Evangelistic Roma churches see (Slavkova: 2007).

able to solve structural problems within the corresponding system.

In Bulgaria, the model „Health mediator in the community“ was introduced in 2001 by the „Minorities Health Problems“ Foundation’s team. Then the “Introducing a system of Roma-mediators” project was implemented experimentally – an effective model for improving the Roma access to the health and social services“ in „Iztok“ residential district of the town of Kyustendil and the first five mediators were trained. The main tasks of the health mediators according to the model are to support the process of access to services within the field of healthcare for people with limited access to health care. This includes some assistance in the communications with the Health Insurance Fund especially for those who have health insurance. With those who don’t have health insurance, health education and prophylaxis remain the only instruments available to the health mediator. The typical clients of the health mediators also need to communicate with other agencies such as the Social Assistance Department, the Agency for Child Protection and the Commission for Protection against Discrimination. As very often the health mediator’s clients might be unaware of the fact that they need help and might not know whom they need to contact or whether there is any agency dealing with their problem at all, the health mediator needs to be very proactive, well informed and outreaching.

Health mediation was relatively quickly acknowledged by the state as a good practice, despite the difficulties accom-

panying the introduction of the position of „health mediator“ in the health care system and challenges upon providing of financing. Presently, the mediators in the country play a crucial role in ensuring the prevention and treatment of the socially significant diseases among Roma community. Health mediation undoubtedly meets real needs related to ensuring access to healthcare. But it must be stressed that this practice makes sense and brings good results only when it is inserted into the context of the comprehensive policy for improving the access to the healthcare and when it is organized „under the umbrella“ of a permanent, sustainable social and health institutions.

In comparison with the other areas of integration, most resources are invested in access to education of Roma children in the years of transition. There have been implemented many educational initiatives aimed at overcoming the various problems in access to education for Roma children, as well as to weaknesses in the education system as a whole. Among the main practices, that left a footprint in the development of the educational policies for integration, are the pilot projects for desegregation in school education and the models for supporting the early child development of the children of Roma origin. The first pilot desegregation project is of the „Organization Drom“ – Vidin Association. The aim of the project, which is characteristic for all subsequent desegregation initiatives, is students from Roma districts to study together with their peers from the majority. Within the frames of this model, the Roma children are transported to schools located in other parts of

the settlement inhabited mainly non-Roma in order to learn together with children of ethnic Bulgarians, rarely – Turkish and others. This practice subsequently applied in another 6 cities in the country and gained popularity in neighbouring countries. The model of desegregation based on the transportation of students has its advantages and disadvantages. There are clear evidences of improving the achievements of a main part of the students included in the model of desegregation – a fact, which indicates as a major argument in favour of the model. Desegregation, however, in neither case does not cover all students and offers no convincing solution for those who remain to attend segregated schools, and that often are namely the most vulnerable, most embarrassed in learning and the most threatened of dropping out students.

Another example of a project, which has a strong impact on the education integration of the Roma, is the establishment of a Health and Social Centre. The centre aimed to prevent early school dropout of 1st – 4th grade students due to the high number of dropouts at that educational level. The young pupils faced serious problems – on the one hand, they were distressed by the unfamiliar social environment with very different requirements from those at home, and on the other - they suffered from a critical deficit in cognitive, social and language skills necessary to cope with school. It was easy to explain their unwillingness to attend school. The team of specialists and health and social community assistants invested significant efforts to improve the unsatisfactory skills of the children. As a result of these efforts and the cooperation

from the school staff, the problems were ameliorated.

With the aim of easing the burden on the parents of these pupils, volunteers were engaged to offer their younger siblings development games at the Centre's children's room. Later, those younger siblings became part of the school dropout prevention program. Much to our surprise, these children were far better able than the other participants to cope with specific tasks: to focus their attention, to listen, to adhere to rules with little difficulty, and possessed good motor skills. This development made them much more successful students.

This example strongly influenced our motivation to design a cognitive, social and language skills development program for pre-school children with the strong conviction that this is the most effective intervention to prevent early school dropout.

Most of the good practices presented within the report have/are being initiated and implemented by NGOs, due to several reasons which are very important to be mentioned for the purposes of this study: the state administration lacks flexibility, creativeness and moreover capacity to handle such sensitive initiatives related to the integration of the Roma.

In times of economic and financial crisis, there is a growing need of elaboration of adequate and targeted public policies for protection of incomes, improvement of living conditions and access to education. A large portion of the Roma is among those who need support.

Although the social safety nets are rarely considered as a field to look for good

practices one should not forget their crucial importance for the capacity of the government and other stakeholders to address social inclusion issues. Social transfers in Bulgaria are well-targeted contrary to existing myths³ that there is a lot of misallocation (Ersado et al: 2009), but their size in the period 2009-2012 is at the same time completely inadequate. The GMI in Bulgaria is currently 65 leva (≈33 euro). People without adequate incomes can hardly be motivated to participate in employment programmes, education, qualification and lifelong learning

or indeed any other activities aiming at their personal development and the development of their communities. So, although we did not consider social safety nets as a good practice, also because they are not eligible for support under the EU Structural Funds, we tried wherever relevant to point out their role in making the difference between success and failure in programmes and measures targeted at the integration of the Roma.

3 These myths as reproduced in the media but often fuelled by people high in the public administration often feature a Roma cheating the system.

METHODOLOGY

The methodology of the study includes a preliminary desk research of documentation and rapid appraisal methods – focus groups and semi-structured interviews with representatives of the local authorities, non-governmental sector, governmental institutions, experts and citizens from the Roma suburbs in Plovdiv, Peshtera, Perushtitsa, Kaspichan, Shumen, Novi Pazar, Kavarna, Razgrad, Kyustendil and Sofia. The good practices described in this document are selected by the team and submitted for review and evaluation of experts and citizens interested in the development of the policies for Roma integration. Some of the best practices were specified by the participants in the seminar „Successful deployment of the activities for Roma Inclusion: Challenges and Good Practices“, held on May 16, 2011 in Sofia.

The team realizes that despite a recent broad consultative process for the selection of additional good practices, perhaps there are other existing or completed projects, programmes and practices, including projects financed by EU Structural Funds, which deserve to be described and to take their place in this study. Our idea was not to make an exhaustive catalogue of the good practices, but only to point out several convincing examples that such practices exist, and they may and should be invested in the future. We have tried to gather information on current and past Roma inclusion **projects, programs and policies** that yielded **positive outcomes** for the Roma population, and whose lessons

can inform policy and practice. Positive outcomes are defined as improvements in access to quality, non-segregated education and health services, employment and housing as well as increased voice in policy decisions affecting Roma lives (at the local or national level).

We have worked to identify the **factors** that appear to have contributed to successful outcomes in the selected interventions, and determine the conditions that would make possible the sustainability, replication and scaling up of such interventions.

We have also examined the major and/or re-occurring challenges or constraints in the design, implementation, and institutional and financing arrangements of assessed interventions and how, if at all, they were addressed

The described good practices are from different fields – from improving the housing conditions and providing employment, through the key public services – education and healthcare – to examples of good governance. From the overview made, there can be drawn several conclusions, which are important for the development of the policies for Roma integration.

Firstly, it must be stressed that practices that produce results exist in each of the areas of intervention, outlined in national documents such as the „Framework Programme for Equal Integration of Roma into Bulgarian Society“, or have become part of the „Decade of Roma Inclusion: 2005 -2015“. These practices mostly have limited impact because they are applied

as pilot experiments with limited funding. Among them we can distinguish two types:

The first type includes practices that can be relatively easily standardized, allowing to be converted into large national programs. Such practices are found mostly in the area of education and health.

The second type includes practices that have a distinct local specificity and cannot be replicated in the form in which they have been applied initially, although they may serve as a useful example and a source of ideas. Such practices show how useful would have been the programmes

for financing of projects developed by municipalities, NGOs, schools, hospitals, employment offices and other organizations and structures at local level, regardless whether they are municipal or managed by deconcentrated units of the central administration. The successful projects related to improving of the living conditions and creations of employment and income for the Roma are examples of local partnerships and commitment of the communities. A key feature of all identified good practices is that they are the outcome of well-planned and sufficient investments.

I. GOOD PRACTICES FOR ROMA INCLUSION

I.1. HOUSING

I.1.1. Context

In the recent years, a number of strategic and operational documents were adopted in regard to Roma integration in Bulgarian society. The main accent in these documents is put on basic human rights – education, employment, healthcare and housing conditions, as well as access to communal services.

A comprehensive policy for improvement of the living conditions of the Roma is still missing: the approved documents are a solid ground for such a policy, but adequate actions for its implementation are still not in place. The systematic documents in most cases remain with no action because of different reasons, most often due to lack of financial commitments, low institutional capacity at national and local level, bias and negative stereotypes in the Bulgarian majority, which make affirmative actions politically unacceptable. Finally, there is often a lack of will and resources on the side of the Roma community itself.

Inclusive policy for Roma integration in the Bulgarian society (in housing policy and urbanization in particular) is implemented on the grounds of a number of national and international documents endorsed in the past decade, such as:

Framework Programme for Equal Integration of Roma in Bulgarian society adopted by the Bulgarian government in 1999 (updated in 2010), in a special chap-

ter IV – “Territorial development of Roma neighbourhoods” brings out a major problem of the Roma community: that of the illegal segregated Roma neighbourhoods without any technical infrastructure. The Programme envisaged the necessity of legislative amendments in the legislation concerning territorial planning (at the time of the Programme’s approval and nowadays as the main piece of legislation in this field is the Spatial Development Act), that will withdraw the complicated bureaucratic procedure on legalizing dwellings build without the required documentation. It also foresees an urgent legalization of house dwellings in Roma neighbourhoods by adopting the principle of minimum intervention in its existing situation. The purpose of these measures is to legalize the larger portion of the existing housing stock in Roma neighbourhoods within the boundaries of the property and the owners to be given the right to obtain documents of property in a short period.

National Programme for Improvement of Housing conditions of Roma in the Republic of Bulgaria 2005-2015. The programme includes needs assessment of infrastructure improvement in Roma neighbourhoods, enhancement of existing housing fund and an estimate of establishment of a new housing fund. A concrete proposal for legislative amendment of the Spatial Development Act is included and it is targeted at the provision of additional authority to local municipalities in regard to territorial development and construction of housing dwellings.

Action Plan for Implementation of the National Programme for Improving the Housing Conditions of Roma in the Republic of Bulgaria 2006-2007.

The Action plan contains a detailed activity description within the timeframe of 2006 and 2007. Key activities are the legislative amendments and preparation of cadastral plans of locations with at least 10% Roma population and some activities for refurbishing of existing infrastructure.

Notwithstanding all compliant documents in the context of EU membership and in a time of financial crisis, the way of life in the Roma community in Bulgaria is not marking improvement. Those that managed to cover their basic needs currently face serious difficulties and poverty expands. This situation exacerbated the already acute housing and infrastructure problems in Roma settlements many of which are gradually turning into ghetto areas in recent years.

A Report of the FRA Agency of the European Union provides evidence that Roma are in much unfavourable situation in terms of accommodation in private and social housing within the European Union. That includes discrimination in access to housing, poor living conditions, segregation and forced evictions. The conclusions are valid for Bulgaria as well.

Every fourth housing dwelling in the segregated Roma settlements in Bulgaria is illegal (Yordanov et al: 2008, 45). The problem is provoked by the longstanding inaction on behalf of the state on the one hand, and the lack of permanent employment, excessive poverty, and insufficien-

cy of existing housing fund on the other. Only 3% of the existing housing fund in the country (National Housing Strategy of Republic of Bulgaria: 4) in 2002 was state- or municipal property; as for the whole country, the number of housing dwellings for the same period was 3 691 787, out of these 2 305 849 being in the cities where almost 69.9% of the population lives. For comparison, in the EU member states the percentage of state and municipal owned housing stock is 16% on average reaching 30% and more is some EU member states (Whitehead & Scalon: 2007, 9). Together with Romania and Latvia Bulgaria is among the countries in the EU with the most severe housing deprivation. Incidentally (or may be not) these are also the three countries with the highest poverty rates in the EU (Rybkowska & Schneider: 2011, 2).

According to data provided by the Open Society Institute Sofia and the World Bank in 2007, in almost half of the housing dwellings inhabited by Roma there is no sewage system, while for the Bulgarians' houses that share is more than twice lower – 21%. Amidst the urban population the disparities are even greater: 43% of Roma in the cities declare that they do not have access to sewage system, 7% of Bulgarians are in the same position.

The share of housing proprietors that are not able to provide for the increasing costs of maintenance because of low household income is high. According to data of Open Society Institute – Sofia obtained from the research "Health status of Roma," at the end of 2007 about 10% of Roma households did not have

running cold water. The share of housing dwellings with no bathroom, even though indicating a decline in comparison to researches of 5 years ago, is still sky-scraping - each second Roma household does not have a bathroom (considering that barely 9% of the respondents declare that there is a functioning public bathroom in their city/village). For example UNDP and ASSA provided data in 2003 that almost 70% of the Roma households were without a bathroom; at present a certain improvement is evident along that indicator, however the discrepancies between Roma and non-Roma still remain.

The existing Bulgarian legislation regulating the housing and territorial matters does not address adequately the problems outlined above, although these have been defined in the policy documents. In the present, the Bulgarian legislation does not provide an efficient procedure for legalization of illegal housing dwellings and the local authorities do not reinforce legalization of housing buildings within Roma settlements, although some of them are conforming to the formal requirements. This aggravates the problem related to the legalization attempts in Roma ghettos where many years of non-implementation of a number of procedures have led to a chaos in the housing regulation situation. On the other hand, even the nominal opportunities of the legislation remain misused by the Roma minority because of ignorance on the procedures and insufficient legal culture. Last but not least, the problem deteriorates because of inadequate

preparation of many administrations to cooperate with Roma community in the process of exploitation of legal procedures for establishment of possibilities for legalization of the housing regulation status.

There are various ideas about what can be done in housing. The two opposites are the claim that housing issues can be resolved by fixing the property rights or that a social housing policy is needed. The first proposal is promoted by Elena Panaritis (Panaritis: 2007) and also in the report "The cost of non - inclusion".

There are many arguments that the lifestyles of Roma families are ill suited to high-rise condominiums. Some researchers say that the organization of the family unit does not vary between poor and wealthy Roma families but is significantly different from the family model of the majority population. Therefore, the most widespread opinion is that condominiums cannot be the main solution to Roma housing problems (Macura and Vuksanovic: 2006), but in large urban ghettos it is sometimes practically without an alternative, especially if extended families want to continue living together generation after generation.

The social housing stock in Bulgaria is less than 3%, which is much below the EU average. The National Programme for the Improvement of the Living Conditions of the Roma, which envisaged investments to the amount of 1.5 billion leva in social housing and public infrastructure, practically never started. The funds dedicated to the programme were negligible com-

pared to the plans even before the start of the economic crisis. In 2009 the implementation of the programme practically stopped (Kolev et al: 2010). Currently the only public investments for improving the living conditions of the Roma planned until 2013 will amount to about 5 million euro and will suffice for 1-2 pilot projects in medium sized communities at the most. This is less than one hundredth of the actual needs. This makes it sure that nothing significant could happen in the field of the housing conditions of the Roma by 2015. Unless some public investments of much larger macroeconomic significance occur between years 2014 and 2020, the situation in 2020 will not be any different.



1.1.2. ADRA and the houses in Kyustendil

ADRA - Bulgaria was registered on 10 July 1992. For a short period of time ADRA established a sustainable network of partners and storehouse stock for humanitarian activity in more than 100 regions throughout the country. ADRA has accomplished a great number of projects. The foundation has distributed aids to different social, educational and medical institutions across the country out of its storehouse stock. Starting with humanitarian aid, ADRA continued its activities in various areas at local level – education, access to medical services, provision of better living conditions.

One of the first locations where ADRA-Bulgaria started its operations was the town of Kyustendil and the Iztok Roma neighbourhood. Further to the humanitarian aid, the organization established a medical centre in the Roma neighbourhood where Roma are still able to go and receive high quality medical services. Beyond that, the organization regularly organizes diverse community activities: cleaning of the environment in the neighbourhood, trainings and seminars on a number of topics like health, education, employment, etc ⁴.

In the beginning of the 2000's, a representative of ADRA Austria was on a mission to Bulgaria. Following his request to visit a deprived Roma neighbourhood, his colleagues from ADRA Bulgaria brought him to Iztok neighbourhood in Kyustendil. From what he saw, he had the impression that working for provision of better housing conditions for Roma makes sense for increasing the living standard of the local community.

In 2002 – 2003, with the collaboration of ADRA Austria, 11 prefabricated modular houses were brought to the neighbourhood. They were placed in the old part of the neighbourhood where the most deprived families live. The houses were assembled by Austrian specialists. The land where the houses were constructed is property of the Municipality of Kyustendil. The Municipality has also participated with the provision of water and electricity connections. After finishing the houses, ADRA donated the houses

⁴ See <http://adra-bg.org/web/Aboutus/tabid/405/Default.aspx>, last accessed 01.06.2012.

to the Municipality, which is now responsible for their maintenance. The houses themselves consist of a living room, bedroom and a bathroom. The inhabitants are paying monthly rent of about 5 euro. They are also in charge of paying the monthly costs for water and electricity.

