



# EUROPEAN STRUCTURAL FUNDS AND ROMA INTEGRATION IN BULGARIA 2007 - 2009

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*With the financial support of Open Society Institute*

## INTRODUCTION

### How European funds (do not) contribute to Roma integration in Bulgaria?

During the years of transition, and especially in the process of accession to the European Union, the integration of Roma was a one of the main national priorities and its implementation was targeted at making the Bulgarian society more lawful and prosperous. Under the pressure of civil society (and the Roma organizations in particular) and the European commission, three successive Bulgarian governments approved strategic and operational documents which regulate the process of Roma integration:

- Framework programme for equal integration of Roma in the Bulgarian society (1999) and action plans for implementation of the programme (2003, 2004 and 2006),
- Action plan for implementation of the Decade for Roma inclusion (2005 – 2015),
- Strategy for educational integration of children and students from ethnic minorities (2004) and five years action plan for implementation of the strategy (2005 - 2010),
- Health strategy for people in disadvantaged situation, belonging to ethnic minorities (2005 -2015) and action plans for implementation of the strategy,
- National programme for improvement of living conditions of Roma in Republic of Bulgaria and action plans for implementation of the programme<sup>1</sup> 205-2015.

Despite this relatively wide and good regulative frame, the process of Roma integration did not become a complete sustainable policy. A main reason for that is the lasting trend by the institutions in Bulgaria not to allocate targeted resources for implementation of the so called «Roma strategies» and no to involve significant administrative capacity in this field. The argument of “there are no resources” was a leading one – during the years of economic crisis and during the years of economic growth.

In this background, the absorption of EU funds has outlined as a serious opportunity for acceleration of the process of Roma integration: currently a basic one. EU funds could not exchange the presence of or the lack of political will for implementation of integrational activities in Bulgaria, but could be a tool for realization of such a will. In an appropriate environment, the EU funds could provide a solid resource for a real

*In 2006 – 2007 Roma organization conducted a successful advocacy campaign for inclusion of the Roma integration in the documents that regulate the absorption of the EU funds in Bulgaria*

*In 2007 and 2008 the first schemes under the three key programmes were announced*

*In 2009 Center Amalipe and Open Society Institute conducted interim evaluation of the impact on the Roma integration*

impetus of the Roma integration.

Bearing in mind all this, in May 2006 Center Amalipe and Open Society Institute – Sofia undertook an advocacy campaign for incorporation of points related with the Roma integration in the strategic documents that regulate the absorption of EU funds in Bulgaria. During the next months the campaign was joined by another 46 Roma NGOs and a number of Roma experts. Overcoming serious difficulties, the campaign achieved almost all planned goals and brought the establishment of more than the needed preconditions for use of resources from EU funds for acceleration of the process of Roma integration in Bulgaria.<sup>2</sup>

In 2007 and 2008 the first schemes for grants were announced under OP “Human resources development”, OP “Regional development” and Rural areas development programme. Under some of these competitions the Roma community was a specific target group, others involved a wider circle of beneficiaries, but were directed to areas that are of a key significance for the Roma integration. Large part of the first schemes for financing of projects is completed, but there were second and even third calls for proposals.

The third year of the programmatic cycle is a time for interim evaluation, analyses and rethinking of the achieved to this moment, amending and corrections – in the operational programmes and in the approach for their implementation. From this perspective Center Amalipe and Open Society Institute – Sofia initiated an interim evaluation of the effect on the Roma community and the Roma integration from the implementation of three key programmes, namely OPHRD, OPRD and RADP

The research took place in the period October 2009 – March 2010. For each of the programmes the research was conducted on three levels:

1. Analyses of the relevance: to what extent the Programme corresponds to the specific problems faced by the Roma integration in a certain area and to the documents for integration of Roma, adopted by the government of Bulgaria;
2. Analyses of the implementation: to what extent the implementation of the Programme supports the process of Roma integration and achieves the targeted goals. Two key questions were examined on this level:
  - What is the effect of the complete implementation of the relevant programme on the integration of Roma: according to the envisaged in the programme and the national documents for integration, adopted by the government of Bulgaria;
  - What is the effect of the implementation of certain granting schemes on the process of Roma integration: schemes who involve Roma as a specific target group (“targeted” at Roma/ethnic minorities) and schemes, targeted at wider circle of beneficiaries without special focus on Roma;
3. Good practices: As additional level concrete examples of good practices that came out during the research, were studied.

Within the frames of the research a desk research and a field research were implemented. The desk review involved the main documents of the relevant programme – the programme and its annexes, memos from meetings of the relevant Monitoring committees, decisions of the Monitoring committees, annual indicative programmes with announced granting schemes, application guides for the chosen granting schemes, Annual report for the implementation of the relevant programme, etc. In the frames of the field research, there were in-depth interviews with the key participants in the process of implementation of the relevant programme

(representatives of the Managing authority and Intermediary bodies, members of the Monitoring committees, representatives of Directorates General of the European Commission), questionnaires for research in the Roma community and focus-groups with beneficiaries. The research also shows analyses of discussions and main findings of the conference "Structural funds and Roma integration" in the frames of "Project generation facility" project, that brought together representatives of two Directorates General of the European Commission, leaders of the Managing authorities of OPHRD, OPRD, and RADP, more than 90 representatives of organizations and institutions, involved in the implementation of the indicated three programmes, representatives of the embassies of the USA, the Netherlands and Hungary.<sup>3</sup>

The present reports includes the main findings of the research of the effect of the implementation of OPHRD, OPRD and RADP on the Roma community and the process of Roma integration and recommendations for improvement of the programmes - their implementation, and the responsive programmes for the next programme period. The report could be a heuristic base for optimization of the implementation of the programmes until the end of the current programme period, as well as for changes of the texts of these programmes. The report proposes main ideas for elaboration of the analogical programmes during the next programme period for the needed bounding with the process of the Roma integration. The authors believe that the process of development of new operational programs will be crucial to accelerate the integration of Roma and hope that civil society organizations and Roma community will actively participate in this process.

The report is elaborated with the assistance of the Ministry of Labor and Social Policy, Ministry of Education, Youth and Science, Ministry of Regional Development and Public Works and the Ministry of Agriculture and food by providing the needed documents and responded to the invitation to share their views regarding the implementation of those programmes and the Roma integration. The first draft of the report was consulted with the indicated institutions and each of them did send a written standpoint. Their recommendations were reflected in the present final version of the document.

The report was also consulted through individual interviews, internet based discussion and a working meeting with tens of participants in the implementation of the programmes: different project beneficiaries, representatives of Managing authorities and Intermediary bodies, representatives of the European Commission, members and observers of the Monitoring Committees, representatives of the Roma community. The authors would like to thank to all of them!

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## OPERATIONAL PROGRAMME

### □ HUMAN RESOURCES DEVELOPMENT □

Without exaggeration it could be said that the Operational Programme "Human Resources Development" (OPHRD) is of a key significance for integration of Roma. If - even with all the contingency of such divisions – we define four main areas in the field of Roma integration, namely Education, Employment, Health and Housing (these are the four main areas of the "Decade of Roma Inclusion" too), then three of them fall within the scope of OPHRD.

In 2006 and 2007 Center Amalipe and the Open Society Institute initiated an advocacy campaign for incorporation of texts related to integration of Roma in the National Strategic Reference Framework (NSRF) and 4 operational programs, emphasising on

*The report represents main findings for the effect from the implementation of OPHRD, OPRD and RADP on the process of Roma integration and recommendation regarding the present and next programme periods*

*The report is elaborated based on the standpoints of the relevant ministries, beneficiaries under different projects and representatives of the Roma community*

*OPHRD covers three of the four main key areas of the Decade of Roma inclusion – employment, education, healthcare*

*In 2006 – 2007 Amalipe and OSI – Sofia actively participated in the elaboration of OPHRD. In 2008 a representative of the Roma organizations was elected in the Monitoring Committee of the programme*

*Strategic goal of OPHRD is to improve the quality of life through investments in human capital*

*Education, employment and social services are the three main areas of OPHRD*

the OPHRD. Going through many difficulties, the campaign achieved most of its objectives, especially in regard to OPHRD.<sup>4</sup> It was extended to advocacy activities for enrollment of representative on behalf of Roma organizations in the Monitoring Committee OPHRD (2007 - 2008) and with active participation of Roma representatives to this Committee.<sup>5</sup> All this created prerequisites for linking the implementation of OPHRD with the process of Roma integration, respectively – for allocation of funds in this area from the European Social Fund.

