



# Civil society monitoring report on implementation of the national Roma integration strategy in Bulgaria

*Assessing the progress  
in four key policy areas  
of the strategy*

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on implementation  
of the national Roma integration strategy  
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Although the Roma Civil Monitor pilot project, as part of which the report was prepared, is coordinated by CEU, the report represents the findings of the author and it does not necessarily reflect the views of CEU. CEU cannot be held responsible for any use which may be made of the information contained therein.



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## LIST OF ABBREVIATIONS

BGN	Bulgarian Lev (currency)
BHC	Bulgarian Helsinki Committee
BSP	Bulgarian Socialist Party
CEICSEM	Centre for Educational Integration of Children and Students from Ethnic Minorities
CPD	Commission for Protection against Discrimination
EAFRD	European Agricultural Fund for Rural Development
ECRI	European Commission against Racism and Intolerance
EEA	European Economic Area
EEA FM	European Economic Area Financial Mechanism
ERDF	European Regional Development Fund
ESF	European Social Fund
ESIF	European Structural and Investment Funds
EU SILC	EU Statistics on Income and Living Conditions
FRA	EU Agency for Fundamental Rights
GERB	Citizens for European Development of Bulgaria (political party)
HRDOP	Human Resources Development Operational Programme
ISCED	International Standard Classification of Education
MEP	Member of European Parliament
MES	Ministry of Education and Science
MH	Ministry of Health
MLSP	Ministry of Labour and Social Policy
MP	Member of Parliament
MRDPW	Ministry of Regional Development and Public Works
NAMRB	National Association of Municipalities in the Republic of Bulgaria
NCCEII	National Council for Cooperation on Ethnic and Integration Issues
NEET	Not in Education, Employment, or Training (young person)
NGO	Non-Governmental Organisation
NRCP	National Roma Contact Point
NRIS	National Roma Integration Strategy
NSI	National Statistical Institute
OSCE	Organization for Security and Co-operation in Europe
RDOP	Regions in Growth Operational Programme
REF	Roma Education Fund
SESGOP	Science and Education for Smart Growth Operational Programme
TSA	Trust for Social Achievement

## EXECUTIVE SUMMARY

Regarding Roma integration, the 2017-18 period is characterised by the collapse of the legitimacy of the National Roma Contact Point (NRCP) and the consultative process with civil society after an ultra-nationalist was appointed chair of the National Council for Cooperation on Ethnic and Integration Issues. The main space for Roma-targeted policy and consultation on it is regarding the usage of EU funds for Roma inclusion (especially ESF funds, and ERDF funds in part).

Important improvements have been observed in the field of education, especially in reducing early school leaving and increasing participation in different levels of education, while segregation remains a problem. Deterioration is obvious in the field of housing. Serious challenges, however, remain in all fields.

### Employment

The chapter on Roma Employment traces Government efforts to counter long-term mass unemployment among Roma, which is the most serious indicator for socioeconomic exclusion and poverty. It attempts to explain why, for Roma people, unemployment has stopped being a question of personal choice but is rather a shared community problem.

The report analyses why State programmes directed at Roma integration cannot reach the majority of target groups, respond to their basic needs, or have an overall impact on their everyday lives, despite positive actions and declared political will. In addition, the chapter criticises the lack of sensitivity on gender issues in state policies, strategies and plans, including at municipal level, that do not take into account the vulnerable position of Roma women, who often face double-layered challenges – restrictions within their communities and multiple discrimination outside their communities – further limiting their chances for decent employment, emancipation and civil participation.

### Housing and essential public services

The housing conditions of Bulgarian Roma are worse than the general population's housing conditions and are one of the biggest problems for the whole society. At the same time, EU-MIDIS II data shows that in many dimensions, gaps between non-Roma and Roma are not so big compared to other European countries when it comes to housing. The illegality of many dwellings is one reason for these gaps and a big problem at the same time. Nearly a quarter of all houses in segregated Roma neighbourhoods were built illegally, compared to one-sixth of all houses in the country. Local authorities often demolish such houses even when they have been brought in line with official requirements. Another feature is that social housing is not typical for Bulgaria – only 2 per cent of dwellings are social housing.

The chapter recommends legalising buildings that do have sustainable construction; imposing a moratorium on the execution of already-issued demolition orders for housing that is the inhabitants' sole residence; undertaking stronger monitoring and proactive work by municipalities to stop illegal construction in detached neighbourhoods; legalising houses in Roma neighbourhoods after they have been brought in line with official requirements; and providing financially accessible housing.

### Impact of health care policies on Roma

Healthcare is probably the public policy field with the greatest number of targeted integration and equal access efforts aimed at the Roma in Bulgaria. Since 2001, when the first health mediators were trained, there has been an increasing trend of municipally-employed health mediators. Mobile healthcare services providing access to immunisations of children with incomplete immunisation status, fluorography, gynaecological examinations, paediatric examinations, mammography and ultrasound examinations were

established in 2006-2009 and are still offered on an annual basis. With the joint efforts of international stakeholders, local authorities and some civil organisations, several integrated (i.e., both health care and social) services were piloted, tested and established: Roma paramedics, Roma healthcare students, and home visiting services (with MDM and UNICEF). However, estimates show almost 60% of Roma people in Bulgaria live without health insurance and both infant mortality rates and adolescent fertility rates maintain relatively high levels compared to other EU countries, as well as epidemic outbreaks in particular neighbourhoods.

The analysis shows that the negative trends cannot just be explained simply by discrimination. The Bulgarian healthcare system suffers a systematic lack of medical staff in some regions, while at the same time about 1.4 million people live without healthcare (in which the proportion of Roma is about 20%). Therefore, major change for Roma and increased access could come about only through a general change of the healthcare insurance mechanism and through regionally targeted measures combating the lack of medical staff. The report suggests differentiating healthcare mediation, putting an accent on the need for hospital mediation in order to combat prejudices among hospital personnel. Some examples of possible measures with regard to pharmacies and access to medication – such as decreasing VAT, subsidising municipal pharmacies, etc. – are suggested, too.

## Education

The field of education marks the area of the most significant advance in NRIS implementation. The objective development of the Roma community is increasing the share of well-educated Roma and coincides with political attention to ensuring full attendance at pre-school and primary education (which became a top priority for the current Government) and these have become the main reasons for the advance of educational integration.

The attendance of Roma children in pre-school has increased but is still below average. The existence of financial barriers (e.g., kindergarten fees), the lack of an intercultural perspective and modern teaching methods that consider the specifics of Roma children and parents form the most serious challenges regarding their access to quality pre-school education. Positive trends regarding abolishing kindergarten fees in new municipalities have still not been supported by national policy.

A significant advance has been achieved regarding the enrolment of Roma in primary school and reducing their dropout rate. The multi-institutional framework for full enrolment established in 2017 is yielding certain positive results. The new model of financing the school system provides hope for better targeting of resources for rural schools. Allocation of additional funds for work with children and students from vulnerable groups is an important positive step that could help these schools to appoint school mediators and to keep motivated teachers in the field. Nevertheless, significant challenges remain in promoting ethnically mixed, inclusive education and desegregation. Persistent challenges also remain obvious when it comes to improving academic achievement and quality of education. More measures are necessary to increase the number of Roma in secondary education.

## Case studies

The Lukovit case study aims to assess progress in the implementation of the Lukovit Municipality's „Action Plan for the Integration of Ethnic and Other Socially Vulnerable Groups 2014-2020“. The case study tracks local policies and initiatives implemented in the municipality that aim to improve key areas such as health, education, housing, and employment, respect for the rule of law and for antidiscrimination, and the preservation of cultural heritage.

The Sliven case study analyses implementation of the local Roma inclusion strategy adopted at the end of 2012 and updated twice – in 2014 and 2018. Sliven’s local Roma inclusion strategy is considered as one of the best in Bulgaria, thanks to participation of Roma NGOs, local Roma experts and activists in its development. However, despite the quality of the plan, the municipality of Sliven does not provide funding for its implementation. It seems that the strategy was developed only because required to draw the ESIF. The case study tracks the progress in the implementation of Sliven Municipality’s Action Plan and gives an in-depth analysis of these municipal policies from both as they are currently underway and from an historical perspective.



## INTRODUCTION

Following the EU Framework, and after a consultation process in 2011, the Council of Ministers adopted Bulgaria's National Strategy for Roma Integration (NRIS) and its Action Plan on 21 December 2011. Following the request of Roma NGOs, the Strategy was proposed to the Parliament and approved by a Decision of the Parliament on 1 March 2012. In this way, the NRIS became the first Roma integration document in Bulgaria approved by Parliament, which was an important, positive development (all previous such documents were approved by Council of Ministers' decrees or decisions).

Roma NGOs' overall assessment of the NRIS is that it was a step forward: it demonstrated political will for putting Roma integration higher on the agenda of the Bulgarian Government and defined a proper strategic approach and direction for action. At the same time, the Strategy did not propose any change to the weak, inefficient and ineffective institutional infrastructure for Roma integration or to the monitoring and evaluation mechanisms. The Action Plan's added value was limited by a lack of financial backing for most activities and an absence of new activities that would be different from the ones performed at present. The NRIS required all municipalities to approve Municipal Roma Integration Plans, and that was an important added value: around 200 out of 264 municipalities have done this. Another asset was linked with the direction of significantly more EU funds toward Roma integration, as well as EEA and Swiss Contribution funds.

The present report evaluates the NRIS implementation in 2017-2018. A wide range of methods was used. The desk review included analysis of existing data from the census, large-sample standard surveys (national and EU ones), specific surveys, (FRA, Open Society Institute, Ministry of Education, Bulgarian Helsinki Committee, Centre Amalipe, Equal Opportunities Foundation and others), sectoral databases in education and anti-discrimination provided by the responsible institutions, as well as media and social media publications. More than 20 interviews and written communications with the main stakeholders were carried out with the relevant politicians, policy makers and officials of line ministries (Labour and Social Policy, Health, Education, Regional Development, as well as the Council of Ministers), the National Roma Contact Point, the Regional Inspectorates of Education, local authorities, principals, teachers, civil society representatives (NGO activists, coordinating structure participants (such as the Monitoring Committees of the Operational Programmes, etc.), Roma community leaders, community members, researchers and consultants. Information from concrete cases from the field (Lukovit, Pavlikeni, Plovdiv, Blagoevgrad and others) was used as well.

The CSMR 2017 provoked significant political and diplomatic attention<sup>1</sup> and important advocacy successes were achieved. When organising the report's development in 2018, the project partners stressed the principles of Roma participation and developing the capacity of Roma organisations to monitor the implementation of public policies and to advocate for a transparent, effective and efficient Roma integration policy, both at local and national levels. We strived to make the voices of Roma better heard through the report. Since the Roma community and movement is not homogenous in social and ethno-cultural terms, the partners intend rather to coordinate these different voices and to propose possible harmonies on certain key topics rather than to pretend they are unified into one voice only.

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<sup>1</sup> Seven ambassadors, EC representatives, ministers / deputy ministers, the national ombudsman and others took part in the first discussion about the Report's conclusions on education organized on 14 May 2018.

## EMPLOYMENT

Roma people in Bulgaria face multiple challenges that have a negative impact on their access to the labour market. Low levels of literacy and education and negative attitudes against them are observed at different levels of social organization - from political rhetoric<sup>2</sup> to individual beliefs<sup>3</sup> – deprive them of opportunities to find decent jobs. Such conditions seem to reduce the effect of active governmental efforts to secure access for Roma people to the labour market. Despite declared political will – positive policies and strategies that consider international and European standards for human rights and minority protection<sup>4</sup> – unemployment among Roma in Bulgaria remains much higher than among non-Roma.

According to the last census data provided by the National Statistical Institute (NSI) in 2011, the number of persons who identified themselves as Roma was 325,343 or 4.9 per cent of the population.<sup>5</sup> Only 38.8% of Roma above the age of 15 are economically active. Despite this ethnic group having the youngest average population, the share of its students in the age group above 15 is the smallest (as is the share of its pensioners). Roma women have less of a share in paid work than Roma men – 25% vs. 37%, respectively.<sup>6</sup> In comparison, the percentage of economically active ethnic Turks and Bulgarians in the age group above 15 is 45.4% and 53.5%, respectively. More than half of the Roma household members in Bulgaria declared themselves „unemployed” (55%), with Roma women reporting 59% unemployment and Roma men, 52%.<sup>7</sup>

Three-fifths of Roma 15 and older (61.2%) are therefore categorized as „economically inactive”. The group of Roma pensioners (the only ones who have generated their own incomes) is the smallest in the country – just about 23.5% (or 14.4% of all Roma citizens 15 and above). The main reason lies not just in the age structure of the community, but also in the fact that many elderly Roma who have been constantly unemployed or have been employed in the informal sector have no pension insurance and do not meet the requirements for pensions.<sup>8</sup> In post-communist societies, women have a long tradition of participating equally in the labour market, which seems to hold true for Roma, and Roma women have unemployment rates comparable to those of Roma men. Higher gender equality in these societies is also reflected in the percentage of women who see themselves as full-time homemakers; only about 2% to 6% of the Roma women were reported as full-time homemakers.<sup>9</sup>

Long-term mass Roma unemployment is the most serious indicator for their socioeconomic exclusion and poverty. This has long stopped being a question of personal choice for Roma and is rather a shared community problem. Even as the Roma population

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<sup>2</sup> Bulgarian Deputy PM And An Ex-Chairman Of Bulgaria’s National Council For Cooperation On Ethnic And Integration Issues Convicted Of Hate Speech <http://www.balkaninsight.com/en/article/bulgarian-deputy-pm-convicted-of-hate-speech-10-25-2017>

<sup>3</sup> Only 39% of Bulgarians would maintain friendly relations with a Roma person, according to research on Bulgarians’ values and attitudes by Trend Research Centre - <https://bit.ly/2PtKSq5>

<sup>4</sup> Among which Europe 2020 strategy, EU Framework for National Roma Integration Strategies up to 2020, UN International Covenant on Civil and Political Rights, The Convention on the Elimination of All Forms of discrimination against Women, Convention on the Rights of the Child, etc.

<sup>5</sup> National Statistical Institute, 2011, <http://censusresults.nsi.bg/Census/Reports/2/2/R9.aspx>

<sup>6</sup> Roma Survey – Data in Focus – Poverty and Employment: The situation of Roma in 11 EU Member States, FRA, p. 24-25

<sup>7</sup> Second European Union Minorities and Discrimination Survey, p.17, FRA, 2018

<sup>8</sup> National Roma Integration Strategy of the Republic of Bulgaria (2012 – 2020), p.7 [https://ec.europa.eu/info/sites/info/files/roma\\_bulgaria\\_strategy\\_en.pdf](https://ec.europa.eu/info/sites/info/files/roma_bulgaria_strategy_en.pdf)

<sup>9</sup> Roma survey: Data in focus - Poverty and employment: the situation of Roma in 11 EU Member States, FRA 2014, p.24

is increasing, there is a tendency for Roma to identify themselves to the authorities as Turkish,<sup>10</sup> raising the question of census data reliability. Only 23% of economically active Roma are employed – 16% of women and 29% of men.<sup>11</sup> In comparison, 53.5% of all ethnic Bulgarians above the age of 15 are economically active.<sup>12</sup> Roma people are employed mainly in low-paid jobs with temporary contracts in construction work, agriculture and communal services due to their low educational status. A substantial share of Roma has only insecure or informal employment. On average in the EU, 19 % of Roma in paid work say they lack medical insurance, with Bulgaria leading among EU countries in this negative tendency (51% of working Roma lack health insurance).<sup>13</sup> These statistics reflect a grim reality in which the Roma population is stuck in the cycle of poverty, as programmes directed toward their integration cannot reach most of the target group, respond to their basic needs, or impact their lives. In addition, state policies and strategies, including at municipal level, are gender-neutral and do not consider the vulnerable position of Roma women, who often face double-layered challenges – restrictions within their communities and multiple discrimination outside their communities – that further limit their chances for emancipation and civil participation.

Turning to youth unemployment, the reasons for the phenomenon of Roma who are „Not in Education, Employment or Training“ (NEET) are complex, but can be summarised as involving the specificities of their family and social environments, generational unemployment, marginalisation, and their lack of education, qualifications and motivation for work. High unemployment is inevitably connected with low education– the biggest factor most commonly pointed out as the key to the formation of a NEET group. Data<sup>14</sup> reveals that 47% of these youngsters are early dropouts, i.e., they have just an elementary education (or less). Of the NEETs, 51% are Roma and/or Turkish, while 46% are ethnic Bulgarians (an increasing number in recent years). 90% of employed Roma have a primary education or less, 0.5% have a secondary education, and only 0.1% have a university degree,<sup>15</sup> which inevitably lowers their chances for professional development and increases the risks for their easily dropping out of the labour market, heavily relying on social support, and falling into the category of the NEETs.

### Improving access to labour market and effectiveness of employment services

The NRIS is the key political document evidencing that Roma issues must be put high on the political agenda. The main key actions of the Strategy that aim at involving Roma people in the labour market include: activating long-term unemployed and economically inactive people with a view to their using integration services; supporting the socio-economic integration of Roma; securing access to different trainings (literacy, motivational trainings, skills-building and professional qualifications); boosting employment, including „green jobs“, by subsidizing positions in environmentally protected regions to create high-quality employment and environmental protections; providing access to tools and initiatives for entrepreneurship; implementation of mechanisms together with representatives of employers, syndicates, municipalities and Roma NGOs for the long-term

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<sup>10</sup> Opinion of health mediators in Roma neighbourhoods in Plovdiv, Bulgaria, who explain it due to the negative attitudes against Roma people in combination with influences from Turkish popular leaders and entertainment stars (especially valid for young people)

<sup>11</sup> Second European Union Minorities and Discrimination Survey, FRA 2018

<sup>12</sup> National Roma Integration Strategy of the Republic of Bulgaria (2012-2020), p. 4

<sup>13</sup> Roma survey: Data in focus - Poverty and employment: the situation of Roma in 11 EU Member States, FRA 2014

<sup>14</sup> National Statistical Institute, <https://bit.ly/2S3xihx>

<sup>15</sup> Position paper of the Confederation of Independent Syndicates in Bulgaria on the EC Report on Bulgaria, 2016, <https://bit.ly/2EQFm3c>

employment of active, working-age Roma; introducing legal and economic mechanisms for stimulating employers to hire Roma, including through corporate social responsibility.

The Ministry of Labour and Social Policy (MLSP) is the main coordinating body promoting sustainable policies for the social protection, inclusion and employment of Roma people. The Employment Agency (part of the ministry) is responsible for implementing policies to support the socioeconomic integration into the labour market of ethnic minorities and other vulnerable groups in a disadvantaged position. It works in close cooperation with the Agency for Social Assistance (under the same ministry) on efforts to promote a proactive approach and achieve a long-lasting effect on the inclusion of marginalised groups by the provision of integrated services through the Employment Agency and Social Assistance Directorate's local branches.

In 2018, 3.7 million EUR (7.2 million BGN) was allocated by the State Budget to securing employment for a period of not less than six months, an allocation in line with the aims set in the NRIS. In 2018 the 28 Regional Programmes for Employment were to affect 2,218 unemployed persons who face the biggest challenges in the labour market. Of these, 1,753 unemployed persons (79%) were to begin full-time work and 465 (21%) would be involved in part-time employment. The target group is further subcategorized in the National Employment Action Plan for 2018, dividing it into six subgroups:

- Long-term unemployed;
- Unemployed youth up to 29 years of age;
- Unemployed without qualification, or holding a qualification that is not sought by the labour market (here there is a special mention of Roma);
- People over 50 years of age;
- People with permanent disabilities;
- Inactive people willing to work, including discouraged persons.<sup>16</sup>

There is also a financial contribution by local municipalities, provinces and their partners amounting to 120,000 EUR (234,000 BGN). Their share covers material costs and secures job creation in a wide range of locally important activities, such as maintaining and preserving municipal and state property - cultural monuments, schools, kindergartens community centres, roads - and assistance in the provision of home social work.

The abovementioned subgroups do not include a gender dimension, thus presenting a broad, homogeneous description that fails to recognise the vulnerable position of Roma women and their difficulties in terms of access to the labour market. Current policies (e.g., the NRIS, municipal strategies on Roma inclusion, the National Employment Action Plan, administrative monitoring reports on employment, etc.), and data collection on ethnic minorities also do not include a gender dimension, which is a signal that decision-makers lack the necessary sensitivity and awareness in terms of gender equality in the labour market, gender-based discrimination, and the formulation of gender-sensitive policies and programmes that encourage equal opportunities for Roma and other vulnerable groups of women on the labour market.

During the last decade, there were two main instruments directed towards overcoming barriers to Roma inclusion in the labour market. The first instrument was through programmes that were mainly funded by the national budget within the framework of the annual National Employment Action Plan. The second instrument was through measures financed by the European Union, mainly through European Structural Funds – Operational Programme Human Resources Development. Thus, by securing national funding in combination with funding from the EU, the State aims to promote labour market participation and employability through a mix of effective outreach measures, active labour market policies and social services.

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<sup>16</sup> National Employment Action Plan 2018: <https://www.az.government.bg/pages/planove-i-programi/>

In 2018 the implementation of the 28 Regional Programmes for Employment began in June. The programmes have been affirmed by the State as an effective instrument of employment policies. On the one hand, they are being promoted to local economies. On the other, they are designed to secure employability to unemployed persons from the most vulnerable groups that face poverty and social exclusion. After changes to the Employment Promotion Act in 2016, new approaches were introduced for developing, improving and financing regional programmes for employability in which local authorities have a key role. The allocation of funds is included in the National Employment Action Plan. The Regional Employment Programme for each of the 28 districts is developed on a project basis, drafted by the district administration and the municipal administrations, and approved by the Employment Committee of the Regional Development Council according to criteria taking into account the average annual unemployment rate and the average annual number of unemployed during the previous year in the respective district. A positive side to these programs is that they guarantee funding for smaller municipalities, paying attention to local problems. Another aspect of the Regional programs is that each municipality has the freedom to choose which activities to implement. Local authorities can define the number of employed persons, how work is organized (full time or part time), during which months of the year, etc. The programmes are in line with the regional priorities in their development strategies and with regional and municipal plans for development and will contribute to the implementation of national priorities in the sphere of employment. These programmes also reflect strategy and action plans for Roma inclusion, both at national and local levels. However, a negative aspect is that most of the municipal strategies for Roma inclusion contain a list of quantitative and qualitative indicators without specifying target values or quality indicators. They are mainly used as an argument when preparing and applying for projects from funding bodies. In practice, a municipality could not apply for funding under project procedures if the activities envisaged for which funding is sought did not appear in the Municipal Action Plans on the Integration of Ethnic Minorities and Other Vulnerable Groups that are closely tied with the NRIS. In order to achieve real change in the lives of ethnic minorities, there is a need for systematic state funding that is not dependent on project initiatives and is not bound by deadlines. Such is the condition of the Regional Employment Programmes – their implementation will continue until the end of 2018, when the minister is expected to adopt the new programme for the next year.