As the outlook and the quality of the houses created a high interest within the community and there were many families who declared their will to be accommodated, the foundation established a "Housing commission", which included representatives of the local community. Based on certain criteria, the commission made the decisions which families were eligible to be accommodated. Since the ownership has been transferred to the Municipality of Kyustendil, ADRA is not in charge of collecting the monthly rents and further maintenance of the houses and the surrounding environment.

Following this example, in 2004 – 2005 ADRA Bulgaria began a second initiative for construction of houses in the Roma neighbourhood in Kyustendil. A land plot was bought from the Municipality and 10 more houses were constructed. This time, the houses were built not by prefabricated modules, but as solid structures using all necessary construction materials – bricks, concrete, etc. All preliminary documentations were developed on voluntary basis, e.g. architecture plan, and the construction itself was done by workers from the Roma community. The water and electricity connections were provided by the Municipality of Kyustendil. The difference with the first initiative is that the property of the land as well as of the

houses themselves is to ADRA Bulgaria foundation.

The approach for accommodation remained the same – the commission of community representatives decides who will be admitted to accommodation.

As the demand for better housing and people's interest continued growing, ADRA Bulgaria continued working on the provision of better housing for the Roma in Kyustendil. Thus, in 2007 the foundation opened 6 more houses and in 2010 another 4, all of them with a living room, bedroom and a bathroom.

Thereby ADRA Bulgaria, in collaboration with ADRA Austria, ADRA Germany, Municipality of Vienna, and Municipality of Kyustendil, volunteers from the local community and from other parts of the country managed to provide better living conditions to 31 Roma families.

The new houses are built in the so-called "new part" of the neighbourhood. The land and the houses are property of ADRA Bulgaria foundation. One of the conditions for accommodation is that inhabitants pay a monthly rent of 10 BGN (appr. 5 euro). The money is being collected by an informal housekeeper, elected by the 20 families who live there. The money is being used for further maintenance.

What is very essential is that after accommodating the families, ADRA Bulgaria continues working with them in order to build up their interpersonal skills, increase their education and knowledge and awareness in diverse areas: Education, Health, Safe environment, etc.

ADRA Bulgaria field workers are in constant touch with the community and the inhabitants of the ADRA houses in particular.

Since then, there have been several cases of removing families from the houses, based on decision of the Community commission. The cases were of people who breached explicit or implicit community rules, e.g. sell the furniture, perpetrate criminal acts, not respect the privacy of the other residents, etc.). After their removal, the commission of community representatives came together and selected new people who were then accommodated. We have to remind here that ADRA is a protestant organization following very strict moral prescripts. Most of the Roma in the Iztok neighbourhood and all ADRA tenants in Kyustendil also adhere to different strands of Protestantism.

The following results of ADRA's work may be outlined:

- 31 families who are now inhabiting and maintaining modern fully furnished houses with regular access to water and sanitation and electricity supplies. Further to that, ADRA Bulgaria has increased their awareness in other areas of personal and community development: Education, Health, Civic participation, Employment, etc.
- ADRA Bulgaria has established an effective and working partnership with the Municipality of Kyustendil and succeeds to maintain it, regardless of the local- or national

political situation.

For the 31 houses built until now, ADRA has invested around 333.600 euro, but this money does not reflect the actual costs, as there was also a lot of volunteer work and a lot of in-kind donations from companies such as Bramac, Wienerberger and others ⁵.

1.1.2.1. Factors and challenges in the case of ADRA Bulgaria and the houses in Kyustendil

It appears that the issue of Roma housing is very sensitive. In this regard all stakeholders (institutions, NGOs, majority – as much as possible) have to be convinced and aware that such initiative is a mandatory precondition in order to avoid any miscommunication and potential tension among institutions, community and NGOs.

Unlike the case with private service providers, eligibility criteria for access to social housing can hardly be based on ethnicity when the provider is the government or a municipality. If the housing units are built within an existing Roma neighbourhood then there will be hardly any non-Roma applicants but the price paid for that will be the missed opportunity to desegregate. If the housing units are built at a place outside the Roma neighbourhood then it is likely that other people who believe they meet the selection criteria will also apply. With only a

⁵ <http://www.adra-bg.org/projects/projects-2010/92-adra-new-houses-for-roma-families>, last accessed 30.01.2012. The video shows the opening ceremony for the last group of houses finished in 2010.

fraction of the tenants being Roma issues of neighbourhood relations and common property sharing and management become even more important.

All relevant stakeholders should be responsive and receptive rather than resistant, as the process requires their concrete and particular long-term commitment. One of the recommendations of ADRA Bulgaria is that if the implementer is not equipped with patience, persistence, skills for mediation and will to compromise, then he/she should not even think about working on the issue.

Moreover, building houses and accommodating people seem not to be sufficient. There should also be a continuing work with the accommodated people in order to increase their level of interpersonal skills and awareness of living in an integrated environment, to guide people into positive behaviour and help them make informed life choices. This support is crucial e.g. when children do not attend school or preschool or are at risk of dropping out, when adults lose their jobs or lose any hope to find a job and stop actively looking for employment. The accumulation of bad circumstances can easily lock households into the poverty trap which is soon reflected in a deteriorating property. As one architect pointed out in a recent discussion on Roma housing policies, the main reason for the deterioration of homes is not wear and tear but the deteriorating condition of its inhabitants.

The community should also be involved in the process of decision making, i.e.

there should be a sense of communal ownership, and it should be real, as a large share of the success depends on it. Such approach would guarantee the transparency and accountability of the involved stakeholders: NGOs, local government and the community itself.

Involvement of the local government is crucial. It is true that if the implementer has the necessary resources (financial and human) the pilot phase could go without the assistance of the local government, but its participation is crucial for the sustainability. For larger housing programmes property issues and the technical provision of utility services such as water, electricity, medical assistance, etc. requires the participation of the local authority.

There was no formal monitoring of the process as ADRA was present on-site all the time before, during and after the construction of the houses and accommodation of the residents. ADRA hired a fieldworker with Roma background, living in the community, who is very well recognized by the Roma people as well as by the accommodated people and the local institutions. The fieldworker is permanently in the community, monitoring and observing the whole process and in constant touch with everyone. In case of urgent issue, the person contacts the headquarters of ADRA Bulgaria, the Community's commission or the relevant authorities. Further, the initiative has been closely monitored by the media and other NGOs, who have provided predominantly positive feedback. The provision of social housing by ADRA has also been

nominated as an innovative practice of the year on the webpage of the Foundation for local government reforms ⁶.

1.1.2.2. ADRA's lessons learnt

- Success is possible only with the positive attitude and the participation of all actors: community, NGOs, local government;
- The carrier of the process should be flexible enough for compromises, and good enough to stand through tough negotiations;
- Available financial resources are very important, but people who do the field work are the core;
- Provision of housing for Roma should not be a short-time mechanical process. This is a complex social intervention that needs to be planned and implemented in a long-term perspective.

1.1.2.3. Conclusions and recommendations

- Despite the not-completely-successful and demotivating experience with housing initiatives in other localities, the case of ADRA proves that provision of housing for Roma can be a successful process that contributes for the development of the whole population. It can even be said that the houses are one of the measures towards

achieving the ultimate goal – the equal integration of the Roma population.

- Provision of housing should not be perceived as a single act, but as a long term process with multiple elements of social development work. Housing is not a technical issue; it is a social practice that requires investments in the capacity in the community and not only in the building of infrastructure.
- It is true that NGOs are more flexible and able to intervene constantly on field. They also seem better equipped to involve representatives of the community. But ultimately governments and local authorities are the ones who are responsible for the provision of better living conditions. Thus, they should be the main driving force behind larger social housing programmes, which can improve the situation of a substantial proportion of the population in need., .

1. 2. EMPLOYMENT SELF EMPLOYMENT AND INCOME GENERATION

1.2.1. Context

To a large extent, success in all areas of Roma integration depends on the employment level in the community. Currently the employment rate among Bulgarian Roma is very low. In Bulgaria, 66% of the male population overall are employed, while with Roma men this ra-

⁶ <http://www.flgr.bg/innovations/?iid=1619>, last accessed 30.01.2012

tio is 35% ⁷, which means that there is a large potential for improvement and for making a substantial contribution to the attainment of the Bulgarian national goal of 76%. In the framework of international initiative “Decade of Roma inclusion 2005 – 2015”, several programmes fully oriented to Roma or explicitly covering the Roma have been organized and conducted. Undertaken measures can be divided into several groups:

Subsidized and temporary employment

Direct intervention on the part of central-government institutions is manifested in two ways: either by subsidizing jobs or through measures intended to preserve existing ones. Examples of new jobs, especially for the Roma, are the so-called labour- and health mediators and teacher assistants. Wages are low; work is non-prestigious because these employees are quite often instructed to accomplish activities, which are outside the job description of the position such as delivery of mail, cleaning of windows, etc. But there is a segment of subsidized employment providing even lower quality jobs like street cleaning and Roma are mostly assigned to such kind of jobs due to their low education and qualification. Unfortunately Bulgarian employment programmes still offer very few opportunities for training and qualification.

In 2009, the measure preservation of jobs was introduced, meaning the addition

of certain money (amounting at half the minimum wage) to the remuneration of workers and employees transformed to part-time jobs in the economic sectors of industry and services.

Subsidized employment plays a significant role for the temporary relief of individuals from the Roma communities who have lost their jobs due to the economic crisis or because of their low level of education. The possibility of opening new (albeit temporary) jobs in landscaping, cleaning, refurbishment of public areas will be supportive to the municipalities as well, in their non-priority activities in a time of severe crisis.

Education, training and retraining

The level of education and the chance to be employed are strongly linked. In 2009, only 8.5% of the individuals of elementary or lower education had jobs.⁸ Literacy courses and professional trainings were conducted in the framework of the national programme for adult education. Several schemes directed to unemployed individuals and for upgrading of the qualification of employed individuals were opened, their aim being to help these individuals' adaptation to the requirements of labour market.

The “I Can” scheme funds 100% of the training for individuals employed full-time under employment contracts, regardless of their field of occupation. The obtained vouchers could be used in schools chosen by the users themselves.

⁷ Measures to promote the situation of Roma EU citizens in the European Union, European parliament, 2011, <http://www2.lse.ac.uk/businessAndConsultancy/LSEConsulting/pdf/Roma.pdf>

⁸ Annual bulletin 2010, Employment Agency, http://www.az.government.bg/Analyses/Anapro/2010/year/Godishnik_2010_bul.pdf

The greatest number of unemployed was included in trainings for acquiring or upgrading of their qualification under the "Development" Scheme. The number of jobs and training courses for them are being booked by the concrete employers and are made available through presentation of the vouchers allocated to the representatives of target groups. The successful trainees are included in the subsidized employment scheme.

Self-employment, starting of own business

"This is my chance to find myself" programme is targeted at unemployed youths of primary- or lower-level education up to 29 years old. It provides an opportunity to those willing to master diverse artisan skills and then start their own small businesses or join in already existing manufacturing processes. Traditional Roma handicrafts such as tinkering, basketry, blacksmithing and making of wooden pots are in crisis (Pamporov: 2004). Providing support to traditional Roma handicrafts however, is part of the preservation of community's culture and history. Those employed in this field have a chance to become part of the tourist industry by making souvenirs, but still this is not an area where good profits can be made even in times of economic boom. Instead, handicrafts have a long-term effect on the variety and richness of Bulgarian culture and Roma culture in particular.

Employment in agriculture

Providing support for the restructuring of semi-subsistence farms (a small part of

their production is marketed, the rest is for personal consumption) in economically viable and market-oriented farms. Many Roma families, who live in rural areas, live on their own production produced in their small farms. It is recommended such small individual producers should be unified in a network so that they can benefit from the synergy of a larger organization.

The part of the Roma population covered by employment programmes is very low. Low qualified workers were the first to lose their jobs. Currently, the majority of employed Roma work in the area of cleaning, scrap collecting and petty farming. Their access to other areas of economy is not easy, not least because of discrimination. Examples of unequal treatment at employment interviews have been numerous: "Companies that offer jobs never say "We don't want gypsies here", but when they see you, you lose all your chances..."(Svensson et al: 2007). This picture is supported also by data from representative sample surveys.

The integration of the Roma in the labour market requires a special emphasis on the participation of the Roma in mainstream national programmes, especially the "new generation" of programmes, which put more emphasis on training and integrated support to the unemployed. Since the start of the economic crisis in 2009 the Bulgarian government curtailed significantly the existing employment programmes, which were reduce since then by 2/3 and new reductions are planned for 2012. Thus the macroeconomic environment and the current policy of the

government gives little hope for the improvement of the situation of the Roma over the next few years.

Below we have describe a successful practice in micro credit and local development in rural Roma communities, The practice is very important as participation of the Roma in EU funded programmes in the field of agriculture has been very low, while the land can indeed be a source of income both for subsistence but also for putting the production on the market and earning some cash.

1.2.2. The Land – A Source of Income Programme 1997 to 2011



***Land as
a Source
of Income
Foundation***

1.2.2.1. Background

The Land as a Source of Income Foundation is an NGO located in Plovdiv, Bulgaria, which focuses mainly on employment, entrepreneurship, and opportunities for generating income for the Roma minorities. Their goal is the improvement of Roma families' life in rural areas by achieving economic independence based on land ownership and sustainable income generation through farming or business. The Land Foundation works in several small villages and towns in the Plovdiv region, and does not work in the large cities.

1.2.2.2. Description of the Practice

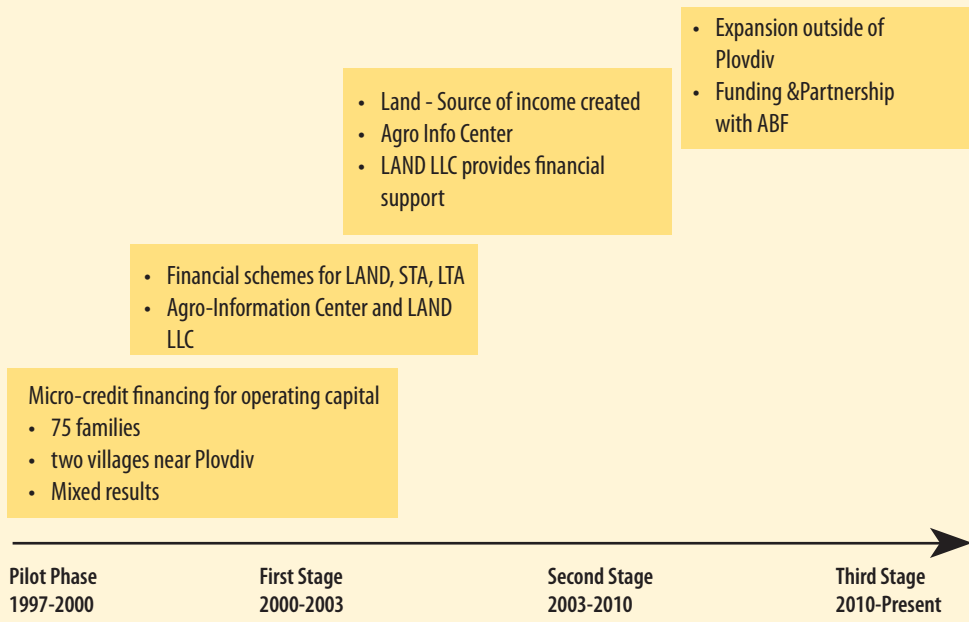
The Land Programme has evolved and changed over the 14 years it has been in existence. During its pilot phase of 1997-2000, the programme was funded by N.O.V.I.B. (Netherlands) and the founders used ideas focusing around the support for farmers.

The results were mixed. In the first stage of 2000-2003, financial schemes were developed and a revolving fund was established. During this period, the programme was implemented by the CEGA Foundation.

In 2003, during the second stage, the Land Foundation institutionalized itself and became an independent NGO but did not break its relations with the CEGA Foundation. The Land Foundation also created a Financial Support division registered as LLC and established an Agro-Information centre. Between 2003 and 2010, the management team reviewed their lessons learned in the preceding stages, and decided to focus on specific communities instead of expanding too much in to new ones. These long-term persistent and focused efforts gradually started to produce encouraging results, which soon became known to experts and the public. In 2010, the America for Bulgaria Foundation approved a three-year grant for the Land Foundation to experiment with expanding their model outside of the Plovdiv region. The Land Foundation has just completed its first year of work on this expansion.

How to organize the financial support division of the Land Foundation was one

Land Program Evolution



This “Land Income” concept has grown, changed and evolved. Lessons were learned and modifications made.

of the major challenges of the organization during the first two phases. In 2003, when they became an NGO, they decided to have two separate organizational structures within the foundation. Based on earlier experience, they decided that the most suitable structure for the financial support part of the organization was a Limited Liability Company (LLC).