### Roma integration within the fields of action of OPHRD

OPHRD was approved in September 2007. The total amount of the funds under the OPHRD is 1 213 869 575 euro; out of them 1 031 789 139 euro are allocated by from the European social fund and the rest 182 080 436 euro are national co-funding. Strategic goal of the programme is “to improve the quality of life of the people through improvement of the social capital, achievement of high employment levels, increase of productivity, access to quality education and life long learning and strengthening of social inclusion”<sup>6</sup>. It is envisaged that this will be achieved through the implementation of three specific objectives: Increasing the labor supply and quality of workforce; Increase investment in human capital through better and more accessible education; More social capital, networks and partnerships and the development of social economy<sup>7</sup>. These specific objectives define the main operational program areas: Employment, Education and Social services (including Health). As a result of this multisector approach the various priority areas of the program are managed by three different intermediate bodies: Employment agency, Ministry of education, youth and science and the Agency for social assistance, and the managing authority of OPHRD is the Ministry of labor and social policy.

Education, employment and healthcare are main spheres in the efforts for Roma integration (together with improvement of housing conditions, as well as preserving cultural identity, equal rights of Roma woman and prevention from discrimination), and in these areas the status of the Roma is much lower than the status of the majority of Bulgarian citizens.

The educational status of Roma in Bulgaria is extremely low and significantly worst than the average for the country. The fact is officially recognized by the institutions in Bulgaria. For example, the OPHRD shows that “the educational disproportions have highlighted ethnic characteristics... The outreach in pre-school education, for Bulgarian citizens is 54%, for Turks – 38% and for Roma – 46.2%. Bulgarians with secondary education are 54%, Turks – 24% and Roma – 7.8% from the total number of the relative groups... The figures for university education are indicative too. Around 23.5% from the Bulgarian people have graduated universities to 2.7% from the Turks and around 0,2% - 0,4% for the Roma. Worrying is the proportion of those who do not possess even primary level education. For the Bulgarian people it is almost 0%, Turks – 5.6%, Roma – 20.5%. the majority of those people are absolutely illiterate.”<sup>8</sup>

Although in Bulgaria the Roma are officially 4,8% from the total number of the population (according to the census from 2001, however many researchers state at least double percentage as more relevant to the real situation), the Roma children in the education system of Bulgaria are a significant group of students – as a number and as a percentage. According to data of the Ministry of education, youth and science, the total distribution of the students by ethnic background in the schools of the country from I to XIII grade is the following:

*Educational status of Roma is significantly lower from the average for the country*

*Roma children in Bulgarian education system represent a significant group of students, whose educational integration stays seriously challenging, despite the presence of many good examples*

Table 1: Distribution of students according to ethnic background

75,48 % – Bulgarian
13,53 % – Roma
9,53 % – Turks
1,44 % – Others

Indicative and highly disturbing is the fact that this ration is largely changing from one education level to another. For example, according to data from the Regional education inspectorates (REI)<sup>9</sup>, almost in all administrative districts the share of Roma children in first grade is around 20% from all children who are subject to compulsory education.<sup>10</sup> This share lowers sharply with the increase of stages and levels of education. In every next education level the number of Roma children decreases and their share in the high-school education is seven times lower than their number in the primary school. The reason is not the increased birth rate, but the high percentage dropping out students: out of every one hundred Roma first graders only 14 reach to the high-school level and after that not all of them stay until graduation of secondary education. On the contrary – according to data of MEYS, practically every Bulgarian or Turkish child who is enrolled in first grade reaches the high-school educational level.

Table 2: distribution of students in educational level and ethnic group

Educational level	Ethnic background			
	Bulgarian	Turkish	Roma	Others
Primary	65,3	9,95	22,6	2,16
Secondary	69,7	11,01	16,8	2,45
High school	88,0	8,2	3,41	0,78

The data show both the low educational status of the Roma community and the problems with access to education, especially to quality education) faced by the Roma children.

The problems in the area of Employment, Social services and Health care are similar. According to data from the World Bank, quoted in OPHRD, the Roma are with the lowest coefficient of employment - 28.6% and the unemployment is the highest - around 70%, to 12.3% for the Turks and less than 7 % - for the ethnic Bulgarians. According to a research implemented under the programme PHARE BG 0006.08 – „Provision of access to healthcare for minorities”, targeted at measuring of the objective health status of the Roma, there is a person with illness in approximately 80% of the visited Roma households in 10 towns with compact Roma population. In one quarter of the visited households there is person with significant level of permanent illness (lost labor efficiency – 50% or more). Surveys of Open Society Institute and Center “Amalipe” also show that the health status of the Roma is times lower than those of the majority.

During the previous years the Government of Bulgaria adopted specific strategic documents for integration in the spheres of education and healthcare: Strategy for educational integration of children and students from ethnic minorities (June 2004)

*There are serious challenges in front of the integration of Roma in the areas of Employment, Social services and Healthcare*

and Health strategy for disadvantaged people belonging to ethnic minorities (September 2005). There is no specific strategy for integration of Roma in the area of Employment. The issues of educational, health and social integration are milestones in the Framework programme for equal integration of Roma into Bulgarian society and in the National action plan for implantation of the Decade of Roma inclusion.

To this moment the implementation of those documents is minimal. One of the for that is the minimal funding from the state budget. The option for allocation of significant resource from the budget for funding of the integration process in Bulgaria has never been fully opened, and in the situation of economic crisis the budget funding for the integration programmes in Bulgaria was additionally decreased. With that background the OPHRD seems to be main opportunity for financial provision of the Roma integration process – at least in the areas of Education, Employment, Social services and healthcare: without canceling the necessity of commitment from the state budget.

### **Design of OPHRD and the integration of Roma**

*During the years of transitions, the Government of Bulgaria adopted strategic documents for the Integration of Roma*

The integration of Roma community was one of the main discussed topics in the process of elaboration of the OPHRD as well as during the past years since the beginning of the Programme. This is a result from the activeness of the Roma NGOs, the special attention that was paid by DG Employment, equal opportunities and anti-discrimination of the European Commission and the responsible attitude of the Ministry of labor and social policy (Managing authority of the OPHRD).

*To this moment their implementation is not sufficient and its financing from the budget is minimal OPHRD emerged as main opportunity for funding of the process of integration*

Example for the collaboration between Roma NGOs, MLSP and DG Employment was the special discussion of the draft version of OPHRD with representatives of wide spectrum of Roma organizations, which took place in July 2006. Representatives of Center “Amalipe” were invited to the meetings of the working group that was in charge for the development of the OPHRD with the purpose to present and defend the Center’s proposals to the Programme. The active position of the Roma organizations was greeted in special letters sent to Center “Amalipe” from the Commissioner for Employment – Mr. Vladimir Spidla. This dialogue was continued by the MLSP despite the changes of the staff in the Ministry, and this fact brings hopes that it is a sustainable policy.

*Amalipe and other Roma organizations actively participated in the elaboration of OPHRD*

By its design the OPHRD is the programme which supports the process of Roma integration at highest level, compared with the rest of the operational programmes. There are texts which describe the problems of the Roma community and give directions for the Roma integration both in the analytical and strategic parts of the document; The Roma people are defined as a specific target group in 6 areas of intervention; there are envisaged specific areas of intervention /measures that support the efforts of integration; specific chart “Areas of intervention in regard with the Roma community” is also a part of the document; there are indicators for measurement of the effect in the Roma community. In addition, the NGOs are involved as possible beneficiaries in all areas of intervention which are targeted at Roma, which gives an opportunity for them to participate as implementers of integration projects. All this creates opportunity for implementation of complete major integration programme, which could apply the measures that are envisaged in the national documents for Roma integration, described above.