A major drawback is the lack of a working system for monitoring, evaluation and control of the current NRIS. Such a system is only now being developed under a project funded by the Operational Programme Human Resources Development.<sup>17</sup> When visiting its website to track its progress, the „system” contains almost no information, and at this point is useless. It is disappointing that only at the end of the strategic period (ending in 2020) such a system is being developed, as it is much needed for the objective assessment of policies and measures concerning Roma integration. Such an online platform could bring transparency to both local and national actions and achievements and allow access by NGOs and stakeholders to provide input and critical analysis of the current situation.

The „Activating the Inactive” programme introduces the widest possible range of activities aiming at NEETs, Roma inclusion and integration in line with the Annual National Strategies and is funded by the state budget. It implements active and preventive measures for integration of inactive, long-term unemployed people. It also introduces a people-centred approach by considering the characteristics of each individual with special attention being paid to the accumulation of negative signs for each active labour market policy beneficiary. It brings together various tools and services to attract people to register and use the services of the public employment services and private employment intermediaries, as well as providing specialized, individual, integrated services to the registered unemployed,

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<sup>17</sup> Link to the System for Monitoring, Evaluation and Control on the Implementation of the National Strategy of Republic of Bulgaria for Roma Integration 2012-2020: <http://www.nccedi.government.bg/bg/node/225>

including psychological support, motivation for active behaviour on the labour market, and referral to appropriate services provided by trained specialists - mediators, psychologists, and case managers. The programme also strives to impact unemployed persons of working age who receive monthly welfare and who should be fully engaged in activities beneficial to the municipality, both with a view to ending the attitude of passively taking welfare benefits for granted and to maintaining/restoring work habits and discipline with a view to facilitating activation for employment. However, social and employment services are not yet provided within a single point of contact/institution, which is still a challenge, and the work to improve service quality continues in 2018,<sup>18</sup> and 2019.

The programme consists of activities divided into four components:

1. Work with inactive, unemployed persons of working age;
2. Labour Exchanges;
3. Encouragement and development of local cooperation on employment;
4. Psychological support, motivation for active behaviour on the labour market and counselling of unemployed persons.

Undoubtedly, the programme introduces contemporary measures to attract and popularise employment opportunities in Roma communities. One of the innovations introduced during the last five years was the Roma Career Mediators – their role is to identify and motivate inactive, discouraged people to join the labour market. There were 54 mediators in 2014, 92 in 2016 and 88 in 2017.<sup>19</sup> Roma NGOs approve this measure as having the potential to reach to Roma community.<sup>20</sup> There are also positive responses from labour bureaux experts in the cities of Burgas, Montana and Vidin, who emphasize the mediators' important role in engaging the long-term unemployed and inactive Roma<sup>21</sup> as well as involving them in literacy and vocational training programmes. Their roles also involve the organisation of the so-called Roma Labour Markets that ease access to information and bridge the gaps between employers and potential employees.

Despite the obvious benefits that this new professional sphere brings, there are several drawbacks that prevent its full development and outreach impact. The monthly salary of 260 EUR (510 BGN) for people with secondary education) and 287 EUR (560 BGN) for people with higher education) is too small to motivate many candidates to apply for such a position. That also explains the low number of mediators and their high attrition rate throughout the years. The role of the mediator is predominantly administrative. Though state reports reveal that the mediators implement field work, their job description does not explicitly state that.<sup>22</sup> In conversations with Roma leaders from Plovdiv, they confirmed that this was the case. For the Izgrev neighbourhood of Plovdiv<sup>23</sup> - the biggest segregated Roma neighbourhood - there used to be two mediators, with one quitting take advantage of better working opportunities in Germany. The other is said to be entirely engaged with the administrative burden within the local labour bureaux and surely cannot respond to the needs of such a big neighbourhood. Thirdly, Roma mediators are hired on labour

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<sup>18</sup> National Employment Action Plan 2018, p.37

<sup>19</sup> Administrative Monitoring Reports on the Implementation of the National Strategy for Roma Inclusion, 2016 and 2017, and Civil Report on the Implementation of the National Strategy for Roma Integration (2012-2014)

<sup>20</sup> Civil Report on the Implementation of the National Strategy for Roma Integration (2012-2014) by Amalipe

<sup>21</sup> News articles BNR - <http://bnr.bg/vidin/post/100820247>, Focus.NET: <http://focus-news.net/opinion/2016/11/18/40751/penka-kirilova-rsz-burgas-ravnishteto-na-bezrobotitsa-e-klyuchov-pokazatel-za-pazara-na-truda.html>

<sup>22</sup> Job Description by Labour Agency – Roma Labour Mediator: <https://www.az.government.bg/bg/news/view/objava-za-podbor-za-rabotni-mesta-1637/>

<sup>23</sup> Izgrev is in Plovdiv, the second-largest city in Bulgaria. The neighborhood is the biggest segregated Roma neighborhood in the country, with an official population of 45,000-50,000 people; unofficially, approximately 70,000 people are said to reside there.

contracts for a period of no more than a year, which also signals that there is no sustainability in terms of long-term engagement in this position.

The NGO association National Network of Roma Career Mediators,<sup>24</sup> established in 2013, is an example of good practice. The Network's mission is to improve mediators' professional and institutional capacity through trainings, conferences and meetings. They aim to promote Roma career mediators as a sustainable working practice. Indeed, such organisations are needed, as Roma career mediators do not benefit from many training opportunities that would allow them to improve and further develop the profession.

Introducing case managers in the work of the labour bureaux was also another attribute of the person-centred approach and the efforts to include and motivate Roma people. Case managers draft an individual plan aiming to define the individual needs and work characteristics of the client and trace the reasons for that person's inactivity and social problems preventing him or her from finding a job. For example, if a woman cannot find a job because she has to take care of her elderly, sick mother, the case manager contacts the local Social Assistance Directorate to secure a social assistant for the mother. It was pointed out above that currently there is no single point of contact that can allow a person to benefit both from employment and social services. That means the person has to visit several institutions to address problems. The National Employment Action Plan for 2018 sets as a target the creation of such contact points. Probably, the tendency will continue in 2019 and 2020 in line with efforts to promote proactive, integrated policies. Still, the case managers are the link between institutions, businesses and the long-term unemployed. Depending on the clients' needs, they receive services focused on increasing their motivation to work, professional and psychological counselling, communication trainings on how to behave at a job interview, participation in informational days, etc. However, case managers share the same problems of Roma career mediators – low salaries, about a year and a half long contract,<sup>25</sup> and administrative burdens. In conversations with representatives from the Social Protection Department in Plovdiv about their interactions with case managers, they share that they collaborate mainly on cases of people with disabilities, in line with drafting a social evaluation of that person. In other words, they do not deal explicitly with Roma issues per se, not to mention Roma women.

In order to prevent school dropout and the social isolation of NEETs under 29, each municipality appoints Youth Mediators of the same age as the target group. Their role is similar to that of the Career Mediators, but with a peer-to-peer approach. All young people who visit the labour bureaux are informed of the European Youth Guarantee, its aims and objectives, and how to get involved, which counts as progress in their individual action plans. Municipalities report this practice as successful, such as Burgas city, which states that youth unemployment has steadily decreased.<sup>26</sup> Though the peer-to-peer approach is proven to be successful when dealing with vulnerable youth, the research shows that per municipality, the maximum number of Youth Mediators is just two to three, which is insufficient for the proper, successful engagement of NEETs. Success stories can be found in Lovech Municipality, where 54 young NEETs out of 200, mostly Roma, found jobs through the joint efforts of the Roma Career Mediators and the Youth Mediators.<sup>27</sup> Most young women there who refused job offers said their parents would not let them work or that they would only work if a friend or neighbour was also hired. The young men refused to obtain qualifications, saying it was not worth the effort for the minimal salary. Others

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<sup>24</sup> Website: <https://bit.ly/2zZwOSJ>

<sup>25</sup> Job Description – Case Manager by the Labour Agency: <https://www.az.government.bg/bg/news/view/objava-za-podbor-za-svobodno-rabotno-mjasto-za-dlyjnostta-aymenidjyr-na-sluchaj-kejs-menidjyr-au-1243/>

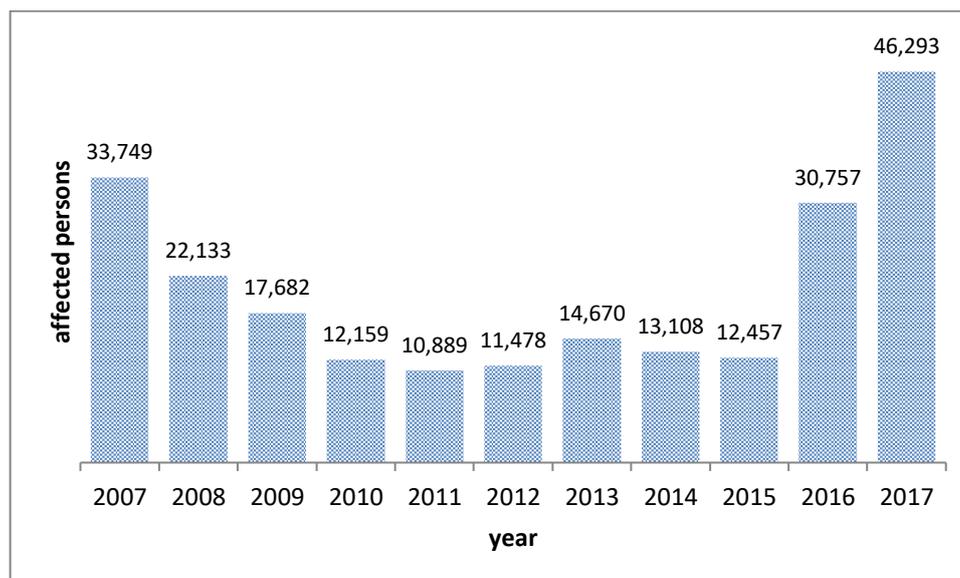
<sup>26</sup> <http://bnr.bg/burgas/post/100924154>

<sup>27</sup> Darik News: <https://dariknews.bg/regioni/dobrich/trudno-nakaraha-54-mladezhi-da-zapochnat-rabota-po-proekt-2065825>

shared that they were already receiving money from relatives abroad, or that they were already working in the „grey sector” (and had consented to such terms).

In 2016 the team delivering the programme included 97 Youth Mediators, 28 case managers and 31 psychologists at Labour Offices nationwide. By the end of the year, 91% of the targeted 248 inactive persons had found employment. It must be considered positive that two-thirds of those persuaded to register were Roma. The inactive-to-active transition of the Roma population has become a very important challenge, considering their demographic trends and high rates of inactivity. So far, the outcomes for them are not satisfactory. The reasons are well known and difficult to cope with, i.e., poverty among the Roma and the sustained trend of its intergenerational inheritance.

The chart below shows the trends from 2007-2017:



The data compiled from Administrative Monitoring Reports on the Implementation of the NRIS, monitoring and evaluating the success of the NRIS (2012-2020).

Despite the fact that 2017 marks an increase in the number of Roma affected by this outreach, which was duly reported in the Administrative Report on the Implementation of the NRIS, Parliament did not adopt that report and even voted against it in June 2018, stating that the main reason for the problem with Roma (un)employment was related to their low educational achievement, low motivation and lack of activity in job searching, combined with a tendency to increasingly register as long-term unemployed. The 2017 report affirms that a badly developed economy cannot secure enough jobs. In some places, municipalities appear to be the biggest employer in relation to hiring Roma or other vulnerable people, while business nationwide lacks an interest in hiring from the abovementioned categories. That can be affirmed by the numbers of employed Roma people – in 2016 they were 19,380, while in 2017 there was a decrease, to 19,144.

The problems around vocational qualifications and training in key skills are broadly discussed and criticised as shortfalls of local labour market policies. The critique references the poor quality of vocational training for those entering the labour market; the limited possibilities for improving vocational qualifications; and the poor supply of literacy courses and courses teaching basic skills to the undereducated. The labour administration organizes vocational training courses for the registered unemployed that may take the form of a single course or integrated training course followed by recruitment into subsidised jobs. More than two-thirds of the participants in such trainings (79% in 2016, Employment Agency data) combine the training with employment.<sup>28</sup> Traditionally, the

<sup>28</sup> Bulgaria – Recent Developments in Employment and Social Affairs – In-Depth Analysis for the EMPL

people interested in training opportunities have university or secondary school degrees, while the people who need improvement of their qualifications are less educated.

The highest demand from both the employed and the unemployed is for computer literacy and foreign language instruction. These trainings are needed to compensate for the insufficient accent placed on the learning of such skills in high school. In response to this need, most of the trainings offered within the programs for employment are in these skills.

The existence of all these programmes and policy measures is of little interest to the end beneficiaries. The kind of support they receive is more important to them than its source.

## Fight against discrimination in employment and antigypsyism in the workplace

While a discriminatory approach is widespread on the Bulgarian labour market, data about it are missing, partly because discrimination on the labour market is most often concealed. Race and ethnicity discrimination contravene the European Social Charter and the European Union Equality Directive. Measures to resolve the unemployment problems of Roma should include assistance to victims of discrimination when they make claims to protect their rights. Problems also arise in relation to gender discrimination. Roma women in Bulgaria are discriminated against by employers for reasons having to do both with their ethnicity and with their sex. Special attention should be paid to addressing Roma women who suffer double discrimination, including efforts to improve their socioeconomic status and to secure their access to education and health care as preconditions for recruitment into the labour force.

Feeling discriminated against due to their Roma ethnicity when accessing medical services was reported by 42.3% of Roma in Bulgaria; 34% reported discrimination in social services; and 32% reported discrimination in employment. This leads to deepening poverty among one of the country's most vulnerable social groups. A study found that during the economic crisis 68.4% of Roma were poor compared to 16.4% of ethnic Bulgarians at the beginning of 2011.<sup>29</sup> A significant gap also exists in the post-crisis years. In addition, the fight against discrimination at the local level is far from adequate. All municipal strategies for Roma inclusion that are part of the NRIS (2012-2020) have priorities that deal with Compliance with the Rule of Law and Non-Discrimination, but usually these have little or no funding at all and are not gender-sensitive. For example, the small municipalities of Krichim<sup>30</sup> and Varshets<sup>31</sup> have set forth in their Action Plans on Roma Inclusion aims directed toward their own staff (police officers, municipal staff) for crime prevention, rather than any aims affecting Roma. The only aim in this area is entitled „Improving the efficiency of police officers in multi-ethnic environments while observing human rights standards“, and the municipalities have envisaged activities with no budgets required, like „Prevention work by police officers and the community, joint discussions and meetings against the dissemination of drugs in Roma neighbourhoods“, „Informational campaign for preservation of public order, cleanness and municipal property“ as well as „Trainings on human and children's rights in schools“. In contrast, the Municipality of Plovdiv has allocated approximately 9,700 EUR (19,000 BGN) in its Action Plan for combating discrimination at the local level for the overall period of the Plan – 2015-2020. Such a sum is, however, far from enough to promote human rights and to combat

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Committee

<sup>29</sup> Bulgaria: Household welfare during the 2010 recession and recovery, The World Bank, 2012, p 15

<sup>30</sup> Action Plan of Krichim Municipality in relation to the Strategy of Plovdiv Region for Integration of Bulgarian Citizens of Roma Origin and other socially vulnerable citizens living in similar situation to Roma people for the period 2015-2020, [https://www.krichim.bg/images/documents/za\\_obshtinata/strategii\\_planove/strategiasocialno.pdf](https://www.krichim.bg/images/documents/za_obshtinata/strategii_planove/strategiasocialno.pdf)

<sup>31</sup> Regional Strategy for Integration of the Roma in Montana District (2012-2020), <http://www.strategy.bg/StrategicDocuments/View.aspx?lang=bq-BG&Id=837>

antigypsyism and homophobia. As in all the strategies, including the NRIS, there is no mechanism for monitoring the envisaged actions and the spending; as stated above, the web platform for this mechanism is still under construction.

There is no systemic analysis available about the frequency of discrimination against Roma in the labour market, or the position of Roma women there. The Commission for Protection against Discrimination also has no accessible public register of recent court decisions. Their efforts to sensitize employers can be found in the Guidelines for Diversity in the Workplace, directed toward businesses and drafted in 2010.

Positive practices in antidiscrimination are mainly implemented by other stakeholders. An example of a programme that works exclusively to protect Roma, with a focus on Roma women, is the JUSTROM2 programme<sup>32</sup> – a pilot project running in four EU countries, Bulgaria, Romania, Italy and Greece. Implemented by the Council of Europe and co-funded by the EU, it aims to increase Roma and Traveller women’s awareness of their rights and existing complaint mechanisms, to establish legal clinics in the countries involved, to support Roma and Traveller women’s empowerment and autonomy, and to reinforce cooperation between relevant stakeholders at local level, the European Commission and the Council of Europe as regards access to justice for these vulnerable groups. Two legal clinics have been functioning in the cities of Plovdiv and Veliko Tarnovo. The legal clinics provide legal consultations and services free of charge. The activities also aim to raise awareness among Roma and Turkish women about the judicial system and institutions where they can submit complaints for discrimination and other types of human rights violations, including early marriages, human trafficking, domestic violence, displacement and housing issues, police brutality, and hate crimes. From February 2017 to October 2018, the JUSTROM clinics in Bulgaria have counselled over 1,000 persons, the majority of whom were Roma women. The issues were diverse – social and family issues including welfare, domestic violence, children’s rights, children’s origins, and indebted households; however, there are few cases on labour discrimination, with clients reportedly unwilling to initiate such cases on their own because of fear and their families’ lack of support and understanding of the issue.

Another positive initiative is being implemented by a local Roma organisation, Indi-Roma Social Foundation, in Kuklen (Plovdiv Region). In 2016 they trademarked the brand „Ethnically Tolerant Employer“. The aim of this initiative is to encourage employers to respect ethnic diversity in the workplace with an accent on Roma. They initiated the „Ethnically Tolerant Employer Award“ to celebrate employers who follow a consistent policy of ethnic tolerance and pay special attention to supporting persons from disadvantaged communities. In 2018, 11 awards were given to municipalities and companies supporting this practice. This innovative social practice is the result of the NGO working with the Czech organisation *IQ Roma servis*.

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<sup>32</sup> JUSTROM2 Program: <https://pjp-eu.coe.int/en/web/access-of-roma-and-traveller-women-to-justice/about-justrom>

## HOUSING AND ESSENTIAL PUBLIC SERVICES

It is well-known that housing conditions amongst Roma are worse than those of the general population in Bulgaria. We would like to demonstrate what the actual gaps are according to the available data, but this is not easy to do because the available data are controversial. According to the latest housing census in Bulgaria, ethnic Bulgarians had an average of 23.2 square meters of living space per person, while Roma had only 10.6 square meters, and almost half of the Roma-inhabited houses had no sewage system. Bulgarian experts say access to public amenities such as water, sanitation, electricity, gas, communication, garbage collection, etc., is more difficult for the Roma than for anybody else.<sup>33</sup>

On the other hand, the EU-MIDIS II data show less severe gaps when comparing the situation in Bulgaria to other European countries.<sup>34</sup> While the average number of rooms per person in the household for ethnic Bulgarians is 1.1, for Bulgarians identified as Roma it is 0.7, but in the other countries surveyed, non-Roma had more than twice as much space per person as Roma-identified people: 1.2 : 0.5 in Greece; 1.9 : 0.9 in Spain, and 1.8 : 0.8 in Portugal. In Bulgaria, 23% of Roma live in households without tap water inside the dwelling, compared to 68% in Romania, 34% in Croatia, and so on. Interethnic disparities are very high elsewhere when it comes to bathing and toilet facilities inside dwellings as well.

Of course, Bulgarian data document that Roma dwellings are of poorer quality than non-Roma dwellings, with 33% of Roma reporting a leaking roof; damp walls, floors or foundations; or ruined window frames or floors compared to 13.2% of the ethnic Bulgarian population. Also, 17% of the Roma population in Bulgaria consider their dwelling too dark, versus 7% of the ethnic Bulgarian population. However, these figures are not as extreme as those on interethnic housing disparities reported in Portugal (66% and 39%), Hungary (44% and 25%), or Slovakia (38% and 30%).

Housing quality also depends on factors such as pollution, grime, and other environmental problems including smoke, dust, unpleasant smells, and polluted water. Here also, the situation among Bulgarian Roma is not as bad (27% report such problems) as it is in the Czech Republic and Portugal, where 41% and 36%, respectively, of the Roma population indicate this to be an issue.

The comparative picture regarding local crime, violence and vandalism is also surprising from a Bulgarian researcher's point of view. Only 9% of Roma in Bulgaria indicate problems with crime, violence, and vandalism, compared to much greater numbers of Roma reporting these problems in the Czech Republic and Spain (46% and 42%, respectively).

It is also interesting that only 3% of Bulgarian Roma felt discriminated against due to their Roma background at least once in the 12 months preceding the survey in terms of housing. This is the best result among the nine investigated countries, where such discrimination elsewhere is reported four times more frequently.<sup>35</sup>

These findings are in accordance with the level of general overall perception for the level of discrimination based on ethnic origin, skin colour or religious belief – Bulgarian Roma show again the lowest result (30%) compared to results for the other countries (Czech Republic 85%, Greece 65% etc.).<sup>36</sup> As for the older data shown in *The Housing Situation of Roma Communities: Regional Roma Survey 2011*, only 9% of Roma households said they believed themselves at risk of eviction compared to 33% in the Czech Republic, 31% in Macedonia, 23% in Albania, and so on.<sup>37</sup>

To describe the situation and the main challenges that Roma face in the area of housing, we define whether they are now in a „critical situation“ (when most Roma are affected by the problem); in an „average situation“ (Roma are not affected by the problem more than anybody else); in an „optimal situation“; or in a situation where improvements have been observed in the last 10 years.