The second and more visible part of the Land Foundation organization is the Agro-Information centre ⁹. The centre organizes on-site consultations, takes repayment deposits, takes care of all blank forms and paperwork, organizes annual trainings and handles all of the small “day to day” activities.

The Land as a Source of Income programme has adopted a sustainable, long-term approach which provides vehicles to create opportunities for income generation for the Roma. The Land Foundation is helping entrepreneurial Roma to accumulate assets (i.e. land, tractors, and business equipment) and start their own businesses. This programme focuses on Roma families and neighbourhoods, and is all-inclusive in the sense that small entrepreneurs can get all the support they need from one place in one package. The Land Foundation helps Roma select land for farming, or develops business plans for small start-ups in other economic sectors thriving in the rural areas.

⁹ <http://www.agrocentre.info/>, last accessed 01.02.2012.

Then, the Land Foundation provides financing for the purchase of the land, or for seed funding for the businesses. It continues this relationship by providing training and business support through experienced agricultural or business consultants. As Roma gain more experience, the Land Foundation will provide short-term loans for the purchasing of fertilizers, seeds, or small farm equipment. All of this support continues for many years until the Roma families no longer need help, or become stable enough not to be considered part of the Land Foundation programme. As the Land Foundation works with individual families, strong relationships develop. These relationships are based on developing a strong work ethic, responsible repayment of loans, self-improvement, helping the others, and most importantly, developing a trust and respect for each other.

As some of the families working with the Land Foundation become more successful, they get other Roma to help with the farm or business. This expands the impact of the programme and brings further improvements in the community. When this happens, the Land Foundation starts working with the local schools to develop small inclusion projects, or conducts work with the local municipality to try to improve the overall integration of Roma into the local communities. The Land Foundation drives inclusion of Roma using a variety of approaches, but first of all, it develops a strong economic foundation before starting to build upon that base with small scale school and community improvement initiatives.

The following results may be outlined:

- The Land Foundation currently has 76 families (approximately 300 people) in 11 sites in the programme.
- The participants have purchased approximately 400 decares of land, and are cultivating more than 300 decares of additional leased or previously-owned land.
- As of May 2011, the Land Foundation has supported 153 income generating contracts for land, equipment or new businesses, totalling almost at 200,000 BGN.
- More than one hundred credit contracts have been paid back. The delinquent or late payment rate is approximately 15%.
- In 2009, the Land Foundation assisted three “Young Farmers” who were children of previous successful programme participants to apply for EU funds under the Rural Development Programme for Bulgaria for 2007-2013. All three applications were approved for funding of 50,000 BGN (≈ 25,000 euro).

1.2.2.3. Factors and challenges to achieving the positive outcomes by the programme

There are many factors which contribute to the success achieved by the Land Programme. However, it is primarily due to long-term involvement, patience and diligence, continuing communications, de-

veloping relationships, and understanding the changes in the communities where they work. Following are some of the key factors the Land Foundation has learned for a successful Roma Income Generating programme.

- Applicant selection is an important criterion for a successful outcome and also for sustainability. When making this selection, it is important to find for a start someone who has entrepreneurial spirit, and is willing to take business risk. On later stages when the programme becomes well established more risk averse people can also join and follow the pioneering example of others.
- Availability of good potential farmland is also important. There must be good farmland which can be purchased or leased and water in order to begin the programme. The Land Foundation uses farming as the economic base for growth. Generally, other small business loans are granted after the small farms have been started.
- The crop structure of the land is another key factor. Planting vegetables, fruit trees, or vineyards takes much less land and provides better income potential, than larger tracks of land used for grain production, or grazing cows and sheep.
- There are several criteria needed for good selection of a Roma community to work with. Although this programme can be successful in many small village communities, there are some community traits which can make success easier. This is why the programme operator needs to understand the leadership dynamics of the Roma community. If community leaders are not approached and involved, then it will be much harder to get local Roma interested in the programme. If there are several strong competing factions within the community, that will deter programme's success. The only way to know this is to have contacts within the Roma community who can help an NGO understand the community's political and leadership environment.
- It is better to support many small initiatives (or projects), and not one large one. The Land Foundation wants to get as many entrepreneurs operating as possible. Although not all of the small projects will succeed, generally several of them are successful.
- Qualified agro- and business consultants are needed, who are available locally to help with on-site visits. It is important to have consultants who are willing to work with Roma, and will do on-site consultations in the communities. These consultations also help keep the Land Foundation aware of changes and potential problems with the participants before they happen.

- Financial support must be extended to small entrepreneurs with conservative lending practices and a stable low interest rate that does not change. (The Land Programme has a constant 6% rate.) Develop loan approval criteria which include visiting the applicant, and getting input from business or agricultural consultants. Although the loan is paid back to the NGO by the Roma applicant, the purchases are made directly by the Land Foundation.
 - By using land as an asset, land becomes collateral which reduces the risks for the Land Foundation during the payback period. When the land is paid back and the title is transferred to the applicant, this asset becomes a base for further expansion, and eventually enables the applicants to work on their own.
 - The Land Programme provides an integrated approach including finance, training, and consultation for several years. This builds confidence and trust within the community, and enables sustainability.
 - Applicant selection is a key part of the programme's success, and there is not a standard process used by the Land Foundation. This is where years of experience play an important role for the final selection, and meeting with the applicants in their homes provides the basis for an "intuitive" decision.
- The more explicit criteria which the Land Programme applies include:
- Employment history – has this person previously worked, and what did she do?
 - Does this person have experience working on farms or in land cultivation? This may have been during communist times.
 - Do they have some land now (either leased or owned) that they are cultivating?
 - Have they ever borrowed money before, and did they pay it back?
 - Do they have the 20% down payment?
 - What is the family situation? Are some of them in other countries working, or doing other seasonal work? Did any family member finish high school, or 8th school grade?
 - As the Land Foundation works longer in a community, they also get background information and recommendations from current applicants living in that place.
- NGO organizational capacity is an important factor. The Land Foundation is staffed with business and agricultural professionals and trainers. They also have people who have worked for the Ministry of Agriculture and have understanding of regulations. The Land

Foundation also has financial managers who supervise the financial support process. These people do not have to work full-time. They can volunteer, or work part-time as needed.

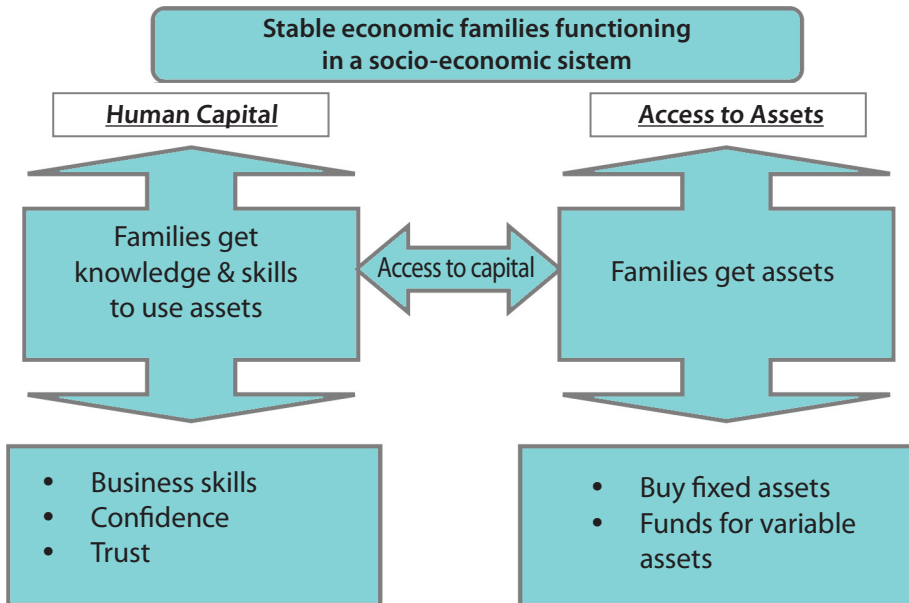
- Any NGO working on income generation programmes must have a passion for helping Roma. They also need to believe Roma want to work, can deliver quality work, and a lot of them have what the Land Foundation call “a natural entrepreneurial drive”. The NGO simply provides the vehicle and support to help Roma achieve stable employment.

There are several ways in which the Land Foundation monitors its progress

- The first one is detailed standard paperwork required by the government for any NGO registered

in public interest. All of the purchases, salaries, and work are documented.

- The Land Foundation provides an annual report to the Ministry of Justice documenting all annual activities.
- In addition, the financial support part of the Land Foundation is a Limited Liability Company (LLC), and it also has specific paperwork required for any short-term or long-term purchases. Repayment deposits are also documented and recorded according to regulations.
- In addition, the Land Foundation has regular auditing reports signed by a certified public accountant showing all income and costs for the respective year.
- Finally, there are also quarterly



documents showing all activities and financial reports for each of the Land Foundation projects. This is done in compliance with specific project funding requirements. Currently the Land Foundation is managing a three-year programme funded by the America for Bulgaria Foundation which requires quarterly meetings to review all aspects of the project status.

1.2.2.4. Conclusions and recommendations

The goal of this programme is to enable minority families to become stable economic units which can function in society and successfully work within the economic system. In order to accomplish this goal, the Land Foundation focuses on enhancing the “human” capital by providing knowledge, skills and continuing support in order to build confidence and trust. At the same time, they provide families with funding capital to buy capital equipment assets. It is the transition from human capital knowledge to enabling families to use these skills and knowledge, which has proved to be a successful formula for income generation and integration of minority families.

The information contained in this brief overview of 14 years of experience providing only a glimpse into the Land Foundation Income Generation and Roma Integration programme. Their success is based on mistakes made during the early days of their work, and lessons learned from those mistakes. A key component of

the Land Foundation’s achievements has been their tireless efforts, their passion and strong determination, and a strong belief that Roma want to work and can work challenging the widespread bias. As part of their expansion programme, the Land Foundation is developing a six-day detailed training programme to use for future potential partners.

Similar projects should continue, these projects being one of the few ways to encourage access to development for the Roma community representatives within a relatively market framework. In a situation of no sanctions foreseen for unethical participants however, the financial schemes should not continue for more than 2 or 3 years if no reliable financial guarantees have been provided. The prolonged application process of such schemes has a demoralizing effect and in a long-term aspect this situation does not contribute to overcoming of Roma segregation.

Projects like “The Land – a Source of Income” should be furthered by opening new opportunities for access to funds. Asking for collateral and own contribution cannot be avoided but it can be made affordable by having good local knowledge about the beneficiaries and managing the inherent risks of default. Risk sharing with the beneficiaries (in the form of collateral and/or own contribution) is also a motivation tool, a healthy incentive to succeed.

According to the Land Foundation team the duration of support should also be carefully determined so as to make ben-

eficiaries self-sustainable and eventually avoid a dependency trap.

Finally, it should be mentioned also that diversification might also played some role in the programmes success. Having started with agriculture the programme also began to support other economic activities. Diversification seems to be an important part of making rural economies vibrant and improving the quality of life. During the expansion of the programme in other places it seems that non-agricultural business will play a growing role. So despite its name, which indicates how the programme was initially conceived it seems that the “The Land – a source of income” will develop into a general long-term microcredit programme with its specific philosophy reflected in the procedures for selecting beneficiaries and addressing the credit risks.

1.3. HEALTHCARE

1.3.1. Context

Medium and long term health care policies in Bulgaria are based on a **National Health Strategy 2008-2013 and Action Plan** to the Strategy developed by the Ministry of Health and approved by the government (as a continuation to the National Health Strategy “Better Health for a Better Future of Bulgaria 2001-2010” and Action Plan 2001-2006.

The health strategy concerning people in disadvantaged position belonging to ethnic minorities (2005-2015) is an integral part of the National Health Strategy, which is targeted to the assurance of better health for the Bulgarian population. The truth is that the National Health Strategy, which is a document of high priority, does not treat the issues concerning the health integration of the Roma in essence and does not include any of the important elements contained in the Health Strategy Concerning People Belonging to Ethnic Minorities. The lack of so-called “mainstreaming”, i.e. inclusion of the issues concerning Roma health integration in the overall health care strategy, is indicative of a low level of political readiness to implement the integration policies (Kolev et al: 2010).

The health status of the people in disadvantaged position belonging to ethnic minorities, Roma inclusive, is characterized with higher morbidity, lower life expectancy and higher mortality, especially with children. This is a result from unhealthy lifestyle and shocking poverty. Poverty among the Roma is spread ten

times more than among the Bulgarians. Poor housing conditions in Roma neighbourhoods, lack of basic infrastructure such as water supply and sewage are reasons for the outbreak of epidemics of infectious diseases resulting from lack of hygiene. The coverage of Roma children in planned immunization schedules is significantly lower compared to the coverage of Bulgarian children.

The health situation of the Roma community is continuously deteriorating. The main issues are:

- High percentage of persons without health insurances¹⁰
- Lack of packages of minimum health services for the persons without health insurances
- Continuing problems with the appointment of health mediators
- Lack of health prevention activities
- Lack of individual approach to the sick
- Lack of health awareness among Roma women.

In recent years, the health system introduced and established the model of mandatory health insurance. A National Health Insurance Fund (NHIF) was established and the healthcare financing was shared between the Fund and the Ministry of Health (MH). The plan was that the MH would gradually withdraw from health care funding which would be fully covered from health insurance contribu-

tions. The MH then would only support some special national programmes for e.g. screening, prevention.

The health insurance model, which has been established in Bulgaria by virtue of the Health Insurance Act, includes two types of health insurance: compulsory and voluntary.

The contributions in the cases of compulsory health insurance are shared between the employee and the employer/the state and represent a percentage from certain income, as it is in the majority of European countries. Payment for medical services is settled directly between the insurer and the service provider.

The compulsory insurance is implemented through the system of NHIF of 28 regional branches distributed throughout the country (Regional Health Insurance Funds – RHIF) in correspondence to the country's administrative division by districts.

The Health Insurance Act introduces a **basic package of medical activities** guaranteed from the NHIO budget for all persons having compulsory health insurances. The scope and volume of the basic package are defined in Regulation 32 of the Minister of Health.

NHIF pays fully or partially for the provision of the following types of medical aid: medical and dental activities for prevention and early diagnostic of illness; outpatient and hospital care for diagnosing and treatment of diseases; medical rehabilitation; emergency medical aid; medical care during pregnancy, delivery and maternity; dental care and dental-mechanic

¹⁰ For detailed account of the profile of people without health insurance in Bulgaria see (Markova et al: 2009)

work; medications for home treatment; medical aids and dietary foods; medical expertise of work ability.

According to the Healthcare Act, the main package of health services is guaranteed from the NHIF budget for all persons having health insurances.

The provision of access to the healthcare system under the arrangements of compulsory health insurance is delegated to the general practitioners. Every person having health insurance is entitled to select their general practitioner and to change him/her for another GP twice a year.

Access to specialized outpatient care and diagnostic tests is limited at the GP's office through the applying of regulating standards introduced by NHIF, which include a limited **number of medical directions referring a patient to medical specialists and certain amount of money allotted for medical/laboratory tests.**

In outpatient care there exist certain regulating standards as well. These include the number of reported medical examinations and the number of dispensary cases. Specialists avail of a certain number of directions for referring a patient to another specialist, an amount of money allotted for laboratory tests limited per three-month periods and for highly specialized activities.

Immunizations and preventive examinations are GPs' responsibility. GPs, in their turn, conclude contracts with other providers of medical aid, usually emergency-aid specialists to provide emergency aid to GPs' patients.

Access to hospital aid is implemented through directions issued at all levels of outpatient care and the patient can choose a hospital throughout the country, provided that this hospital holds a signed contract with the RHIO.

Payment for health services is regulated by the National Framework Contract, which defines the scopes and prices of health services.

On the one hand, access to specialized outpatient aid and diagnostic is limited because of a limited number of directions referring a patient to examination by a medical specialist, and on the other hand NHIO does not cover expensive consumables employed in hospital treatment. In this situation exemplary **regular payers of their health insurance contributions are made to pay additional money in order to be examined by a specialist**, which is an explicit example how access to medical aid is being limited.

Consecutive changes introduced in the Health Insurance Act in 2003 and 2004 provided conditions for **deferred payment of contributions under the compulsory health insurance obligation**, and the individuals staying abroad for more than **183 days in a year can be relieved from their obligation to pay health insurance contributions** upon advance notice given to the National Revenue Agency.

Following the most recent changes, health insurance status is determined on the grounds of the contributions paid in the most recent 36 months; irregularity is pronounced in case of non-payment of

three or more contributions and in cases of contributions left unpaid in past periods: art. 109 of the Health Insurance Act.

Three are the main measures through which the government provides social protection for persons in disadvantaged position with regard to their access to healthcare:

- Coverage of the health insurance for persons in disadvantaged position;
- Payment of targeted aid for provided hospital care;
- Providing of midwifery aid to women without health insurances.

