

Efforts Towards Roma Integration with Development Funds – Insight Into Professional Views

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“Without Roma integration not only is social inclusion impossible, but sustainable economic development is blocked too.”

- Interview with Deyan Kolev

What kind of EU or otherwise funded projects have been planned in the last five years in order to decrease social and spatial exclusion of people belonging to the Roma minority in Bulgaria?

Several sources were available in Bulgaria. The biggest was the ESF (European Social Fund) financed by the HRDOP (Human Resource Development Operational Programme). During the previous period HRDOP financed activities to improve employment assistance, social and healthcare services and education. Under the HRDOP there were seven - I would say - Roma targeted calls for proposals. However, other minority groups were targeted too, since the phrasing of the calls referred to vulnerable social groups. In fact, these calls became one of the main sources for financing Roma integration activities.

If we take a look at the Hungarian situation, Hungary had a special programme for the most disadvantaged micro region, however that was not the case in Bulgaria. Targeted calls were announced for beneficiaries such as municipalities, NGOs and schools. In fact, the calls caused great competition among beneficiaries and in the end the larger and better prepared municipalities, schools and NGOs managed to obtain funding.

What about other developments, outside of EU funds?

Alternative funds available in Bulgaria are mainly determined by the following donors: the NFM (Norwegian Financial Mechanism), the Swiss Fund, the OSF (Open Society Foundation), the America for Bulgaria Foundation and some Dutch funds. The requirement for 10% Roma participation was among the six priority areas of the NFM. The rate of Roma participation was part of the negotiations between Bulgaria and Norway. Therefore, the Norwegian government and Roma NGOs were active in this requirement. It was an important step, because otherwise nothing could reach Roma people through this mechanism. The requirement contributed to having some funding dedicated to Roma inclusion. The strong will and the support of the Bulgarian Government helped a lot. The Swiss contribution also had a Roma component with a small amount of funding. In the last five years the America for Bulgaria Foundation contributed too, and the OSF continues to work in the field of Roma integration.

For many organisations the situation became difficult due to the decrease of private donors - many NGOs relied on them. However, the advocacy of Roma organisations became successful with EU funds: five calls were announced under HRDOP. Advocacy made it to the Monitoring Committee of the OPs since there were representatives of Roma organisations, for example, I was elected as an observer from the side of Roma organisations. We had the possibility to play an active role in

the Monitoring Committee, and I can state that most of the calls were announced because of the active advocacy of Roma organisations and the support of the European Commission. In the preparation of OPs, especially the HRDOP there was no special investment priority dedicated for Roma integration. We managed to advocate for announcing some targeted calls with some investment priorities. It is not the same now. In the present period we have a special investment priority called social economic integration for marginalised communities such as Roma, which was not there in the previous period. In the previous period Roma were mentioned, but as a possible target group in several investment priorities. That is why we managed to advocate for Roma targeted calls.

What are the interests of these donors and how are they related to development policies?

The OSF and the America for Bulgaria Foundation keep Roma priorities high on their agendas. We observe increasing interest of ESF managed by DG Employment in the European Commission (EC) in the past several years. However, it is not as high as desired. It is the same with the Norwegian and the Swiss governments. They are interested in having Roma integration in Bulgaria: they want to put Roma integration among the priorities. I would say that they realised that Roma integration is part of the social inclusion agenda. Without Roma integration not only is social inclusion impossible, but sustainable economic development is blocked too.

What are the main features of these projects in view of the development policy frame? Do they follow the recommendations?

The OSF had had a Decade of Roma Inclusion and they more or less tried to follow policy indications they initiated. The other donors are taking into account that there is a Roma Integration Strategy and they follow their own agenda that is usually harmonised with the NRIS (National Roma Integration Strategy), but they have their own priorities. The Swiss Memorandum set education and health as priorities for Bulgaria and for Romania for this year and they support projects within those two categories. Similar to the Norwegian Funds who set several priorities, within which they expect 10% Roma participation. The NRIS formulating process is under the EU regulation, there was Council Recommendation of December 9, 2013, but there are no strict, clear indicators at the EU level.