1. *Physical security of housing* (no ruined or slum housing): Nearly one-sixth of Roma houses leak and are not stable.<sup>38</sup> Almost 33% of their dwellings have a *leaky roof, damp walls, floors or foundation*, or ruined window frames or floors. More people of Roma origin are affected by this compared to the general population. Improvements are needed. (Critical Situation).
2. *Access to drinking water*: The situation is bad, but it is a little bit better than in some other EU countries. EU-MIDIS II results show that: „...the share of Roma living in households without tap water inside their dwelling is much higher than for the general population [...] Compared to results from the 2011 Roma survey, the situation seems to have improved in Bulgaria...“. The figure for Bulgaria is 23%.<sup>39</sup> (Average Situation)
3. *Security of tenure* (legal titles are clear and secure): There is no security of tenure for Roma in Bulgaria. The main reasons and situations are:
  - Informal land purchases that do not follow legal procedures: the owners do not have the necessary documents to prove ownership;
  - A significant number of landowners carry out construction for residential purposes without following legal procedures, which renders the buildings illegal and therefore at risk of demolition;
  - A significant number of cases where buildings are on land not owned by the builders (either privately-owned or state-owned land), which exposes the residents to the risk of being evicted and the building being demolished without compensation;
  - A significant number of people living in municipally-owned dwellings are unable to pay rent regularly.

Weak legal status not only involves risks, but also prevents the use of public services such as utilities, registration of ownership, possible transactions involving the buildings, etc. (Critical Situation).

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<sup>33</sup> T.Todorov - ОЦЕНКА НА ПОЛИТИКИТЕ ЗА ИНТЕГРАЦИЯ НА РОМИТЕ В БЪЛГАРСКОТО ОБЩЕСТВО-ЗАЕТОСТ, ОБРАЗОВАНИЕ, ЗДРАВЕОПАЗВАНЕ И ЖИЛИЩНИ УСЛОВИЯ -Тодор Тодоров, [https://www.unwe.bg/.../Research%20Papers\\_vol1\\_2012\\_No5\\_T%20Todorov.pdf](https://www.unwe.bg/.../Research%20Papers_vol1_2012_No5_T%20Todorov.pdf)

<sup>34</sup> FRA. (2017). Second European Union Minorities and Discrimination Survey (EU-MIDIS II) Roma – Selected findings. Available at: <http://fra.europa.eu/en/publication/2016/eumidis-ii-roma-selected-findings>

<sup>35</sup> FRA. (2017). Second European Union Minorities and Discrimination Survey (EU-MIDIS II) Roma – Selected findings, p.37; Available at: <http://fra.europa.eu/en/publication/2016/eumidis-ii-roma-selected-findings>

<sup>36</sup> FRA. (2017). Second European Union Minorities and Discrimination Survey (EU-MIDIS II) Roma – Selected findings., p.39; Available at: <http://fra.europa.eu/en/publication/2016/eumidis-ii-roma-selected-findings>

<sup>37</sup> Perić, Tatjana. (2012). The Housing Situation of Roma Communities: Regional Roma Survey 2011. Roma Inclusion Working Papers. Bratislava: United Nations Development Programme. p.41

<sup>38</sup> РОМИТЕ В БЪЛГАРИЯ- ИНФОРМАЦИОНЕН СПРАВОЧНИК. 2008, Институт „Отворено общество“ – София , ISBN 978-954-9828-61-0, p. 45

<sup>39</sup> FRA. (2017). Second European Union Minorities and Discrimination Survey (EU-MIDIS II) Roma – Selected findings, pp 38-39; Available at: <http://fra.europa.eu/en/publication/2016/eumidis-ii-roma-selected-findings>

4. *Access to social housing*: Social housing is not typical for Bulgaria – only 2.2% of dwellings are social.<sup>40</sup> Almost all their inhabitants are Roma – 15% of Roma live in social housing compared to 1% of non-Roma.<sup>41</sup> On the one hand, Roma have access to the existing social housing because they meet the criterion for it (low income), but on the other hand, the social housing is extremely insufficient. (Improvements needed).
5. *Access to sanitation inside housing*: Just 56% of Roma have access to sanitation in their housing. (Critical Situation).
6. *Access to garbage collection* (public collection services): This is one of the main problems for Roma people living in spatially segregated neighbourhoods. It is difficult to secure precise numbers, but insufficient public collection of garbage combined with a lack of indoor sanitation facilities are the main problems in the Roma neighbourhoods that cause them to be so unattractive. (Critical Situation).
7. *Secure access to electricity*: According to the EU MIDIS II, nearly all Roma live in households with electricity supply in Bulgaria, the Czech Republic, Spain and Hungary (97-98%). (Optimal Situation.)
8. *Restricted heating* (families unable to heat all rooms when necessary): This is a common situation for many Roma families, because of their low incomes, but in fact this is common also for many people in Bulgaria. (Average Situation).
9. *Overcrowding*: Sufficient personal space at home is a key indicator of housing quality. Eurostat looks particularly at overcrowding, which measures the space available to the household, taking into account its size, its members' ages, and the family's situation. The EU-SILC also measures the average number of rooms per person by tenure status and dwelling type. This indicator can be compared against EU-MIDIS-II findings on Roma households. Results suggest that insufficient space remains a problem in Roma households, which contributes to their severe housing deprivation. (Critical Situation).
10. *Indebtedness at levels that may cause eviction*: This is only somewhat typical of Bulgaria, but it is a problem – according to the National Housing Strategy,<sup>42</sup> „the share of homeowners who find it difficult to hold onto their property in current market conditions is increasing.” (Critical Situation).
11. *Housing in segregated neighbourhoods*: Nearly 30% of Bulgarian Roma are residents in segregated neighbourhoods.<sup>43</sup> (Critical Situation).
12. *Housing in informal or illegal neighbourhoods*: Margarita Ilieva's „Comparative Analysis of EU Countries” concluded that: „There are models of residential segregation and discrimination against Roma in Bulgaria. The majority of Roma live in ghettos in harsh conditions and non-standard dwellings, with very limited access

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<sup>40</sup> ПРООН (2004 г.), *Vulnerable Groups in South Eastern Europe Dataset*. Документът е достъпен на адрес: <http://vulnerability.undp.sk/>; ПРООН (2002 г.), *Avoiding the Dependency Trap Dataset*. Available at: <http://vulnerability.undp.sk/>

<sup>41</sup> As a result of privatization, public housing decreased from 7% in 1990 to 3% in 2001. Source: Ministry of Regional Development and Public Works (2004), National Housing Strategy of the Republic of Bulgaria. Available at: <http://www.mrrb.government.bg/index.php?lang=bq&do=law&type=4&id=220>

<sup>42</sup> Национална жилищна стратегия 2018-2030 г. (National Housing Strategy 2018-2030), p.8

<sup>43</sup> Национална жилищна стратегия 2017 г. (National Housing Strategy 2017)

to basic infrastructure or basic services such as public transport, garbage collection and, for some, even water supply."<sup>44</sup> (Critical Situation).

13. *Access to housing loans*: There is a housing loan market, with an increase in the number, volume and amount of housing loans offered by more than 10 banks in the country. Unfortunately, in practice this credit is very hard for poor people like Roma to access, although the borrowers are protected by a special law guaranteeing their good awareness of loan conditions and risks; however, housing affordability is declining. The price to income ratio increased in 2016, increasing the share of those needing support for the acquisition or rental of housing.<sup>45</sup> (Average Situation)

14. *Other country-specific issues not listed above*: NGOs estimate that half or more than half of all Roma live in illegal housing. Experts believe one quarter of all houses in segregated Roma neighbourhoods at a minimum were built illegally.<sup>46</sup>

As of this writing, deliberations are underway on the June 2018 National Housing Strategy (NHS), slated for adoption by the Government in early 2019. The NHS will create new, important tools for deciding many housing problems. Many measures will be aimed at problems typical for Roma people, like „increasing affordability of the housing market and providing social housing for vulnerable groups through new construction or by adapting an existing fund."<sup>47</sup>

### Addressing Roma's needs in spatial planning and access to basic amenities

The data show that the housing conditions of Roma, especially in segregated Roma communities, are significantly worse than that of the general population.

According to the NHS 2018-2030:

- Affordability of housing is deteriorating; the price/income ratio rose in 2016, increasing the proportion of people in need of support to buy or rent housing, especially for single parents, who are 25% more affected by this, according to Neochron research.<sup>48</sup>
- The number of uninhabited housing units is continuously increasing (over 31% in 2011, the last year for which there is data). Most are empty 51 weeks of the year. Unoccupied units in multi-family buildings hamper the implementation of energy renovation and structural improvement programmes.
- Housing markets in medium and small towns, with the exception of those with tourism potential, are underdeveloped due to limited demand as the population declines.
- The share of homeowners who find it difficult to hold on to their property under current market conditions is increasing.<sup>49</sup>

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<sup>44</sup> Ilieva, Margarita, *Comparative Analysis of EU Countries* (Sofia, 2017).

<sup>45</sup> Национална жилищна стратегия 2018-2030 г. (National Housing Strategy 2018-2030), p.8

<sup>46</sup> Roma in Bulgaria, OSF, Sofia, 2008; p. 46

<sup>47</sup> Национална жилищна стратегия 2018-2030 г. (National Housing Strategy 2018-2030)

<sup>48</sup> Сравнително регионално социално-икономическо изследване 2017-18  
<https://neochron.alle.bg/%D0%BF%D1%80%D0%BE%D1%83%D1%87%D0%B2%D0%B0%D0%BD%D0%B8%D1%8F/>

<sup>49</sup> Национална жилищна стратегия 2018-2030 г. (National Housing Strategy 2018-2030), p.8

NGOs estimate that many Roma live in illegal housing, with some experts alleging that between 50 to 70 percent of Roma reside in such arrangements.<sup>50</sup> According to other experts, nearly one quarter of all houses in segregated Roma neighbourhoods were built illegally.<sup>51</sup> Government findings differ from NGO ones in this regard. The UN independent experts on minority issues have expressed concern that Roma who live in illegal housing, including settlements that have existed for decades, face the perpetual threat of eviction.<sup>52</sup> Although spatial planning according to government programmes is beneficial for providing access to public amenities like water, sanitation, electricity, gas, communications, garbage collection, etc. for all inhabitants, some segregated neighbourhoods remain unserved.<sup>53</sup> Sometimes this is because of objective difficulties, but in some cases the problem is a lack of political will – it depends on the municipality. The situation of single mothers' housing is even worse than that of the general population – 25% worse, according to regional research.<sup>54</sup> Some efforts have been made to execute the Action Plan based on the NRIS in terms of housing,<sup>55</sup> but only in some municipalities.<sup>56</sup> The plan is to draw up cadastral maps of 153 settlements with predominantly Roma populations, and 127 settlements have been mapped so far.<sup>57</sup>

The primary role of the state, according to the NRIS, is to create and maintain a stable, transparent market environment that allows households to acquire and use quality housing proportionate to their income.<sup>58</sup> Many experts and Roma activists hope 2019 will be crucial for establishing a new policy tendency.<sup>59</sup> Adoption of the NHS would create new, important tools for deciding many housing problems.<sup>60</sup> Concrete measures will be taken by the Government for the first time to secure more social housing: first, building new municipal social rental housing for citizens with registered housing needs; and second, providing protected dwellings and shelters for homeless people – those with registered housing needs, those with special needs, and those both „without a roof over their heads” and without any financial options.

### Improving access to secure and affordable housing

Bulgaria has a very small stock of social housing – only 2.2% of dwellings are social. This differs from the situation in most EU countries like Poland, for instance, where more than 80% of Roma live in social housing.<sup>61</sup> Most social housing residents in Bulgaria are Roma,

<sup>50</sup> US 24 May 2012, 21; UN 3 Jan. 2012, para. 46)

<sup>51</sup> Roma in Bulgaria, Институт „Отворено общество” – София, 2008, р. 45

<sup>52</sup> US 24 May 2012, 21; UN 3 January 2012, para. 50

<sup>53</sup> Национална жилищна стратегия 2017 г. (National Housing Strategy 2017)

<sup>54</sup> Сравнително регионално социално-икономическо изследване 2017-18  
<https://neochron.alle.bg/%D0%BF%D1%80%D0%BE%D1%83%D1%87%D0%B2%D0%B0%D0%BD%D0%B8%D1%8F/>

<sup>55</sup> National action plan for the period 2015-2020 for Roma integration

<sup>56</sup> Сравнително регионално социално-икономическо изследване 2017-18  
<https://neochron.alle.bg/%D0%BF%D1%80%D0%BE%D1%83%D1%87%D0%B2%D0%B0%D0%BD%D0%B8%D1%8F/>

<sup>57</sup> An Official Letter of the Ministry of Regional Development and Public Works on the topic of Roma housing N92-000-387/1.11.18

<sup>58</sup> Национална жилищна стратегия 2018-2030 г. (National Housing Strategy 2018-2030)

<sup>59</sup> Национална жилищна стратегия 2018-2030 г (National Housing Strategy 2018-2030)

<sup>60</sup> Интервю с М. Сукарева –Директор Дирекция „Жилищна политика” Община Пловдив, и А.Костадинова- Община Куклен

<sup>61</sup> Национална фокусна точка на мрежата RAXEN в Полша (2009 г.), *Тематично проучване на жилищните условия на ромите и travellers.*

15% of all Roma compared to 1% of non-Roma.<sup>62</sup> Roma are therefore accommodated in social houses 15 times more often than ethnic Bulgarians and Turks. On the one hand Roma have easy access to existing social housing, but on the other hand the social housing is extremely insufficient.

Although building new social housing is an aim of the NRIS and its Action Plan, the results so far are too modest. Monitoring reports document a lack of significant progress in meeting the targets set, especially on the priority of „improving housing conditions”. This is noted both in the evaluation reports of the European Commission and in the alternative monitoring reports developed by NGOs, according to which the progress of the NRIS on this priority is the weakest. There are good results mainly in pilot projects about building social housing in a few municipalities such as Vidin, Devnya, Lulin-Sofia, and Dupnica.

The following general issues are important to keep in mind:

- Homeowners are finding it increasingly difficult to hold on to their property under the current market conditions;
- Public housing stock has been reduced to a symbolic share of 2.4% and has been steadily declining. It is difficult to manage because the units are scattered among private condominiums. Municipalities have limited resources to support public housing;
- Most young families and vulnerable groups – especially single mothers (see the research of the Neochron Association)<sup>63</sup> - do not have a chance to become homeowners or even renters in either private or public housing. A study documents that their effective demand does not exceed 25% of the potential demand for acquiring their own home and does not exceed more than 30% when they are looking for a privately-owned dwelling (among youth looking to rent a privately-owned home);
- There are no mechanisms for housing assistance targeted at the most needy and vulnerable groups or at young people who want to start their professional careers and families in Bulgaria.

Under the Operational Programmes (the Regional Development OP and the Growing Regions OP) for the provision of modern social housing for minorities and for socially or otherwise disadvantaged and vulnerable groups, 334 individual social housing units were built in four municipalities: a good start, but obviously just „a drop in the ocean”. The implementation of this project encountered many obstacles. In some cities there was public opposition to the very idea of building houses for renters who would be Roma, and two big municipalities (Varna and Burgas) were pressured by ultranationalists to cancel their plans. In some places, protests against „Roma houses” occurred, the most recent one in Stara Zagora, where local councillors protested.<sup>64</sup> Another seven or eight such projects target not just Roma, but all groups identified as in need of social housing (including single mothers). For the current programme period more than 21 urban municipalities plan to build social houses in their Integrated Urban Reconstruction and Development Plans but have not yet begun, with the exception of Blagoevgrad, where 202 social apartments had already been under construction, Plovdiv, where 42 units are under

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<sup>62</sup> As a result of privatization, public housing decreased from 7% in 1990 to 3% in 2001. Source: Ministry of Regional Development and Public Works (2004), National Housing Strategy of the Republic of Bulgaria. Available at: <http://www.mrrb.government.bg/index.php?lang=bg&do=law&type=4&id=220>

<sup>63</sup> Сравнително регионално социално-икономическо изследване 2017-18 <https://neochron.all.bg/%D0%BF%D1%80%D0%BE%D1%83%D1%87%D0%B2%D0%B0%D0%BD%D0%B8%D1%8F/>

<sup>64</sup> [https://www.blitz.bg/obshtestvo/vmro-skochi-na-kmeta-na-stara-zagora-che-shche-stroi-zhilishcha-za-romi\\_news625537.html](https://www.blitz.bg/obshtestvo/vmro-skochi-na-kmeta-na-stara-zagora-che-shche-stroi-zhilishcha-za-romi_news625537.html)

construction and Rousse, where 26 are under construction - but this is highly insufficient. Such community dwellings are affordable for most poor families in terms of rent. The tenants of social houses are adequately secure in their tenure, but some families living in municipally-owned dwellings cannot pay even the realistically-priced rent regularly. According to some activists and experts, Bulgarian Roma have the same access to municipal social housing as non-Roma.<sup>65</sup> In some places the social housing available for Roma is provided in ethnically and socially mixed neighbourhoods, but in other places they are segregated, either because only Roma are inhabitants there or because ethnic Bulgarians, in some cases, refuse to rent in ethnically-mixed buildings. The experience of the ERDF in Bulgaria shows that in most of the big cities, social housing meets serious problems if it is envisaged in an ethnically mixed environment.

For Bulgaria, problems with non-sedentary Roma and Traveller communities are not relevant.

The Ministry of Regional Development and Public Works (MRDPW) is the lead institution responsible for the implementation of the NRIS housing conditions priority, where there are 10 objectives aimed at solving some aspects of the residential construction and infrastructure problems in detached Roma neighbourhoods, such as:

- De-concentration of compact Roma neighbourhoods by designating new territories for home construction;
- Increasing affordability on the housing market and providing social housing for vulnerable groups through new construction or by adapting the existing housing.
- Improvement of existing technical infrastructure, new social housing, etc.

„Building and ensuring social housing“ is one of the major aims. The NRIS Action Plan’s Goal 6: Building and rehabilitation of social housing has been allocated EUR 14.2 million (in European and national financing), which means no more than 100 family dwellings yearly will be built for the whole country.

Even if the results so far have been too modest, we now have reason for hope – the ambitious NHS not only clearly defines ambitious aims, but provides financing instruments. For the mobilisation of targeted public financial resources, a Special Fund will be set up to accumulate funds from all possible sources (state budget, Operational Programmes, international donors, capital markets, etc.) and direct them to implement activities such as funding the „subsidies“ and „financial instruments“ components of the national renovation programs for residential buildings; financing municipal housing programmes; and providing bank guarantees on subsidised loans.<sup>66</sup> The NHS also aims to provide affordable housing and direct assistance to vulnerable groups, the main measures for which are municipal social rental housing for citizens with registered housing needs and protected dwellings and shelters for the homeless, which includes those with registered housing needs, with special needs, and persons without any housing at all. Two options will be offered here: Public rental housing with regulated (sub-market) rent, and the very innovative option of privately-owned rental housing where landlords offer sub-market rents to demonstrate their social responsibility.

More than 1.2 million homes in Bulgaria are currently unoccupied. The state plans to apply a system of tax burdens and incentives to stimulate the owners of unoccupied housing to rent units to the needy at sub-market rents.

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<sup>65</sup> Interviews with M. Sukareva – Director in Municipality of Plovdiv and A. Kostadinova – City Councillor in Kouklen municipality and President of Social Foundation Indi Roma 97

<sup>66</sup> Национална жилищна стратегия 2018-2030 г. (National Housing Strategy 2018-2030), p.22

## Effectiveness of housing benefits and social assistance to access and maintain housing

Housing benefits and social assistance to access and maintain housing are not typical of the Bulgarian state. So far, the winter heating benefit for people with monthly incomes of less than 140 EUR has proved popular. The monthly amount of targeted heating aid for the forthcoming winter season will be 38.25 EUR (74.83 BGN), or 191.19 EUR (374 BGN) yearly.

As is mentioned above, according to the World Bank's 2017 assessment, solvent demand does not exceed 25% of the potential demand for homeownership.<sup>67</sup> It does not exceed 30% in the case of private rental housing.<sup>68</sup> The NHS takes this omission into account and for the first time envisages a real financial tool as described above.

## Fight against discrimination, residential segregation and other forms of antigypsyism in housing

Discrimination and residential segregation take place in different forms (from big Roma ghettos, to small Roma neighbourhoods, to „Roma streets” in ethnically-mixed neighbourhoods), but the most typical methods for creating such segregation are forced evictions and opposition to municipalities building housing that is likely to be occupied by Roma tenants. For instance, in some cities there has been public opposition to the very idea of building houses for the Roma, and two big municipalities (Varna and Burgas) were pressured by nationalists to cancel their plans.<sup>69</sup> The last big case was in October 2018 in Stara Zagora, where city councillors stood firmly against the building of new houses („for Roma”). Both Burgas and Varna received a lot of media coverage after ultranationalists pressured them to cancel their housing construction plans.

The UN independent experts on minority issues expressed concern that Roma who live in illegal housing, including settlements that have existed for decades, face the perpetual threat of eviction.<sup>70</sup> A recent case of demolition and eviction attracted the attention of the whole nation. In the village of Vojvodinovo, after the beating of an ethnic Bulgarian soldier by two Roma youths, mass protests by people from the village and the region were followed by the demolition of 15 illegal, dangerous Roma houses in just three days and 20 more were to be demolished by the municipality two weeks later. This action was taken in winter and no replacement housing was offered to the affected Roma families, which escaped to other settlements. The statement of Vice Prime Minister Karakachanov that „Gypsies in Bulgaria have become extremely insolent ...” and that all illegal houses must be destroyed was applauded on the one hand and met with demonstrations of protest on the other. According to the mayor, „all houses in the Roma neighbourhood are illegal.” The Government has not yet expressed an opinion of this situation. Civil activists will resist and the rise of tension in the country seems very likely.<sup>71</sup>

According to the reports of the National Construction Control Directorate about orders issued to demolish illegal constructions, only 9% of those properties are owned by Roma.