With the changes introduced in the Health Insurance Act, as of 01.01.2003, the Social Assistance Agency through its territorial divisions transfers money targeted for health insurance of persons in disadvantaged social position who do not have health insurance rights or whose health insurance rights have been broken.

As provided in Art. 40, Para 3, I. 5 and I. 9 of the Social Insurance Act, the following groups of individuals are being insured from the national budget through the Social Assistance Directorates at their address of permanent residence, if such individuals are not insured on other grounds:

- If they meet the conditions for receiving monthly social aids and targeted aids for heating under the procedures provided in the Social Assistance Act, if such persons are not being insured on another

grounds; included in this group are individuals accommodated in specialized institutions for social services.

- Parents, adoptive parents or spouses who take care of disabled persons of lost ability to work over 90% who are in constant need of assistance.

From these regulations it can easily be seen that access to medical care for the poor is tied up with the eligibility for one of the GMI programmes. These programmes are very restrictive. For example the monthly social benefits only cover 3% of the population. Which means that being poor in Bulgaria is related to a very high risk of being excluded from the health insurance system.

The Social Assistance Directorates prepare each month and present to the territorial divisions of the National Revenue Agency lists of the persons receiving monthly social aids under Art. 9 of the Regulation for Applying the Social Assistance Act intended for social assistance, targeted aids for heating, aids to non-insured persons accommodated in specialized institutions for social services, aids to parents, adoptive parents or spouses who take care of disabled persons of lost ability to work over 90% who are in constant need of assistance.

Bulgarian citizens who meet all of the below listed criteria have the right to receive targeted aid intended for payment of hospital care for diagnostic and treatment provided in medical institutions (Decree No 17 of the Council of Ministers

of 31.01.2007):

- They are not health insured under the conditions and order provided in the Health Insurance Act;
- They don't have income;
- They don't possess receivables, deposit accounts, share participations and securities of total value above 500 BGN;
- They don't possess real or personal property which might be a source to generate income, except for objects servicing this person's usual needs;
- They haven't concluded a contract to give property as compensation for support and/or care provided to them;
- They haven't transferred residential- or holiday property and/or shares thereof against payment in the recent 5 years (**amended to 1 year**);
- They haven't transferred ownership over residential- or holiday property and/or shares thereof in the recent 5 years via a grant contract;
- They haven't travelled abroad on their own expense in the recent 12 months except for the treatment of a medical condition; (**cancelled**).

As can be seen from the list of criteria means tests for receiving targeted aid were forbiddingly restrictive, which lead to the rejection of a large proportion

of applicants.

Midwifery aid to women without health insurances is provided under a Regulation of the Ministry of Health – Regulation No 26 of 14.06.2007. The scope of medical services related to midwifery aid provided to women without health insurances includes the services specified in clinical pathway No 141 "Delivery regardless of pregnancy duration, foetus examination and manner of delivery". This Regulation has been in effect as of 01.01.2007 and the activities under this pathway intended for women without health insurances are financed from the national budget through NHIO. **This Regulation does not provide funds for monitoring of pregnancy.**

Newborn babies and children up to 18 years old are entitled to free medical aid regardless whether their parents have health insurances or not.

The analyses of reported data about the past period show that over one half of the approved applications for targeted aid have been for payment of hospital aid under the clinical pathway for child delivery.

The data provided make evident that the system for social protection of persons in disadvantaged social position with regard to their health insurance does not cover the needs for medical aid of the separate groups in the three main directions in which this system operates.

According to conducted sociological research, 57.7% of the persons without health insurance indicate unemployment as being the reason why they don't have

health insurance, while 12.9% claim financial difficulties. These persons do not cover the criteria for receiving monthly social aids and targeted aids for heating, thus they are not eligible for health insurance from the national budget.

This group of persons without health insurance can rely on **two social safety nets**: one extending targeted aid for hospital treatment, and one for the provision of midwifery aid to women without health insurances. In order to obtain support for hospital treatment, the persons without health insurances must meet special requirements. The information provided by the Social Assistance Agency shows that on the grounds of applying the above eligibility criteria, targeted aid for hospital treatment was refused to 50% of the applicants in 2006, to 37.4% of the applicants in 2007 and to 39.1% of the applicants in 2008.

This means that such people are deprived even of hospital aid, when such aid is necessitated in case of grave diseases. Persons without health insurances belonging to the groups who define themselves as unemployed or being in difficult financial situation are practically deprived of access to all levels of outpatient medical aid with the exception of emergency medical aid.

The building of a system for social protection of persons in disadvantaged social position should be based on the constitutional provisions which validate health insurance as a right and not as an obligation of the Bulgarian citizens.

Even the criteria for receiving monthly social aids and targeted aids for heating distributable under the order of the Social Assistance Act, which are also very restrictive, are inapplicable to the provision of health care services. So even more restrictive means tests are applied to poor people without health insurance.

The issue about the health insurance of the socially disadvantaged persons is obligation of the state and it must find its adequate solution, however not in the form of social assistance when a need for medical aid arises but rather as payment of contributions to the regular health insurance system. For this purpose current means tests for GMI need to be revised so as to include at least the persons in the lowest income decile a lot of whom are Roma.

It is necessary to build an independent system for the health insurance of these citizens, which should account for their ability to pay regularly the health insurance contributions and such system should further provide flexible mechanisms for quick inclusion when a person is not in a position to pay their health insurance contributions.

The system for protection of socially disadvantaged persons turns the **emergency medical aid into the single health aid accessible to a significant share of the citizens belonging to these vulnerable groups**. It is necessary to thoroughly review the health insurance system with regard to these persons and it should be done in compliance with the

constitutional provisions (Kirov et al: 2008).

1.3.2. Health mediators

1.3.2.1. Background

The initiation of the position of Health Mediator in the Roma community can be mentioned as a positive practice in the field of healthcare. This is a new practice for Bulgaria, while it has a long history in other European countries such as France, Spain and Romania. The health mediator in the Roma community is meant to act as intermediary between the poorest Roma communities and the healthcare and social services.

The model of the **HEALTH MEDIATOR** has now 10 years of history and its model has been recognized as one of the most successful practices in the field of minority access to health services. The experiences of the Romanian NGO “Romani Criss”, the Romanian Ministry of Health and the Institute of Public Health of Netherlands have been used for the development of the model of the health mediators in Bulgaria.

1.3.2.2. Description of the Practice

The main objectives of the mediation programme are:

- Overcoming cultural barriers in the communication between Roma communities and medical personnel
- Overcoming the existing discrimi-

natory attitudes in Roma health service;

- Optimizing the implementation of preventive programmes among the Roma population;
- Health education of Roma and active social work in the community;
- Active social work with vulnerable groups of Roma

Initially the model was introduced by EMHPF, but later the model became government policy implemented by the Ministry of Health and the National Council for Cooperation on Ethnic and Demographic Issues¹¹.

In Bulgaria, the health mediator model was launched in 2001 by the team of “Ethnic Minorities Health Problems Foundation” (EMHPF) as a part of a pilot project under which the first five health mediators were trained in Iztok quarter in Kyustendil.

2003-2007 - The first Health-Mediator Curricula were developed by the Ethnic Minority Health Programme Foundation in 2001 (www.emhpf.org). EMHPF was responsible for the training of the health mediators during the project implementation in its part concerning health mediators’ training.

The Following projects have played key role for the training of health mediators (HM):

- 2003-2004 - PHARE 2001 Programme, Consortium – OSI Sofia,

¹¹ Now renamed National Council for Cooperation on Ethnic and Integration Issues.

EMHPH, Bulgarian Family Planning Association, Diversity Foundation;

- 2005-2007 - ECIP Foundation, EMHPF, MATRA Programme of the Ministry of Foreign Affairs of Kingdom of Netherlands, working in the rural areas of 5 districts — Montana, Yambol, Ruse, Razgrad, Blagoevgrad
- 2006 - Initiative for Health Foundation and The Roma Health Foundation- Sliven, under European project; the training component of HM is implemented by EMHPF
- 2006-2007 PHARE 2003, Centre of social practices

2007 – The curricula for the Health Mediators programme were approved by the Ministry of Health and the National Council of Ethnic and Demographic Issues under the PHARE project - Europeaid/121330/D/SV/BG - Educational and Medical Integration of Vulnerable Minority Groups with a Special Focus on Roma – Component 03: Health

All the health mediators were trained under a uniform curriculum approved by the Ministry of Health. The trainings were financed from different programmes and projects. The total number of trained health mediators in the period 2001 – 2010 was 178. In 2010 and 2011 the officially appointed health mediators have been 105. About 15 of them are not actually working because of different reasons. In 2011 health mediators have been appointed in 57 municipalities in Bulgaria.

Financing of the Health Mediator Programme

In late 2005, the Ministry of Labour and Social Policy (MLSP) showed their interest in the mediator’s position. In 2005, only the trained health mediators from the town of Dupnitsa and the town of Dobrich were appointed under the Programme “From social assistance to employment”, and in 2006 another thirteen health mediators were appointed under the same programme. In the period 2003 – 2007, under different projects and programmes more than 100 health mediators were trained in the whole country.

Starting from 2007, the health mediators were appointed in the municipalities through delegated budgets. Despite this achievement, it turned out that each year the budget for health mediators’ salaries had to be negotiated and approved by the Government (Ministry of Health and Ministry of Finance). There were many difficulties during the years: health mediators weren’t appointed on time, they waited for months to start working, or the delegated budget was delayed. Supported by nongovernmental organizations and citizens that stand for the institutionalization of the health mediator’s profession, representatives of the Network had work meetings with the respective institutions, sent letters to the Prime minister and to relevant ministers.

In one of the critical periods for the health mediator’s profession (2009), a representative from the National Network of Health Mediators (NNMH) was sent to Brussels. A meeting was held with the representative of the European Com-

mission - Mr. Eduardo Fernandez-Zincke, member of the cabinet of the Commissioner responsible for health Adroulla Vassiliou. The meeting was arranged following a letter addressed to Commissioner Vassiliou which briefly described the situation of the profession "health mediator" in Bulgaria. The letter indicated great number of difficulties with regard to the institutionalization of the profession: problems with approving the delegated budgets each year, the lack of an employee in the Ministry of Health in charge of the mediators' programme, the blocked process of selection and training of new health mediators.

In 2010 and 2011, the necessary minimum budget was secured and the programme of health mediators was more sustainable than it was in 2008-2009, meaning that the service could be delivered without break and discontinuity. The delegated

budget comes on time (in January each year). Now (March 2011) the Network of Health Mediators holds even a promise of Tsvetan Tsvetanov (vice-premier and chairman of the National Council for Ethnic and Demographic Issues in the Council of Ministers) that the budget has been secured for year 2012.

Number of mediators

More than 100 health mediators were trained throughout the country under different projects and programmes in the period 2003 through 2007. In 2008, nineteen new health mediators were trained in the Medical College in Plovdiv. They were selected from municipalities without any trained health mediators at that time, and the mayors of these municipalities covered the costs for the health mediators' training.

year	Number of employed HM	The budget for HM salary comes form:
2005	6 HM (2 municipalities)	Programme „From social allowance towards employment“, Ministry of Labour and Social Policy
2006	13 (3 municipalities)	Programme „From social allowance towards employment“, Ministry of Labour and Social Policy
2007	57 HM (24 municipalities)	Ministry of Finance, Delegated budget
2008	111 (55 municipalities)	Ministry of Finance, Delegated budget
2009	105 (55 municipalities)	Ministry of Finance, Delegated budget
2010	105 (55 municipalities)	Ministry of Finance, Delegated budget
2011	105 (57 municipalities)	Ministry of Finance, Delegated budget

In 2011, there are 105 health mediators employed in 57 municipalities (in Bulgaria municipalities are 264) in 20 regions (out of total 28).

Who provided and led the training of Roma mediators?

year	Number of trained health mediators	Organizations that trained health mediators	Official certificate for HM Training/ education comes from:
2001	5	Ethnic Minorities Health Problems Foundation - EMHPF, working in Iztok quarter, Kyustendil	
2003-2004	51	PHARE 2001 Programme, trainees from 15 Bulgarian cities; Consortium – OSI Sofia, EMHPH, Bulgarian Family Planning Association, Diversity Foundation	Ministry of Health
2005	16	ECIP Foundation, EMHPF, MATRA Programme of the Ministry of Foreign Affairs of Kingdom of Netherlands, working in the rural areas of 5 districts — Montana, Yambol, Ruse, Razgrad, Blagoevgrad	Ministry of Health
2006	17	Trained HMs from Varna, Sliven, Stara Zagora, Sofia, Initiative for Health Foundation - Sofia and Roma Health Foundation -Sliven, under European project, funded by Secretariado General Gitano	Ministry of Health
2007	45	PHARE 2003 Programme, trained in the Medical Colleges in Vratsa and Plovdiv	Medical college in Plovdiv
2008	19	Trained in the Medical college in Plovdiv, training was paid by the municipalities	Medical college in Plovdiv
2010	25	Trained in the Medical college in Plovdiv, training was paid by the municipalities	Medical college in Plovdiv

Health mediators can be trained in two certified medical colleges – Plovdiv and Vratsa.

The colleges form part of the Medical University of Sofia and Medical University of Plovdiv.

The Profession “Health Mediator” is officially recognized by the National Classification of Occupations in Bulgaria in the following group: Single Group3222: Health Inspectors;

Code of the position: 3222-3002

Job title: Health Mediator

The health mediator's model is unique and successful for Bulgaria because:

- For the first time in Bulgaria a profession has been institutionalized that contributes to the direct improvement of the access to health and social services for vulnerable groups (especially Roma);
- The introduction of this new profession also contributes to overcoming cultural barriers in the communications between Roma population and medical staff and the existing discrimination attitudes in the field of health services for the Roma locally;
- The health mediators are irreplaceable figures in optimizing the implementation of prevention programmes among the Roma population;
- The health mediators introduced practices for health education of the Roma and for active social work in the community;

The Bulgarian health mediator's model already provoked the interest of the neighbouring countries Macedonia and Serbia. In 2010, trainers of health mediators from Bulgaria were invited to visit Macedonia in order to participate in training for state institutions and NGOs where they presented the Bulgarian model.

1.3.2.3. Achieved Outcomes

2010 was the most successful year for the health mediators and the Network of Health Mediators in Bulgaria.

Due to the efforts of the Directorate "Ethnic and Demographic Issues" at the Council of Ministers, municipalities and others, for the first time **the delegated budget was received on time and the health mediators started work on time, without the problems caused by delayed payments.** In 2011 the delegated budget was received on time too.

In 2011, for a fifth consecutive year the programme was financially backed by the state. NCCEDI, Ministry of Health, and the National Network of Health Mediators agreed to increase the number of health mediators from 105 to 130 in 2012. This will support the expansion of the programme in other districts and municipalities in which up to now there haven't been trained health mediators.

National Network of the Health Mediators – www.zdravenmediator.net

The idea for establishing a health mediator's network evolved over the years and became a fact in a time when the first 57 health mediators were appointed in 24 municipalities in the country. In February 2007, two meetings took place with more than 50 health mediators to discuss the concrete objectives and tasks of the National network, the organizational structure of the Network and its representation. Association "National Network of the Health Mediators" was established on 27 April 2007 in Sofia. Founders of the

Network are health mediators, physicians (specialists, general practitioners), nurses, trainers of the health mediators, experts in integration policies, experts and specialists in the field of public healthcare, followers and citizens who support the introduction of the health mediator's figure as a part of the public healthcare system in Bulgaria.

The Network of the Health Mediators which works for improving access to healthcare is the biggest Roma organization in Bulgaria: more than 80 members in the Network are Roma and they work daily in their Roma neighbourhoods (Roma mahalas), villages, etc.

Other achievements of the health mediation programme include:

- Increased number of immunizations and re-immunizations in the Roma community;
- Prevention of early births: the health mediators provide information about contraception (condoms, contraceptive spirals);
- Improving the access to primary and specialized medical aid;
- Improved implementation of the national health programmes targeting mother and child healthcare;
- Informational campaigns focused on different diseases with regard to the specifics of the community;
- Improved health culture: health insurance, rights and responsibilities

of patients, etc.;

- Prevention of tuberculosis: the health mediators participate actively in screening campaigns;
- Prevention and participation of the health mediators in national immunization campaigns: measles epidemics, prevention of child cerebral paralysis;
- Increased health awareness among the Roma: hygiene at home and in the neighbourhood;
- Change of the attitudes of Roma with regard to their health: health is valuable;
- Antidiscrimination model: Roma and Bulgarians work together (health mediators, physicians, health specialists, local authorities, etc.);
- Changed attitudes towards education: parents are encouraged to send their children to school;
- Work with Roma women: increased health culture with regard to family planning and reproductive health, domestic violence and trafficking prevention;
- Work with youths: participation of young Roma in public and civil initiatives on occasion of Roma holidays.