How did these projects define the question of “who is Roma”?

People who are considered as Roma do not declare themselves as Roma. Many of them in Bulgaria declare themselves as Turkish, Bulgarian, and so on. Consequently, there was no clear way to describe who is Roma, and who is not Roma among the final beneficiaries. In some of the calls it was decided by the organisations who implement the projects. The Managing Authority (MA) asked the organisations, municipalities and schools about the percentage of Roma among the final beneficiaries and the organisations provided those numbers. In some of the projects

they asked for self-identification, but the criteria were still not clear. It, How to identify who are Roma and who are not among the final beneficiaries is an open question.

In my opinion, there are three possible ways to deal with the issue. Firstly, to dedicate the intervention to certain disadvantaged micro regions. It is well known which neighbourhoods are Roma. It does not matter if the people declare themselves as Roma, Turkish or other, they have this specific problem in their neighbourhoods. Secondly, to direct the actions to certain social criteria linked with poverty. In this way the majority of the final beneficiaries, who are in need are Roma.

Or to have the possibility for self-identification for different subgroups in the Roma community. Because in Bulgaria Roma declare themselves as Millet, as Rudari etc., but not Roma. So, when they have to choose whether they are Roma or Bulgarian, they choose Bulgarian not Roma. If they have the choice between Rudari or Bulgarian, they choose Rudari.

Both the first and the second way have some disadvantages. The third way could be better, it can be specific to have more possibilities in taking the different subgroups into consideration. However, also the three ways combined could also be a solution.

How would you describe the access to these calls? What type of organisations/institutions have a better access?

The most accessible funds were the private donors' funds. OSF and other private donors set very easy criteria and many different types of organisations/institutions opened for the funds. The most serious problem was with the EU Funds at the national level in the previous year. The EC set some criteria, the Managing Authorities at national level set additional criteria because they want every single Euro to be recognised by the EC. The national government set difficult, bureaucratic criteria. In addition, the payment scheme at national level was also very difficult. Small pre-payment of approx. 20% was provided and after that everything was on reimbursement principal. It is different with private donors who provide much bigger pre-payment, even bigger than what their grant was prepared to give. What happened as a result of this bureaucratic criteria for application, for reporting, and for reimbursing? As a result, mainly big municipalities, big beneficiaries managed to obtain funds. Bulgarian municipalities are very different. We have municipalities that vary in size a lot. In the big municipalities the authorities very promptly realised how important the EU Funding is. That's why they followed entire units and have established a directorate for EU funding, they have engaged experts for writing proposals and they have managed to attract lot of funding.

Big municipalities have big administrations with enough budgetary means and available experts, and they can allow their fees with reimbursement scheme; they can invest money and they can expect reimbursement. At the same time, the small municipalities are in a disadvantaged situation and that's why small schools and small NGOs didn't manage to obtain a lot of funding. In Hungary the Programme for the Most Disadvantaged Micro Region was a good model, but that was not the case in Bulgaria. Although it was necessary to have such a programme opened for the most disadvantaged regions, it attracted the smaller amounts of money. It appeared, that

EU Funding didn't provide cohesion, but even made the differences between the regions much bigger.

How would you evaluate the outcome of the development projects targeting Roma?

The overall picture is not very optimistic. Certain good things were achieved at a local level. Notably, not only private donors but even the EU Funds through the Roma targeted calls supported mainly the local level initiatives; municipalities and NGOs applied and implemented activities at the local level. In some municipalities, in some schools good things were achieved. The problem is that these good things achieved at the local level were not converted into national policies. The logic of an intervention in general has 3 stages. 1st stage is piloting, 2nd stage is extension to more places, and the 3rd stage is providing sustainability at a national level. The 1st stage was done in many places. Of course there were cases of bad projects as well. Usually, the donors prefer to show the cases of good and bad practices, which can be useful because one could learn from failures even more than from successes. Regarding the extension, it was done only in few cases. Sustainability is the main task of the national institutions, and it didn't happen. Hence, funding didn't bring significant added value, it didn't bring significant outcomes, because the outcomes were mainly at a local level. Many of the outcomes and many of the activities ceased after the end of the projects.