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<sup>67</sup> България. Оценка на жилищния сектор, 2017, Световна банка; Анализ на състоянието на жилищния сектор, 2017, НЦТР ЕАД, Приложение 1.

<sup>68</sup> Национална жилищна стратегия 2018-2030 г. (National Housing Strategy 2018-2030), p.9

<sup>69</sup> Both cities had approved projects for social houses, but the city councils rejected them after ultranationalists objected.

<sup>70</sup> US 24 May 2012, 21; UN 3 Jan. 2012, para. 50

<sup>71</sup> <http://focus-news.net/news/2019/01/10/2610608/kmetat-na-obshtina-maritsa-dimitar-ivanov-zhilishtnite-postroyki-v-koito-zhiveyat-romite-v-selo-voyvodinovo-sa-mnogo-opasni-i-vseki-moment-mozhe-da-ruhnat.html>

Only some are in segregated ethnic neighbourhoods, according to the public register of demolition orders that have been enforced.<sup>72</sup>

In Plovdiv, demolitions of illegal houses in some Roma or Turkish neighbourhoods often take place.<sup>73</sup> The neighbourhoods include Arman Mahala, Stolipinovo, Sheker Mahala, etc., most recently in August and October 2018.<sup>74</sup>

### **Possible ethnic discrimination in some demolitions**

In their study entitled „Demolition of Illegal Houses in Roma Neighbourhoods: Sustainable Decision for Roma Integration or Problem of Discrimination against Roma in Bulgaria?“,<sup>75</sup> authors Mihaylova and Kashamov claim that demolishing the only homes of Roma families may be considered ethnic discrimination and a violation of their rights: it affects Roma families particularly adversely and disproportionately, which is in breach of the Racial Equality Directive. According to data collected from 61% of municipalities in Bulgaria, 89% of demolition orders concerning residential buildings issued by local administrations referred to the only homes of Roma inhabitants (399 of 444).

In many cases, evictions of Roma families intensify around the time of local elections under pressure from anti-Roma protests and the demands of various non-Roma political groups and citizens. The demolition of homes in detached neighbourhoods and the eviction of their inhabitants (existing law does not make it possible to legalise illegal houses) exacerbates the problems with the housing situation of the Roma. No alternative accommodation is made available to the evictees, so the affected families move in with their relatives in the same neighbourhoods and later build new, illegal homes. The demolition of Roma houses intensifies interethnic tensions, provokes anti-Roma sentiment, and creates total distrust in institutions among the Roma affected.

Unfortunately, case-law on this matter shows that the courts often do not treat the removal of buildings used for housing differently from any other illegal buildings. However, protection of the homeless by lawyers and human rights activists can be effective, as the case below shows:

By letter dated 12 September 2017, the European Court of Human Rights (ECtHR) issued interim measures to protect a Roma family with a three-month-old child. The family was represented by lawyer Margarita Ilieva (Bulgarian Helsinki Committee - BHC). The measures obliged the Bulgarian authorities not to destroy a home in Arman Mahala, Plovdiv. The ECtHR announced it would prioritize the case filed on behalf of six families over the scheduled demolitions of their only homes.

The Bulgarian authorities then committed to the ECtHR that they would not destroy the homes of the six complainants until „adequate alternative accommodation was provided.“ Contrary to what the Government promised, however, the municipal authorities in Plovdiv informed one complainant that they would destroy his home without offering him shelter.

<sup>72</sup> Official Letter of the MRDPW on the topic of Roma housing N92-000-387/1.11.18

<sup>73</sup> <https://news.plovdiv24.bg/807702.html>

<sup>74</sup> <https://news.plovdiv24.bg/819109.html>

<sup>75</sup> Demolition of Illegal Housing in Roma Neighbourhoods: Sustainable Solution for Roma Integration or a Problem of Discrimination against Roma in Bulgaria? (Sofia: 2017), p. 50.

<sup>76</sup> National action plan for the period 2015-2020 for Roma integration, p.35-44.

## Improving housing conditions and regeneration of deprived neighbourhoods

Local authorities are hardly taking any action currently to legalise houses in Roma neighbourhoods even though some have been brought up to code. This exacerbates the problem of legalisation in the Roma ghettos, where chaos in housing regulation exists. Even the basic possibilities offered by law remain unused by Roma for two reasons: 1) unfamiliarity with legal culture and procedures; and 2) the complexity of the procedures. The problem is compounded by the unpreparedness of many administrations to work with Roma. Only a few Roma have taken advantage of the possibility to legalize their dwellings due to the complexity of the procedures.

The amendments to the Spatial Development Act adopted in October 2012 have been insufficiently used for improvement purposes. According to expert Daniela Mihaylova, „Mayors and municipalities need to get much more support.”

Nevertheless, local government is not powerless. A great deal depends on the political will and purposefulness of mayors and councils - from zoning neighbourhoods to the provision of suitable land. Good examples are the initiatives in Kyustendil, Dupnitsa and Peshtera, where - with the financial and personnel support of the Trust for Social Achievement (TSA) - there have been good steps taken to solve the problem of legalising buildings in large Roma neighbourhoods. It is no coincidence that the TSA has just received the annual Global Award from the Global Forum on Settlements (Urban Planning - Winning All).<sup>77</sup>

However, local policy can also contradict itself in practice. A good example of how local powers take measures that are both „for” and „against” improvements is the practice in Stara Zagora concerning the demolition of illegal Roma houses near the „Borova Gora” Park and its plans for new construction.<sup>78</sup> In this interesting case, after a lot of serious discussion, nothing ultimately happened in practice.

When we speak about the legislative changes that are necessary, they must allow for the legalisation of structurally resilient residential buildings (and only for them) and differentiate the rules for the treatment of illegal constructions depending on whether they are residences or not.

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<sup>77</sup> *You'll Never Guess Who Received the United Nations' Award for Sustainable Urban Planning*. Available at: <https://www.us4bg.org/news/trust-for-social-achievement-un-prize/>

## IMPACT OF HEALTH CARE POLICIES ON ROMA

It is illegal to accumulate information about individuals' ethnicity and medical conditions in Bulgaria, according to the Law on Personal Data Protection, since such information is doubly sensitive. Therefore, there are no relevant national statistics disaggregated by ethnicity. However, one can draw indirect conclusions and make risk assessments based on the prevalence of some cases. The most urgent issues are presented in the following table:

### Death rates in Bulgaria for selected most common diseases (per 100,000)

	1980	1990	2000		2010	2016	2017
Scarlatina	145.6	85.7	64.6		34.3	67.6	52.1
Measles	121.5	1.7	0.6		292.1	0.0	2.4
Rubella	779.1	147.3	348.2		0.5	0.0	-
Varicella	537.2	418.6	285.8		261.8	455.6	353.4
Dysentery (shigellosis)	96.9	61.9	19.8		7.9	4.1	4.4
Viral hepatitis	110.8	274.2	104.8		39.9	30.4	44.3
	1980	1990	2000	2005	2010	2016	2017
Tuberculosis Respiratory	115.1	80.5	144.8	106.5	79.2	53.8	51.7

Source: [http://ncphp.government.bg/files/nczi/zdr.statistika/health\\_B\\_1.pdf](http://ncphp.government.bg/files/nczi/zdr.statistika/health_B_1.pdf)

The Roma Health Report (2014) shows that Roma in Bulgaria are especially vulnerable to outbreaks of measles and hepatitis A, B, and C, while HIV infection has been evidenced among the most socially-excluded Roma, such as prisoners, drug addicts and prostitutes.<sup>79</sup> An outbreak of measles in 2009 found 89.3% of the 24,047 people affected were Roma, and 22 of the 24 deaths were Roma. The same study finds that levels of tobacco use are consistently higher in Roma than in non-Roma communities.

### Ensuring equal access to public healthcare services

According to the Health Insurance Law (HIL), an obligatory health insurance system was introduced in 1998. After the hyperinflation of 1996-97, this came to replace the universal healthcare coverage inherited from the socialist regime. According to the HIL, access to health care services in Bulgaria remained universal only for children (age 0-17). However, according to Article 82, the following are no longer covered by obligatory health insurance:

1. emergency healthcare;
2. preventive examinations and obstetric care for uninsured women;
3. outpatient psychiatric care;
4. blood transfusion;
5. transplantation;
6. compulsory treatment and/or compulsory isolation;
7. disability expertise;
8. assisted reproduction;
9. some types of deaths and some medical transportation cases.

What remains free of charge are all types of compulsory immunisations and all anti-epidemic treatments. Complementary to the HIL, the Health Law (2005) has declared in Article 2 that:

1. there shall be equality in the use of health services;
2. affordable, quality health care shall be provided with priority for children, pregnant women, and mothers of children up to one year old;
3. health promotion and integrated disease prevention are a priority;

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[https://ec.europa.eu/health/sites/health/files/social\\_determinants/docs/2014\\_roma\\_health\\_report\\_es\\_en.pdf](https://ec.europa.eu/health/sites/health/files/social_determinants/docs/2014_roma_health_report_es_en.pdf)

4. health risks caused by adverse environmental impacts shall be prevented;
5. children, pregnant women, mothers of children up to one year and persons with physical disabilities and mental disorders shall receive distinct health care services;
6. state participation in the funding of activities aimed at protecting citizens' health.

Moreover, in Article 85 (updated in 2009) a large antidiscrimination protection was granted: „Patients receive healthcare services regardless of their age, gender, origin, language, national, racial or political affiliation, education, beliefs, cultural level, sexual orientation, personal, social or material status, disability and type and cause of disease.“

The Healthcare chapter of the National Roma Integration Strategy (2012-2020) has been formally designed in line with the above legislation and aims at „equal access to quality healthcare services,“ establishing five objectives:

1. child and maternal preventive care;
2. equal access to healthcare by members of vulnerable minorities;
3. increasing the number of qualified Roma healthcare workers;
4. awareness-raising and access to healthcare information;
5. increasing the number of insured vulnerable persons.

However, the NRIS is quite far from meeting good international standards for such a type of document, and the gaps and deficiencies were pointed out in 2012 as follows:<sup>80</sup>

- The NRIS does not provide an adequate contextual description due to its limited use of relevant data;
- Structural factors for social exclusion (for example: segregated education, labour market discrimination) are not identified by the NRIS;
- There is no analysis of the good practices and lessons learned from previous Roma inclusion programmes;
- The NRIS and the Action Plan reveal a lack of awareness and/or no intention on the part of the Government to tackle crucial Roma integration issues. For example, „genetic diseases“ are described as one of the primary factors determining Roma health status. This assertion could be considered discriminatory because it has been made without providing any supporting evidence.

Moreover, the NRIS does not fully meet the criteria for providing a description of the current situation focused on specific issues deemed important within the given national context. For example, the systematic exclusion of Roma from health insurance, as well as the need to create healthy living conditions in predominantly Roma neighbourhoods, are just mentioned as reasons for the strategy, but the Roma themselves are then blamed for this situation, and these topics are then not directly addressed in the Action Plan. Despite multiple civil society organisations flagging this issue, Government experts keep stigmatizing Roma; for example, in the Administrative Monitoring Report 2016 (p. 61), „irregular payment of healthcare insurance“ is regarded as the „main reason for lack of access“ and not regarded as a systemic problem that needs a permanent policy solution.

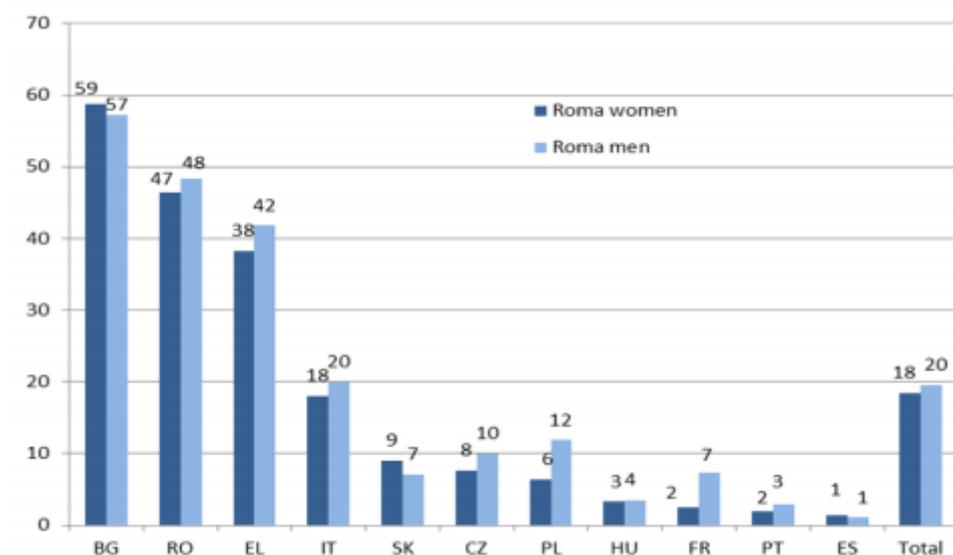
Despite declared *de jure* equal access, *de facto* it is extremely easy to drop out of the health insurance system. If no health insurance contributions are paid for three non-consecutive months over a period of 36 months, then the person is considered not insured (even though 33 monthly instalments have been paid). This rule affects some self-employed persons working abroad, all long-term unemployed persons, and some employed persons who are not aware of accounting malpractice and their employer failing to pay insurance contribution. State regulations say that for 2018 the self-employed and the long-term unemployed (who do not receive healthcare insurance and benefits) should contribute monthly. Moreover, if someone is unable to pay, he or she has to report this obstacle before the 25<sup>th</sup> of the month, otherwise an administrative fine will be applied.

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<sup>80</sup> <https://www.opensocietyfoundations.org/sites/default/files/roma-integration-strategies-20120221.pdf>

This creates a trap for Roma, because due to their extremely high functional illiteracy rate (about 90% of Roma have a primary education or less), as well as due to their long-term unemployment or seasonal employment abroad for three to six months a year, a significant number of Roma are not participating in the healthcare system. The FRA Survey shows that Bulgaria is the country with the highest proportion of Roma with no health insurance – both for females and males, as illustrated in the following chart:

**Proportion of Roma females and males without health insurance in selected EU countries as of 2011 (self-reported data)**



Source: FRA Roma pilot survey 2011: Self-declared having no medical insurance, Roma respondents aged 16+

The data show 2% more Roma women than men lack health insurance in Bulgaria, the highest proportions in the countries surveyed. Moreover, the proportion of self-reported non-Roma women without health insurance in Bulgaria was just 22%, a sign of significant inequality in access to healthcare. However, an extrapolation based on the survey methodology and population size reveals that Roma are less than 20% of those uninsured in Bulgaria. Therefore, our statement is that this is not a particular case of a Roma-targeted discriminatory practice, but a deep structural problem that affects Roma people about twice as much as everybody else. The National Health Insurance Fund (NHIF) reports 1.39 million and 1.38 million people uninsured for 2016 and 2017, respectively, which is approximately 19.5% of the entire population for both years (calculated on the basis of the average annual country population reported by the NSI), which is also a figure indicative of a systemic and not an ethnic problem, as it is depicted in the Government's policy documents.

In order to combat most people's lack of access to healthcare services in Bulgaria, the Council of Ministers published Decree 17/31.1.2007, aiming to arrange healthcare access for people with no assets or income. According to Article 1, the MLSP, through its Agency for Social Assistance, should be responsible for covering all expenses incurred in hospitals for medical treatment. However, clear public accountability for the money spent under Decree 17/2007 and the services provided thereby is not available on the publicly accessible web pages of either the MLSP, the Health Ministry, or the Ministry of Finance.

Some fieldwork observations and outreach work of the Largo Association in 2013 showed that hospitals try not to inform the uninsured about this option, firstly because there is a serious lag in the state's reimbursement of such expenditures, and secondly because if

there are too many such cases, an audit is usually initiated by the Ministry of Finance and not all the expenses are actually reimbursed, which causes debts for the hospitals.<sup>81</sup>

Health Ministry ordinance 26/2007 is tailored to Decree 17/2007 and targets the granting of obstetric care to uninsured women. Like Decree 17/2007, the ordinance is not very well known to either Roma or obstetric and gynaecological (OG) facilities. Moreover, OG doctors try to avoid providing care on the basis of this ordinance as it does not allow the provision of proper pre-natal care and pregnancy tracking, but just one preventive check-up during pregnancy, research has shown.<sup>82</sup> The expert recommendations discussed in the report on that research insist there is a need for extended services, namely, a second echography check-up and full blood count (including blood type) around 32-36 weeks.

After 1989, the transition to a free market economy brought about economic instability in the healthcare system, the permanent underfunding of small hospitals (due to the principle that „money follows the client“), and relatively very high medication prices (compared to average income), rendering medication unaffordable (Bulgaria is among the countries with the highest VAT on medication). Currently, Bulgaria has a serious systematic problem with a lack of equal access to healthcare services in some regions and municipalities, as discussed in many academic and policy papers. In its last *State of Health in the EU* report,<sup>83</sup> the OECD and the World Health Organization pointed out that „unmet needs for medical care point to access problems across all income quintiles for financial reasons. Travel distance and availability of doctors remain important barriers, especially for lower income groups.“ The report found Bulgaria has the second-lowest life expectancy at birth across all EU countries, almost six years lower than the EU average, and at the same time shows significant differences in mortality rates by region and level of education and inequality in access to healthcare based on region, income group and level of education – with concern for the extreme vulnerability among Roma people, lower-income households and older people.

The extremely high infant mortality rates and adolescent fertility rates in Bulgaria<sup>84</sup> led to the establishment of several initiatives focused on pre- and postnatal care and preventive care in disadvantaged areas. In 2013 UNICEF, in cooperation with the Ministry of Health and the Bulgarian Association of Health Professionals in Nursing, developed a model of a home visiting service to improve the health and development of young children. A model of a home visiting service referred to as the „Centre for Maternal and Child Health“ was established with the primary aim of strengthening caregivers' capacities to provide nurturing care to children from birth to three years of age, to improve early identification of developmental difficulties and risks for children's wellbeing, and to facilitate early intervention, including by improving access to available health care and to social and educational services in the community. The outreach teams consist of trained nurses or midwives and a social worker. The target group for the services are expectant parents and families with children under three, regardless of their ethnic identity. Support is tailored to the individual needs of particular households and families who experience specific difficulties are offered additional home visits and support until the issue is resolved. Special attention is paid to the most disadvantaged families, where there are potentially more risks to child health and development, in which case the support may include the involvement of other specialists (speech therapists, medical specialists, occupational therapists, etc.) or child protection services. The service was piloted in the period 2013–2018 in two provinces, Shumen and Sliven, (and failed to start in Montana Province due

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<sup>81</sup> <http://www.ddrom.net/2012-11-30-13-52-15/2942----17.html?lang=ru>

<sup>82</sup> [http://wp.flgr.bg/wp-content/uploads/2016/05/LARGO\\_Naredba-26.pdf](http://wp.flgr.bg/wp-content/uploads/2016/05/LARGO_Naredba-26.pdf)

<sup>83</sup> [https://ec.europa.eu/health/sites/health/files/state/docs/chp\\_bulgaria\\_english.pdf](https://ec.europa.eu/health/sites/health/files/state/docs/chp_bulgaria_english.pdf), p.1, 16

<sup>84</sup> For example, according to the available data by NSI, the average infant mortality rate in Bulgaria for the period 2010-2016 is 7.7‰. The period age specific fertility rate (10-14) is 1.9‰ and the period age specific fertility rate (15-19) is 44‰.

to a lack of human resources in the healthcare field). Until August 2018 the two services provided different packages of support to more than 10,000 families with 12,000 children (approximately 67% of the population 0-3 years of age in the two provinces), focused on nurturing care – a set of conditions that provide for children’s health, nutrition, security and safety, responsive caregiving, and opportunities for early learning. For the 2018-2022 period UNICEF will further support work in this area and the Ministry of Health is planning to extend the service to other regions.

The French initiative *Médecins du Monde* (MDM) has worked in Bulgaria since 2004. Within its project in the Nadezhda quarter of Sliven in the 2009-2013 period, MDM conducted awareness-raising sessions and outreach work on four issues: Family Planning, Pregnancy, Hygiene, and Vaccination. At the end of 2013, MDM decided to adjust their mission and services in order to meet the needs of the community and contribute to the reduction of maternal morbidity and mortality related to unwanted pregnancies. Therefore, in February 2014 the Municipality of Sliven, the Bulgarian Association for Family Planning (BAFP) and MDM signed a memorandum of understanding. The municipality agreed to provide funds in order to pay the fees for two gynaecologists to conduct Pap smear tests and provide contraception to women after being orientated about it by MDM. After signing the memorandum, the MDM expanded its area of intervention to the whole Municipality of Sliven (the city proper and its 45 satellite settlements). The project, implemented since 2014 by MDM in partnership with the Municipality of Sliven and BAFP, includes the following activities:

- Maintaining an Information and Orientation Centre (I&O Centre) in the building of a school in proximity to the big Roma community of Nadezhda. The centre ensures the presence of a team member or nurse providing users with information, consultancy and referral. Awareness-raising sessions and meetings with community leaders are held there and the administration of the MDM mission Bulgaria is based there.
- Outreach work: This is a community-approach service during which team members visit Roma communities in Sliven and surrounding villages daily, meeting with people on the streets, visiting them in their homes, and informing them about the services of the I&O Centre and the referral mechanism, as well as motivating people to participate in the awareness-raising sessions. The team also provides community members with consultancy on family planning and other health/social topics.
- Awareness-raising sessions for young men (age 14 – 18) and women of childbearing age (age 14 – 35). Each month the team of the organisation is organizing and conducting two modules of awareness-raising sessions, one with young men and one with women of childbearing age. Each module, attended by 12-15 people on average, is done in four sessions, during which the team provides users, in an interactive way, with information about the anatomy of the human reproductive system, family planning, the available methods of contraception, the most common sexually transmitted infections (STIs) and protection methods. The main aim of the modules is to present community members, in an interactive, participatory manner, with information about the construction of the human reproductive system, what family planning is, what the possible health and social consequences of not practicing family planning are, what contraceptive options exist, and which are available in Bulgaria. During this point of the awareness-raising sessions the team is informing those attending about the possibility to use the referral mechanism and means for family planning free of charge. The team informs users about the most common STIs and how they are contracted, how to protect against them, and the symptoms of the different diseases.
- Opportunity for pregnant women and mothers of new-borns to use showers. In Nadezhda people have no running water. Women are unable to wash themselves,

so MDM decided to provide these particular women from the community with the opportunity to use the shower at the I&O Centre daily.