Conditions that will make sustainability of the health mediation programme possible

- Sustainability of the "health media-

tor” profession can only be guaranteed in a long-term period by making it part of the health care system and policies for access to health care;

- The delegated budgets for health mediators should be ensured and transferred to the municipalities on time in order to guarantee normal work conditions for the health mediators. The budgets for health mediators’ salaries should be included in the three year budget forecasts;
- National standard for the contracts, work conditions, salaries and work time of the health mediators should be elaborated in close cooperation with municipalities, state institutions and experts;
- Training of new health mediators should be made regular and ideally based with Medical Colleges and Universities;
- Promotion of the profession “health mediator” with the participation of institutions and the Ministry of Health – internet site, good practices – in national and local media – PR campaigns, working with national and regional Media;
- Internal professional supervision of the health mediators’ work should be organized. Independent monitoring and comprehensive evaluation of the impact of the health mediators’ work hitherto should be conducted taking into account the differences among minority

communities in terms of health status and health related life styles.

- The Ministry of Health should designate an expert directly responsible for the health mediators’ programme. This person should be acquainted with the essence of the health mediator’s job; s/he should also know and be sensitive towards the specific health problems of the ethnic minorities.

Replication and scaling up of the health mediation programme has already started. As the participation of municipalities in the process is crucial it is very important to involve closely the National Association of Municipalities. An overall assessment of the total number of health mediators needed in Bulgaria will be very useful for determining the optimal size of the health mediation programme. Such an assessment should be based on a new evaluation of the programme, mapping of communities that need health mediation, and drafting of a standard for the health mediators workload.

1.3.2.4. Mechanisms for monitoring and evaluation

In 2007, an assessment of the mediators’ motivation and the municipalities’ readiness to employ them and to effectively utilize their skills was conducted. Most of the settlements with health mediators holding certificates from the Ministry of Health (MH) were visited: Pazardzhik, Lom, Varna, Dobrich, Lovech, Kazan-

lak, Stara Zagora, Asenovgrad, Haskovo, Yambol, etc.

The major goals were both to assess the motivation of the trained mediators per settlement and to strengthen the position of health mediators in the reformed health system. The assessment tried to specify the institutional map of health mediation and, more specifically, the roles of the local authorities, Regional Centres of Health Care, the Regional Inspectorates for Public Health Protection and Control (RIs for PHPC), Regional Health Insurance Funds, National Public Health Institute, and other stakeholders.

Looking for a slot for health mediators' placement within the Bulgarian health-care system, at that time health mediators were perceived as part of the Health Strategy for Disadvantaged Persons. Such an approach gave also an acceptable solution for the funding mechanism. Funds for health mediation could be easily incorporated in delegated (allocated) budgets for all municipalities where there are health mediators holding certificates from the MH. It can be argued of course to what extent this approach is viable in a long-term perspective and whether health mediation is a temporary solution or forms a part of the permanent package of public services in healthcare.

A model for evaluation and monitoring the work of the health mediators was also elaborated in 2006 with funding from the Phare programme: PHARE 2004 - TA for the implementation of the Health Promotion & Preventive Maternal and Child Health Care) (EuropeAid/122909/D/

SER/BG).

The model for monitoring and evaluation of the health mediators' work gave some guidelines and recommendations for conducting such monitoring. In particular, the monitoring model reviewed a list of key issues and gave some concrete recommendations how to address them:

- Internal monitoring – models and proposals;
- Timeframe of the monitoring conducted;
- Who should conduct such monitoring;
- Tools for conducting monitoring – analysis of reports, provided by the health mediators; monitoring field visits; interviews with representatives of the local community, health and social institutions, GPs and other medical specialists, employers, etc.; focus groups.

The elaborated proposal for monitoring and evaluation of health mediators' work in Bulgaria was meant to be used and adapted by the municipalities where health mediators work. We could not collect information to what extent the work of the health mediators continues to be monitored at present. There is little doubt that this needs to be done systematically along with introducing a system for professional supervision and support for this challenging helping profession, in which high rates of burn out should be expected.

1.4. EDUCATION

1.4.1. The Education of Roma in Bulgaria

Access to quality education for Roma children is a complex problem of key significance to these children's overall future development and integration. This problem has been well recognized and it is no by coincidence that various NGOs, foreign donors, local- and central government institutions have invested a lot of effort, time and money in this area over the past ten years compared to any other domain of Roma integration.

Practical field work through these years showed that there is **no universal educational model** which can be multiplied everywhere. The two examples of good practices in education outlined in this report are only a small fraction of the large "palette" of approbated practices, which can be applied in varying combinations depending on local conditions.

In recent years, this approach has logically pushed a large number of NGOs in the direction of developing and applying of "**local models**" for access to education, which, on the one hand take account of all local specifics, and on the other hand apply a comprehensive approach to the resolving of each individual issue.

Development and applying of "local educational models", which are unique for the respective place, have been increasingly meeting with the approval and support of specialists and NGOs and we can definitely state that in the future we shall witness a massive development and rep-

lication of this approach.

It should be noted that nearly all good integration practices have started as projects implemented by NGOs and financed mainly by international donors. To a large degree, this circumstance has provided for the freedom needed by the NGOs to "experiment" with new methods and approaches. Learning from their own experience and mistakes provided these NGOs with an opportunity to develop practices, which in many cases became a cause for changes in governmental policies, in one direction or another.

Many NGO initiatives have been related to "attacking" the issue of early dropouts from school of Roma children. One of the reasons for such dropouts is the fact that Roma children do not have command of the Bulgarian language because until their enrolment to school they have never had the chance to learn Bulgarian.

In first school grade, the lack of command of Bulgarian language adds up to the stress of entering a new environment and the demand to observe new rules. Even in cases where children do show interest in learning, they soon lose it because the teacher-pupil communication is virtually impossible and children get depressed from being perceived as ignorant. Poor command of Bulgarian language leads to serious delays in mastering the topics on the school curriculum, which causes gaps in knowledge to accumulate with years and thus, eventually, children drop out from school.

This is the reason why numerous NGOs dealing with educational issues of Roma

children direct their efforts so that these children can master the official language of the country. This happens either before children enter the first school-grade: in preparatory groups organized in pre-schools or in preparatory classes organized at the schools, or in special lessons conducted by hired specialists. In all cases however, the fundamental practice is identical: alongside with the professional teachers who lead the educational process, teacher assistants attend in class. These teacher assistants are Roma of secondary education who have equally good command of both their mother tongue and the Bulgarian language. They interpret the taught material to the children, when necessary, they monitor that all children understood and memorized the material taught and they take care for the good relationship between Roma parents and the school, i.e. they provide for the "family-school" liaison.

Thus, in 1996 in "Liliya" preschool in Stolipinovo quarter in Plovdiv, under the leadership of Prof. Irina Koleva and with the support of C.E.G.A. Foundation and "Roma" Foundation of Plovdiv, the first "teacher assistants" were introduced. This has also been the first mediation practice introduced in Bulgaria: the practice of "learning mediator" with the respective job description included in the Classification of Occupations.

Highly positive results have been achieved in the first years after the "learning mediator" position has been introduced: increased interest to learning not only with children but with their parents as well, very good achievements in the

elementary school grades and abrupt reduction in the number of dropped-out children.

These achievements have become the reason for the development and implementation of two projects under the PHARE programme, the first of which was implemented by a Consortium of leader organization "Step by Step" Foundation. This project was targeted at the development of a job description for the "teacher assistant" position, and the second project implemented by a Consortium led by "Care Bulgaria" provided training to teacher assistants.

Introducing delegated budgets in education practically cut off opportunities for employment of additional teaching staff (what teacher assistants are) and the process of hiring such staff in schools could not be developed to a degree, which would have allowed individual approach in the work with every single child in the classroom to be applied. There are examples from other education systems showing that this could become a good remedy for many behavioural and learning problems. It's plainly visible by everyone that the Bulgarian teacher cannot pay sufficient attention to every child in their class owing to a large number of pupils included in each class formation.

The first desegregation projects started with claims to be the ultimate alternative to the introducing of the teacher assistant position in the educational system, attention being paid exclusively and solely to the legal aspect of the process while the processes of children's adapta-

tion and progress were not included on the agenda.

It was believed that the mechanical act of transporting pupils from Roma neighbourhoods to mixed schools would automatically resolve the issues of equal start and equal access to education, and that the mixing of children was a guarantee in its own right that Roma children would integrate without problems.

There were Roma employed at the desegregation projects, the so-called “mentors” who were responsible for the bus transportation of the children to school and back. The environment of the host schools had not been prepared in advance for what some school directors have called the “invasion of Roma children”. This environment stayed hostile to Roma children and this was the reason why we witnessed the process of return of Roma children to segregated schools. What’s more, the lack of organization, a plan for risk mitigation and clear tools to address the situation in receiving schools?

With the closing of approximately 400 schools throughout the country owing to demographic and financial reasons, numerous Roma children were additionally commuted to host- or secondary schools. All these circumstances gave birth to a phenomenon called “secondary segregation” known from before, when the number of Roma children per class exceeded 25 to 30% in one ethnically mixed host school. Then another phenomenon appeared: the segregated school simply shifted from the Roma neighbourhood to downtown. In this way, the so-called

“optimization of school network” in many cases additionally devaluated the efforts for successful desegregation of Roma pupils, though examples can be cited, where financially motivated optimizing considerations became a valid reason for the closing of schools, and for the successful (at least for the time being) redirection of children to another, better school.

Until some years ago, the experience of Association “Nevo Drom” of Kyustendil in the area of desegregation was very valuable with the comprehensive approach applied by it. Their approach used a combination of a large share of the so-far approved educational practices:

- Work with the children in preparatory groups to make them ready to start school and to prepare children for enrolment in downtown schools.
- Organizing of trainings for the host-school teachers, for teacher assistants, for parents (both Roma and Bulgarian), and for the local educational institutions.
- Scientific monitoring on the desegregation process: preparation of preschool children for the forthcoming first grade in the mixed school, trainings for the teachers conducted by university lecturers.
- Preparation of parents (“School for parents”).
- Close cooperation with educational institutions and local mass media.

- Financing for extracurricular integration activities in host schools: a proven practice to raise children's interest to school.
- Introducing a large variety of manuals and aids on the subject of cross-cultural (cross ethnic) understanding and intellectual experience in the daily work of teachers and teacher assistants in preschools and host schools.

Over the time, several models of desegregation shaped out: the first one is the Vidin model of clearly expressed human-right protection nature, this being the most widely spread model in Europe; the Kyustendil model, which has been based on university research on intercultural education. This model tries to test different approaches involving all relevant stakeholders.

The third model of desegregation can be called a model of desegregation through voluntary shift of pupils from the majority, instead of from the minority. This is achieved through turning the segregated schools into "magnet" host schools for children from the majority, the focus being on intercultural education but in the surroundings of the majority. This model is successfully applied in Belgium and has only been tested in Bulgaria in the late 90-ties in the framework of a Phare funded project to reduce school dropout.

The major drawback of the Kyustendil model of desegregation, as well as of all desegregation projects made after the pattern of the Vidin model, is the

total lack of activities in the segregated schools, the explanation being that no money should be "poured down" into schools offering questionable quality of education. This approach leads to complete marginalizing of the most vulnerable of Roma children, namely those children who remain in the segregated school after the places on the desegregation programme have been filled-out and after the pupils of higher social standing have left the segregated school, leaving behind an even more marginalized and marginalizing social- and pedagogical environment.

Educational experts (Ivatts: 1998; Kyuchukov: 2006) consider that the second (i.e. the one applied in Kyustendil) model is more suitable for the education of Roma children, while the third (magnet) model is more appropriate for preschools and elsewhere as possible (Kyuchukov: 2006).

The comparison between the different models of desegregation, and the example with the introducing of teacher assistants were necessary in order to demonstrate how the good practices can be additionally "improved" through combining and complementing, while neither practice is being perceived to be an ultimate alternative. What's more, the outlined negative aspects of the different desegregation models show that we have complex and multilayer processes and they should be approached with greatest sense of responsibility, good planning and moderation, and with the support and engagement of all stakeholders in the process.

Desegregation understood simply as bussing (transporting of Roma children to school and back by bus) cannot be applied in all places. Currently, only the large cities offer conditions to start desegregation because of existing capacity to enrol Roma children in downtown schools although this is done up to a certain critical threshold, the purpose being to avoid withdrawal of Bulgarian children from these schools.

In Lom, for example, the schools are “mixed” with prevailing number of Roma children: a situation becoming more and more typical in rural and areas and small towns with large share of the Roma population. These schools do not have the capacity to enrol even one extra child, thus the only possible strategy here is based on work targeted to improve the quality of education in existent schools, the focus being on intercultural education.

1.4.2. Desegregation

1.4.2.1. Desegregation of the Roma students in Vidin



In 2000, following an idea of the DROM Association in Vidin, the first project on

desegregation of the Roma education was initiated. It had relatively small coverage considering the size of evolving desegregation programmes, which occurred just a few years later. The pilot project covered 200 children from the “Nov pat” (New Way, Nevo Drom) Roma neighbourhood in Vidin and was funded by the Roma Participation Programme of Open Society Institute – Budapest.

Gradually at the year of 2009, the number of locations where desegregation programmes were being implemented reached 10: Vidin – implemented by “Drom” Association, Montana – “Sham” Foundation, Berkovitsa – “Nangle 2000”, Sofia – “Romani Bah”, Kyustendil – “Roma” Foundation, Pazardzhik – “Napredak” foundation, Plovdiv – Foundation for regional development - Roma, Pleven – “Amala R”, Stara Zagora – “Lozenets” Foundation and Sliven – “Roma academy for culture and education”, covering between 3000 and 3500 children in total (REF: 2011).

The model of desegregation initially accepted by the Vidin project, and subsequently by the rest of the projects in the other cities, included all or most of the following elements(BHC: 2006):

1. Enrolment of Roma children in as many as possible host schools outside Roma neighbourhoods.
2. Specially hired teachers provided the academic administration of the project by determining (independently or through consultations with other project participants and the host school administrations) a strat-

- egy for enrolment, the need for extra academic work with children and the types of extracurricular activities that would be organized, and by supervising the work of the councillors.
3. The project staff sought out political and social support for desegregation from the local educational authorities, from the Roma community, from non-governmental organizations, and from political parties active in the respective town.
 4. The project hired councillors, usually one per host school, who met the needs of the enrolled Roma children and of their teachers, and who provided an everyday liaison between the schools, the project administration, and the parents.
 5. The pupils were transported from the Roma neighbourhoods to the host schools in buses specially purchased by the non-governmental organization for the purposes of desegregation and labelled accordingly.
 6. The project organized supplementary classes for children who were falling behind in their classes. These were taught by teachers from the host school or by other teachers specially hired for this purpose. The project also provided supplementary preparatory classes in summer and during other school vacations.
 7. The project provided teachers from the host schools with opportunities for additional training, which had to lay special accent on multicultural education.
 8. The project organized extracurricular activities, holiday celebrations, excursions, summer camps, etc., of an explicitly multicultural character, and attracted both Roma and Bulgarian children and parents to participate.
 9. The project sought the support of the mass media, the local educational and municipal authorities and NGOs.
 10. The project provided school supplies and meals for the needy participants and in some cases it also provided clothing and shoes.
 11. The project supported the Roma parents and helped them participate in parental meetings at the host schools and in the occasional meetings organized especially for parents of children in the project.
- Usually the team of the project consists of the following administrative and operative staff:
- Project director: Responsible for the overall implementation of the project, observing and monitoring the rest of the team;
 - Project manager: Responsible for the on-field activities;
 - Teacher assistants: Accompanying the children from the neighbourhood to the host school and bringing them back after school; maintaining relations with the parents of the children as well as with the teachers being the mediator between the community and the school;

- Coordinator/s working with parents: responsible for the direct communication with parents – keeping them informed, involving them in activities of the project, etc.
- Bus driver/s
- Accountant

For the years 2000 – 2005 those initiatives were supported primarily by the Open Society Institute in Budapest. After the launch of the Roma Decade, the funding for the initiatives from 2005 to 2009 was provided by the Roma Education Fund. For the same period (2005 – 2009), the total amount for the desegregation projects was approximately 4.000.000 euro.

In 2010 the Roma Education Fund decided to scale up the success of the projects by transferring more responsibilities to the public authorities, who are supposed to be and are obliged to be the providers of quality education for all. Thus, the REF has invested in the Centre for educational integration of children and students from ethnic minorities at the Ministry of Education, Youth and Science in a project aimed at institutionalization of the desegregation process. Results cannot be discussed yet as the project is still ongoing.

Currently, the desegregation projects are being implemented with the financial assistance of the Roma Education Fund through the Centre for Educational Integration of Children and Students from Ethnic Minorities and some of them are financially supported by the America for Bulgaria Foundation.