What were the outcomes at a local level? Can you give some example?

In different municipalities there were some very good outcomes. For example, a decrease in the number of school leavers, in the number of school drop-outs, improving the proportion of Roma who attend university. This is in the field of education. There were outcomes regarding healthcare and social services and particularly in some places, in employment. In Bulgaria, if we have to differentiate the fields of Roma integration, we had good results in education in many cases, not so many, but some good cases in the field of healthcare and social services. Limited results in the field of employment and almost no good cases in connection with living conditions.

How do you see the involvement of Roma through these projects?

The involvement was higher in the initiatives financed by private donors and significantly less in EU funded projects as well as in the cases of the Norwegian Fund and the Swiss Fund. The logic of the Norwegian and the Swiss funds and the HRDOP was to dedicate more activities at municipal level to municipal authorities and institutions. That's why the involvement was not high - but there were some good cases. Moreover, as is mentioned above, in the past several years in this very important dangerous tendency many Roma organisations collapsed because of a lack of funding. In fact, only a few organisations at the national level could contribute. They need to invest more in the capacity of Roma organisations and also there is a very important need to outsource activities to Roma organisations who are capable. Because there are some activities that could be implemented especially at grass-roots

level, they could be implemented only by Roma organisations, Roma professionals and experts. But our institutions, up till now, do not have the culture to outsource these activities.

There is a need to increase the capacity of Roma organisations. How do you see it from the donors' perspective?

I really would advise the donors to outreach some activities to Roma organisations. Especially, when they are linked with the grass roots' work or with work which could not be done by other institutions. It is very important to delegate such kinds of activity. It is also very important to finance bigger projects of NGOs. What do I mean? In the previous period Bulgaria had a limit of EUR 200,000 for EU funded projects implemented by NGOs. That is why it was not possible to finance national level initiatives implemented by NGOs. There is a need to outreach to finance more activities toward to NGOs.

You already mentioned some blockages which were not a good case for achieving a better outcome. Can you please list some?

First, there were some bad models. Especially, when our institutions tried to transmit some practices from Western Europe that work for the so called new minorities, for the migrants. Roma are not a new minority here. We have been living here for centuries. These models obviously did not work well. For example, in two or three PHARE projects there was an attempt to introduce the so called teaching assistant or school mediator, in order to have a translator in the classroom. Despite having worked for the new minorities in Western Europe, it was inapplicable to Roma people. First, because many Roma speak Bulgarian. Second, if you insert a translator into a classroom, it is not accommodated by the present way of teaching in Bulgaria. In fact, these teaching assistants were trained in PHARE projects and the most well known of them was disappointed together with the school director, because they actually saw that this model is not working. In fact, these projects failed and it is a lot of money spent on a model that does not work. But there are some obstacles, such as the very bureaucratic procedure for reporting, especially within EU funded programmes, within OPs. This bureaucratic procedure took a lot of time from the staff. In fact, the staff involved invested more efforts in reporting rather than on activities; it stopped them from achieving significant results. This is another obstacle. The other important obstacle was the lack of cooperation or synergy between different types of institutions. It appeared to be very difficult to make the institutions work together. Even more difficult to make the institutions work with NGOs and with the local community. The other very important blockage was the lack of involvement of the local community. Especially, when the project was implemented by institutions. They do not have the skills to involve the local community and this is the reason for failure in this activity.

Did these developments meet with the needs and problems of Roma communities living in segregated settlements? Does the municipality consider the real needs of Roma community?