- Individual and family consultancy on questions family planning and contraception (in the I&O Centre). Users are informed about the different available methods of contraception, how they work, possible side effects of their use, and other related topics. During this consultancy users are provided with all the necessary information in order to make a conscious, informed choice of contraceptive method.
- Referral mechanism: All users who have expressed the demand for a particular kind of contraception are then referred and accompanied to a consultation with a gynaecologist (the referral mechanism is done with two doctors). The project provides each woman who is going to receive contraception three consultations with a gynaecologist. The first determines the woman's health status and provides a Pap smear test (if there is need of treatment, that is also covered by MDM); a second exam during either inserts an IUD or prescribes oral contraception is provided; and a third exam within one year checks up on the patient. Women who do not choose to use either form of contraception can also get free Pap smears.
- Provision of oral contraception and drugs for treatment of STIs: MDM provides all women, as early as 14 years old, with the available contraception method chosen by the particular user with the advice of the gynaecologists when deciding which method is best for her. If the woman prefers to use oral contraception, then after consulting with the gynaecologist, MDM provides the prescribed pills on a monthly basis. If a woman needs to be treated before receiving a contraception method, the doctor prescribes what is needed and MDM also covers the drugs for that treatment.

In May 2016 the TSA launched a pilot Nurse-Family Partnership project in the Fakulteta district of Sofia. It follows the worldwide philosophy of the NFP and aims at improvement of prenatal health and pregnancy outcomes, decreasing adolescent fertility rates by encouraging longer spacing between births, as well as increasing maternal employment and the improved school-readiness of children as a long-term side effect. On the one hand, this is like the UNICEF project due to the home-visiting principle, but on the other hand, it is focused on a segregated, vulnerable population (like the MDM project in Sliven) and does not offer universal coverage. As of October 2018, there had been 86 active clients included in the NFP programme receiving between 50 and 65 annual visits on issues tailored to the needs of the dyad (mother-baby/foetus). The family nurses within this project offer:

- Demonstration of proper baby care and training to the mother and other family caregivers
- Emotional and social assistance
- Information and targeted services
- Assessment of childcare and the environment in the family, including the living environment and social environment
- Access to a „Toy Library“
- Access to medical check-ups and examinations
- Access to nutritional supplements and contraception
- Breastfeeding support.

In 2016 the Government reported there had been 59 info-campaigns focused on immunization calendars (reaching 4,213 persons) and 10 working meetings with health mediators on awareness raising. The initiative was focused on several provinces: Blagoevgrad, Burgas, Varna, Kyustendil, Montana, Pleven, Plovdiv, Sliven, Sofia Region and City, Stara Zagora, and Haskovo.

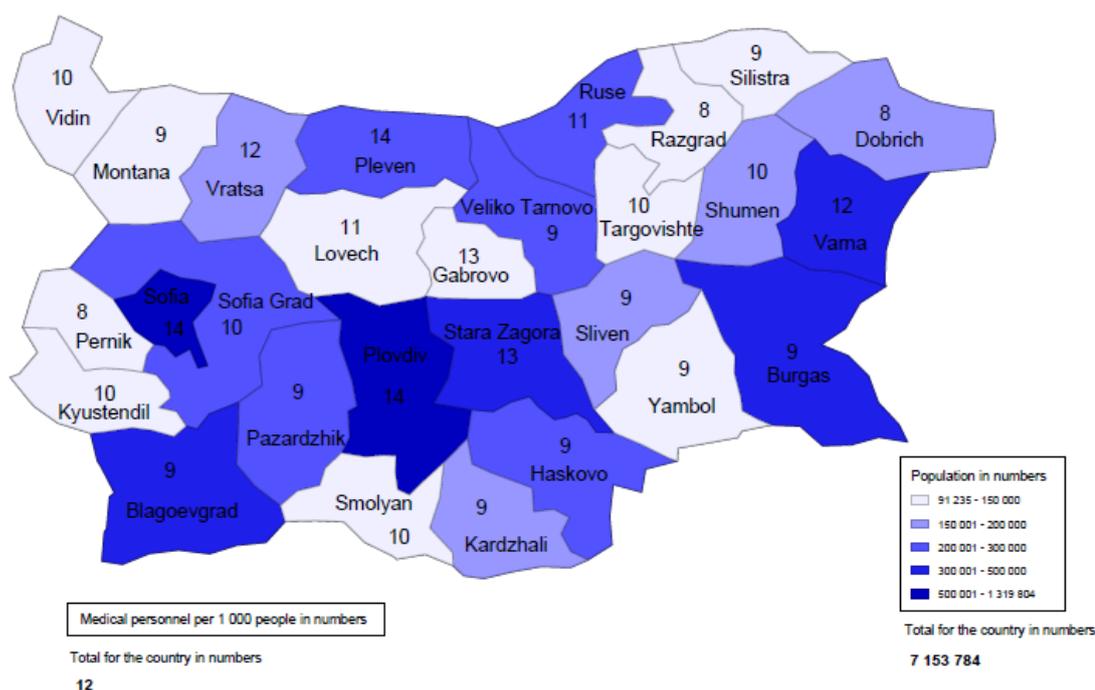
For the Decade of Roma Inclusion period (2005-2015) the Government reported a significant number of healthcare activities, as follows:

- 9,924 info-meetings
- 2,711 healthcare campaigns
- 151 trainings
- 53,472 epidemiological check-ups
- 3,494 preventive check-ups.

There are some rural settlements where the proportion of Roma significantly exceeds the country average (5%), and some municipalities and settlements where the Roma population exceeds 50%. The access to and the quality of the healthcare in such cases depends mostly on the regional distribution of medical staff and pharmacies, as shown in the map below. If we look at regions with concentrations of Roma population according to the census data (both for 2001 and 2011), then one could expect there would be more Roma healthcare users per medical personnel member in the regions of Dobrich, Montana, Sliven, and Yambol.

Due to the prejudices of political decision-makers, and in line with the stereotype that there are „services used mostly by Roma”, there are some systemic dysfunctions in the provision of emergency care, obstetric and prenatal services, and in the national disability certification procedure. Most of these dysfunctions have been addressed recently by different projects listed in the next subchapter.

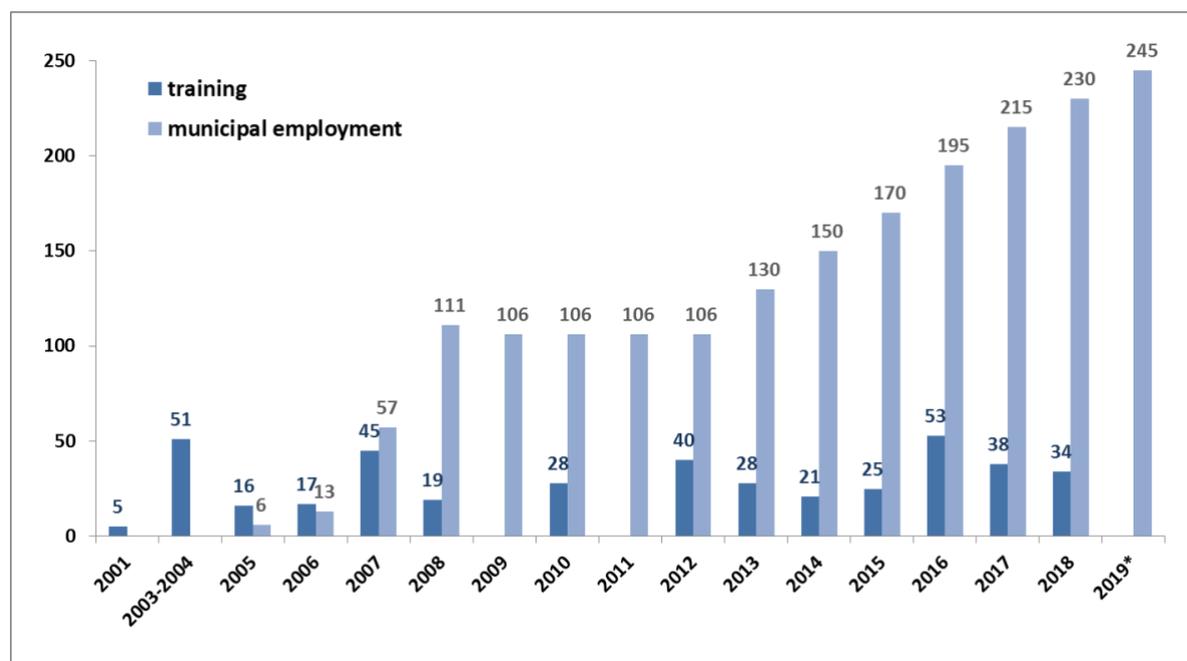
### Medical personnel per 1,000 people by NUTS-3 regions in Bulgaria



Source: OECD 2017. *Bulgaria: Country Health Profile 2017*

The concept of „health mediators” was officially introduced in the Bulgarian normative framework in 2005 with the „Health strategy for vulnerable individuals belonging to ethnic minorities 2005-2015”. This was included later in the „Healthcare” chapter of the NRIS and in many other official documents, such as the National Child Protection Programme, the National Strategy for Demographic Development, the National Development Programme „Bulgaria 2020”, the National Programme for the Prevention and Control of HIV and STDs in the Republic of Bulgaria 2017-2020, and the National Programme for Prevention and Control of Tuberculosis in the Republic of Bulgaria 2017-2020.

**Number of trained and employed health mediators in Bulgaria for the period 2001-2018** (Note: the figure for 2019 is projected, based on the 2019 budget)



Source: National Health Mediators Network

The first Health Mediators in Bulgaria had been trained already in 2001 within a project of the Partners Bulgaria Foundation. In the 2001-2004 period they were not yet recognized as necessary by the state, and all the trained individuals were employed only by NGOs in projects. In 2005, through the Operational Programme „From social benefits to employment“, the first six health mediators were employed by municipalities. Since 2007 health mediation has been an official state policy supported by a dedicated budget line. Since then, the list of municipalities receiving this targeted budget for health mediators have been updated annually. The provisional distribution of health mediator services at regional level (NUTS-3) is presented by number of municipalities with this service available and by number of health mediators per province for 2019 in table below. The budget line for one health mediator for 2018 was equivalent to the minimal monthly salary.

In parallel with the state-provided mediators, there are still some health mediators employed on a project basis. Since 2016 about 12 mediators have been trained and employed through the Bulgarian-Swiss cooperation programme, three mediators were trained and employed within the UNICEF visiting nurse programme, and two mediators were trained and employed by the NFP pilot project of the TSA.

### Expected number of municipalities with health mediation services available and health mediators by administrative provinces in Bulgaria for 2019

Province (NUTS 3)	Number of Municipalities (LAU1) with health mediator	Number of health mediators per province	Province (NUTS 3)	Number of Municipalities (LAU1) with health mediator	Number of health mediators per province
Blagoevgrad	7	12	Shumen	8	14
Burgas	9	19	Silistra	2	2
Dobrich	6	13	Sliven	4	11
Gabrovo	1	1	Smolyan	1	1
Haskovo	6	9	Sofia City	1	7
Kardzhali	2	3	Sofia (province)	7	14
Kyustendil	2	11	Stara Zagora	7	10
Lovech	4	6	Targovishte	2	2
Montana	8	15	Varna	5	13
Pazardzhik	7	11	Veliko Tarnovo	7	9
Pernik	4	6	Vidin	3	5
Pleven	2	2	Vratsa	6	9
Plovdiv	7	11	Yambol	3	12
Razgrad	4	9			
Ruse	5	8	<b>TOTAL</b>	<b>130</b>	<b>245</b>

Source: National Health Mediators Network

From 2001 to 2006 the health mediators were trained by an NGO and certified by the Health Minister. With the extension and standardization of the service, since 2007 there have been two medical colleges accredited to provide health mediation training. The Medical University Plovdiv was a training centre for 2007-2010, and the Medical University Sofia was a training centre for 2012-2018. There is a state-standardized syllabus for this training and the successful trainees receive a professional qualification certificate, according to Decree 215/2004. The duration of the training is 14 days and currently costs about 511.20 EUR (1,000 BGN) per mediator for a group of 15 mediators.

The health mediators are engaged in different activities in their daily community work. The following table reflects activities self-reported by mediators to the municipalities (their direct supervisors and employers). However, until 2015 there was no unified template and database for this information. Since 2016 the National Network of Health Mediators has developed and is piloting a unified monitoring system, so the data for 2016 have been verified by that system.

### Self-reported health mediation cases in Bulgaria for 2012-2016

	2012	2013	2014	2015	2016
<b>Immunisations</b>	19,753	26,009	19,065	20,906	12,861
<b>Preventive examinations</b>	30,831	40,114	31,703	29,201	21,712
<b>Healthcare causes</b>	8,958	16,924	13,884	18,644	17,569
<b>Social exclusion causes</b>	4,598	30,526	24,902	33,722	n.a.
<b>Consultations</b>	25,197	26,374	38,786	26771	37,029
<b>Health information campaigns</b>	1,618	5,060	1,591	1,520	2643

Source: National Health Mediators Network

According to the job description in the national occupational classification, health mediators are responsible for the following activities:

- Work with clients (acquaintance with and formulation of the problem; assessment of the difficulties connected with access to the respective services, elaboration of a work plan on the case).

- Facilitating access to services (accompaniment, clarification, explanation, information; contacts the GP and/or other medical experts; carries out services for families at risk, pregnant women and young mothers).
- Assistance in communications (with the Health Insurance Fund, the Department for Social Assistance, the State Agency for Child Protection, and the Commission for Protection against Discrimination).
- Awareness raising and preventive care (family planning and reproductive health; vaccinations and immunizations; principles of general hygiene), often done with regional health inspectorates.

In 2015 a pilot project of hospital-based health mediation services was tested in Haskovo, Lom, Samokov and Yambol. According to Professor Ivaylo Tarnev and representatives of the National Network of Health Mediators, it was an extremely positive experience and the state should consider further development of such services.

### **Roma paramedics**

Another hospital-based service for increased access of Roma people to medical care was also piloted in 2015. The Association „Diverse and Equal” established a training programme for paramedics of Roma origin who later on will be able to find employment in Emergency Rooms. The first seven Roma paramedics were trained in Sofia and two are still employed in Sofia’s Emergency Centre. Positive feedback has led to the current extension of the programme. Since 2017, 10 individuals have been enrolled in a specialised centre for professional training. The training programme is for one year and operates on a basis of gender equality, with a 50:50 quota for recruitment overall. In Sofia, the female- to-male ratio in the training was 4:3, and the ration among those currently employed as a result of this training is 1:1.

The main aim of the programme is to reduce mutually negative attitudes between Emergency Room teams and Roma communities. The project is running in partnership with medical schools in Pleven and Sofia.

### **Mobile access to healthcare**

Mobile healthcare services offered in a targeted manner were established for 2006-2009 under the PHARE programme, resulting in the Health Ministry receiving 23 mobile units, including five general check-up rooms, two fluorography offices, two mammogram offices, three ultrasound offices, three mobile laboratories, four paediatric offices and four gynaecological offices. The conducting of examinations in certain regions is preceded or accompanied by lectures, discussions, and talks providing specially developed health information materials presented by specialists from the Regional Health Inspections. The subjects discussed and the materials developed are in the field of contraception, STIs, breast cancer, cervical cancer, nutrition, immunisations, patients’ rights, the possibilities of social assistance, and the health mediator’s role. Reviews and discussions carried out by specialists of the Regional Health Inspectorate in that area happen at the mobile office, together with the health mediators.

Activities carried out in 2015 with the mobile units total 12,593 examinations:

- 895 immunisations of children with incomplete immunisation status;
- 1,023 fluorography sessions;
- 1,555 gynaecological examinations;
- 1,549 paediatric examinations;
- 1,148 mammography examinations;
- 1,582 ultrasound examinations;
- 5,736 laboratory tests.

In 2015, preventive examinations of uninsured Roma and those with difficult access to hospitals were carried out by mobile surgeries as follows: 97 children were diagnosed through a total of 1,549 examinations and referred for further treatment. A total of 895

immunisations were performed with mobile units, a common practice for children from 0-18 with incomplete immunisation status, according to the National Immunisation Calendar.

With the mobile gynaecological units, 1,555 examinations of 540 women diagnosed the state of their reproductive and sexual health. In the clinical laboratories, 5,736 tests revealed abnormalities in 206 cases. With the mobile ultrasound units, a total of 1,582 examinations diagnosed diseases in 386 people. With the mobile fluorographic units, 1,023 examinations diagnosed diseases in 35 persons. The mobile mammogram services performed 1,148 examinations and diagnosed diseases in 127 people. All patients were directed to the appropriate specialist for further treatment.

The OSF/REF programmes for Romani healthcare professionals have been very positively evaluated as successful and have also been implemented in other countries in Central and South-Eastern Europe. In the period 2008-2018 there were 117 medical students who were granted scholarships through REF. For the past five academic years the figures are as follows:

### **Number of scholarships for medical students granted by REF in the period 2014-2018**

<i>Academic year</i>	<i>Number of scholarships</i>
2014-2015	39
2015-2016	31
2016-2017	24
2017-2018	16
2018-2019	15

The success of the programme and successful advocacy by Amalipe and OSI–Sofia made the Government introduce this as state policy under the Healthcare Programme of the Norwegian Grants (2012-14) and later in the Active Citizens Fund established within the EEA mechanism (2014-2021) and operated by the OSI–Sofia and the TSA. The call for healthcare students in 2018/2019 was opened on 26 July 2018 and there were 79 applications, of which 74 were found acceptable. There were 25 granted scholarships and 11 candidates shortlisted to replace someone in case of drop-out.

### **Fight against discrimination and antigypsyism in health care**

There are many different stereotypes about the Roma community in Bulgaria. The positive news is that a survey by Amalipe conducted in 2011 among teachers, social workers and medical doctors in six regions showed that doctors do not share healthcare-related stereotypes as strongly as the other professions surveyed.<sup>85</sup>

However, much more work is needed in that respect, since combating ethnic stereotypes is not among the state's priorities, and, unfortunately, the prevalence of hate speech in society leads to the fact that a former Health Minister even openly spoke against Roma people, calling them „cattle that do not deserve human treatment” in 2014. A European manual about this was translated and introduced in Bulgaria, but it is not very well known among healthcare professionals.<sup>86</sup>

The team of the ROMACT programme in Bulgaria organized and conducted a training called „Approaches to work in and with the Roma community” in 2017 for a wide range of professionals – municipal staff, social workers, teachers, health professionals, ethnic and integration specialists, police officers, specialists from the Labour Offices and others

<sup>85</sup> Amalipe, *Beyond Anti-Roma Stereotypes*, pp 126-129. Available at: <http://amalipe.com/files/publications/Stereotipi-eng.pdf>

<sup>86</sup> [http://ec.europa.eu/health/ph\\_projects/2004/action3/docs/2004\\_3\\_01\\_manuals\\_bg.pdf](http://ec.europa.eu/health/ph_projects/2004/action3/docs/2004_3_01_manuals_bg.pdf)

who are directly involved in the implementation of municipal plans for the social inclusion of marginalized Roma at the local level. The training was organized in two modules: the first module was held on 30 October – 1 November in the city of Plovdiv and the second was held on 29 November – 1 December in Veliko Tarnovo. The training group was formed of 25 participants. Due to high interest, the ROMACT team organised another, additional training on the subject. The extra training was held from 6-9 December in Plovdiv for 35 participants.

### Addressing needs of the most vulnerable groups among Roma

In the Bulgarian Narcotics and Precursors Control Act there is a chapter on prevention of drug use. However, there is no sustainable preventive policy and some recent research papers show that exactly the market in synthetic drugs (for example „pico“ or methamphetamine) are triggers for trafficking in human beings and for HIV cases, after commercial sex work abroad (in France, Switzerland, and Germany).

## EDUCATION

### Access to quality early childhood care and preschool education

The Pre-school and School Education Act states that „Pre-school education is compulsory from the school year in which the child turns five.”<sup>87</sup> Nevertheless, for the fourth consecutive year, the net enrolment rate in pre-primary education is decreasing to 78.4% in the 2017/18 year compared to 83.6% in 2013/14, according to the National Statistical Institute. The negative trend shows that every fifth Bulgarian child is not enrolled. The number of families living in emigration is not enough to explain this decline.

The NSI data relate to all children in the relevant age group and are not reported on an ethnic basis. Nevertheless, numerous studies (such as EU-MIDIS-2) indicate that the participation rate of Roma children in pre-primary education is at least twice as low as the national average. This not only causes lower school performance and a higher dropout rate, but also limits the employment possibilities of mothers. The CSMR from 2017 points out that certain financial barriers (e.g., fees), an absence of kindergartens in some cities, not engaging Roma parents, and a lack of modern teaching methods are the key reasons for this discrepancy.<sup>88</sup>

The period of 2017-18 did not see any significant change regarding these barriers. As explained in CSMR 2017, municipalities have the legal right to collect such fees and most do so. According to information from the Ministry of Education from June 2017, only 5% of municipalities, e.g., 13 municipalities, did not collect any fees. Twelve other municipalities collected fees for children aged two to four, but not for children at the compulsory pre-school age of five to six. Most are small rural municipalities with relatively high percentages of Roma but with few children. Over 90% of municipalities collected monthly fees (from 5 to 35 EUR) for all children in kindergartens. According to information given by the MES, municipalities collectively collect approximately 31.21 million EUR (61,048,690 BGN) per year for the training of 201,776 children in kindergartens (of which 98,524 children are in compulsory education at age five or six). Average municipalities collect 14 EUR (27.5 BGN) per month per child, but in this respect the difference between the individual municipalities is sensitive: 46 municipalities collect less than 5.11 EUR (10 BGN), 33 municipalities between 5 and 7.67 EUR (10-15 BGN), 59 others between 7.67 and 10.22 EUR (15-20 BGN), and 45 municipalities collect fees above the average levels of 14.06 EUR (27.5 BGN). It can be declared, with no exaggeration, that if the state budget provided an additional 14.31 million EUR (28 million BGN), the municipalities would not experience any additional difficulties from eliminating the fees for compulsory pre-school education.<sup>89</sup>

The general public environment supports free of charge pre-school education. A national representative survey shows that 74% of parents back the idea.<sup>90</sup> Since 2017 a civil society coalition<sup>91</sup> has been advocating for abolishing kindergarten fees, uniting the efforts of the most active Roma and pro-Roma NGOs. They managed to convince new municipalities to abolish the fees even in a less-supportive political environment. In 2018 several new municipalities abolished the kindergarten fees: Devnya,<sup>92</sup> Smyadovo, Antonovo<sup>93</sup> and

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<sup>87</sup> Pre-school and School Education Act, art. 8, para 1.