1.4.2.2. Achieved outcomes

The approach, implementation and results are open to discussion. But dry facts are, that for those 10 years:

- around 3000 children were provided with access to quality education;
- the awareness and the motivation of the Roma parents to send their children to school increased;
- the dropout rate significantly decreased;
- the average GPA of the children from the project are comparable to the children from the majority in the respective schools;
- public awareness on the issues of the educational integration were increased;
- piloted successful model;
- established relationships with relevant public institutions;
- gained valuable experience on community work.

1.4.2.3. Factors and challenges to achieving good outcomes

Total and long-term commitment: The work is very complex and for a single NGO it takes the full capacity of resources to manage implementation. Implementers share that their working time is '24 hours per day'. They cannot even take a vacation during the summer, because this is usually enrolment time, and they

are the ones who assist to the families with all required documentation for having their children enrolled.

Long-term planning: The process of desegregation should not be taken as a single activity or a single project. It should be planned in details for as long as possible (depending on the existing resources). Planning should also include raising the capacity of the project team, as the field workers are the ones who actually drive the process. Their work reminds of the work of professional social and community workers, extremely well paid, which is not the case with the project teams of the existing desegregation projects. They, however, have gained the trust of the community, of parents, children, teachers and institutions and have gained extremely important skills and knowledge by themselves.

Besides the factors for achieving good results, the most valuable condition for sustainability would be the involvement of the public authorities as they can guarantee sustainable budget, independent from external donors.

Transferring the existing practice into wide local/national educational policies targeted at complete educational integration, involving in the process not only Roma children, but also children from other minorities and children from the majority and their parents as well as all relevant public authorities.

The process of desegregation proved to be replicable. It has already been shown in the past and the present. The model, applied in Vidin, has been replicated in

the country and abroad – Romania, Hungary, and etc. What could be done in order to scale it up and to make it better, is to work towards transferring it to the official authorities, but still being a part of the process.

The financing of the projects is based on funding from external donors, mainly from Open Society Institute – Budapest and Roma education fund. Both of the organizations are private and since there was an update of their priorities, the implementation of the desegregation process may stop. Thus, the provision of funds from the national budget is needed, as well as a wider and official public policy, covering all stakeholders in education (Roma and non-Roma children and students, Roma and non-Roma parents, teachers, school masters, local communities, official authorities, wide society).

Beyond that, the work with the parents should be reinforced, since most of them relate the presence of their children in school to the provision of transportation and school books for free. Most parents declare that if the projects stop, they will not be able to send their children to schools, because of financial insufficiencies in the family.

The implementation of the projects has constantly been monitored to ensure smooth and appropriate implementation of the activities. Besides that, there have been a number of publications on the process published through the years (Kanev et al: 2005; BHC: 2008; Kyuchukov: 2006; Nunev: 2006)

1.4.2.4. Conclusions and recommendations

- Desegregation of Roma education is a complex issue related to other socio-economic factors: level of parental education, economic situation of the family, public awareness; level of development of the country;
- Constant work at many levels is required in order to achieve positive results – with all stakeholders;
- State/Municipal participation is not only about financial sustainability, but also about embedding successful pilot initiatives into mainstream policies, about reshaping the school education system in a way that makes it more equitable.
- Teachers and pedagogical personnel have to be better qualified to teach in ethnically mixed classes: to help overcome language barriers, to prevent cases of discrimination, and to support Roma identity and culture.
- Demonstrated willingness and commitment of the authorities at all levels has been declared through the development and adoption of different strategies, frameworks, action plans: national, regional and local. However, significant financial and other resources have not been allocated for their implementation and thus the commitment of the authorities remains only formal.
- The process of desegregation has been driven mainly by Roma NGOs, while the official authorities support them only symbolically (with few exceptions, where the Municipality participates with real, but still insufficient resources, compared to the real needs). In order to render sustainability to the process, it should become part of a wide and very well designed national public policy, implemented on national level and funded by the state budget, with the participation of a multitude of actors: the Government, Ministry of Education, Ministry of Labour, Regional Inspectorates of Education, Roma and non-Roma NGOs, local authorities, and the media. Community work should become the main focus – both with Roma and non-Roma community in order to increase awareness on the importance of educational integration and multicultural education, involving Roma and non-Roma parents as much as possible.
- The official institutions are the ones to bear the responsibilities for the provision of access to equal and quality education for all, regardless of ethnicity or other social and physical features. To date, what has been achieved in the area of desegregation of Roma students is due to the efforts of a few Roma NGOs. Roma NGOs are not public institutions and they should not be assigned with such

tremendous responsibilities as desegregation is. They, however, have piloted desegregation initiatives and have developed an approach that might be eventually redesigned and applied by the official institutions.

1.4.3. Community Centre for Health and Social Services



1.4.3.1. Background

Back in 1987, a representative KAB (knowledge, attitudes, behaviour) study on factors influencing the effectiveness of AIDS prevention school programme was carried out in Sofia among 1100 students aged 15-16. In order to establish the factors attributable to participants' outcomes, basic tests for personal psychological characteristics of the students were applied (such as extroversion/ introversion, anxiety, focus of control, self-esteem, IQ, etc.). In addition, some data about their families were collected related to the parents' income, age, education, number of siblings, etc.

It was established that the only significant factor for the effectiveness of AIDS education was the social status of the students measured by their parents' income, parents' educational attainment and the educational achievements of the student himself/herself.

It was quite obvious that the social skills of adolescents were related to a large

extent to social status. Owing to this reason, the subsequent health programmes among young people were based on development of social skills including decision-making, verbal and non-verbal communication, listening, assertiveness, how to say "no", leadership, self-esteem, aggression management, creativity.

However, health education as a micro-intervention was not sufficient as an effective strategy when 14 years ago HESED started to provide health promotion and disease prevention among Roma community in Bulgaria.

On the basis of everyday practice and critical analysis, we developed the model of the Health and Social Community Centre addressing a **higher** number of determinants of vulnerability of the Roma Community, including poverty, unemployment, poor living conditions, poor education, shortage of services, poor health education, shortage of social skills and limited life perspectives among Roma youths, social and geographic isolation of the Roma neighbourhoods.

1.4.3.2. Early childcare and education, early school dropout prevention

Our first programmes at the Health and Social Centre aimed to prevent early school dropout of 1st – 4th grade students because of the high number of dropouts at that educational level. The young pupils faced serious problems: on the one hand, they were distressed by the unfamiliar social environment with very different requirements from

those at home, and on the other hand they suffered from a critical deficit in cognitive, social and language skills necessary to cope at school. It was easy to explain their unwillingness to attend school. The team of specialists and health- and social community assistants invested significant efforts to improve the unsatisfactory skills of the children. As a result of these efforts and the cooperation on the part of school staff, the problems were ameliorated.

With the aim to ease the burden of these pupils' parents, volunteers were engaged to offer development games to their younger peers at the Centre's children's room. Later, those younger peers became part of the school dropout prevention program. Much to our surprise, these children were far better able to cope with specific tasks than the other participants: to focus their attention, to listen, to easily adhere to rules, and they possessed good motor skills. This development made them much more successful students.

This example strongly influenced our motivation to design a cognitive-, social- and language skills development programme for preschool children with the strong conviction that this is the most effective intervention to prevent early school dropout.

In 2002 a Health and Social Centre was set up in the Roma neighbourhood "Fakulteta" in Sofia with the cooperation of the Ministry of Health, the National Council of Ethnic and Demographic Issues, Sofia Municipality and Krasna Polyana sub-municipality and the financial support by the Co-operating Dutch Foundations for Central and Eastern Europe and the

National Institute of Health (NIH) [USA], through CAIR (Centre for AIDS Intervention Research) at the Medical College of Wisconsin. The establishment of appropriate infrastructure in the Roma community provided the necessary premises for mobilization of financial and human resources to implement local- and national health, social- and educational policies.

The Centre provides a wide range of complementary community-based services for different target groups, including:

- Early child care and education and school dropout prevention programmes targeted at:
 - parents of children under three years of age and pregnant women – programme for skills in parenting and child care;
 - children from 4-5 and their parents – school readiness improvement programme through daily 3-hour educational sessions with the children to improve their social, cognitive, language and motor skills, and monthly sessions with their parents to enhance their parenting skills;
 - children in 1st – 4th school grade – programme providing support to children in primary education to cope with the requirements of the school system; organization of extracurricular activities; and improvement of parenting skills for better support for children of school age;

- Prevention of the institutionalization of children at risk (children of long-term unemployed parents, single mothers, prisoners, chronically ill, etc.);
- Employment support – programme for social skills development, professional orientation and qualification;
- Health promotion and family planning programmes targeted at young people;
- Programmes for prevention of infectious diseases such as Sexually Transmitted Infections (STIs), HIV/AIDS, hepatitis, tuberculosis, etc.;
- Violence prevention programme for social skills development to enhance youths' personal development and to reduce risky behaviour;
- Drug use prevention programmes;
- Gender equality – empowerment of women and girls through sessions addressing gender issues in all programmes.

A key element of the model of the Health and Social Centre is human resources development of the Roma community through building Roma community-based teams of health and social assistants and specialists. They receive continuous in-service training and supervision.

1.4.3.3. Achieved outcomes

In the past 15 years the efforts of HESED's team have been focused on develop-

ment, testing and improvement of high quality effective services. So far, the following key positive changes in knowledge, attitudes and behaviour have been measured:

Children 0-3:

- **Improvement in children's general mental health, particularly in emotional attachment and relationship to parents** – through individual psychological counselling; improvement of parenting skills for selection of adequate games and regular playing with the child for development of his/her cognitive-, language-, social- and motor skills; establishment and maintaining of a daily routine of the child: sleeping, eating, and playing; development of parenting skills for non-violent reactions towards misbehaving children.
- **Improvement in children's health status** - through access to milk kitchen in the Health and Social Centre, improved skills and knowledge of pregnant women and mothers for healthy pregnancy, nutrition and childcare and development, consultations with gynaecologist and paediatrician.

Parents of children 0-3:

- improvement in parents' conception and attitude to their children and child care;
- improvement on parents' self-confidence and efficacy (empowerment);

- improvement in parents' help-seeking behaviour;
- improvement in parents' family planning skills;
- improvement in parents' skills for protection against unwanted pregnancy and sexually transmitted infections;
- overall value system oriented towards longer-term life perspectives and commitment to investment of efforts for the successful development of children;

Children 4-6:

- increased coverage of children who receive Early Childhood Development (ECD) services;
- improvement in children's cognitive-, language-, social- and motor skills, including coping at school;

- reduced number of drop-outs from the school;

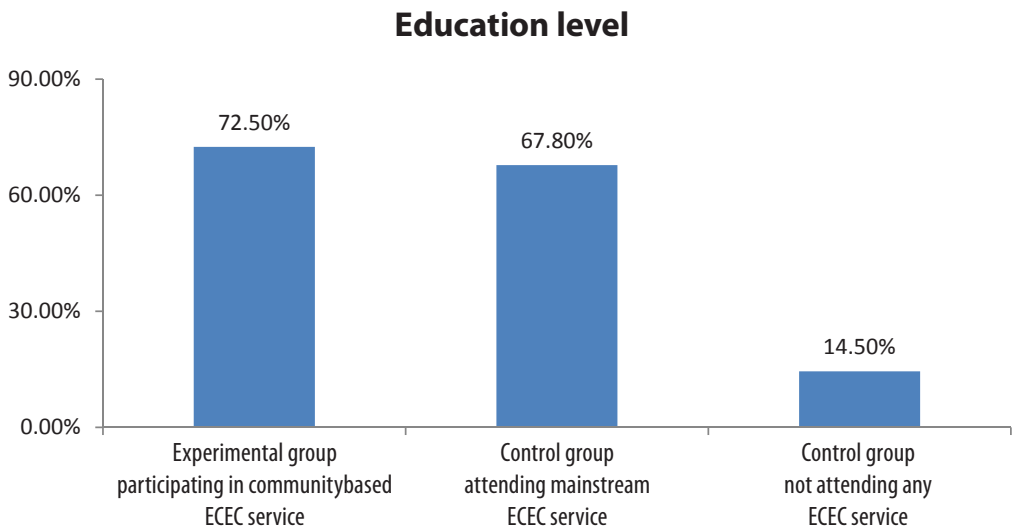
Parents of children 4-6:

- improvement of parents' attitude and skills to support children in their school preparation;

Young people 15-25

- teen pregnancy reduction;
- family planning improvement;
- improved skills for responsible parenthood;
- improved skills for protection against HIV/AIDS, Sexually Transmitted Infections (STIs) and drug addictions;
- improved skills for better integration in the labour market;
- reduced likelihood of school drop-out.

Comparative data according to the Bulgarian state education standards for 5-years old Roma children



I.4.3.4. Young People's Perspectives

The positive turn in the life of the first participants in the group trainings for social skills in Fakulteta neighbourhood was an inspiring example of the huge untapped potential for personal and social development of Roma youths and the way it could be capitalized on with relatively small financial resources.

The beginning was in 2000, when a group of boys and girls aged 12-14 successfully completed training for health- and sexual education. During preliminary discussions, the participants revealed their modest future plans to complete their primary education (7th or 8th grade) and get married. However, they gradually changed their self-perception and the ideas for their development. All of them expressed willingness to improve their academic achievements and enrol in professional secondary schools. It was at that time that the huge deficits in their knowledge of Bulgarian grammar and vocabulary, mathematics and other basic subjects became apparent.

The situation was especially frustrating for the young students as they saw new opportunities for themselves but lacked the requisite knowledge and skills to fulfil them. Neither could the team specialists accept that the development and improved job opportunities of the young people could abruptly end at this stage. Over the course of one year, the organization's team devoted their free time to the necessary academic preparation of the young people. Many of them managed to substantially improve their knowledge and continue their education.

Even though Roma parents traditionally avoid parent-teacher conferences, following the advancement in their children they started to attend the meetings regularly. They shared that their children had started to behave as grown-ups, had learnt how to speak "as adults", had won the respect of their peers and spoke of further achievements. This encouraged other parents to enrol their children in similar personal development groups. These first participants postponed the time of their marriage, a large number of them completed their secondary education, and now work as assistant social workers, assistant teachers, in the food industry, and in other spheres of production. Though not so numerous, these young people became positive role models in the community.

The experience with this and many other social skills development groups confirmed that this intervention is particularly effective for teen pregnancy reduction, family planning improvement, responsible parenthood, and better integration opportunities on the labour market. Even though this intervention could reduce the likelihood of school dropout, the problem of insufficient school preparation still lingers on.

The British Medical Journal published a finding from the work with Roma youths in Fakulteta (Kelly: 2006)

In collaboration with research teams from the United States, Russia and Hungary, a methodology was applied, custom-designed by project leader Prof. Jeffrey Kelly from the Medical College of Wisconsin, for positive change in attitudes and behaviour regarding the prevention of HIV/

AIDS and other sexually transmitted infectious diseases in vulnerable communities. The methodology is based on identification of groups of friends (social networks) and their “leaders”. The latter participate in trainings for building knowledge, attitudes and social skills related to raising risk awareness and behavioural change. The leaders are then prompted to discuss these issues with the members of their groups of friends. The change in the behaviour of the social networks in this intervention is compared against the change in the behaviour of control groups for the same period. This methodology was implemented in Saint Petersburg, Budapest and Sofia with men having sex with men, young Roma men and heterosexual youths. Following the intervention, a significant positive change in the behaviour was established in all target groups.

Most surprising were the research findings in the follow-up survey completed one year after the intervention. They indicated increase in the positive change for the young Roma men and reduction for the other target groups.

This research provides evidence for a steady change in Roma youth social norms through training of social skills provided by specialists. The increase in those adhering to the new social norm could be interpreted as an effect of the decisive role of social norms in the Roma community behaviour.

Further research in this direction could establish which interventions can lead to sustainable social changes in Roma youths.

I.4.3.5. Factors and challenges to achieving good outcomes

Involvement and empowerment of local communities through:

- Analysis of the local situation and investigation of resources;
- Involvement of representatives from the Roma community in all stages of planning, implementation and evaluation as well as at different levels of management according to their capacity;
- Building up appropriate infrastructure (Health and Social Community Centre) with relevant equipment in the Roma neighbourhood to be maintained by a local NGO;
- Infrastructure should serve as a basis for complimentary programmes aimed at community development: health, family support for better education, early childhood development, personal development for adolescents, professional orientation and qualification and others;
- Building up a team of health and social community workers from the local Roma community;
- Establishment and maintenance of professional relations with existing relevant institutions, services, and local authorities.

Conditions that would make sustainability possible

The sustainability of this approach depends on focusing the strategic priori-

ties for Roma integration on longer-term cost-effective solutions that require investment in infrastructure and human resources development in the Roma community. The implementation of these priorities will be possible through allocating funds from the OPHRD and OPRD. The use of municipal property for the premises of the Health and Social Centre will ensure greater sustainability of the activities and a long-term commitment on the part of local authorities. The positive change in the behaviour of the service recipients is only guaranteed by the high quality of the services which is accomplished through ongoing training and supervision of the teams of professionals and health- and social community assistants.