In the same time the design of the OPHRD contains certain weaknesses: the opportunity for multisector interventions is hardened, there is a lack of clear funding definition for implementation of the chapter “Areas of action towards Roma

*In its design OPHRD supports the process of Roma integration in relatively high level*

*The design of OPHRD contains weaknesses that place the integration activities in high dependence from the will of the political leadership of the relevant institutions*

*The analytical part of the programme contains texts that represent the Roma situation correctly*

community”, and opportunities for support of Roma organizations as specific beneficiaries<sup>11</sup> are not envisaged, and so on. This makes the realization of the activities for integration of Roma in high dependence on the the political will of the Managing authority and the three Intermediary bodies, as well as the coordination between them, which sets limits to the possibility for multisectoral, systematic and targeted integration interventions: because if there was strong political will and good coordination between the institutions then the integration policy would be realized and implemented even without the resources of the EU funds.

The analytical part of the OPHRD (Part 1 “Socio-economic analyses of the current situation in the area of human resources” and Part 2 “Analyses of strengths, weaknesses, opportunities and threats”) contains many texts describing the situation of the Roma community. A paragraph “Equality of minorities” describes the problems of Roma in the area of Employment (p. 22-23); paragraphs “ethnic specifics of educational outreach”, “dropping out of the education system” and “access to education” give trustful and view for the educational problems faced by the Roma (p. 27 – 29); texts regarding the status of the Roma are included also in the paragraphs which describe the access to social services and the health status (p. 41). Rightful place is devoted to the description of the administrative infrastructure associated with the integration of minorities – paragraph "State policy towards vulnerable minority ethnic groups in Bulgaria" (p. 64-67).

Overall, these paragraphs provide reliable picture of the problems faced by most of the Roma in Bulgaria and the integration process. At the same time, the analysis suffers a serious contradiction, which is a feature of all national policies for Roma integration: recognition of existing problems does not always lead to action to resolve them; recognizing the existing imbalances in ethnic dimensions (social, educational, etc.) is often accompanied by attempts for reconstitution into social categories. Example of this analysis is the labor market. Startling indication of imbalances of the level of unemployment among Roma compared with the levels among ethnic Bulgarians and Bulgarian Turks (p. 23) does not lead to the identification of the Roma as a "vulnerable group on the labor market”. The list of vulnerable groups on the labor market in OPHRD involves “Permanently unemployed; young people up to 29 years of age without labor experience; unemployed with low level of education and without qualification, This gap is partially compensated in the strategic part of the program, where among target groups under measures 1.1 and 1.2 Roma are explicitly listed as a vulnerable group. That contradiction is not a problem only for OPHRD, it is an indicator of contradictions in all national policies for Roma integration, which can not be solved by the OPHRD.

The strategic part of OPHRD develops relatively precise the topic of integration of Roma (minorities, vulnerable groups) and continues the text of the analytical part, and even overcomes some of the described weaknesses. Strength in this respect is the inclusion of Roma as a specific target group in six areas of intervention in the fields of employment (1.1 and 1.2), the access to education (4.1.) and the social services / the healthcare (5.1, 5.2 and 5.3). This was one of the points with most discussions in the process of development of OPHRD: most of the Bulgarian institutions opposed the designation of the Roma as a specific target group, while representatives of Roma organizations insisted on it and this was one of the main requests of the advocacy campaign of Center “Amalipe” and 46 other NGOs. Ultimately, the definition of the Roma as a specific target group gives an opportunity for announcement for project competitions targeted at Roma/minorities and to include activities that guarantee the participation of Roma in all competitions announced under those procedures: thing

that distinguishes OPHRD from the other operational programs and is undoubtedly achievement. It could be said that Roma are larger part from the possible final beneficiaries under two of the indicated areas of intervention (4.1. “Access to education and training for vulnerable groups”) and 1.1. “Integration of vulnerable groups on the labor market”), and under the rest 4 areas the Roma are large share of the final beneficiaries. In addition, under two more measures (4.2. and 4.3.) activities for educational integration could be implemented, without explicitly mentioning the Roma as specific target group( the target group is fairly defined as “children, students and adults”): under those measures different out of class and out of school activities could be organized, to conduct adults education activities, etc., and one of the indicated potential beneficiaries is the Center for educational integration of children and students from ethnic minorities. The inclusion of Roma as a target group is explicit, albeit in different forms: in most of the areas of intervention it is written as “vulnerable ethnic groups (Roma and others)”.

Another significant achievement of OPHRD is the incorporation of a special chapter “6. Areas of action in regard with the Roma community” (p. 144 – 147). The chapter clearly says that “main focus of the OPHRD is the resolving of problems of vulnerable groups at general and the ethnic minority groups among them, including the Roma... In this regard, during programming of OPHRD specific problems of the Roma people that require individual approach for resolving were taken into account.” (p. 144). The chapter indicates the combination of the so called “mainstreaming” and “targeting” in implementation of activities targeted at integration of the Roma community (i.e. combination of activities aimed at all vulnerable groups and specific activities aimed at specific problems of Roma): During the implementation of all actions that are involved in the operational program, there will be special focus on the establishment of adequate tools which would allow effective coping with specific problems of each of the target groups... Positive measures towards the Roma community will be proposed, some of them will be funded by the OPHRD. (p. 144). Chapter 6 shows also a wide circle of indicative activities for three of the priority axes (1, 4 and 5), which would guarantee significant progress of the Roma integration process. An important part of the chapter is a table with indicators that measure the impact of OPHRD in a Roma community (p. 146 – 147): they are related not only to the areas targeted at Roma, but to all areas of intervention. Those indicators provide preconditions of permanent monitoring and evaluation of the implementation of OPHRD in regard with the Roma: something which is laid as request in the programme.

Another strength of the OPHRD is the involvement of diverse potential beneficiaries in the areas of intervention that are targeting the Roma: NGOs, schools, municipalities, etc. This real participation of stakeholders in the implementation of projects under the respective measures. Beyond the indicated strengths, the OPHRD also contains certain weaknesses. For example, the feasibility for multisectoral interventions, including employment, education, social services and health care is largely hampered: although it is clear that namely the multisectoral interventions provide sustainable results, especially in the field of Roma integration. Employment, Education and Social services are axes that are managed by different managing authorities (Employment agency, Ministry of education, youth and science and Agency for social assistance), which prevents multisectoral projects. Such are not possible but would complicate the highly bureaucratic system of those three institutions and it is unlikely to be realized. In addition, the fact that the measures where the Roma are a target group are within the duties of three different managing authorities, makes the complete programme for Roma integration difficult to be achieved: it would depend on the political will of three institutions and on the good

*The strategic part of the programme develops relatively precise the topic of Roma integration*

**Strengths:**

*Roma are defined as specific target group in six areas of interventions*

*OPHRD contains a special chapter “Areas of intervention in regard to the Roma community” with examples for activities and indicators*

*Different beneficiaries (incl. NGOs) could participate in the implementation of the measures targeted at Roma*

**Weaknesses:**  
*The possibility for multisectoral interventions is difficult*

*Chapter 6 has no clear financing*

coordination between them.

The legislation establishes that any procedure for granting of financial assistance should be implemented only under one axis of the operational program. In this regard, multisectoral interventions may be realized only in supplementary way in the frames of different priority axes of OPHRD and by the means of suppletive measures with other operational programmes in accordance with the National strategic reference framework and the demarcation between the different financial instruments. The schemes of the OPHRD that are currently implemented give an option for such a synergy, e.g. between the measures in the area of education and the labor market, that are targeted at provision of smooth transition from the education system to real employment. This synergy, however, would be possible only if one and the same beneficent (e.g. certain municipality) applies under both of the announced schemes and both of the applications are approved. The experience shows that such cases are extremely rare.