It is a big issue, since usually, when the project proposal is being written, the majority of the beneficiaries, municipalities and NGOs skip the preliminary survey on the real needs. Projects are usually prepared on the basis what the applicant considers an issue of the Roma community. Beneficiaries who are far from Roma communities formulate the issue even more weakly. It caused serious problems and it is linked with the lack of Roma involvement. Unfortunately, if the agent problem of the Roma community missed from the stage of the project design it is guaranteed that the project will not contribute significantly to improving the situation of a marginalised community. This is one of the reason why Bulgaria insisted on having Municipal Roma Integration Plans (MRIP) prepared by municipalities and on inclusion of NGOs to the preparation process. Municipalities can assess submitted projects by considering linkage to MRIP. Obviously, it does not guarantee everything will be perfect but it is a mechanism for consistently accounting the needs of Roma. It is a requirement in Bulgaria (in the NRIS) for every municipality to prepare MRIP. The quality of MRIP varies. In those municipalities where Roma organisations participated actively in the process, the municipal plans are better developed. In some municipalities it was just 'copy-paste' versions of some other municipal plans. Nevertheless, a big step was made to have local strategy document counting on Roma inclusion.

The new OPs started to announce their first calls. My colleague and I had the opportunity¹ to advocate in these calls that every project should be in compliance with MRIPs. Realistically that could make projects meet the real needs.

In which field (education, housing, health, employment, culture etc.) are development projects placed more frequently in your opinion? What is the most "popular" field?

Education is the most popular field in Bulgaria. It is followed by healthcare and social services. We have good models in education and more or less well developed models in healthcare. In the case of employment a few good practices can be found. Living conditions is the most problematic field due to lack of expertise. No organisations work on living conditions and neither does the state, nor do municipal institutions have good solutions either. For some municipalities dealing with big Roma ghettos this is an issue. In Plovdiv for instance there is a Roma ghetto with 60,000 people and another one with 20,000 people. Practically they are like separate towns. The local municipalities do not know how to deal with that issue.

A good multi-sectoral pilot initiative by the Minister of EU Funds (and supported by the HRDOP Regional Development OP) that included housing, employment, education, healthcare and social services has been on for three years.

¹ Deyan Kolev currently is a member of the Monitoring Committee of the Science and Education OP and his colleague from Amalipe Association is a member of the Monitoring Committee of the Human Resources Development OP.

Currently it is implemented in three municipalities, though the initial plan included four. Ultra-nationalists protested against the project and local authorities involved forced the project in the municipality to stop. It seemed to be one of the best projects, and although, the Mayor is very popular and successful in his position, the reaction of the right-wing made him stop the initiative.

Previously, the problem with Roma inclusion activities was the lack of funding. Nowadays the biggest problem is the lack of public support. Hence, the majority is able to make politicians step aside from Roma integration. Therefore, it is essential to hold advocacy – as we managed to include Roma investment priority socio-economic integration at marginalised communities such as Roma during the preparation of the HRDOP. It will be a special sub-priority called development of local communities and overcoming of the Roma stereotypes. However, without creating a favourable public environment, integration policy cannot be implemented.

What do you think about the selection process of these projects? Do you see any differences between East European countries? If so, what are they?

I think the selection process is not very transparent. And private donors are even worse compared with the EU funded programmes. Private donors do intend to support Roma integration projects but the approval of projects lacks transparency.

Do you think that the selection process has to be transparent?

At least the principle should be so and the criteria should be as concrete as possible. Applicants should have the possibility to complain and to receive reasonable answers. Regarding EU funded projects there can be a special commission, experts, and yet there are a lot of doubts about fairness of the process. In Bulgaria the municipalities that follow the same party as the government usually receive more projects compared with the municipalities ruled by the opposition parties. In this case the process is completely unfair.

Are the projects' objectives coherent with the policies? Do they include know-how learned from any previous development projects? Do they focus on local sources and their reinforcement?

Up till now, new calls have repeated the previous ones to some extent. Their logic is to support local level initiatives and that's why the tenders provide a broad framework for projects. In fact, within the calls applicants can apply with whatever they want. Actually, after piloting and successful practice proof, it should be improved by independent evaluation and have the guarantee for extension and sustainability. Unfortunately, this has not happened yet.

Our idea for the new planning period is to bring together Managing Authorities of the OPs and civil society to define certain standardised Roma integration interventions with a precise methodology. If someone wants to have a community centre, it should be specified what kind of activities will be provided, the number of people, areas of expertise, etc. Therefore, if a standardised intervention is in hand, a

project can be easily supported by the OPs and new ESF regulations that allow the so called simplified payments. Paper work will be reduced, as well as bureaucracy. It also can provide space for certain good standardised practices to be extended in many municipalities. However, standardisation does not necessarily bring added value. It is good in providing results within certain frames but not to exceed difference. Hence, it is important to have possibilities for innovative intervention for piloting, but also to have possibilities of financing the extension of standardised interventions.