<sup>88</sup> CSMR, 42-43.

<sup>89</sup> More information see at: <http://amalipe.com/index.php?nav=news&id=3105&lang=2>

<sup>90</sup> Information provided by Trust for Social Achievement

<sup>91</sup> All-in for Strong and Equal Start coalition unites 19 NGOs coordinated by World Without Borders

<sup>92</sup> <http://bnr.bg/varna/post/100912562/po-500-b>

<sup>93</sup> <http://amalipe.com/index.php?nav=news&id=3352&lang=2>

others. This seems to be a positive trend among an increasing number of relatively small, rural municipalities, while the authorities of certain big cities express disregard for the idea of free kindergarten.<sup>94</sup> Some urban municipalities (such as Dobrich) decreased the fees for obligatory preschool, while others kept and even increased these fees.<sup>95</sup>

At national level, the 2018 State Budget Law limited the possibility to charge fees for obligatory preschool only to fees for meals, since the other expenses are covered by the state budget.<sup>96</sup> The practical consequences of this are insignificant, since the law does not require different/lower amounts for fees charged for obligatory preschool. According to MES data, 123 municipalities have not reduced fees for five and six-year-olds.<sup>97</sup>

On 1 June 2018 the National Ombudsman, Maya Manolova, launched a campaign called „No Fees in Kindergartens”.<sup>98</sup> She also formed a working group with the participation of the respective institutions and NGOs and initiated a policy debate. Education Minister Valchev and Deputy Education Minister Sacheva have expressed support for the NGO advocacy for free kindergarten, at least for those of obligatory pre-school age, during civil society forums.<sup>99</sup> Nevertheless, the political decision to remove kindergarten fees (entirely or partially) is still not being taken. The state budget forecast for 2019 also does not contain any financial backup for such a measure.

The lack of kindergartens (or places in those that do exist) continues to be an obstacle to increased Roma enrolment, mainly in some urban Roma neighbourhoods. In addition, in big cities like Varna, Sofia and Bourgas, online application systems for enrolment into kindergartens that require computers, Internet connections and technical competence exclude many Roma, since local administrations do not provide any technical assistance to parents.

Using funds from the Swiss Cooperation Programme „Health and Education for All”, the municipalities of Sliven and Montana built modern kindergartens in the Roma neighbourhoods of Nadejda and Kosharnik. Burgas Municipality provides transport for children from the Pobeda neighbourhood to kindergartens in neighbouring ethnically mixed districts. The most common strategy at municipal level for addressing the physical lack of kindergartens is to open preparatory classes in schools in those districts. The preparatory classes at primary schools offer only a half-day training that is not enough for the preparation of many children because it is lower quality, as well as severely limits parents’ (especially mothers/grandmothers) opportunities to find paid work. In addition, free transportation is provided from villages where there is no kindergarten to the closest „focal-point kindergarten”.

The low quality of education and care in the kindergartens attended by Roma children combined with poor interaction with Roma parents is the other big barrier. Although most kindergarten teachers are qualified and have university degrees (only 470 of 19,617 teachers have just an upper secondary education<sup>100</sup>), in general they lack intercultural skills and training for work in multicultural environments. Almost no teachers have even a

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<sup>94</sup> <http://amalipe.com/index.php?nav=news&id=3105&lang=2>

<sup>95</sup> In December 2017 the City Council of Shumen voted to introduce back the fees for 5- and 6- years old children which were removed 3 years ago. After reaction of the City Ombudsman and Center Amalipe the fees were returned only for the high-income families. See: <http://www.kmeta.bg/vuvedejdat-mesechna-taksa-za-decata-ot-preduchilistna-vuzrast-v-shumen>

<sup>96</sup> *State Gazette*, 99/12.12.2017, p. 76.

<sup>97</sup> MES information provided for the purposes of CSMR 2017.

<sup>98</sup> <http://www.ombudsman.bg/news/4738?page=11#middleWrapper>

<sup>99</sup> <http://amalipe.com/index.php?nav=news&id=3282&lang=2>

<sup>100</sup> National Statistical Institute, *Education in the Republic of Bulgaria 2018*, p. 33.

limited knowledge of basic Romani or Turkish words, although many Roma and Turkish<sup>101</sup> children do not speak Bulgarian.<sup>102</sup> The curriculum is centred only on the culture and traditions of ethnic Bulgarians. In this regard, preschool education is significantly underdeveloped compared to primary school education, which has incorporated intercultural practices. In addition, Roma parents are seldom involved in the work of the kindergartens. Although the Public Education Act requires the existence of Public Councils as a form of parents' empowerment in every kindergarten and school, most councils function in a perfunctory way.

### Improving quality of education until the end of compulsory schooling

Ensuring that all children of compulsory school age are enrolled has remained a permanent challenge for decades and has become a key political priority of the new Bulgarian Government (after May 2018). „The Situation of Roma in 11 Member States“ survey by FRA and UNDP, undertaken in 2011, showed that only 68% of Roma children of obligatory school age in Bulgaria are enrolled.<sup>103</sup> In 2016, the EU-MIDIS-2 survey showed an improvement, but Roma enrolment is still below the national rate of 91%.<sup>104</sup> The survey also registered 67% of Roma as early school leavers (aged 18-24 years old with at most a lower secondary education and no further education or training) with significant gender differences: 57% of young Roma men vs. 77% of young Roma women.

NGOs, schools and municipalities have achieved significant results in decreasing the dropout rate of Roma students within many pilot projects during the last decade. Since July 2017, the Bulgarian Government has tended to back up these efforts with political attention, trans-institutional cooperation, and even with state budget financing, as explained below. The framework is not a Roma-targeted one, but follows one of the Government's basic promises, namely, to ensure full enrolment of pre-school and school age children.

With Decision 373/5.7.2017 and later with Decree 100/8.6.2018, the Council of Ministers set up a multi-institutional framework for full enrolment. It contains a Mechanism, a Coordination Unit, and local, multi-institutional teams. The Mechanism<sup>105</sup> includes the key institutions working with children and their families (not only educational but also social care and health care, police, municipal authorities, etc.). They are obliged to cooperate on seven cross-cutting areas to ensure every child will attend school.<sup>106</sup>

The Coordination Unit is at a high political level, chaired by the Deputy Prime Minister and including ministers of education, social policy, healthcare, interior and others. Its main function is to ensure coordination at the central level for applying the Mechanism and its measures. Since the central institutions have decentralized structures at regional level, the Unit can ensure cooperation also at district and local levels.

The multi-institutional teams are formed at local level in every „catchment area“ that is the area of a certain school/kindergarten. They include representatives of all local

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<sup>101</sup> Bulgarian Turks form the other big ethnic minority. They use only Turkish in their family environment, similar to the Turkish-speaking Roma *Millet*.

<sup>102</sup> There is no official data about the share of preschool and school-age children who do not speak Bulgarian. Expert estimates vary between 20 and 50%. The opinion of the author is that the real share does not exceed 20%, since many Roma children speak both Bulgarian and Romanes at home.

<sup>103</sup> FRA 2014, *Education: the situation of Roma in 11 Member States*, p.18.

<sup>104</sup> FRA 2016, *EU-MIDIS II*, p.27.

<sup>105</sup> Its full name is Mechanism for cooperation among institutions for inclusion in the educational system of children and students in pre-school and school age

<sup>106</sup> Decree 100/08.06.2018, Art. 3

institutions working with children (including the police). The head of the respective Regional Inspectorate of Education forms the teams after consulting with municipal authorities. The teams are expected to perform comprehensive measures in the field for „finding“ the children who are not attending school, enrolling them, and preventing of dropout and early school leaving.

Establishing the multi-institutional framework for full enrolment could be evaluated as an important, positive step that meets a crucial need, namely, to engage a broad range of institutions (not just educational ones) with this goal. It is also a sign of political attention and willingness to mobilise all institutional resources. The envisaged high political participation is a precondition for fulfilling the expected tasks.

At the same time, the framework has important limitations. Its engagement of parents and the local Roma community is insignificant: the local teams can (but are not obliged to) include mediators and NGOs, but this is only optional and no participation by them at central level is envisaged. Roma NGOs and mediators take an active part in many local teams, highly improving the teams' efficiency, but no support is provided for their participation. The role of the institutions is exaggerated in the framework (it is expected that they can solve the main challenges facing the full enrolment), while the local communities' role is underestimated, although it is widely recognized that without parental participation no change is possible. The mechanism stresses certain semi-populist measures that could have immediate effects but are problematic from a child- and family-wellbeing point of view: for example, replacing family welfare benefits now given in money with clothing and shoes, strengthening administrative punishments for offenses related to attendance, etc. Their longer-term impact is disputable. The pedagogical side of the process is rather missing, and there is no significant attention paid to the change needed in pedagogical methods and tools in the classroom when the children are re-integrated back into school. Important problematic fields that cause non-enrolment or dropout are not properly addressed, such as financial barriers (fees for kindergartens) or migration abroad and domestically. The entire framework is rather administratively based.

In September 2017 the MES announced that 206,378 children age five to 18 are not enrolled in school (the number did not include another 100,000 who were officially abroad with their families). According to MES data, 1,134 local teams were formed<sup>107</sup> and they carried out 216,904 home visits in search of 197,659 children. Around 23,898 children have been enrolled back into school, but 2,124 out of them dropped out again.<sup>108</sup> Nevertheless, the biggest success is regarding the children who are in the lowest age groups – 7,974 five-year-olds, 2,863 six-year-olds, etc. The number of reintegrated students who dropped out in previous years is significant – 7,741 – but their share is not as big as expected.

According to MES data, 35% of the children who have not been enrolled back into school moved abroad. No reliable information was obtained about the child for another 35%. The parents were said to be unwilling to enrol their children in 18% of cases, health problems were said to be the reason the child was not re-enrolled in 8% of cases, and 2% were said to be due to early marriage.

From 1 August 2018 to 31 October 2018 more than 10,000 specialists in 1,239 local teams carried out 24,356 home visits. MES reports that in this short period, 9,100 children were integrated at school.<sup>109</sup> Nevertheless, around 6,000 of them are children in first grade who had not been enrolled in preschool but who most probably would have been enrolled without the local teams. We can draw the following conclusions:

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<sup>107</sup> Information from MES provided in June 2018

<sup>108</sup> <http://mon.bg/bg/news/3162>

<sup>109</sup> Information from MES provided in November 2018

- The percentage of successfully reintegrated children is comparatively low – around 5 to 10%. This indicates the limitations of the administrative approach even when there is political attention and cooperation among institutions.
- Migration abroad appears to be the heaviest challenge: no institution in Bulgaria has reliable information about how many children live abroad and whether they are enrolled in school in the host country, even though according to the Bulgarian Constitution, the state is obliged to ensure mandatory education up to age 16. Certain normative obstacles obstruct their fluent reintegration into Bulgarian schools when they return to Bulgaria.
- A possible reason for the big share of children for whom no reliable information was obtained (35%) is that Roma communities lack confidence in the local teams: 18% of these cases involved the family moving without providing information about their destination, while 17% simply could not be located at all. Because most Roma maintain strong links with their relatives and other community members, the fact that local teams have received no precise information for 35% of them indicates mistrust (i.e., those community members who have information do not share it with the local teams). The absence of Roma and Romani/Turkish speaking members on the local teams, combined with the perception that social workers and police are visiting Roma neighbourhoods only to enact sanctions against community members closes local Roma communities to cooperation in many cases;
- The number of children who were found by the local teams but were not reintegrated is significant – 9,357, which shows the limitations of the administrative approach;
- Health problems also appear to be serious obstacles, although the information does not indicate what kinds of health problems. The Bulgarian educational system needs more adaptive forms (and their application in the rural areas and Roma neighbourhoods) for reintegrating children with health problems.

The beginning of 2018 marked two important changes in financing school education that seem to be having an important impact on the education of Roma children, namely, reforming delegated school budgets and providing additional funds for work with students from vulnerable groups. Both have been designed to let two types of disadvantaged schools (rural ones and schools that educate Roma children) appoint motivated teachers and keep them in education by increasing their salaries.

The State Budget Act 2018<sup>110</sup> introduces a new, reformed system for funding schools and kindergartens. It remains within the delegated budgets yet refines them to reduce the disproportion in funding between urban and rural schools and provides opportunities for the development of schools and kindergartens with smaller numbers of students (especially in rural areas). The novelty in the system of delegated budgets is that they will be determined not only by the number of students, but also by class and school numbers. Since 2018, the MES will provide municipalities with funds not just under the unified funding standard per student, but also under the new standard per class and the institution standard. In addition, a regional component for differentiating these standards is introduced, providing additional financing for remote municipalities and regions.<sup>111</sup>

The launched reform of the school education funding system thus promises a positive change in terms of more equal resource distribution and overcoming systemic under-

<sup>110</sup> State Gazette 99/12.12.2017

<sup>111</sup> Amalipe, *New in schools' delegated budgets in 2018*. Available at: <http://amalipe.com/index.php?nav=news&id=3171&lang=2>

financing of schools in rural areas. It will make it possible to raise the salaries of teachers working in „small“ schools: in order to meet the requirements for increased payment in education and the particularly acute need for qualified, motivated and innovative teachers in villages and small towns. At the same time, the changes introduced in 2018 are rather the beginning of the reform than its overall framework. In this regard, we can recommend:

1. Linking funding reform to raising educational outcomes in each school;
2. The weight of the regional component should be increased: in 2018, municipalities in Group 8 (rural municipalities in the poorest areas) will receive 12% more through standards than will municipalities in Group 1 (the most urbanised municipalities). This is insufficient and should be changed;
3. Introducing a standard or supplement for a school if it is the only one in a settlement.

In 2018, for the first time, the MES allocated nearly 12 million EUR (24 million BGN) for schools and kindergartens to work with children and students from vulnerable groups.<sup>112</sup> The budget forecast shows the promise that this commitment will continue in the coming years. This is the first time the state budget is financing, in a systemic (not project-based) way, a huge amount of work with vulnerable students.<sup>113</sup> Overall, 940 schools and around 400 kindergartens having at least 20% of children from vulnerable groups received this additional financing in 2018.<sup>114</sup> Vulnerability is determined by parents' educational status: if parents have lower than secondary education, students are at risk and should be considered representatives of vulnerable groups. The information about the parents' education status is collected by every school and kindergarten through the National Information System of Pre-school and School Education.

According to the Regulation, schools and kindergartens with a concentration of students from vulnerable groups receive an extra amount of between 20.45 and 102.24 EUR (40-200 BGN) per student for additional work with those at risk. They are divided into five groups, depending on the percentage of parents with lower than secondary education and lower than primary education. The allocated funds are only for basic and additional salaries of the staff, as well as for payments of experts, but they could also be used for appointing school mediators, and the MES has recommended this.

The funds were distributed in May and June. The MES still does not have any generalised information about their usage, which is still ongoing. Nevertheless, a survey carried out for the needs of the present report among 109 schools shows that 54% paid honoraria for teachers who participate in the multi-institutional teams, 49% paid for additional lessons in Bulgarian, 27% appointed mediators, 18% appointed other staff, 20% increased teachers' salaries, etc.<sup>115</sup>

Allocation of additional funds for work with children and students from vulnerable groups is an important positive step that could help these schools appoint school mediators in order to keep motivated teachers in education. It is positive that the regulation defines additional transfers as means for „working with“ children and students from vulnerable groups, i.e., they are provided for additional activities, not as „compensation“.

At the same time, the application of the Financing Regulation, as well as its positive effect, are faced with several serious challenges:

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<sup>112</sup> Standard for Financing, art. 52a

<sup>113</sup> Until now this happens mainly through Science and Education OP (co-financed by ESF) and the Centre for Educational Integration (financed by the state budget with around 500,000 EUR annually), which support is project-based.

<sup>114</sup> Order of the Minister of Education

<sup>115</sup> Survey carried out by Amalipe

1. The granting of these funds is not tied to specific results: it is entirely possible for a school/kindergarten to spend the money legally but inefficiently, without achieving tangible results. Indeed, there is no indication what specific results are expected to be achieved. This is a serious omission that the MES should remove from the 2019 budget;
2. Use of these resources for working with parents is not guaranteed: appointing staff to work with parents (educational mediators, social workers, teaching assistants, etc.) is recommended, but principals may not take advantage of this opportunity.
3. There is a real danger that the investment will intensify segregation. The supported schools and kindergartens are of three different types: rural schools (usually with small cohorts, with ethnic minorities, and with less-educated parents), segregated schools in large cities (with many pupils whose parents are less educated) and ethnically mixed schools. Support can be provided for all schools where students from vulnerable groups are over 20%, and some of the schools supported are ethnically-mixed schools with a relatively low percentage of minority children – between 20 and 40%. Because the regulation stresses the number of children as a criterion for financing, the largest additional funding is provided to the biggest segregated schools. Additional support will be significantly lower in the ethnically mixed schools.
4. There is no way to engage NGOs according to the present text of the financial regulations, although this is crucially needed in many cases, especially for improving the capacity of schools to work with parents.<sup>116</sup>
5. Upper-secondary students are not included: these additional funds are provided only for students in pre-primary and primary education. At the same time, every year the number of students from vulnerable groups in upper secondary schools is increasing. Amalipe and dozens of schools have initiated advocacy activities for providing funds for work with vulnerable upper-secondary students.<sup>117</sup> The State budget for 2019 meets this claim and contains funds for upper-secondary students.<sup>118</sup>

Another new development in 2017-2018 is the introduction of educational mediators. After the unsuccessful experience with introducing the position of teaching assistants with PHARE funds during the pre-accession period, for a decade only a few NGOs and schools appointed educational mediators. The first calls of the Science and Education Operational Programme and the Swiss Cooperation programme demonstrated the need of such a position; it was included in the National List of Professions in September 2017. MES encouraged schools and kindergartens to appoint educational mediators with the additional funds for work with children and students from vulnerable groups. The survey carried out for this report among 109 schools shows that 27% have appointed mediators and 35% plan to do so in 2019. Obviously, tens and even hundreds of mediators are going to join schools and kindergartens (our expectation is that they will exceed 200) for the first time on such a mass scale. According to information provided by the MES, around 220 educational mediators were working at the beginning of November 2018.<sup>119</sup> Most are representatives of the local Roma communities. The requirement for this position is upper secondary education. Most appointed mediators (91) have upper secondary education. A

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<sup>116</sup> During a meeting of Minister Valchev with organizations from Roma Integration Network on 27 September 2018 change in the Standard for financing was negotiated that will explicitly include NGOs.

<sup>117</sup> <http://amalipe.com/index.php?nav=news&id=3359&lang=1>

<sup>118</sup> <http://amalipe.com/index.php?nav=news&id=3387&lang=1>

<sup>119</sup> Information provided by MES

significant number possess a university degree (58 mediators) while the others have primary education. Most are female (144 out of 220).

### Support of secondary and higher education particularly for professions with high labour market demand

Only 9% of Roma have completed secondary education and just 0.5% have a university degree, according to the census of 2011. In addition to a permanent increase in the number of Roma youth who study at professional gymnasiums and other secondary schools, big numbers of Roma (especially in villages and big ghettos) stop their educations after completing primary education.

In June 2017, both seventh- and eighth-graders received primary education diplomas, and that was the last year primary schools included the eighth grade. Thus, one of the innovations of the Preschool and School Education Act has come into force - the new educational structure that sets the boundary of primary education at the seventh grade.

The data provided by MES about students enrolled in September 2017 in secondary schools who completed primary schools (seventh or eighth grade) during the 2016/17 school year<sup>120</sup> outlines the following trends:

1. Thousands of students drop out after completing primary education, becoming the largest group of dropouts: 2,763 students are not enrolled in secondary or high schools from the 42,221 who graduated from primary schools, or about 6.33%.
2. The presence/absence of a secondary school in a locality is an important, statistically significant factor that affects enrolment into secondary education. The percentage of students who do not go on to secondary education in settlements without secondary schools is almost double: 8.97% compared to 5.03% in places with secondary schools.
3. The creation of united schools (first through ninth grade) is an effective way to minimise dropout after seventh grade: 55 primary schools have been transformed into united ones from the 2017/2018 school year. Most of them are in rural areas (48), five are in urban areas, and two are in the capital.<sup>121</sup> In 43 of them all students who obtained a primary education diploma continued to 8<sup>th</sup> grade.
4. Students who drop out are not evenly distributed across schools and regions, and there is concentration and even overconcentration in certain municipalities and schools.<sup>122</sup>

The statistics of the MES and NSI show that the dropout rate in upper-secondary education (grade 8 to 12) is lower than in lower-secondary grades (5 to 7). The hardest problem is linked with irregular attendance: in many secondary schools, especially mostly-Roma professional gymnasiums, the daily attendance often is below 30 to 50%. In the schools that apply dual education,<sup>123</sup> attendance is significantly higher. Nevertheless, dual education in Bulgaria is still at the pilot stage and includes a small number of students. Another hard problem is that very few students successfully pass matriculation exams into

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<sup>120</sup> Information provided by MES

<sup>121</sup> The position of Amalipe as the main promoter of the idea for united schools, as well as the position of Intellect and other Roma NGOs, is that establishing united schools in localities where other secondary schools do exist strengthens segregation. See *SCMR 2017*, P. 45.