Serious weakness is that Chapter 6 “Field of action in regard with the Roma community” does not have clearly defined sources of funding. The examples of axes and measures described in the chapter are included to the different priority axes (1, 4 and 5) without indicative financial plan for their implementation. This gives an opportunity to minimize the competitions that would be in favor of the Roma integration – a trend that was present during the analyzed period of the Programme.

The lack of clear funding for the implementation of Chapter 6 has its clear logics in the way of programming of the OPHRD. Chapter 6 was not programmed as a separate priority axis and the approach of the OP for the integration of the Roma was exposed, as a part of the horizontal principles that are being tracked during the implementation of every stage. In regard with Regulation (EC) 1083/2006 the budget of the programme was divided in priority axes, and within their frames certain indicators should be achieved. In this context, it was not possible to plan resources for the implementation of Chapter 6, and actually they are a tool for assessment of the measures of OPHR targeted at the Roma community. This approach could be changed during the next programming period if it appears that it is not sufficient to guarantee the social inclusion of Roma through resources from the ESF. At the same time the option to determine the indicative budget for measures aimed at vulnerable groups (in particular - the Roma), ensuring their effective implementation in the current programming period – that guarantees their effective implementation - could also be considered.

Another weakness is that the principle of support of vulnerable regions / Groups in the acquisition of competence to participate in the absorption of EU funds. This creates preconditions for the vulnerable (smaller municipalities, schools, NGOs) to become even more vulnerable, from the point of view that they will absorb much lower percentage from the funds. In priority axis 8 “Technical assistance” there is an area of intervention “8.3. Strengthening the capacity of potential beneficiaries”, but this area of intervention (as well as the whole axis 8) is given to the Managing authority and the Intermediate bodies. The experience of Hungary in the absorption of the EU funds convincingly shows that in the cases of vulnerable regions and groups it would be good if a specific approach of support is applied, where they have certain funding (and they do not compete with other regions and groups which are much better prepared) and they receive support for the absorption of the allocated funding. Thus the participation of vulnerable groups and regions in the absorption of EU funds is ensured: otherwise they could hardly broken through glass in the competition with

municipalities and regions which have significantly higher resource.

The Hungarian experience for provision of participation of vulnerable regions and groups is based on 2 main pillars. The first is the definition of vulnerable micro regions (NUTS IV level) and of targeted funding for them. Less developed micro regions, situated mostly in East and South Hungary are characterized with low incomes, high unemployment, bad infrastructure and low level of human resources. Around 10% of Hungarian population and around 30% of Hungarian Roma live in those regions. In order to support the development of those micro regions the Government sets a specific programme for them, allocating targeted funding for each micro region – for improvement of the infrastructure and the quality of the human resources. Thus, the micro regions are not in competition for the EU funding, but develop a capacity for absorption of the allocated funding. Roma are targeted in the programme for less developed micro regions – the participation of Roma NGOs and experts is a requirement for approval of project plans of the micro regions, and the projects that are aimed at Roma are being approved with priority.

*The principle for specific support of vulnerable regions is not envisaged*

The second pillar is the municipal plans for equal opportunities. Each municipality is obliged to develop its own plan that guarantees that the absorption of the EU funds will assist the provision of equal opportunities to vulnerable groups – to the Roma in particular. This requirement is valid for all municipalities that apply for funding from any European programme. In addition – the Government appoints the so called “Roma advisors” in the regional structures that support the absorption of the EU funds, while their function is to observe and consult the implementation of the municipal plans for equal opportunities. Although some municipal plans are made formal and superficial and their implementation is often quite problematic, their presence certainly gives impetus to the process of Roma integration.<sup>12</sup>

Roma organizations are not included as a potential beneficiary of a specific OPHRD, which is also a weakness of the program. Overall status of Roma NGOs is vague and too low - in all operational programs. Roma organizations are not included as a social partner. As a result they are represented in the Monitoring committee only as “observer” and not as a “member”: however, OPHRD is the only program in which the Monitoring Committee has a specific group of NGOs “organizations working for Roma integration” and have selected their observer (Deyan Kolev from Center “Amalipe”) and substitute (Radostin Manov from “Diverse and Equal” Association)<sup>13</sup>. The Roma NGOs are not enlisted as concrete beneficiaries under none of the areas of intervention and as a result they cannot receive a resource through a procedure of “direct provision of funds” for certain activities. Similar opportunity exists for the so called “social partners” (syndicates and employers’ unions): they received 71 223 676 BGN for increase of the capacity and activities under priority axis 2.<sup>14</sup> Explanation for not-enlisting the Roma NGOs as concrete beneficiaries gives the lack of nationally represented Roma NGOs or consortiums as the so called “umbrella organization”. However, experience from the absorption of EU funds in Romania shows that even under such conditions Roma NGOs may be beneficiaries of specific major projects and successfully deal with this task. The non-involvement of Roma NGOs as social partner gives the adopted from the Bulgarian Government interpretation of the definition of the term “social partners” from the document of the European Commission “The Social partners as beneficiaries – support of the European social fund for the social partners in the period 2007 – 2013”. In point 1 of this document the following definition for the term „social partners” is proposed: „a term which is widely used in Europe, and refers to representatives of representatives of management and labor force (unions and employers' organizations)”. Narrow interpretation of this

*Roma NGOs are not enlisted as direct beneficiaries*

definition actually excludes Roma organizations as social partners and could be considered - both at national and European level - a broader definition that would include more participants in the social dialogue. Such definition would guarantee the circumvent of the danger that Roma NGOs will stay excluded from the social dialogue: currently this risk is avoided due to the active participation of the Roma NGOs and the understanding by the side of the Ministry of labor and social policy.

The existing experience from the implementation of the Programme foursquare shows that none of the social partners defend the interests of the Roma community. Both the unions of the employers and the syndicates are effective in their strive to represent the interests of the employees and the employers. Given that the majority of Roma do not fall into none of these categories, it is understandable that the social partners do not represent their interests. Moreover - stenographs of the meetings of the Monitoring Committee of OPHRD indicate that part of the social partners share negative prejudices towards the Roma community.

### **The implementation of OPHRD and the Roma integration**

At end of 2007 were announced the first schemes for funding of project under the Operational Programme for human resources development. The contracting and real execution however started in 2008. During that period were implemented projects along 7 schemes and until mid 2009 another set of projects under 11 more schemes were launched. See Annex 1

Up to date the implementation of OPHRD is irregular: along part of the priority areas were completed certain grant schemes (for example Priority axis 4), while along other – the first schemes were announced in 2009. One of the measures targeting Roma as a specific group was announced and even implemented a grant scheme: Establishing favorable multicultural environment for practical application of intercultural education and training”, however calls under other measures with a focus on Roma integration are not yet launched.

Roma are final beneficiaries in some of the projects under schemes that are already launches, however in other the participation of Roma is simply symbolic. Based on the information submitted by beneficiaries to the intermediary units and managing authorities is evident that Roma /minority participation is serious in projects under the targeted scheme Establishment of a favorable multicultural environment (total 9923 people out of 19 414 people) and quite modest in other project schemes. An incomplete exception is represented by the extracurricular and out of school activities “To make the school attractive for young people”. Some 6 338 children and students from ethnic minority origin took part; however the number of participants with ethnic origin is disproportionate in comparison to the total number of participants – 50 443. See Annex 2

So far the only targeted scheme Establishing favorable multicultural environment, as well as the announced at the end 2009 one, newly launched scheme “Integration of children and students from ethnic minorities in school system” are funding activities that are key priorities outlined in strategic documents related to Roma integration: endorsement of intercultural education, desegregation of Roma schools, dropout prevention, training of teachers for working in multicultural environment. With a high degree of confidence it is be noted that these two schemes support the targeted efforts in promoting Roma integration. Whereas the rest of the schemes are supporting the implementation of national documents, that consider integration only in indirect

manner.