Conditions that would make possible the replication and scaling up of the good practice

The practice is cost-effective and easy to replicate. One crucial condition for replication of the practice is a qualified and experienced team to design the concrete strategy for dissemination according to the state/municipal/community priorities. This process was carried out by the HESED team during the designing and strategy development of the National Programme for HIV/AIDS Prevention and Control and the Programme for Improvement of the Control of Tuberculosis in Bulgaria implemented by the Ministry of Health and funded by the Global Fund to Fight AIDS, Tuberculosis and Malaria. The period for dissemination is relatively short: within a 6-month period it was possible to disseminate and

further develop the model of community-based services in the largest Roma settlements in the country.

What are the challenges and constraints in design, implementation, financing and institutional arrangements of the good practice and how they were addressed

There is no state-supported system of alternative community-based services.

- Funding is only available in the short-term and requires fragmentation of the integrated approach due to different priorities of the different funding programmes.
- Very limited funding is available for research and development of new methodologies for specific services.
- The target community is easily disappointed when the services are interrupted or if they are of low quality and effectiveness. To overcome this, fundraising to support continuous service delivery is a priority, as well as keeping service delivery at the highest professional standards.

What mechanisms for monitoring and evaluation have been implemented, available documents from monitoring and evaluation activities?

The activities at the Health and Social Centre are project-based and the monitoring and evaluation systems have varied according to the donors' requirements.

In addition, there are different mechanisms for internal monitoring and periodic evaluation of effectiveness. There is available documentation from these activities.

Lessons learned

Effective interventions in the Roma community need to encompass all of the following:

- Involvement of representatives of Roma community as health and social assistants and service providers;
- Engagement of professionals;
- Professional monitoring and evaluation;
- Large-scale interventions addressing simultaneously health-, social- and educational issues;
- Investment in early childhood development for successful health, educational and social integration.

Conclusions and recommendations

The Health and Social Centre is a promising and evidence-based model for Roma community development. Seen from the graph above, the educational impact from the application of this method increases several times. In order to achieve tangible impact on the entire community and not only on individual members, adoption and implementation of a national policy encompassing the whole Roma community is needed.

1.4.4. Typical features of the successful education integration model

In this section we make an attempt to describe the main features of the successful model for the educational integration of the Roma. This is not a description of any single case that existed in reality, but since every empirically identifiable model had its limitations and addressed some of the aspects of a multifaceted problem, we decided to put the strengths of different empirical cases into a single model.

In order to describe and assess the factors, which have proven to contribute for the achieving of positive results in the field of educational integration, as well as the common challenges and ways for their overcoming, we'd like to illustrate the main stages of development and practical application of a local educational model in the town of X, a place with a large segregated school in the Roma neighbourhood and, respectively, a sufficient number of downtown mixed schools. Within the course of illustrating the individual stages, we'll be making assessment of the factors and challenges in combination order.

1.4.4.1. Planning of a local educational model

In order to be able **to lead** the future processes of providing access to quality education for Roma children, the local NGO should satisfy several conditions: to be community-based, to assure necessary transparency to its actions, to have relevant authority among the Roma

community and to possess the necessary capacity.

An important factor to assure positive results is the development of **local partnerships achieved through the involvement of local public institutions** in all stages of planning, practical application and monitoring of the process. **Inclusion of specialists from local universities** in the comprehensive process will contribute to focus on long-term and sufficiently low-cost solutions with regard to methods, approaches and strategies for implementation, monitoring and assessment of the local model and of the individual educational practices included in the model's structure, as well as the conducting of all kinds of trainings on the required professional level.

As a process, planning is preceded by a very careful Analysis of the Stakeholders; such analysis, apart from revealing the attitudes of local community, will provide the planning team with information about what conduct of the major "local actors" can be anticipated and what work will be required to change their "rival" or "neutral" position into that of supporters to the process:

- Local Roma community: the involvement and active participation of the local Roma community in the process is a matter generally related to giving power to the community; this is a way to help the community to build a feeling that it possesses tools and potential to make its own decisions on issues bearing on its own future.

- Segregated school: targeted work is required to reduce the opposition of school management, who are afraid that they might be left with too few students in their schools, and consequently, they would lose their jobs.
- Host schools: targeted work is necessary to "prepare the ground" in host schools for the enrolment of Roma children.
- Local public educational institutions and authorities: to provide support and undertake the full political-, financial- and governing responsibility for the process.
- Local mass media: to provide media support to the process.

Stakeholders' Analysis provides us with two other important characteristics connected with: **specifics of local Roma community** and one other feature, especially valid in recent days: **the social standing of Roma households**. Recent years witnessed visible processes of differentiation in Bulgarian society. Large gaps and social inequalities opened in the Roma communities as well.

As in any large city, in X the Stakeholders' Analysis shows the presence of four separate groups of parents:

- The first type of parents is those of bigger financial potential: they usually travel and work abroad. Having come in contact with the lifestyle typical for more affluent societies mainly in Western Europe, they quickly recognize the

need of good education and they start to purposefully invest money and effort so that their children will receive such education. Typically such parents choose for their children schools situated out of the segregated Roma neighbourhoods and they do not need the extra support which a local NGO would provide to them if they participated in a desegregation project.

- The second type of parents is those who are willing (or at least hesitant and prone to be convinced to send their children to mixed (non-segregated) schools but cannot afford it. Typically, this is the group of children with whom desegregation programmes work.
- The third type of parents is those who are opposed to the opportunity their children to be educated in mixed schools, because they fear discrimination and maltreatment in the new environment, and because of their low social standing. From the perspective of these parents the neighbourhood school is the only opportunity for their children to receive “any education”.
- The fourth type of parents are the parents of socially neglected children who are not enrolled in any school (street children), some of whom have either never been to school or have dropped out in early school grades; with these chil-

dren, participation in a desegregation project is also very difficult and the neighbourhood school remains as their only opportunity. Families that struggle day-to-day for their physical survival are typically more likely to involve their children in various income generating activities, which are often very harmful to their development (lack of schooling is the obvious but not the only example).

Community attitudes to education and the practice of early marriages should also be accounted for so that the local educational model can adequately address these issues.

1.4.4.2. Structure of local educational model

These detailed characteristics provide us with orientation which main educational practices should be included in our local educational model:

1. Practice of early childhood development

In all cases, a successful local educational model for children with difficulties connected with initial lack of social skills and competencies should preferably include a practice for early childhood development aimed to achieve preparedness for school. Good language skills and a basic command of the language of instruction (the Bulgarian language) are key factors.

This practice is especially important for neighbourhoods where no preschools are available. In the places having pre-

schools, this type of work can be organized with the introduction of Roma teacher assistants and specialists on early childhood development. Achievement of preparedness for school and good command of Bulgarian language will assure to a large degree the “equal start” for the Roma children who are to start school.

2. Desegregation practice

On the analysis of parents’ attitudes to desegregation and their possible potential to participate in this process, the concrete desegregation model can be designed and implemented. It usually includes at least some of the following components:

- Preparation of host schools: training of teachers and School Board on the legal aspect of the segregation issue; training of teachers to work in multicultural environment; training of School Board members and school authorities how to overcome ethnic-based conflicts; informal meetings and talks with parents of Bulgarian children from the classes where Roma children are expected, the purpose being to reduce opposition and discrimination attitudes; preparation of Roma children’s parents to reduce the fear that their children might be maltreated or abused; suitable get-together events for the children of the two ethnic groups to bring them close.
- Introducing of intercultural education in host schools. This can be done either by using some of the existing education packages developed in the course of previous pilots or by trying to develop the practice of intercultural education from scratch within the receiving schools. This includes the organization of extracurricular activities supporting integration and other activities, which meet the needs and desires of the children.
- Provision of various additional services in the classroom or at the school. This requires the wide use of individualized approach and access to sessions with specialists for children with special educational needs and children lagging behind. Additionally to resource teachers, psychologists and pedagogical advisors, trained teacher assistants of Roma origin have also an important role to play. Their function in the classroom, which evolved along with their functions in communicating with the parents created some controversies at the beginning. Allegedly teacher assistants were disrupting the work of the main teacher and slowing down the progress of other children. But the existing experience seems to indicate that the presence of the teacher assistant in class is not harmful to non-Roma children and can be even beneficial, especially if she has the task to help also those Bulgarian children who lag behind.

3. Targeted work to improve the quality of education in present school situation

With the parents who are yet not ready to send their children to schools out of their neighbourhood or settlement (i.e. the third and fourth type of parents described above), the local educational model should predominantly focus on the work to improve the quality of education in present schools. This approach might include additional training for teachers to upgrade their qualification; interactive teaching methods; extracurricular work with children; enhancing the “family-school” relationship through introducing of teacher assistants in class plus other practices of proven effectiveness.

The existing practice in Bulgaria shows that NGOs usually start their work with first-grade and second-grade pupils of the segregated school who have shown good achievements in their first school grade. The situation is more complicated with the third-grade and fourth-grade pupils of the segregated school. At this stage, the considerable gaps in their knowledge become evident and if these children are shifted to a mixed school without additional preparation, this can be detrimental for them. In only a couple of months a large part of these children may either drop out from school in the worst case scenario or return to the segregated school.

4. Catch up programmes for Roma pupils

The above circumstance predetermines

the need to organize catch up **programme for Roma pupils** enrolled in ethnically mixed schools. The need for such a programme is there no matter if the children participate in an organized desegregation programmes, if their parents choose on their own to enrol them in a new school, or they had to move from basic to primary or from primary to secondary schools. In any case such children are potentially in threat of dropout from their new school. A catch up programme has to be addressed at least the educational gaps and deficits of children coming from segregated schools. But it can also address broader issues.

1.4.4.3. Practical application of the local educational model

At this stage, it is important to have clear distribution of tasks and engagements between the various stakeholders, several things being of special importance:

- The NGO's role in the process is to mainly initiate, experiment and develop models, to build partnerships, to advocate and lead the process at the pilot stage but work **for the transferring of responsibility for its sustainability to the government agencies** who are ultimately responsible for the provision of equal access to quality education for all children regardless of their ethnic origin, social- or physical condition.
- The local NGO should finally withdraw from **tasks such as** trans-

portation of children, purchasing of busses, hiring drivers, technical maintenance, etc. This function should be transferred to the local government.

- The role and place of the local NGO are inside the community. NGO is valuable as **giving voice to the interests of local community** and the main tasks, which a NGO should assume in the process, is to work with the local community for supporting the process, to keep up motivation and to work with parents on daily basis.
- It should not be forgotten that **the bus is not reserved for Roma children only**; it should be regarded as a regular school bus which transports all children to school, regardless of their ethnic origin.
- If a necessity arises to organize a **supportive social programme** for the Roma children going to a mixed school, it would be beneficial if Bulgarian children are given opportunity to participate in it; in this way a feeling that Roma children are privileged will be avoided. Besides, such programme should be very well balanced and it shall not instil in parents a feeling of dependency and assuredness that “the others” must and shall take care of their children. Such programme shall not relieve parents from their daily parental duties.
- The most significant challenges at

the stage of “practical application of the model” are:

- Providing of sufficient and sustainable financing for the comprehensive process from the (central or local) government, regardless of external donors;
- Overcoming the resistance of Bulgarian parents against their children being educated together with Roma children;
- Working with the parents of Roma children in two aspects: to reassure these parents that their children will not be maltreated, and then – to get understanding that everything is being done for the future of their children. The local civil society activists should definitely work to convince parents that sending their children to school is something they do for their own benefit and the benefit of their children rather than “a favour” to the organization or leaders who drive the desegregation process.
- Overcoming the resistance of the segregated school is another major challenge which requires systematic work. **Teachers usually fear the coming of supposedly “difficult” children from ethnic minorities, especially when they don’t have previous experience of working in a multicultural environment and with children of low social**

background. In such cases it is very important to take seriously and address in a professional way the fears of those teachers by influencing systematically their attitudes and improving their capacity through training, supervision and professional exchange.

It is very important that the local NGO, local Roma community, public educational institutions and local government, joined in partnership, transmit common messages in public space that promote the local model as a **product of a concerted effort** towards the provision of equal access to quality education, and not as an individual idea generated solely and only by an NGO. This will give legitimacy for some difficult decisions and in the process of resolution of the ensuing conflicts, which often accompany the process of desegregation.

1.4.4.4. Monitoring and evaluation

So far, practice has shown that monitoring is conducted by different actors in the local partnership: representatives of the local Roma community and public institutions. It is a type of internal monitoring, which aims to detect problems when they arise, discuss them and eventually change the approach or the overall strategy.

The so-called “Community monitoring” method has been gathering momentum recently. In its essence, this is a method of

consultation with the community before and after the respective interventions in order to register changes of community assessment of the service they receive.

In all cases, when an assessment of a particular model or good practice is being made, it is the assistance of independent experts and university specialists that should be sought instead of organizations which are linked to the implementing operator. It’s better when an assessment is at the same time critical and reflective and shows both the positive and negative aspects of a certain practice. In this way, those who will try to apply the respective practice in a new place or a new context will have the opportunity to learn from previous experience (not necessarily their own).

1.5. GOOD GOVERNANCE

In 2008, under the guidance of the Ombudsman of the Republic of Bulgaria, a Guide for good governance at local level and Methodology for assessing good governance in municipalities were prepared under the project “Applying the principles of good governance in local government”, co-financed by the European Union through the European Social Fund. The Manual and Methodology contain principles and indicators of good governance, which are used in evaluating the good practices described in this chapter:

For the purposes of the research, places were selected, meeting the following criteria:

Size of the city and number of Roma residents

- Large city (over 300 000 residents) divided into regions and having a large Roma neighbourhood – Plovdiv
- Medium-size city of significant number of Roma residents – Shumen
- Small town of significant number of Roma residents – Peshtera, Kavarna, Novi Pazar
- Village, where Roma are the majority of the residents – Kaspichan

Presence of developed NGOs or Roma participation in local government

- Places of strong NGO structures – Plovdiv, Novi Pazar
- Place of visibility of Roma in local government – Kavarna, Peshtera, Shumen
- Village with Roma mayor – Kaspichan

For the preparation of this chapter, meetings and interviews were held with: mayors of municipalities, a district governor, a village mayor, municipal councillors, experts in municipal administrations, representatives of Roma organizations and a representative of NGO working on local government issues.

Description of a good practice

It is a universally acknowledged fact that Roma are not sufficiently represented or not represented at all at the various levels of government in Bulgaria, i.e. they

do not participate actively in the decision making process. This circumstance explains to a certain degree the lack of trust in government institutions by the Roma and their perception mainly as a repressive apparatus. Roma leaders and civil activists are regarded as intermediaries between the Roma community and external factors. In the majority of cases they act as mediators of the government and donors in their work with Roma. The major issue that emerges is the lack of legitimate representatives or spokespersons of the Roma before the institutions; this issue is often formulated as missing “Roma partner” by central government officials. Attempts to artificially create Roma partners of the government purported through appointment of mayor’s representatives in Roma neighbourhoods or empowerment of individual NGOs do not always provide the expected positive results. That is why it was necessary to trace out possible existing local-level models, which could be multiplied.

In the process of this research, two models of intervention emerged: centralized and decentralized. The first model is well represented in Kavarna and elements of it have been observed in Novi Pazar and Plovdiv as well. The Decentralized model is best represented in Peshtera and in Shumen, though in the latter place it is in a stage of initial development.

Centralized model specifics (best functioning in Kavarna)

- Presence of political will for specific issues to be resolved on the part of the respective mayor

- principle of responsiveness of local government to citizens' expectations
- Organizing of an administrative unit on the minority issues within the municipal administration structure (Kavarna, Plovdiv)
 - principle of human rights, cultural diversity and social unity
- Providing of funds for the resolving of specific issues from the municipal budget and from external financing
 - principle of sound financial management
 - principle of efficiency and effectiveness
- Presence of Roma who perform governing/coordinating/technical functions: mayor in Kaspichan, head of section in Kavarna, head of department in Plovdiv, municipal officials in Novi Pazar municipality
 - principle of competency and capacity
- Developed trust between Roma community and Roma in administration: the mayor of Kaspichan is approaching the end of his second term, the head of section in Kavarna has been "Roma mayor" since 2001
 - principle of openness and transparency.
- Actual results from good governance: building the overall neigh-

bourhood infrastructure in Roma suburb in Kavarna, provision of bus to transport pupils from the neighbourhood to all schools in the town, rehabilitation and renovation of the kindergarten and primary school in the neighbourhood.