<sup>122</sup> See: <http://www.amalipe.com/files/publications/SO.pdf>

<sup>123</sup> Dual education is a relatively new concept for Bulgaria that started in 2013 within the DOMINO project financed by Swiss Cooperation. After changes were made to the Professional Education Act, a precondition for the scaling up of this model was established. The MES plans to use funds from the Science and Education Operational Programme to support it.

many majority-Roma professional gymnasiums (significantly lower compared to the national rates). Thus, many Roma youths finish twelfth grade without obtaining a secondary education diploma (although some receive a professional qualification certificate).

Although there are no ethnically disaggregated statistics, teachers and experts share the opinion that in mostly-Roma secondary schools the dropout rate and irregular attendance are higher than elsewhere. The reasons are complicated and combine social factors (poverty and the need to participate in income-generation activities<sup>124</sup>), ethno-cultural factors (in some Roma groups early marriages and other patriarchal practices still exist<sup>125</sup>) and educational factors (an impractical, low-quality school process).

Statistics show that the dropout rate in upper-secondary education (8<sup>th</sup>-12<sup>th</sup> grade) is lower than in lower secondary (5<sup>th</sup>-7<sup>th</sup> grade). The hardest problem is linked with irregular attendance: in many secondary schools, especially mostly-Roma professional gymnasiums, the daily attendance often is below 30 to 50%. In the schools that apply dual education,<sup>126</sup> attendance is significantly higher. Nevertheless, dual education in Bulgaria is still at the pilot stage and includes just a small number of students. Another hard problem is that very few students successfully pass graduation exams from mostly-Roma professional gymnasiums (significantly fewer compared to the national rates). Thus, many Roma youths finish 12th grade without obtaining a secondary education diploma (although some of them receive a professional qualification certificate).

During 2016-17, the MES undertook measures for increasing participation in upper-secondary education in three directions: general measures for developing professional education, providing free transportation, and a Roma-targeted scholarship programme for secondary students (co-financed by REF). In June 2018 the Council of Ministers approved a list with „preserved professions specialties” that train students for professions with high labour market demand.<sup>127</sup> The state budget provides additional financing for them, including scholarships. The possibilities for dual education have been extended. Free transportation for secondary students to the closest secondary school has been provided since 2017. The State Budget Act for 2018 provided transportation also to the nearest vocational school.<sup>128</sup> Nevertheless, most upper-secondary students still cannot use any free transportation because it is not provided to schools that train in the professions they have chosen, but just to the closest school, which also leads to segregation of the vocational schools.

In 2016 the MES started co-financing a Roma scholarship programme for secondary students financed by REF and implemented by the Centre for Educational Integration (a structure of the MES). It supported 763 motivated Roma students to graduate from secondary schools all over the country. It is remarkable that most were girls: 408 (and 355 boys). Most applicants were female Roma (909 of 1559).<sup>129</sup> This contradicts the widespread opinion that Romani girls might be less represented in higher secondary education than Roma boys.

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<sup>124</sup> This affects boys and girls differently: boys are expected to work together with their fathers, while girls are expected to look after younger siblings while the parents and male family members work.

<sup>125</sup> Usually early marriages affect the education of girls to a significantly higher degree compared to boys, since girls marry at an earlier age and almost immediately drop out.

<sup>126</sup> See 137 above.

<sup>127</sup> <http://mon.bg/bg/news/3228>

<sup>128</sup> <http://amalipe.com/index.php?nav=news&id=3338&lang=2>

<sup>129</sup> Information provided by MES Centre for Educational Integration

## Fight against discrimination, segregation and other forms of antigypsyism in education

More than 60% of Roma are currently educated just with other Roma or mostly with Roma, according to the 2016 EU-MIDIS-II survey. In many cases this is a question of education in rural schools, where ethnic Bulgarian children are missing for demographic reasons: most of the schools in small settlements are attended only by children of Roma, Turks or Muslim Bulgarians. At the same time, the existence of segregated schools in big cities and smaller towns is an objective fact. In 2005 Yosif Nunev, a researcher and expert at the MES, published information about 68 „primary segregated schools” located in Roma neighbourhoods where all students are Roma.<sup>130</sup> With the desegregation process, i.e., the enrolment of children from Roma ghettos into ethnically-mixed schools, dozens of schools that originally educated primarily ethnic Bulgarians have become „secondary segregated Roma schools” because the ethnic Bulgarian children have been enrolled into other schools with fewer non-ethnic Bulgarians by their parents. No preventive activities were undertaken by the respective municipalities and the MES to stop this „white flight” and secondary segregation. In recent years, with the increasing percentage of Roma youths training in secondary education, a big number of segregated high schools or vocational high schools educating primarily Roma appeared.<sup>131</sup> Another common form of Roma segregation is the separation of children into „Roma classes” or „Roma groups” in ethnically-mixed schools and kindergartens, including in separate buildings (located close to the Roma neighbourhood and attended only by Roma) at the same school. This latter form of segregation was outlawed by the new Public Education Act but still exists.

The MES ceased to collect information about the ethnic composition of the schools in 2010 after that data collection was scandalised in Parliament. Nevertheless, since 2017 all schools and kindergartens are expected to submit information about parents’ educational status through the National Information System of Pre-school and School Education.<sup>132</sup> The information is used for defining the percentage of vulnerable students and the funds for working with them (see above). Although ethnic information is not being collected, the picture of the parental educational status per school coincides to a relatively high degree with parents’ ethnicities. The information from 2017 reveals a quite disturbing picture of educational segregation in pre-school and primary education:

- every fifth educational institution is segregated: in 748 schools and kindergartens out of 3,371 that have submitted information, between 80 and 100% of parents have less than a secondary education;
- 17.71 % (or 597 institutions) are mixed, but with advancing secondary segregation;
- only one-third (or 1,123) of the schools and kindergartens are mixed without any threat of secondary segregation, since the share of less-educated parents is between 10 and 30%, like the national figures;
- every fourth school or kindergarten (26.79%, or 903) is attended by children of highly educated parents (the so-called „elite” schools and kindergartens); Roma children are quite an exception to the rule in such facilities.

Segregated „Roma schools” in Bulgaria educate children according to the same curriculum and standards as other schools, but the educational quality in most of them is significantly lower, the dropout rate is high, and the number of continuing students in secondary

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<sup>130</sup> Nunev, Yosiph, *Romite i procesat na desegregatzia v obrazovaniето (Roma and the process of desegregation in education)*, p. 63-64. Available at: <http://www.amalipe.com/files/publications/desegregation.pdf>

<sup>131</sup> Although gender-sensitive statistics on this topic are not available, the Roma scholarship programme for secondary students shows that there has been a significant advance in accelerating the participation of Roma girls in secondary education.

<sup>132</sup> <http://safeschool.mon.bg/>

schools and universities is negligible. In the grouping of all schools into seven sets according to access to education levels and quality of education that was used by the MES in 2016 and 2017,<sup>133</sup> almost all the segregated „Roma schools“ were categorised as belonging to the most troubled (first and second) groups. The situation is different in many rural schools that educate predominantly Roma children. Although many rural schools have predominantly Roma students, like the segregated urban „Roma“ schools, the situation in both types of disadvantaged schools differs in certain important characteristics. The village schools usually educate all children from the respective villages, while middle-class Roma parents remove their children from segregated urban schools. The rural schools are under-financed, while the segregated urban ones are among the schools with the biggest budgets. As a result, both types of disadvantaged schools differ in their readiness to apply educational innovations. For example, more than 20 village schools with a high percentage of Roma students were recognized as „innovative schools“ by the MES, while only one segregated urban school managed to achieve that recognition in 2017. The status of „innovative school“ allows for a certain flexibility so the school can change its curriculum, teaching methods and tools.

Desegregating urban „Roma schools“ has been a main goal of the Roma movement in Bulgaria since the 1990s. It was also highlighted as a priority in several political documents from the Bulgarian Government, including the Strategy for the Educational Integration of Children and Students from Ethnic Minorities<sup>134</sup> and the NRIS.<sup>135</sup> Thanks to the advocacy of Roma organisations, the Pre-school and School Education Act, in force since 1 August 2016, prohibits ethnic segregation at the class level: Article 99, para. 4 and Article 62, para. 4 ban the existing vicious practice in ethnically mixed schools and kindergartens of forming mono-ethnic („Gypsy“) classes and groups. Nevertheless, there is no specific action undertaken by Ministry of Education and its regional structures to abolish the existing segregated classes. There is no data how the anti-segregation provisions in the law are respected. Certain advances can be observed: for example, in 2018 the MES did not grant the status of „innovative school“ to applicants who proposed the „innovation“ of creating a „special curriculum“ for their Roma children, and the provisions of the new Public Education Act were the argument for the refusal to recognize such an „innovation“.

At local level there are both negative and positive examples of fighting school segregation:

#### ***The Gabrovo Model to Address Secondary Segregation<sup>136</sup>***

There are just 367 Roma in Gabrovo Municipality out of 61,482 inhabitants, according to the 2011 census. They are not separated into a ghetto and live under relatively normal conditions. Prejudice, intolerance and the mistakes of some principals have led to the transformation of the Third Primary School „Tsanko Dustabanov“ into a „Roma“ school.

On March 29, 2018 the Municipal Council decided to close the school and enrol its students into all other schools in Gabrovo. This was the result of a public discussion held by the municipality, as well as numerous meetings with parents, especially Roma ones, organised by the Amalipe Centre. Thus, since September 2018, there is no „Roma“ school in

<sup>133</sup> The grouping for the project „Your Hour“ financed by the Science and Education for Smart Growth Operational Programme was made according to 15 indicators. See: Order of Minister of Education RD 09-1072/10.08.2016, which groups the schools.

<sup>134</sup> Approved by the Minister of Education in 2004 and updated in 2010 and 2015. Available at: <https://www.mon.bg/?qo=page&pageId=74&subpageId=143>

<sup>135</sup> Approved by a decision of the National Assembly of 1 March 2012. Available at: [http://ec.europa.eu/justice/discrimination/files/roma\\_bulgaria\\_strategy\\_en.pdf](http://ec.europa.eu/justice/discrimination/files/roma_bulgaria_strategy_en.pdf)

<sup>136</sup> More information see at: <http://amalipe.com/index.php?nav=news&id=3318&lang=2>

Gabrovo. The approach of Gabrovo Municipality for desegregation and preventing secondary segregation includes:

1. Overcoming already established secondary segregation by closing the „Roma” segregated school;
2. Integrating Roma students into all the other schools in order to prevent secondary segregation. It is important that all the other schools accept Roma students and that no other school develop the profile of a „Roma” school;
3. Permanent work with Roma parents is carried out by a respected NGO. Roma parents generally realize the low quality of segregated education and want their children to study together with ethnic Bulgarians, but they are afraid of how the „Bulgarian school” will deal with admitting them. The real partnership of a community-based Roma organisation is the surest way to persuade Roma parents to enrol their children into mainstream schools;
4. There should be constant work with the non-Roma parents to convince them that the enrolment of Roma children will not lead to a decrease in the quality of education;
5. Political courage and leadership is needed: the decision to stop secondary segregation by enrolling Roma children into all the other schools or by closing schools is never popular. It requires courage and strong leadership.

The desegregation approach of Gabrovo is applicable to irreversible, relatively advanced processes of secondary segregation. If efforts are made from the beginning, it is unlikely that school closures will be needed. It would be even more successful if preventive measures would be taken. At the same time, the approach of a relatively balanced enrolment of Roma students in all schools in order to achieve similar proportions can and should be applied in many municipalities. It is one of the prerequisites for avoiding secondary segregation.

# COMPREHENSIVE LOCAL CASE STUDIES

## Lukovit

### Methodology

The following methods have been used to assess progress:

- Secondary analysis of strategic documents, desk research into documents developed and adopted by the Municipal Council on the relevant topics.
- Interviews with local stakeholders: Vice Mayor Mrs. Cvetenka Hadjieva; Mrs. Nadia Rabadjieva, who is responsible for the projects and programmes in Lukovit municipality; Svetlina Kalcheva – director of a kindergarten in Dermatsi village attended by many Roma.

### Introduction

Lukovit is a rural municipality located in the district of Lovech in the North West Planning Region. According to the last census<sup>137</sup> in 2011, of 18,125 inhabitants, 2,776 (16.5%) identified as Roma. Lukovit is the municipality with the highest percentage of Roma in Lovech district. Around 70% live in Lukovit, while the rest are in the bigger villages. The statistical data is based on an optional question in the census and was answered by around 92.5 % of Lukovit residents.

The observations are that the Roma community in the municipality is much larger than official records indicate, as some of the Roma prefer to identify themselves as ethnic Bulgarians due to stigma and the threat of marginalisation. Many Roma there are 35 or younger - 75.07%. It is noteworthy that in the age group 0-9 years the two groups are almost equal in numbers: 1,115 Bulgarian children and 809 Roma children. According to the UNDP Human Development Index,<sup>138</sup> Lukovit ranks 78<sup>th</sup> out of 262 municipalities on the Roma unemployment index, displaying one of the highest rates of illiteracy (35%) among the Roma population and vulnerable groups living in a situation like that of the Roma. According to data from the last census, 505 residents have never attended school, of which almost half (248) are 35 or younger. An especially negative fact is that over 70% of the Roma population in Lukovit have no basic education - 54% are illiterate (never attended school or did not complete their elementary education).

### Employment

As mentioned above, a large group within the Roma community has little to no education, making it difficult for them to find jobs and resulting in their long-term unemployment. The average rate of registered unemployment in Lukovit in 2017 was 23.4%. The share of the long-term unemployed in that result was 48.82%. Lukovit is among the municipalities of Lovech district with the lowest employment rate among the Roma - 5.6%, with total employment of 36.7% (according to the Regional Strategy for Roma Integration 2012-2020).<sup>139</sup> Their low educational status determines the types of jobs Roma can take.

In the period 2012-2014 Lukovit provided temporary employment for more than 900 persons, many of whom had also attended vocational training. The Municipality makes efforts by implementing projects (e.g., under the National Programme „From Social Assistance to Employment“, the Human Resources Development Operational Programme 2014-2020, procedure „Active“, etc.) to employ or support the employment of vulnerable groups, especially Roma, but still these initiatives are temporary and do not ensure permanent,

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<sup>137</sup> <http://www.nsi.bg/census2011/pageen2.php?p2=179&sp2=209>

<sup>138</sup> <http://hdr.undp.org/en/content/human-development-index-hdi>

<sup>139</sup> <http://oblastlovech.org/assets/Dokladi/dokumenti/str1220.pdf>

sustainable employment. Some of the implemented projects include not only subsidised employment but literacy or vocational training in various professions. Unfortunately, it is difficult to encourage employers to hire newly qualified people, and most often the employer is the municipality itself.

## Housing

The Roma living on the territory of the municipality are concentrated in Lukovit town (71% of the Roma population in the municipality), mainly in the Iztok district. There are 412 registered buildings in the district, while the census data indicated 503 actual buildings and 2,536 people living in the neighbourhood. According to local pastors and the health mediators working directly in the community, in the Iztok district there were about 4,000 people by 2018.

The biggest issues in the Roma neighbourhood include illegal constructions, poor housing infrastructure, and limited access to quality public services. Poor living conditions lead to spatial segregation of the Roma neighbourhood from the rest of the population. Illegal construction is identified as a major problem by the policy for improving living conditions. According to experts, at least every fourth house in the neighbourhood was illegally built. This is mainly as a result of the homebuilders' low incomes, long-term unemployment, and deep poverty. Due to illegal construction, there are violations of construction and fire regulations and norms, as well as non-compliance with basic sanitary and hygienic requirements. There is a water supply system and partial sewerage, and the whole neighbourhood has electricity. In recent years, some of the streets - Temenuga, Lale, Prolet, Kokiche, and Nachalna- have been reconstructed, but still the condition of the streets is very bad and needs repair.

Roma people also live on the outskirts in single-family houses, but this is not distinct as a separate district because the buildings are located outside the Lukovit regulation zone. These residential buildings are illegal and do not comply with the current urban planning and building standards; it is not possible to legalise them.

In the period 2012-2014, Lukovit identified a suitable zone for construction and housing in order to improve the living conditions of vulnerable groups. In the last few years there has been an interest in buying land within Iztok district as well. At the end of 2017, following a decision by the Municipal Council, a request to the Ministry of Agriculture and Forestry was made to extend the construction zones of the existing urbanised territory according to Art. 45, para. 2, item 3 of the State Property Act.

Apart from the illegal construction in the Roma neighbourhoods of Lukovit, there are also water supply problems, bad roads, lack of athletic fields and children's playgrounds, an insufficient number of bus stops, and a lack of social and business infrastructure.

## Health

The general trends related to the health status of the Roma are extremely negative: high morbidity, high mortality, and low life expectancy. The health status of the Roma is indirectly influenced by their lower educational levels and poor living conditions. In the framework of a project called „Students' Oscars - Intercultural Dialogue in the Municipality of Lukovit“, a survey was done among representatives of vulnerable minority groups, including a section on health status. Analysis of the results yielded the following conclusions: Children's health and that of their families is particularly concerning in the Roma community, and poor access to health services leads to ignorance about disease prevention, misinformation about disease and health, early and frequent births, and high rates of chronic (untreatable) illness. The specificities of STIs are unknown to this population. Inadequate nutrition and stress leading to immune system collapse are prerequisites for lifestyles that will not safeguard health. Lack of health insurance is an extremely serious problem among local Roma.

Another problem among Roma girls is that of early marriages and births. The statistical data of births under 18 shows a slightly positive trend (decline) in the last two years. In 2013 there 56 such births; 2014 – 66; 2015 – 58; 2016 – 53; 2017 – 28; and as of mid-2018 (July) there were 10 such births.

The most common diseases for which patients are hospitalised are heart failure (10.25%), pneumonia (11.67%), skin and subcutaneous tissue infections (9.58%), diabetes mellitus (9%), acute bronchiolitis (6.24%), and brain infarction (3.84%). The Lovech Regional Health Inspection organizes discussions about health topics in all the schools on the territory of the municipality in order to raise awareness about the importance of health preservation and prevention.

There no information about how many people are uninsured. As of 31 December 2017, 16,517 persons had chosen a GP, of which 12,232 persons were insured. Apart from the 4,285 people who chose a doctor and were not insured there are probably more people who are not insured and have not chosen a GP.

Even though there are already two health mediators operating locally, there is need of a female mediator to work in the Iztok neighbourhood with young girls and women, especially on the topics of early childbirth prevention, STIs, drug addiction, etc.

### Education

By Decision No 346 of 18.12.2017, the Municipal Council has adopted a Programme for the Educational Integration of Children and Students from Ethnic Minorities in the Municipality of Lukovit for 2018-2020. There are seven municipal schools and five kindergartens there serving 2,163 pupils, 281 of whom attend vocational secondary school. The local statistical data for the 2017/2018 school year are:<sup>140</sup>

- The net enrolment rate of children in kindergartens is 63.0% locally compared to 78.4% nationally, which means significantly fewer children are in preschool.
- The net enrolment rate in primary education for first through fourth grade is 92.7% locally, almost identical with the national enrolment rate of 92.8%.
- The net enrolment rate in lower secondary education (fifth through seventh grade) is 90.1%, slightly below the national rate for the same age group of 91.3%.
- The net enrolment rate in secondary education (grades 8-12) is 53.3%. Unfortunately, the enrolment rate for Lukovit is significantly lower than the national one (82.8 %), mainly due to the dropout rate in this age group.

Statistics of reintegrated students and dropouts is as follows:

<i>school year</i>	<i>number of students</i>	<i>number of dropouts</i>
2011/2012	12	34
2012/2013	0	23
2013/2014	2	44
2014/2015	23	5
2015/2016	12	24
2016/2017	14	22
2017/2018	201	21

The number of reintegrated students in 2017/2018 has increased due to the implementation of the Mechanism for institutions to jointly work on enrolment and retention in the educational system of children and students at compulsory preschool and school age, adopted by the Council of Ministers' Decision No 373 (5.7.2017). Three teams for enrolment and retention in the educational system of children and students in compulsory pre-school and school age have been formed, 1,455 home visits were made, and 201 students were enrolled.

<sup>140</sup> National Statistics Institute

There are five local kindergartens – three in the city of Lukovit, one in Dermantsi village, one in Toros, and preschool groups in four villages. The number of children aged three to six in 2017 was 605, 537 of whom were enrolled in kindergartens in Lukovit, but only 460 of whom attended regularly; 29 officially withdrew and 18 never enrolled.

Unfortunately, in Bulgaria, accessibility to early education is impaired by the existence of fees and additional „hidden“ costs. It is particularly difficult for families living below the poverty line to provide opportunities for their children to attend kindergarten regularly. For these reasons, a large proportion of impoverished children (mostly Roma) does not attend kindergarten or attends irregularly. This often leads to their having difficulties in the first grade and subsequently dropping out of school.

The fees for kindergarten are determined on the local level by the Municipal Council. The Council fixes the fee and the reductions for certain vulnerable groups. The largest share of the funding for early education comes from the national budget, but this is far from enough to reduce the financial burden on families. Municipalities co-fund early childhood education; in the case of Lukovit, in 2017 the municipality provided more than EUR 280,000 in co-funding for the kindergartens, while the fees from parents contributed 36,000 EUR and the state subsidy was 607,482 EUR.

The kindergarten fee locally for children aged three and four is a 3.50 EUR fixed fee + 80 cents per attendance day. There is a 50% reduction for parents with limited abilities to work, for single parents, for parents who are still in university, and for the parents' second or third child enrolled at the same kindergarten. The five- and six-year-olds do not pay the fixed fee, just the attendance day fee.

Another problem in early childhood education is the lack of Roma teachers in the kindergartens, especially where there are large groups of Roma kids. In 2018, the implementation of an educational programme for preparation of Roma students to become kindergarten teachers will start. The programme is financed by the TSA and will support the preparation and studies of four young Roma students.

The local authority and the schools have implemented several projects to improve the educational integration and social inclusion of Roma children and students. In the framework of these different projects and initiatives, more than 140 parents have been reached in order to raise awareness about the importance of education and 47 Roma have attended literacy courses for basic education. There are 12 Roma youth graduates from higher education and colleges, and 61 teachers and principals have been trained to work in a multicultural environment. More than 900 students per year have attended after-school activities. In the framework of the Erasmus+ school projects, students and teachers enriched their experiences and competencies via study visits in partner countries.