Roma organizations are actively participating in the implementation of OPRHD in two ways. On one hand they are admissible beneficiaries and successfully implement projects under the different schemes, and on the other initially unfavorable trend for not non admission of NGOs as leading beneficiaries were noted. It was however quickly surmounted.

The criteria on selection of operations, submitted by Ministry of Education on the first preliminary session of the Monitoring Committee on OPRHD took place on June 18, 2007 and in practice excluded NGOs as beneficiaries along the first two schemes: “To create a favorable multicultural environment..” and “To make the school attractive for young people”. According the Ministry of Education’s proposal the civil society organizations could apply only as partners and not as leading beneficiaries in these projects. Mr. Deyan Kolev’s intervention, supported by representatives of the European Commission – Mr. Thomas Bender and Mr. Dimo Iliev, during the session led to the critical reconsideration of the proposal and the inclusion of NGOs as possible leading beneficiaries.

Amongst part of the approved projects under the “Establishment of favorable multicultural environment...”were submitted by non governmental organizations: 27 out of 62 projects. Many of those were submitted by Roma organizations. Some of these were presented by Center Amalipe, Roma Youth organization -Sliven, Badeshte - Rakitovo, Association Drom – Vidin and etc.

Many NGOs successfully defended and implemented their projects under the other scheme “To make the school attractive for young people”; including Roma organizations like Association Integro, Stilipinovo Union and other. Some Roma NGOs were beneficiaries of projects announced by other schemes including others that Roma are not targeted in a specific manner.

It is very important that Roma NGOs take part in the Monitoring Committee’s activities. According Regulation of Council of Ministers 182/21.07.2006 representatives of non governmental organizations may be invited as “observers” and participate in the activities of Monitoring Committees with not right to vote though. The Roma civil society organizations choose after a selection procedure organized by the Managing Authority of OPRHD as their representative Mr. Deyan Kolev (Amalipe Center) and as a replacement – Mr. Radostin Manov (Diverse and Equal Association). They have actively participated in the Monitoring Committee activities and specific results were accomplished. For example, Mr. Kolev has submitted a proposal in November 2008 in front of the Monitoring committee voted for the announcement of a grant scheme for projects “Integration of children and students from ethnic minorities in school system”; on another proposal presented by Mr. Kolev in November 2009 the budget of the same scheme was doubled (from 3 million to 6 million euro). The Committee also approved in principle the launch of a grant scheme in the area of employment (under measure 1.1. of OPRHD).

As pointed above the OPRHD is unequally implemented in the different priority axis. The implementation of activities in favor of Roma integration and Roma inclusion in the project is also uneven. Below we present information on the different priority axis:

*The implementation of OPRHD began in July 2007*

*Under one of the measures involving the Roma as a target group has announced targeted schemes, under the others – no.*

*The participation of Roma as final beneficiaries is sufficient under the announced targeted schemes and minimal under the rest of them*

*The announced targeted schemes are funding activities that are envisaged in national strategic documents for integration. The rest of the schemes support the integration only indirect*

*Roma NGOs implement projects under many of the announced calls, after a competitive selection*

## Priority axis 4 and Roma integration

At the end of 2009 the implementation of a targeted scheme in the area of intervention 4.1 “Establishment of a favorable multicultural environment...” finished. The scheme was announced on July 30, 2007 as open procedure for competitive selection of projects at the total amount of 5.5 million leva. From the submitted 157 proposals only 64 were approved for financial support. According data provided by the Intermediary Body and the Managing Authority “From all 64 contracts, 52 are completely targeted at children and students from more than one ethnic group (from Roma and Turkish origin and others), in these projects the beneficiaries address the issue with the educational integration of children and students from ethnic minority groups with not strict division on the ground of specific ethnic origin.”<sup>15</sup>

In project activities funded by that grant scheme have participated 19414 people, 9923 of them are representatives of ethnic minorities<sup>16</sup>. The goals of the announced scheme and key activities were corresponding with the Strategy for educational integration of children and students from ethnic minorities: bringing out children and students from ethnic minorities from segregated schools in Roma neighborhoods in hosting schools; support to the process of integration in hosting schools; improving environment and motivation of families from regions with mixed population for ensuring smooth implementation of the integration process; establishment of conditions for better understanding and reconciliation between different ethnic groups; increasing the teachers’ preparation, tutors and experts for working in multicultural environment.<sup>17</sup>

it is still too early for an overall assessment of the grant scheme implementation. Although the terrain research conducted for the needs of the current report clearly point out that the projects have reached a wide range of end beneficiaries – students and parents. The degree of satisfaction amongst them is high – over 88% of students and 64% of parents have declared their satisfaction with the project’s results. The projects have given a chance for implementation of integration activities requiring additional resources that usually is difficult to be allocated with the delegated school budgets: social and psychological work with parents from marginalized families, endorsement of intercultural education in the mandatory subjects and through optional classes, organizations of diverse extracurricular activities and out of school activities, implementation of “green schools” activities and activities with children during school vacations, work with dropping behind students, and etc. Overall the realized activities have contributed to the implementation of the municipal plans for educational integration.

In the same time the realization of projects has encountered serious problems that has decreased critically their efficiency and have created obstructions for the end beneficiaries. Almost everyone from the included in the research beneficiaries pointed the delayed payments and complicated reporting and accompanying documents as barriers that has led to the minimum achieved results. The data from the research point also that between 60% and 70% of the time of key personnel working on the projects have been used for preparation of reporting documents and only 30% to 40% were dedicated to implementation of project activities.

The delayed payments have led to that part of the projects (especially the one with

*Roma organizations elected their representatives in the MC of OPHRD. They participated actively in the work of the MC which lead to concrete positive results*

*In 2008 – 2009 there was a Roma targeted scheme “Establishment of favorable multicultural environment...”*

*The realization of the projects under this scheme has reached large number of beneficiaries and has contributed to the implementation of the municipal plans for integration*

*Serious problems are the delayed payments to the beneficiaries and the complicated technical documentation which is required*

*In 2009 there was a targeted scheme "Educational integration of children and students from ethnic minorities",*

leading partners' schools) has absorbed a small part of the approved budgets and projects were not realized in their completeness. The average delay in payment noted is 6 months – a term that goes beyond the one envisaged in the contracts. The surveyed beneficiaries stated that that has caused serious inconvenience with funding and many of them declared hesitations regarding possible application to forthcoming grant schemes. The high degree of discontentment amongst beneficiaries is with the Intermediary Body within Ministry of education, science and youth: contracts were prepared in way that put the beneficiaries in disadvantaged position and the same time often these contracts are not observed by the Intermediary Body that is not leading to any penalties and recovery of lost benefits for the beneficiaries. On the contrary – the breach of the contracts on behalf of the beneficiary is always sanctioned. The outlined projects are identical with almost all of the announced funding schemes within OPRHD. In 2009 another targeted scheme was launched under operation 4.1 "Educational integration of children and students of ethnic minorities in school system." The announcement was delayed (decision for its approval was taken on session of the Monitoring Committee held on November 27, 2008, and invitation for selection of project proposal was published in October 2009 with a deadline for submission – December 21, 2009). The scheme's total amount was 6 million leva (3 million euro), however on the proposal presented by the representative of the Roma non governmental organizations the Intermediary Body Ministry of Education, youth and science the Committee voted on November 10, 2009 an increase of the budget allocation to 12 million leva (6 million euro). The interest on that possibility was remarkably high and up to December 21, 2009, 417 projects were submitted for funding. That is a vital and positive fact, however posing sharply an issue related to that larger part of the quality proposals submitted would not be funded: even the doubled budget of the scheme will be sufficient for funding a small number of projects considering the size of each project – between 50 000 and 390 000 Bulgarian Leva. The offered projects are in high competition: most probably out of 4 or 5 projects only one will be approved, that will definitively discourage the rest of the participants. A solution to that case is an analogue, targeted scheme in area of intervention 4.1 to be announced as constantly open until the end of the programme period: that would give a chance for approving all quality proposals and decrease to minimum the lost of energy and time for preparation of valuable projects that are not financed. It will lead also to a greater incentive of the process of Roma educational integration. A proposition in that regard was suggested by Mr. Deyan Kolev in April 2009, however a decision in that direction is still not taken.