- Principle of effectiveness and efficiency

Decentralized model specifics (best functioning in Peshtera)

- Functioning neighbourhood council in the Roma suburb organized by the initiative of the residents
 - principle of representation and participation of the citizens in government
- Registration of the neighbourhood council under the Regulation for Neighbourhood Councils approved by the respective municipality
 - principle of superiority of law
 - principle of responsiveness of local government to citizens' expectations
- Participation of Roma possessing the required competency and qualities in local elections and successful participation in the work of the Municipal council
 - Principle of participation of the citizens in government
- Actual results from the function-

ing of the model: arriving at an agreement with the future mayor of Peshtera, establishment of “Directorate for Social Activities and Ethnic- and Demographic Issues” where a total of six persons have been employed, out of which four Roma, among whom two health mediators: one for each of the two Roma suburbs; attracting of funds under the operational programmes to the municipality

- principle of sustainability and long-term orientation
- principal of sound financial management

Analysis of factors contributing to positive outcomes

A key factor is the motivation for **Roma participation**. In places where Roma do not participate in public and political life, we cannot talk about successful practices of good governance towards the Roma community.

Of course, the success of the practices depends on a number of local factors such as ethnic tolerance; job-opening investments in economy at local level; educational level; cultural life in the respective place – all these contribute to the positive outcomes. Central-government policy can be a positive factor if it encourages civil participation in the decision making process on local level and also through the providing of targeted funding from the central budget and EU funds. The non-governmental sector stays as an influence-exerting factor for the central- and local government; however its work

needs to be more independent and more transparent.

Analysis of common challenges and possible ways to overcome them

Sustainability and replication of good practices are impossible to achieve without a **targeted state policy**, however such state policy should find manifestation in the creating of legal conditions and opportunities for **people at local levels to develop local models for resolving of their issues**, accounting for the local specifics of each place.

Implementation of the Centralized model of good practices has one major disadvantage: it is dependent on the personality of the mayor/respective administrator, i.e. a subjective factor is present, which is unsustainable in time. In this sense, sustainability and development can be to a higher degree expected under the Decentralized model of good practices, which is related to mobilization and empowerment of the Roma community itself. Of course, this depends on the capacity of the local community, which varies from place to place. The expansion of this capacity needs some prerequisites of legal- and financial nature to be in place.

Prerequisites for the development of good practices are **legislative reform in local government** aimed to achieve actual decentralization, reform of the budgetary (fiscal) policy of the government and municipalities, and taking of responsibility by the Roma community for the resolving of its own issues.

The obstacles and challenges most frequently encountered by respondents

in the implementation of good practices can be provisionally divided in two groups: external for the Roma community and internal for the Roma community.

Lack of political will on the part of the people occupying positions of power is most frequently indicated as a major external obstacle. Since, as a rule such people come from the ethnic majority, it is believed that they have discrimination attitudes towards the Roma. The majority of mayors and municipal councillors, for example, do not consider the issues of Roma neighbourhoods in the respective inhabited places as their priority and consequently, municipal councils do not easily allot funds from municipal budgets to improve infrastructure in these neighbourhoods. Municipal applying with projects under the operative programmes does not change anything because of the low priority of the issues concerning Roma neighbourhoods.

Related to discrimination attitudes is also the practice of buying votes in a number of Roma neighbourhoods in time of elections. This practice leads to alienation between the Roma minority and the majority and gives rise to mutual mistrust; it creates a relationship of clientelism and dependency. Gradually, Roma in the neighbourhoods start to realize that no one from the outside will help them and that their own initiative is of utmost importance.

Internal obstacles are: difficulties to achieve mobilization among the residents of Roma neighbourhoods; difficult process of building trust in local lead-

ers; lack of coordination and exchange of experience among the Roma living in different places; low self-confidence of Roma, lack of trust in their own strength and potential.

Roma have had traditions in self-government: it was their successful inner self-organization that has been a factor for their survival through many centuries in Europe; however these traditions have been destroyed under the impact of macro society. The paradox in this case is, that today Roma once again need those lost skills in order to approach and resolve their own issues.

A common challenge before both Roma community and Bulgarian majority is the sharing of power- and access to financial resources of representatives of the community who possess the necessary expertise and capacity; such admission will allow one of the fundamental principles of good governance to be applied: that of citizens' participation in the decision making process.

II. CONCLUSIONS AND RECOMMENDATIONS

Apart from the practices outlined in this report, there exist numerous examples of equivalent projects and programmes that can take a justified place under the “good practices” heading. Our main purpose is not so much to point out at the best ones among these, but rather to emphasize the fact that such practices do exist and they will be worth investing in, in the future.

II.1. Housing conditions

Social housing in Bulgaria is probably the public service with the highest mismatch between demand and supply. This makes selection of beneficiaries under the programme a key factor but allows also to focus on those beneficiaries who maximize the chances of success for the programme. The building of homes for Roma families in Iztok quarter in Kyustendil, implemented by ADRA Foundation is among the few examples of sustainable new social housing in the recent history of Bulgaria. Like in the case of the “Land as a Source of Income” programme, here again potential beneficiaries are not the most vulnerable and needy members of the community, but people capable of “observing the rules”, selected by a local board.

ADRA is religious organization of protestant denomination to which a large part of the inhabitants of Iztok neighbourhood belong. They are members of the Adventist church (so-called Sabbatar-

ians). Shared values and common identity define high levels of social capital in this community, which to a large extent guarantees the achievement of positive results and programme’s sustainability.

At least part of the success of the programme is due to community pressure to observe the rules, pay regularly the costs and keep the property in good state. Lack of respect for these rules may lead to beneficiaries having to move out. ADRA Foundation applies a model similar to that in the land providing model: a **combination of social goals and market rules** though in a softer version, because the money collected from the beneficiaries as rent and current maintenance fees are used to fund building maintenance activities in a manner similar to social housing management in the developed countries.

Here it is important to notice a second major factor, which in our opinion will be playing increasingly important role in the applying of similar interventions in different communities: **or level of social capital within the community**. This is a factor defined by connections within the group and relationships based on similar identity, customs, beliefs, values, attitudes, convictions and shared norms.

Similar pilot initiatives have been applied in other places throughout Europe as well, the difference being that ADRA Foundation has realized the inevitable needs of **supplementary social work** in these instances and succeeds to efficiently organize it through volunteers from within the community.

Whether by chance or not, in Perush-titsa where the land providing practice for needy and landless Roma families is being applied, the local community also belongs to a protestant denomination. It is obvious that **shared values** play some role in the transformation of community values and attitudes and increase the chance of success to practices based on shared responsibilities and community prosperity.

The third crucial factor for the success of the initiative is the **partnerships** which ADRA and the local community succeeded to create through the course of the initiative. Kyustendil Municipality participated by providing a suitable land plot where the houses will be built, while the Vienna municipality was the main contributor to the programme. Here again, as with the provision of agricultural land, **own contribution** was required: not in cash but as voluntary work in the construction process. This requirement according to the programme promoters helps to build a sense of ownership in beneficiaries, which is a prerequisite both for the management of the property and for maintaining good relations in the neighbourhood.

II.2. Employment and self-employment

In the area of income generation, the practice presented in this report is the program of Foundation “Land as a Source of Income” intended to provide land for the needy and landless Roma. Here again, as with the development of local

educational models, a very good **preliminary analysis** of the conditions and attitudes of the local Roma community for participation in such interventions is necessary. What’s more, the experience of the Foundation’s specialists shows that the decision who can participate in this programme and who is not eligible should be made after “one has lived in the neighbourhood for some time” in order to get a firsthand understanding on the **neighbourhood internal factors**, attitudes, opinions and possible influence of local leaders, to get personal assuredness that potential participants possess entrepreneur spirit and can make sufficiently reliable partners under the programme. Those people should be found who have the will but not the potential to buy land: this is that layer within the community, which is not focused on their day-to-day “survival” but **possesses strength and potential to develop**. This experience comes to show that **selection of beneficiaries** under the programme is a key factor for future positive results.

Another major factor that is worth considering is the very special skills of the team implementing the action. The example contains evidence of agronomists and financiers of high qualifications, who possess the **patience and will** to work with the Roma community and who believe that Roma can be successful entrepreneurs.

The description of this practice has registered also some important details, which bear significance to the achievement of positive results and which are connected with sustainability and the potential for

this concrete practice to be multiplied.

What is more important in our opinion, however, is an understanding of the approach, which to a large degree guarantees the achievement of positive results. The approach applied in this practice is a typical example of integrated approach, which lies in the basis of programme's sustainability and which includes financing, training and on-site consulting for a couple of successive years. The requirement for **own participation** in the initial financing of the land purchased brings an additional element of risk sharing and responsibility in mutual relations. This approach builds trust in the community because people can see that work is being done not "piece by piece" but as an investment in their long-term development.

One of the major obstacles before the development of entrepreneurship among Roma community is the **lack of initial and working capital**. This is so, because banks do not recognize Roma as reliable customers: they usually have nothing to offer as collateral for their loan; because what they possess holds no value for the bank.

The model "Land as a Source of Income" has the power to overcome obstacles by **combining social goals and market rules**. The Organization's team through its **partnership policy** contributes to "pull out" farmers as potential landowners off an initial state of instability through social measures and then develops each landowner up to a level at which the farmer is able to continue with

his farming and to use bank loans when necessary, all on this own.

Recently the model has been tested and successfully not only in farming but also in other businesses dealing with service providing in the community. Foundation's team helped a starting small business in the Roma neighbourhood in Perushtitsa where a tyre replacement- and car mechanics workshop and a hairdresser's operate successfully to-date.

II.3. Healthcare

Currently in Bulgaria health mediation is widely recognized as a practice of proven effectiveness, which is known among the Roma community and which is becoming increasingly popular with local institutions. The concept of health mediation was introduced in Bulgaria by the "Health Issues of Minorities" Foundation. Later the position of "health mediator" was officially introduced in the health care system and the number of health mediators grew steadily.

Sustainability of this practice is mostly related to the need to guarantee long-term engagements of institutions towards the health mediators and to assure continuous and timely financing for the programmes under which health mediators' salaries are paid.

The next step in the development and expanding the scope of this position will be the definition of national standards for health mediation including working conditions, payment and working time. Training and employment of new health

mediators should be continued with the cooperation of the medical colleges and universities.

Promotion and expansion of the “health mediator” profession should be organized predominantly with the participation of institutions, the Ministry of Health and specialized local- and national mass media.

II.4. Education

Existing practices and models in education address then very important issue of segregation of Roma students. Different attempts have been made at desegregating Roma schools and supporting the integration of the Roma into mainstream schools with a large Bulgarian student population. Experiences are mixed and demonstrated both the benefits of the multiethnic and multicultural environment in education and the dangers of moving students to schools, which are not prepared to secure a good and welcoming environment. Massive school closures done by the government not as part of desegregation plans but as a result of school network rationalization have also both provided opportunities for some students to attend better schools and increased school dropout.

In the field of education more than in other fields there is a need to critically reflect on existing practices and move forward by trying to take out the best elements of different approaches and combine into innovative models of schooling. Constant reforms and the resulting instability in the education system also presented

opportunities, but probably even more risks. Though school education and the educational integration of minorities has been on the policy agenda for quite some time if we look at government strategies and documents, both commitments and real actions did not live up to the challenge of the task. In the Bulgarian context it is very important to advocate for more resources invested in education and for truly national programmes by scope and ambition for addressing the increasing school dropout and the provision of equal access to education for the Roma.

II.5. Good governance

Good governance observes superiority of law, it guarantees human rights and citizens’ participation in the decision making process. Every government comes into power with claims to be good, to build effective partnerships with the citizens and to consider their interest in the decision making process; however a very small percentage of governments really fulfil these claims in their term of service. That is why, it was important to search out and depict examples of good governance: on the one hand to see whether good governance leads to resolving of Roma issues on local level, and on the other hand to show that good governance is a mandatory intersectoral factor in every good practice in general.

In the two outlined models of good governance: centralized and decentralized, presence of **political will** at local level and **empowerment of Roma for the**

local-level decision making have been drawn out as key factors for the achievement of positive results. The combination of these two prerequisites is a sufficient condition for the development of **effective partnerships**, which can grow into a generator of good policies and good practices of integration at local level. If we look back to the descriptions of good practices in the individual fields we shall see that the presence of effective local partnerships is to be seen as an element, almost mandatory for the achievement of positive results. These partnerships, however, need to be purposefully built and developed. We cannot be sure that in case of possible interventions in a place, we are to instantaneously witness **positive political will** at local level and **empowered Roma community**. Investments should be made in both time and patience, so that the two parties can build mutual trust and join efforts towards the resolving of local issues.

The main challenges connected with the potential to replicate the outlined good governance practices are related to the **need for a purposeful central-government policy and support to the people at local-level** who will then jointly with their local government develop and introduce a local model to resolve issues, while taking into account local specifics. Here again, like with the access to education, we speak mainly about local models because everything depends on the specific local conditions and resources: human and socio-economic, financial and even political. This, however, is related to the presence of “empowerment” for

the local government itself; it needs to avail of the necessary authorizations and resources, in order to be able to resolve people’s issues at local level. And here we arrive at the issue of **decentralization and need for a local government reform. Currently the only available solution is to have sustainable funding from the central government, as local governments, especially the poor ones, where Roma tend to live, have few if any other instruments at their disposal**. Giving power to local governments should be accompanied with the respective **financing on the part of the central government**, regardless of local government’s political coloration, because it is no secret that a practice exists in Bulgaria that central governments usually give financial toleration to local governments of their own political “colour” and what is left behind is only then distributed among the rest. The development of good governance policies at local level, their replication and financing should be independent from the central government because these are consensus policies and long-term processes and they require targeted investments in people, time and money, i.e. the **issue of continuity** in the policies of integration at local level must not depend on changes in the political composition of local government; once established, the local model for resolving of people’s issues should be further developed and adequately perceived by each successive government.

The issue of policy continuity bears the same importance at central government

level. Numerous NGOs suffer the negatives arising from the lack of succession with regard to integration policies which have been negotiated with previous governmental officials and ministers. With every new government coming into power, NGOs lose the momentum gathered in a joint work in certain field and it usually takes long time before the respective ministry builds anew the necessary working mechanisms if it ever builds them. Quite often, already negotiated consensus policies are being rejected and thus a feeling is created that things once again “start from the very beginning”, which brings disappointment among the media dealing with this type of issues. And here we arrive at the question how to assure continuity with regard to the implementation of integration policies. Political will, which is obviously indispensable, is however not enough. One symbolic gesture for which Roma organizations have insisted is to raise the **legal status** of the strategic documents outlining the policies for the integration of Roma. Specifically the request is to have the National Strategy for the Integration of the Roma endorsed by the Parliament. The hope is that this will ensure that more resources will be allocated and actually used for the integration of the Roma. Previous experience proves that commitments alone do not matter if the government cannot live up to them and implementation is not monitored.

II.6. Conclusions

Despite the existence of plenty of regulatory documents – there is no *real commitment* to fund adequately and implement policies for the integration of the Roma. In each of the explored areas (Housing, Education, Health, Employment, and Good governance) there are many documents – strategic and operational – which unfortunately do not bring added value to the process and the efforts for integration of Roma. Commitment in most cases remains on paper and without real budget allocation. Initiative cannot be driven without resources.

Involvement of Roma is in most cases only on the surface. Often representatives of Roma NGOs are being invited to forums of different levels, but their participation remains at the stage of deliberations with little influence in the process of actual decision making. The showcased examples of good practices are proving that participation of Roma into the implementation of the initiatives has contributed to the positive outcomes. Hence, Roma should not only be beneficiaries, but also implementers and decision makers.

Long-term planning, not project based initiatives. Long term planning also means that the undertaken measures should be connected and to follow certain planned tracks of intervention, increasing the success based on previously achieved outcomes, taking into account the lessons learnt from past experience and from existing practices.

NGOs are good innovators – because of their flexibility and much less bureau-

cracy, which enables them to be more creative and responsive to challenges and adaptive to current environment and context.

Sustainability requires also involvement of the central and local governments, both as a reliable source of funding and as a tool for building a strong institutional fundament for the integration policies.

Partnership with authorities is of crucial importance for all stakeholders. Partnership does not cancel the ultimate responsibility of the government for the integration policies. . This, on one hand, challenges the openness and flexibility of the authorities, and on the other hand the ability of the NGOs to adapt to the structures and approaches of authorities' work.

Participation of the Roma in the local decision making process looks like a promising tool for improving the effectiveness of implementation and monitoring. Local informal and semi-formal bodies have turned out to be viable and able to assist decision making and consensus building.

Interaction between ministries and other agencies at central level can be further

improved though some progress has been made in this respect. In this context the role of the central coordination body can hardly be overstated. In the case of Bulgaria this is the National Council for Cooperation on Ethnic and Integration Issues under the Council of Ministers. There is little doubt that the coordination role needs to be strengthened, although debates about the best institutional set-up to achieve this are far from settled.

Last but not least continuity of integration policies beyond election cycles and government mandates is also a challenge not least because the Roma are inadequately represented in politics. Commitment to Roma related policies seems to be rather weak and they seem to be among the first to be cancelled in times of lower public revenue, which is a sign of their rather low position on the priority list. There is unfortunately little evidence that this problem was relieved by participation of governments in long-term initiatives like the Decade of Roma Inclusion, which also follow a stop and go pattern of national politics and tend to lose momentum over the mid and long term.

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