You already mentioned the issue of sustainability of the good models. But how do you see the opportunity for the sustainability of successful projects? What kind of tools are available for the implementers in order to ensure sustainability?

As of now almost no tools are available for sustainability. Sustainability should be provided by the state and its institutions from the state budget. Currently we don't have such an engagement by the state. Amalipe Association has been having some initiative for years and they are expending. We are just trying to raise more and more funds.

How can development projects affect the dialogue between Roma communities and local authorities?

They can contribute at very high level and this is important for the success of the project. No development project could success without cooperation between the local communities and mainstream institutions. That is why it is important to encourage partnership between local communities and local institutions.

Do you know of any projects that have their focus on Roma participation in any phases?

A lot of projects contribute to participation. I'd give an example of projects implemented by Amalipe using EU financing obtained directly from Brussels. There are some Brussels operated projects. One of our projects was for establishing community development centres as a means to activate a community to participate in the development process, as a means to overcome some patriarchal traditional practices like early marriages, etc. Within this project we implemented the activity in 11 municipalities in Bulgaria. In all of these municipalities the Community Development Centres (CDC) were established with the support of the municipal authorities (MA). The MAs provided locations for the CDCs. We smoothly cooperated in all of the activities. We established the CDCs together with the MAs and we developed the activities of the centres, and for four years we were the main beneficiary of the project.

What if the municipality is the owner of the project? How would they deal with Roma participation?

We had a lot of such cases and yes, this is can be a real partnership, especially, when every partner has their own part of the budget. This is very important. Now, within the new OPs we are advocating for all the Roma integration projects to be based on the partnership principle – to have the municipality and the NGO on the board and to guarantee that the partnership will be real.

How do you see the possibility to implement the same project in different Roma communities? What was your experience with the implementation of the same project in 11 different municipalities?

We deliver a tool to implement this project in municipalities with different types of Roma communities with different problems. It was our idea from the very beginning. It works well, when you engage local people and this is a very important principle of mine. They should be from the same Roma group, from the same municipality. Not to send someone to this community, but to have someone from the community. Second, the project should provide a space for concrete activities designed from the local level. For example we had an idea for a CDC to work on decreasing early school leaving, on decreasing early marriages, but what exactly was to be done was decided at the local level by the local community.

What kind of challenges did you face during the implementation of CDC project?

It requires more attention and creativity. But I would not say that it was difficult. In some ways it is challenging but it should be like that. For sure it is possible to pay some more attention to the local needs. The local people should be in the position to define what kind of activity should be implemented at the local level.

How can the local people get to this position? For example when there are needs which are related to capacity building.

First it is very important to employ people from the local community and to include them into different kinds of trainings in order to increase their capacity. It should also be a part of the project to establish local volunteer community groups and to work toward raising their capacities. It is a dual game. From the one side we should engage local people and from the other side, raise their capacity.

What do you recommend in order to reduce social and spatial exclusion of Roma in development projects?

I would recommend to have Roma targeted projects. The right approach is to combine mainstreaming projects and targeted projects. Second, it is very important to ensure Roma participation. This is not a moral issue, this is an issue of efficiency. If we want to have the activities implemented efficiently and if we want to achieve real results we should involve Roma people and the Roma community.

It is indispensable to make sure a community – despite the project framework – fits the concept of community development. Local capacity can then be satisfactorily realised and implementers can cultivate, raising low capacities by knowing where the stages are to intervene. No project should be implemented that sees Roma only as passive beneficiaries.

Do you know any country in the East-European area that has a strong integration policy?

No, absolutely not. The Roma integration policies are not strong enough in the countries with significant Roma populations, neither Bulgaria, nor in Romania, nor in Hungary. There are good strategies and good intentions but nothing concrete in terms of actions.