During the session of the Monitoring Committee held on November 27, 2009 a procedure for adult literacy scheme within area of intervention 4.3 was approved. The procedure will be implemented through direct disbursement of financial resources to Directorate "Policy in common education" of Ministry of education, youth and science, and not as a grant scheme. It is expected that within the framework of the scheme approximately 10 500 people will participate in the literacy activities and will receive a document for graduating 4 grade or even a diploma for elementary school education (in dependence of the class attained of participants in the programme). That would give a better chance to all beneficiaries to take part in courses and qualifications for acquiring a degree in professional qualification – a non disputable positive fact.

*with large interest from potential beneficiaries*

In previous years the Ministry of social policy and labour implemented a Programme for literacy and qualification of Roma within the National Action Plan for Employment. Annually the Programme has had between 1000 and 2000 participants, a significant weakness however was that the end users did not received any document for attained class and therefore could not be involved in any other courses for attaining a decree for professional qualification – even the lowest one, first degree.<sup>18</sup>

Although the procedure “Literacy of adults” is not specifically targeted to Roma, in most cases a larger part of users will be Roma. It is expected that it will contribute towards the implementation of strategic documents corresponding to the educational integration of Roma: in all those activities related to literacy of illiterate Roma are envisaged.

The scheme has not yet started and it is not possible to analyze it. Some problems are clear even on that early stage. It is difficult to predict the reaching out approach for the significant number of end users: 10 500 people. The practice of the Programme for literacy and qualification of Roma implemented by the Ministry of Social Policy and Labor is evident that 2000 people on annual basis are tricky to be reached, the literacy courses last 5 months and are conducted mostly throughout the working day and the scholarship granted is relatively low (3-4 Bulgarian leva). That leads the participants in the courses to the preference to look for so called “black work” in the grey sector for higher income because of the lack of any other income. It is envisaged in the framework of the scheme “Literacy for adults” a higher scholarship for the beneficiaries; however that would not change significantly the conditions if relevant motivation activities are not in place. The motivation of potential participants is another serious issue: at that stage the scheme stake on motivation on behalf of the Labor bureaus. However, it is obviously unreliable: the “non active” persons would not be reached, the one not registered at the labor bureaus and that group is the largest one and most vulnerable part of the illiterate adults. The motivation of illiterate persons requires specific work, efforts and resources in the community. At that stage the procedure does not envisage financial resources that could lead to the failure of the procedure from its announcement. The question was raised on a session of the Monitoring Committee by the Observer from the Roma NGO group and a specific preposition was made to Directorate “Policy in common education” to provide specifically allocated resources for motivation of illiterate people, however at that moment there is no clear statement on that case.

Roma students are included in the schemes “To make the school attractive for young people” implemented as a procedure for competitive selection of projects; open for schools, municipalities, NGOs and others. In the past years that scheme was launched twice: in July 2007 (projects in practice have already been finalized) and in 2008 (the projects were implemented until September 2009). In November 2009 the Monitoring Committee decided to announce that grant scheme for open until the end of the current Programme period.

The interest to that scheme is significant and hundreds of schools applied under the two procedures. According data provided by the Intermediary Body and the Managing authority – 6338 out of 50443 students, included in the approved at the first stage projects are from minority origin, that number is relatively high,

*Start of a scheme for “Adult education” is expected*

however still very unequal to the percentage of minority students in Bulgarian school. Most probably that is due to the higher competition of the approved projects, including more students from the elite schools, with a insignificant number of minority students.

The implementation of the projects under that scheme has encountered problems that are described above in the analysis of the grant scheme “Establishment of a favorable multicultural environment...” delayed payments, complicated reporting documents, etc. A major issue turned out to be also the higher competition: large number of proposals and small number of approved projects due to the insignificant size of the announcement scheme. For instance at the first scheme launch in 2007 were submitted 689 projects, only 251 were approved for financial support. Even more serious was the situation when the second announcement (deadline January 9, 2009): 1200 proposals presented (exact number 1173) and only 150 were financed. That frustrates a larger part of the beneficiaries that have invested a serious human and time resource in the preparation of good projects that were not approved. A solution to that problem is the constant availability of that grant scheme until the end of the Programme period.

It is difficult to estimate the impact of the implemented projects on the educational integration of Roma children since that is not set as priority in the scheme, however in most cases it partially contributes to the achievement of that purpose although in indirect manner.

Analyzing the implementation of chapter 6 “Areas of action in regard to Roma community” one may state that only in Priority Axis 4 has been marked progress in implementation. This refers to indicator 4.1 “Number/percentage of Roma children included in programs for desegregation”: target until 2013 are 63000 children. The achieved so far within the target scheme “Establishment of favorable multicultural environment ...” is 10 000 students, a number that seems hopeful.

Of course this could be stated after many reservations: not all of these students are from the Roma minority, part of the approved projects barely can be treated as desegregation ones and etc. Indicator 4.2. “Number/ percentage of Roma children included in Programs for intercultural education” aiming at target of 20% of total number of students, included in out of schools activities” was not reached after the first announcement of the scheme “To make the school attractive..” and there are no mechanisms that will guarantee the achievement of that indicator in the new stages of implementation.

### **Priority Axes 1 and 2 and the integration of Roma**

The announcement of schemes under Direction 1 begun in 2009 and it is too early to speak about results. In 2009 there were announcements of 5 schemes and none of them was targeting explicitly the Roma/minorities. The announced schemes were not targeted at the most vulnerable groups on the labor market: inactive and unmotivated people. The explanation of the Managing authority was that those groups are targeted by the National action plan on Employment (NAPE). This explanation is untenable from the point of view that in 2010 the NAPE is funded only to minimum amounts. During meeting of the Monitoring Committee on November 10<sup>th</sup>, a decision was made to announce a scheme under measure 1.1

*Roma students participated in the scheme “Let’s make the school attractive for the young people”, however the share stays unproportionally low*

*Only priority axis 4 shows progress in the implementation of indicators of Chapter 6 of OPHRD*

from OPHRD, targeted at inactive and unmotivated people, while the concrete parameters will be defined in the upcoming months.

The schemes that are announced to this moment under priority axis 1 are not successfully targeted to any other vulnerable group – long-term unemployed: they do not include their motivation, but proceed from the assumption that work with long-term unemployed is similar to working with the rest of unemployed. This is clearly not the case and the omission of a specific motivational activities led to practical non-inclusion of long-term unemployed into the announced schemes

Under priority axes 2, in 2008 a scheme “Qualification services and training of employed persons” was conducted, and in 2009 a second phase of the programme was announced. In the conditions of economic crisis, the interest at the scheme appeared lower than expected, and many contracts were terminated (17 out of 181 during the first phase of the implementation of the scheme).

According to data from the Intermediary body (Agency on Employment) and the Managing authority, under projects of Priority axis 2 there are 685 representatives of ethnic minorities, out of 12952<sup>19</sup>, which is almost 5%. Out of them „441(are) Roma. 252 Roma were involved in trainings for increase of professional qualification and others 189 Roma were trained in key competences.”<sup>20</sup> Due to the low value it is impossible to make any conclusions for contribution for implementation of the priorities for employment from the Framework programme for integration of Roma and from the National action plan for implementation of the Decade for Roma inclusion.

Analyzing the participation of Roma (more concrete: representatives of ethnic minorities) in the schemes under Axes 1, 2 and 5 *Анализирайки участието на ромите (по-точно: на представители на етническите малцинства) в схемите по Оси 1,2 и 5* we should have in mind that at that time it can not be counted with absolute accuracy. This is due to the fact that a large part of the concluded contracts are still not finished and to this moment the beneficiaries have not reported real data from their implementation, or the people have not indicated their ethnic origin. The Managing authority undertook activities to improve the process of monitoring of the concluded contracts, including through filling individual surveys from the target groups, while in this way the reporting of the indicators under Chapter 6 of OPHRD will improve.