One of the most recent projects in Lukovit, „TOGETHER“, involved 15 kindergartens and schools as partners of the municipality aiming to improve Roma educational integration. The project involved 716 students (514 of whom were Roma) and 560 parents. Ten educational mediators have been appointed to support the educational activities during the project duration. The project was financed under the Operational Programme Science and Education for Smart Growth by the ESF.

In 2016, in response to the adopted Action Plan, Lukovit developed a concept for the inclusion of vulnerable groups. The concept was approved for funding under the integrated procedure of the Operational Programmes Human Resources Development and Science and Education for Smart Growth and in 2018 the municipality submitted a project called „Socio-Economic Integration in Lukovit“. The expected start of that initiative is the autumn of 2018, and the implementation period will be until 2021.

The project includes „Aleko Konstantinov“ Secondary School – Lukovit, „Hristo Botev“ High School – in the village of Rumyantsevo, Primary school „Eng. Valkov“, Vocational High School „Sergey Rumyantsev“ and the Knowledge Association Lovech. Some of the educational activities in the framework of this project will be:

1. Additional Bulgarian language training for about 260 students.
2. Additional activities with students at risk of dropout – about 140 students.
3. Support of ethnic minority students continuing into secondary education and successfully graduating – 350 students.
4. Work with parents – about 400 people.
5. Overcoming negative public attitudes by working with NGOs - this will cover about 350 students.
6. Five educational mediators of Roma origin will be appointed.

There are other educational initiatives undertaken by Lukovit, its schools, and its kindergartens, but the following challenges remain:<sup>141</sup>

- About 20% of Roma students do not attend school regularly;
- Rom children have poor command of the Bulgarian language both in kindergarten and primary school;
- Kindergarten fees are not affordable for the poorest families;
- There are segregated schools and classes. In the Primary School „Eng. Vulkov“ all the students are of Roma origin, in the „Hristo Botev“ school in Rumyantsevo village 90% of the students are Roma, in the Secondary School „A. Konstantinov“ in Lukovit more than 50% of the students are Roma.
- Poverty and lack of clothes, shoes, textbooks and aids for children and students.
- Insufficient engagement of parents in their children's education.
- Difficulties in passing the matriculation exams and external evaluation exams in grades 4, 7 and 12;
- A significant number of children emigrate. They frequently return to Bulgaria in the middle of the school year but cannot study with their peers and either skip a year or drop out.

### Conclusion and recommendations

The measures and activities proposed in the Action Plan, as well as the relevant funding and deadlines, are agreed by the Municipal Monitoring and Evaluation Unit and are regularly subject to monitoring and evaluation of the extent to which the planned measures are being implemented and what their effect is. The local authority has a vision for successful social inclusion and has already begun the process by planning and implementing EU projects and initiatives. The problems of project-based funding are how to achieve sustainable results and impact in the community. For instance, the appointed 10 educational mediators under the „TOGETHER“ project could not continue their work after the project funding ended. One positive trend is the will of the municipal administration to implement so-called „soft measures“ to make the life of the community better and to support the improvement of local Roma residents' capacities and competences.

One problem is the lack of a local NGO working on social inclusion issues. The local authority successfully partners with organizations from Lovech and other municipalities, but the impact of a local organisation would be much greater.

Another problem is the lack of social service providers based in the Roma community that could offer integrated services tailor-made for the specific target group. This problem will be tackled by the establishment of a Centre for Community Support that eventually will start operating in 2019-2020.

Involving representatives of the Roma community in the decision-making process via the established ROMACT programme's Local Active Group is an important achievement.

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<sup>141</sup> ROMACT Local Active Group findings

Lukovit is regarded as a typical case of a rural municipality with a relatively large Roma population.

In comparison with other municipalities, though, there are some traits that make the local authority of Lukovit a bit different from similar municipalities. The local authority dedicates its own efforts and resources to improve the implementation of the Action Plan for Roma Integration. There is a unit at the municipality assigned to develop projects to improve social inclusion that involves Roma residents in the needs analysis and in tracking the progress of the Action Plan.

The main factors that have contributed to Lukovit's performance in terms of planning and implementing the Action Plan are:

- A systematic approach and an assigned group (of municipal officials) working on social inclusion issues;
- Use of EU and other funds to support social inclusion;
- Partnership with educational institutions, business, NGOs, and public institutions in implementing the Action Plan;
- Roma involvement in all stages of the process (including decision making);
- Needs and stakeholder analysis were performed while developing the Action Plan.

The experience of Lukovit is applicable to similar municipalities, i.e., those that are similar in terms of size and demographic structure. This experience could be easily replicated in other Bulgarian municipalities, as it just takes the willingness and preparedness of the local officials to work consistently on the social inclusion issues at hand. It is essential to follow the already-established, agreed-upon process for social inclusion policy adoption at national, regional and local level. Another key factor for the successful implementation of Roma inclusion policies at local level is local governmental and mayoral recognition of the importance of these policies.

## Sliven

### Introduction

Sliven Municipality is in South East Bulgaria. According to the official data of the 2011 census,<sup>142</sup> the population is 125,268 people, 93,421 of whom (74.6%) reside in the towns of Sliven and Kermen, while the other 25.4% (31,847 people) live in the other 43 villages of the Municipality. The administrative centre (Sliven proper) is home to 73.1% of the population.<sup>143</sup>

Roma are the second-largest ethnic group in Sliven Municipality, according to the census. A total of 107,276 people answered the self-identification question, and 82.7% (88,750 people) self-identify as ethnic Bulgarians, while 11.3% (12,153 people) identify as Roma. Around 46.6% (5,666 people) of the group self-identified as Roma live in Sliven and constitute 59.3% of the Roma population in Sliven Province.

Both Sliven Municipality and Sliven Province have higher concentrations of Roma, 11.3% in the Municipality and more than 11 % in the Province, higher than the average for the

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<http://www.nsi.bg/bg/content/3078/%D0%BD%D0%B0%D1%81%D0%B5%D0%BB%D0%B5%D0%BD%D0%B8%D0%B5-%D0%BF%D0%BE-%D0%BE%D0%B1%D0%BB%D0%B0%D1%81%D1%82%D0%B8-%D0%BE%D0%B1%D1%89%D0%B8%D0%BD%D0%B8-%D0%BD%D0%B0%D1%81%D0%B5%D0%BB%D0%B5%D0%BD%D0%B8-%D0%BC%D0%B5%D1%81%D1%82%D0%B0-%D0%B8-%D0%B2%D1%8A%D0%B7%D1%80%D0%B0%D1%81%D1%82-%D0%BA%D1%8A%D0%BC-01022011-%D0%B3>

country as whole (4.9%).<sup>144</sup> About 12.3 % of the Province did not answer the optional question about ethnicity (24, 267 people), which makes the data problematic. According to expert observations, the real number of Roma in Sliven Municipality is much higher than the numbers provided by official statistics, because during the census people are not required to disclose their identity. Part of the Roma population chooses to identify themselves as Bulgarians, Turkish, or another ethnicity.

Several interviews were held with civil society representatives who have been implementing projects for Roma community integration for more than 15 years, and their observations were that many Roma communities prefer to hide their ethnic identity because of increased discrimination against the Roma community and because of hate speech, which is present everywhere (even from Parliament). We therefore conclude that many Roma chose not to answer the optional question about ethnic identity. Irrespective of how specific the data is, every study at either national or local level concludes that Sliven Municipality is a region typified by a concentration of ethnic minorities.

### Analysis of the current local situation and policies

The „Action Plan of Sliven Municipality for the Integration of Bulgarian Citizens of Roma Origin 2011–2020” was updated by Decision No. 1091 of 26 April 2018 from the Municipal Council of Sliven.<sup>145</sup> There is no publicly accessible information showing the progress of Sliven Municipality on implementing the Action Plan, which is not on the webpage of Sliven Municipality and is difficult to find. The last update in April 2018 removed the Action Plan’s financial dimensions at the request of the Deputy Mayor. There is no concrete funding of any Action Plan measures by Sliven Municipality.

The Municipality of Sliven relies just on external funding for the Action Plan implementation – donor programmes, Structural Funds, and the state budget. The expectations of the municipal administration, like most other municipalities, is that Roma NGOs should resolve the problems of Roma on their own by implementing activities from different projects, which is not an adequate state mechanism for completely resolving the problems Roma have. In addition, the indicators in the Plan are very vague. There are no specific qualitative or quantitative indicators clearly showing the results of implementation.

The only Roma-targeted funds that the Municipality spends are for celebrating 8 April – the International Roma Day (which were reduced by half for 2018). To achieve real changes and to resolve the Roma community’s specific problems, purposeful work and systematic implementation of Roma integration plan measures are needed, which also means funding being provided from the local budget.

### Local cases of discrimination

There is no local organisation protecting rights in Sliven to work on cases of discrimination. Roma Academy for Culture and Education (RACE), an organisation working for Roma integration and protecting the rights of the Roma community, is a partner on a project called “*READI 777324*”, funded by the European Commission. RACE offers free attorney consultations in its office and collects evidence of discrimination. The cases of discrimination are based mainly on ethnicity, social status and gender. Hate speech is everywhere – in the Municipal Council,<sup>146</sup> at the police, at school, and in the local media.

In an interview, Municipal Council member M.G. shared that the expectations of the Municipal Council are that Roma NGOs alone should resolve Roma problems. If there are

<sup>144</sup> <http://censusresults.nsi.bg/Census/Reports/2/2/R9.aspx>

<sup>145</sup> [http://obs.sliven.bg/uploads/files/reshenia/Reshenia\\_2018\\_04\\_26.pdf](http://obs.sliven.bg/uploads/files/reshenia/Reshenia_2018_04_26.pdf)

<sup>146</sup> <http://www.kmeta.bg/obstinarite-v-sliven-protiv-harcheneto-na-1-mlnlv-za-romi>

no visible results from such projects, it is better for the Municipality not to support them and to participate instead as a candidate for Structural Funds.

Although in July 2017 the Supreme Administrative Court overturned<sup>147</sup> a Municipal Council of Sliven ordinance banning<sup>148</sup> animal-drawn vehicles from being used on the roads, in May 2018 the Municipal Council initiated a new attempt<sup>149</sup> to impose restrictions on the use of animal-drawn carts in the town.

Reports of police brutality against Roma are becoming more frequent. During the last year there were some cases of violence in Sliven's Roma neighbourhoods.<sup>150</sup>

There are no signs posted or graffiti appearing against Roma in Sliven, but racism is communicated through social media. During the Days of Roma Culture in October 2017, RACE put up a banner on the main street in Sliven advertising the event. The next day the banner was gone, having been cut down. The police couldn't find the perpetrator and prosecution of the case was stopped. The comments on social media about this were extremely racist.

Media outlets post racist articles as well.<sup>151</sup> In cases of alleged crimes where the perpetrators are suspected to be Roma, they usually refer to them as „gypsies“. Examples of such online headlines are: „Gypsies from Sliven terrorise neighbourhoods in Burgas,“ „Gypsies from Sliven fight each other with axes in Burgas,“ „A katun<sup>152</sup> of gypsies from Sliven was demolished,“ etc.

## Education

Low educational attainment is one of the main factors for poverty and social exclusion. The main way to prevent poverty and social exclusion, therefore, is to increase investments into education. According to census data, the Roma population age seven and older in the Municipality of Sliven numbers 9,837 people, and 120 of those seven-year-olds have not yet enrolled in school. As for education levels attained<sup>153</sup> among Roma, most have achieved a primary education – 30.2% (2,937 people). In addition, about 25.2% (2,446 Roma) have not completed primary education. Secondary education has been achieved by just around 4.7% of Roma (453 people). It is concerning that 16.4% (1,590 people) from the local Roma community have never attended school.<sup>154</sup>

According to expert estimates, around one-fifth (20%) of the students in first grade in Bulgaria are Roma, while in 11<sup>th</sup> grade only 2% are Roma.<sup>155</sup> This huge discrepancy is

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<sup>147</sup> <https://news.bg/crime/vas-vrashta-karutsite-v-sliven.html>

<sup>148</sup> <https://novini.bg/videoswf/aWQ9MTM1OTImZW1iJm5vYWRz.html>

<sup>149</sup> <https://sliveninfo.bg/община-сливен-иска-забрана-за-движени/>

<sup>150</sup> <https://dariknews.bg/novini/bylgariia/9-zadyrzhani-sled-sblsyka-mezhdu-romi-i-polici-v-sliven-2126628>; <https://btvnovinite.bg/videos/tazi-sutrin-strelba-i-slasaci-v-romskija-kvartal-v-sliven.html>; <https://trafficnews.bg/bulgaria/tsigani-sliven-nad-50-politsai-nahluha-mahalata-streliaha-74624/>

<sup>151</sup> <http://new.sliven.net/sys/news/index.php?id=242496&l=bg>; <http://www.slivenpress.bg/ОБЩЕСТВО/12977-СЛИВЕНСКИ-ЦИГАНИ-СЕ-МЛАТЯТ-С-БРАДВА-В-БУРГАС;> <https://slivenseqa.wordpress.com/2018/08/31/разтуриха-катун-на-сливенски-цигани/>

<sup>152</sup> A neighbourhood consisting of tent-like dwellings.

<sup>153</sup> For a base in calculating the parts by stage of education the author used the total number of Roma above seven, 9,717 people, which is calculated as the difference between the total number of Roma above seven (9,837) and the number of seven-year-olds not yet enrolled in school (120); see: <https://bgr.news-front.info/2018/08/25/prirast-na-naselenieto-v-sliven-ogromni-romski-kvartali-95-negramotni/>

<sup>154</sup> We have to state that the real figures are likely to be different: Sliven stands out with its high number of Roma with university degrees. The educated Roma often prefer to hide their ethnicity.

<sup>155</sup> [https://www.actualno.com/education/15-ot-pyrvoklasnicite-u-nas-sa-ot-romski-proizhod-news\\_601510.html](https://www.actualno.com/education/15-ot-pyrvoklasnicite-u-nas-sa-ot-romski-proizhod-news_601510.html)

because of the high dropout rate. In Sliven Province, for the period from December 2017 to February 2018, over 100 students<sup>156</sup> who had dropped out of school were visited by teams from the Permanent Mechanism for Inter-institutional Cooperation for reaching out to children and students of mandatory preschool and school age and including them in the education system. For the last eight years, between 1,400 and 1,550 children have been born in Sliven Municipality. Nevertheless, the number of children attending kindergartens is decreasing: 3,686 children were enrolled in kindergartens during the 2014/2015 school year compared to 3,596 children enrolled during the 2015/2016 school year, 3,554 during 2016/2017, and 3,355 children during 2018/2019. Half-day preparatory groups (HDPG-s) at schools had a similar tendency up to 2018/2019: 846 children attended HDPGs during 2014/2015 in comparison with 786 in 2015/2016, 712 in 2016/2017, and 727 children during 2018/2019. The main reasons for children dropping out of school or not being covered by the education system are Roma community migration within Bulgaria and abroad, as well as difficulties in learning academic content because of the language barrier.

The only visible local result for the last 25 years has been the building of a new kindergarten in the Nadezhda neighbourhood, where RACE is a partner. The funding for this project came from the Bulgarian-Swiss cooperation programme.<sup>157</sup> Nevertheless, no representatives of the Roma community were included on the kindergarten team, although there were Roma with the necessary education in the neighbourhood.

There are also large-scale issues with Roma access to health care in Sliven Municipality. The problem of uninsured pregnant women is being generally addressed through the Bulgarian-Swiss cooperation programme.

### Conclusion and recommendations

„The Plan for Integration of Roma and Other Vulnerable Groups in Sliven Municipality“ is one of the best in Bulgaria because it was developed in partnership with Roma NGOs, experts, activists and other associates. Unfortunately, there are no mechanisms for the implementation of its measures or its monitoring. Neither the plan nor any report about its implementation is available on the town’s website. The last update of the plan was adopted with a delay of one year, and then only because the municipality had to propose a new project within the „Socio-economic Integration“ operation funded by HRDOP and SESGOP (ESF co-funded Operational Programmes). If it had not been necessitated by the process of applying for funding to different programmes, we believe the Municipality of Sliven would never have updated the plan, nor would they have proceeded with its implementation, its financing, or its specific measures.

The local government, the Mayor and the Municipal Council, is the sole decision-maker as to which organisations to partner with for the implementation of different projects. In most cases, these decisions are politically coloured.

Many young Roma parents want to enrol their children in kindergarten, but the lack of vacancies and the high fees make that process difficult. The new kindergarten in the Roma ghetto of the Nadezhda neighbourhood in Sliven, built under the Bulgarian-Swiss Cooperation Programme, is a successful model taking the right approach to cover children in the educational system at an early age. Yet, with its 150 seats, it is insufficient for this huge neighbourhood, where between 300-370 children are born every year. The RACE team has suggested building a cultural centre next door to the kindergarten. The idea was to work there with the parents and residents on different topics of cultural identity and empowerment that would support Roma with overcoming their marginalisation and fully integrating. Unfortunately, the idea was poorly understood by the local authorities and the cultural centre instead became part of the kindergarten.

<sup>156</sup> Presented report for training of the teams in Sliven Province on 31.10.2018.

<sup>157</sup> <http://zovprogramme.bg/bg/locations-sliven>

## RECOMMENDATIONS

### Employment

#### **To the Employment Agency:**

1. Establish a single point of contact professional who can be the link between different institutions and allow unemployed (Roma) persons access to employment and social services in one place instead of being referred from institution to institution;
2. Introduce sustainable practices for improving the work of Roma Career Mediators, Youth Mediators and Case Managers in the Labour Bureaux Department and municipalities – long-term contracts, social bonuses, and remuneration for achievements in their work.
3. Provide frequent trainings for Roma Career Mediators, Youth Mediators and Case Managers that would allow for their capacity building, exchange of experiences, and the introduction of innovations in their practice.

#### **To the Ministry of Labour and Social Policy:**

4. Create employment opportunities for long-term unemployed persons that guarantee them a minimum wage combined with social benefits in order to provide workers with enough income to make ends meet, thereby alleviating extreme poverty and hunger.
5. Provide awareness-raising trainings on gender and minority rights to professionals working in the employment and social sphere.
6. Introduce policies, measures and trainings for staff so they can combat antigypsyism and discrimination in the workplace.

#### **To the private business sector:**

7. Encourage „positive discrimination” via hiring quotas for Roma in big companies.

### Housing and essential public services

8. Legislative change in the foreseeable future should head in the following direction: 1) Develop the legal framework for the legalisation of buildings with sustainable construction for residential purposes that are the owner’s only housing and differentiate the rules for handling illegally-constructed buildings depending on whether they are used for residential or non-residential purposes; and 2) incorporate into Bulgarian law of the international legal protection against forced demolitions and/or evictions from a person’s sole residence.
9. The problem with illegal housing should be addressed as follows:
  - Impose a moratorium on the execution of already-issued demolition orders for housing that is the sole residence of its inhabitants until the proposed legislative changes for legalisation of irregular dwellings have been developed; and
  - Municipalities should undertake stronger monitoring and proactive work to stop new illegal construction in detached neighbourhoods, in cooperation with NGOs, to ensure Roma community understanding and participation in this effort.
10. The local authorities should legalise houses in Roma neighbourhoods when they meet the official requirements.

11. Provide financially accessible housing: both public rental housing with regulated (sub-market) rents and private dwellings rented for sub-market rents by socially responsible owners.

### Impact of health care policies on Roma

12. Some mediators should be employed at regional level, directly subordinated to the Regional Health Inspectorates, in order to conduct and focus on regional prevention. Some mediators should remain at municipal or settlement level in the segregated areas. National standardization of this service per person is needed (some small neighbourhoods have more than one mediator, and at the same time some large quarters have none). Some mediators should be directly employed by hospitals and medical centres in order to grant them easy access and to combat the prejudices of medical staff.
13. The model of MDM in Sliven – where the mediators are based in a „mediation centre” – should be considered. This model could be supported with additional mobile services and the general establishment of municipal healthcare centres for vulnerable populations in remote regions or ones with huge income inequalities.
14. The model of Roma paramedics in Sofia is reported to be very successful. After the employment of Roma paramedics, ambulances serving Roma neighbourhoods ceased to be attacked by locals. This should be further developed and supported in municipalities with high proportions of Roma or large segregated neighbourhoods.
15. Pharmacies depend on retail income. Therefore, some municipalities and settlements do not have a single pharmacy. There is a need for subsidised salaries or other mechanisms (like municipal or state-operated pharmacies) in vulnerable areas in order to combat the lack of access to medicaments. A good first step could be the reduction of VAT on medicine (which is among the highest in Europe at the moment) and permission for pharmacists to substitute cheaper, generic equivalents for prescribed medications (which is not legally possible at the moment for chronic disease medications).
16. Bulgaria pays little attention to disease prevention. The focus should be placed there in order to reduce infant, child and maternal mortality and to increase longevity in good health.

### Education

#### **To the Ministry of Education and Science:**

17. Increase the enrolment of Roma children in early childhood education and care through activities that include, but are not limited to:
  - eliminating all types of fees in compulsory pre-school by providing additional resources to municipalities and introducing a ban on charging fees for the compulsory education of pre-school age children;
  - introducing the full-day organisation of pre-school classes at schools;
  - encouraging the introduction of intercultural education and modern teaching methods that consider the specifics of Roma children and parents in all kindergartens.

18. Strengthen the efforts for ensuring full enrolment by:

- including the Roma community and NGOs in the Inter-institutional Framework for Full Enrolment and diversify its administrative approach;
- continuing the reform of the delegated school budgets by expanding the regional component, providing additional amounts for schools that are the only educational institution in a respective location, and linking funding reform to raising educational outcomes in each school;
- improve the efficiency of the additional state budget for working with vulnerable students by providing scholarships for secondary school students; enable NGO participation and link this investment to the achievement of educational results.

19. Support inclusive, ethnically mixed education and the desegregation of „Roma“ schools through:

- purposefully organising the implementation of the anti-segregation texts in the Pre-school and School Education Act, including by imposing penalties for principals who do not comply with those articles;
- paying specific attention to and implementing measures for avoiding secondary segregation;
- directing political guidance and the necessary financial resources at local level for implementing local desegregation policies, including through a national desegregation programme financed by the state budget, investment through the Science and Education Operational Programme, etc.

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