There is seriously lagging behind in the implementation of the indicators in Chapter 6, "Fields of action towards the Roma community" of OPHRD to Axis 1. For part of them nothing has been done, and the implementation of the rest – if it continues with the same trend – would take much longer than the period of the Operational programme. For example, the implementation of indicator “Number of Roma involved in training for acquire of key competences” would take 11 years and the implementation of indicator “Number of Roma, involved in training for acquire or upgrade of professional qualification” would require 79 years. The indicated clearly shows that relying only on the principle „mainstreaming”, i.e. that Roma will be included in the mainstream activities without specific measures, without to have it guaranteed, would lead to failure of OPHRD in regard with the envisaged goals towards the Roma community.

*The announcement of schemes under Direction 1 begun in 2009, and Roma targeted schemes are not announced yet*

*The schemes under Axis 1 are not targeted at long-term unemployed, inactive and not-motivated people*

*The share of Roma who participate in Axis 2 is low*

*There is a serious delay in the implementation of Chapter 6 in regard with Axis 1*

## Priority Axis 5 and the integration of Roma

In 2008 there were 2 competitions under priority axis 5 and in 2009 there were 4 new schemes announced schemes for funding. None of them was targeting explicitly the Roma, however all areas of interventions under priority axis 5 involve ethnic minorities too. It could be expected that under 2 of the announced schemes: “Social entrepreneurship development” and “Social services for social inclusion” will be realized projects in Roma community too, but it is still early to insist in to what extend it is going to happen.

According to data of the Intermediary body (Agency for social assistance) and the Managing authority, in the projects under Priority Axes 5 in 2008 there were not Roma participants. There were a large number of people with disabilities and other people in disadvantaged situation, but not representatives of ethnic minorities<sup>21</sup>. This trend confirms the above conclusion that the lack of targeted competitions and / or components leads to practical exclusion of the Roma community. The indicated also shows that the implementation of Axis 5 to this moment did not support the implementation of the Framework for Roma integration and the National action plan for implementation of the Decade for Roma inclusion.

There is a serious lagging behind with the implementation of the indicators from Chapter 6: practically they haven't been implemented.

### MAIN FINDINGS:

By its design, the OPHRD is the program that – in comparison with the rest of the programmes is targeted to support the process of Roma inclusion in highest degree. There are weaknesses in the design that already occur in the implementation of the programme. It could be said that ***OPHRD creates good preconditions for promotion of the Roma integration process and its support by EU funds, without any guarantee that this will happen.*** The implementation of set of activities for the integration of Roma is on high dependence on the political will of the management of the three intermediary bodies (Employment agency, MEYS and Agency for social assistance) and on the managing authority (MLSP), as well as on the coordination between them, which highly decreases the chances for complete programme of concrete integrational measures, without to exclude it by general.

***The participation of Roma organizations in the monitoring Committee and in the implementation of projects is an important precondition for the success of the OPHRD:*** Large part of the achievements of the Programme in regard with the Roma are due to the active behavior and partnership of the Roma NGOs with the Intermediary bodies and the Managing authority, as well as with DG “Employment” of the European Commission. The active participation of the Roma observers in the monitoring Committee of OPHRD is an appropriate example.

***The announced targeted schemes (under Priority Axis 4) promote the process of Roma integration and lead to inclusion of the Roma as final beneficiaries.*** The inclusion of Roma in the rest of the schemes at this stage is still problematic. There are positive examples, but even there the participation of Roma is

*To this moment there are no Roma targeted schemes under direction 5*

*In 2008 Roma have not participated in the projects under Axis 5*

*There is a significant delay in the implementation of the indicators of Chapter 6 in regard with Axis 5*

*OPHRD gives good preconditions for support of the Roma integration with resources from EU funds without guaranteeing that it will happen*

*The participation of Roma organizations in the MC is crucial for the success of the programme*

*The announcement of targeted schemes promotes the process of integration*

disproportionately low. The experience from the implementation of Priority axis 1, 2 and 5 shows that *relying only the principle of “mainstreaming” without its supplement with specific measures, targeted at Roma, will lead to fail of the OPHRD in regard with the goals that are set towards the Roma.*

***The implementation of the indicators for impact in Roma community, which the OPHRD sets is insufficient:*** Actually, there is only partial implementation of the Chapter 6 indicators, in the area of Education (namely in Priority Axis 4), but not in the areas of Employment, Social services and healthcare. This is due to the announced targeted schemes under Priority Axis 4 and the lack of such schemes within the rest of the axes.

***The resources of OPHRD are already being used for implementation of activities for Roma integration, but there is still a lot to do in this direction:*** Resources from OPHRD are already being used for promotion of the Roma integration in the area of Education and their value repeatedly exceeds the resources that are being allocated by the state budget in this direction. In the meantime these resources are still incomparable low – in comparison with the rest of the announced schemes and in comparison with the needs. For example, the budget of the announced targeted schemes is less than 17.500.000 BGN, which is disproportionally low while the dimension of the approved to this moment schemes from the Monitoring Committee is 1.314.000.000 BGN. The picture will not change even if we add the budget of the procedure “Adult literacy” to the budget of the measures that are targeting the Roma. The lack of targeted schemes announced under the measures of Axis 1 and 5 is worrying is, because it effectively replaces the idea of OPHRD. There is a need for rapid progress in this area.

## RECCOMENDATIONS

### ***Recommendations for improvement of the design of OPHRD***

- *Setting of indicative budget for implementation of the measures of Chapter 6 “Areas of intervention towards the Roma community:* It is going to emancipate the directing of resources for Roma integration from the political conjuncture and will establish more secure preconditions for the implementation of the indicators and for impact in the Roma community.

*Provision of opportunity for multisectoral interventions which include Education, Employment, Social services and Healthcare:* it will make the impact in a Roma community more effective and more sustainable. For the next programming period there could be a consideration about application of approach, similar to the LEADER approach, in the Roma community in rural areas. The approach requires development of municipal programmes for Roma integration (guaranteeing the participation of civic organizations and Roma community in this process) and the implementation of complete programmes is funded by the OPHRD.

In the current programming period a way to link more clearly the announced schemes under the different priority axes (e.g. close linkage between the chemes for educational integration and employment). It could be considered a regulation of the project implementation, funded by the OPHRD and Operational programme “Regional development” following an analogy of the project for

*The implementation of the indicators for impact in Roma community stays insufficient*

*More efforts are necessary for bounding the implementation of the OPHRD with the Roma integration*

*Setting up of indicative budget for the implementation of the measures of Chapter 6*

*Provision of opportunities for multisectoral interventions*

deinstitutionalization “With care for our children”. Such project could be regulated in the area of educational integration, where a supplement with measures for repair and renovation of school buildings (funded by the OPHRD) is needed.

- *Creating preconditions for participation of the most vulnerable regions and groups:* it could be achieved through different measures like definition of specific schemes, completely targeted at the most vulnerable regions and mmicroregions; provision of technical assistance for improve of the capacity for EU funds, etc. It should be regulated in the text of the OPHRD.

- *Creating preconditions for involvement of the organizations that work in Roma community as concrete beneficiary under some of the schemes:* the implementation of the OPHRD will be more successful with more active participation of the Roma NGOs. Their definition as concrete beneficiary under a part of the measures that are targeted at the Roma and the delegation of larger projects to Roma NGOs (following the example with the delegated resources under Axis 2 of the social partners) would make OPHRD more effective towards the Roma. That would require changes in the text of the OPHRD.

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### ***Recommendations for improvement of the implementation of OPHRD***

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- *Announcement of schemes that are targeted at Roma/minorities in the areas of intervention that include Roma as a target group. Establishment of significant preconditions for the Roma to participate in the rest schemes too:* At this stage targeted schemes are implemented only under measure 4.1, and the success with achieving the educational indicators from Chapter 6 is due mainly to them. It is necessary to wide this successful experience in the rest of the areas of intervention that include Roma as specific target group: 1.1, 1.2, 5.1, 5.2 and 5.3.

- *Opening schemes in Direction 1, targeted at inactive and unmotivated people and at the long-term unemployed:* It is necessary the schemes to count the specifics of work in Roma community and to involve participation of organizations that work in Roma community.

- *Opening schemes for Health prophylactics and health campaigns in Roma community under Direction 5:* it could and it has to take place within the frames of competitions according to area of intervention 5.3. It is necessary those schemes to count the specifics of work in Roma community. Significant capacity in this area was developed by the Roma organizations that are involved by the Ministry of Health in the implementation of Component 5 and 6 of Programme for HIV/AIDS prevention and that capacity should be used.

- *Announcing a scheme for innovative social services in Roma community: this could be a component in scheme for social services that promote the social inclusion or a separate scheme, funded under measure 5.1.*

- *Diversification of the activities that are funded through schemes under Direction 4:* It is necessary to have a permanently open scheme for educational integration – until the end of the programme period – the high interest from the potential beneficiaries and the necessity of urgent activities for education integration predefine this. It is necessary to diversify the sample activities that are funded under Axis 4: it would be good to define them after consultations with schools and NGOs.

*Creating preconditions for participation of vulnerable regions*

*Inclusion of Roma organizations as concrete beneficiaries*

*Announcement of Roma targeted schemes for project funding*

*Announcement of schemes for health prophylactics in Roma community under Axis 5*

*Announcement of schemes for innovative social services in Roma community*

*Diversification of the activities, funded under Axis 4*

*Involvement of NGOs in the implementation of "Technical assistance" component*

- *Involvement of Roma and other organization in the implementation of component "technical assistance"*: The allocation of resource is required for increase of the capacity of an NGO in the implementation of activities in Roma community. Component "Technical assistance" at this stage is being spent only by the Managing authority and the Intermediary bodies, while its effectiveness is low; a change towards inclusion of wider spectrum of beneficiaries is needed.

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## OPERATIONAL PROGRAMME □ REGIONAL DEVELOPMENT □

Subject of assessment of the present study are the activities implemented within the framework of OPRD, participation of interested parties, stakeholders and direct beneficiaries in activity implementation, funding process, achieved immediate and midterm results as well as their sustainability.

The analysis takes in consideration the context of existing national and local mechanisms for provision of adequate social, technical and housing infrastructure. The current evaluation was realized in accordance with the principles and standards grounded in a number of strategic and operational documents of Republic of Bulgaria – Framework Programme for Equal Integration of Roma in Bulgarian society, National Programme for improvement of living conditions of Roma in Republic of Bulgaria, International Initiative Decade of Roma Inclusion 2005-2015 and Action Plan for implementation of Decade of Roma Inclusion 2005-2015. These "targeting" Roma documents are part of the strategic and operational documents are the basis of the outlined measures in the National Strategic Reference Framework, fostering improvement of living environment of vulnerable groups, including Roma community. Their operationalisation is introduced in number of operational programs; one of these is Operational Programme for Regional Development.

The analysis was conducted based on:

- review of main documents of the relevant programme – OPRD and her annexes, protocols of sessions of the Monitoring Committee, decisions of the Monitoring Committee, annual indicative programs with announced grant schemes for funding, guidelines for application under the chosen grant schemes, annual report for OPRD implementation;
- results from terrain research for the implementation of OPRD in regions with predominant Roma population;
- Interviews with participants and key stakeholders.

The model of assessment includes the following components:

- **Adequacy** – relevance of described measures, open grant schemes and indicators to the contemporary challenges, related to the improvement of quality of life and working environment with a better access to major services and new possibilities for increased regional competitiveness and sustainable development and to what extent they are adequate to the Roma integration challenges in Bulgaria.

*OPRD has a key significance for improving of living conditions of Roma and the infrastructure in the Roma neighborhoods*

- **Efficiency** - establishing the degree of compliance between set goals and achieved results.
- **Results assessment** – establishing the degree of compliance with the achieved results, needs and interests of target groups and assessment of the consumers' utility within the delivered services and products of OPRD.
- **Long term effect** – assessment of present impact and recommendations for application of its results for attaining sustainable effect on the system of school education.

For the assessment were developed and approved in advance by the Commissioning organization a system of indicators and a set of quality and quantitative instruments with a methodology and instructions for its application that include also a cabinet review and OPRD analysis, as well as conduct of terrain research (jointly implemented with the research on the implementation effects of the Rural Development Programme and Operational Programme Human Resources Development).

As principal documents were used also a synopsis of results contribution and products of the project for achieving its final purpose (output-to-purpose review) as well as expert evaluations obtained by the application of Delphi method in the elaboration of recommendations for better execution of OPRD.

## Context

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

Comprehensive policy for integration of Roma is still missing: the approved documents are a solid ground for such a policy, however adequate targeted actions for its implementation is still not in place. The systematic documents in most cases remain with no action because of different reasons, most often due to lack of financial instruments available, capacity on behalf of institutions on national and local level, negative majority attitude towards affirmative actions, lack of will and resources on the side of the Roma community itself.

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

1. Adopted by the Bulgarian government the **Framework Programme for Equal Integration of Roma in Bulgarian society** in 1999, bring out in a special chapter IV – “Territorial development of Roma neighborhoods” a major problem of the Roma community – illegal and without infrastructure segregated Roma neighborhoods. The Programme envisaged the necessity of legislative amendments in the Law on Territory Planning (at the time of the Programme's approval and nowadays Spatial Development Act), that withdraw the compound bureaucratic procedure on legalizing house dwellings. It also foresees an urgent legalization of house dwelling in Roma neighborhoods by adopting the principle of minimum intervention in its existing situation. The purpose of these measures back than is to legalize larger part of the existing housing fund in Romani neighborhoods within its forms and size and the proprietors to obtain the right of property documents in a concise period.

*The policy for improval of housng conditions of Roma is based on adopted by the government documents and strategies*

*Framework programme for equal integration of Roma into Bulgarian society*

National program for improving of housing conditions of Roma in Bulgaria

Action plan for implementation of the NPOHCRRB

Roma are not in a favorable situation in regard with housing conditions and infrastructure

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

**3. Action Plan for implementation of the National Programme for Improving the housing conditions of Roma in Republic of Bulgaria 2006-2007.** The Action plan consist a detailed activity description within the timeframe of 2006 and 2007. Key activities are the legislative amendments and preparation of cadastre plans of locations with at least 10% Roma population and some activities for refurbishing of existing infrastructure.

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

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

Each forth housing dwelling in the segregated Roma settlements in Bulgaria is illegal.<sup>22</sup> The problem is provoked by the longstanding inaction on behalf of the state on one hand, and the lack of permanent employment, excessive poverty, and insufficiency of existing housing fund on the other. Only 3% of the existing housing fund in the country<sup>23</sup> in 2002 is state or municipal property, as for the whole country the number of housing dwellings for the same period is 3 691 787, of these in the cities where almost 69.9% of the population lives it is 2 305 849. For comparison in most of the EU member states the percentage of state and municipal housing fund is almost 30%.

According data provided by Open Society Institute Sofia and World Bank in 2007 in almost half of the housing dwellings inhabited by Roma there is not sewerage system, while amongst Bulgarians that share is almost twice lower – 21%. Amidst the urban population the disparities are even greater: 43% of Roma in the cities declare that they do not have access to sewerage system, 7% of Bulgarians are in the same position.

The share of housing proprietors that is not able to provide for the increasing costs of maintenance because of low household income is high. According the data of Open Society Institute – Sofia from the research “Health status of Roma” at the end of 2007 about 10% of Roma households do not have running cold water. The share of housing dwellings with no bathroom, even though indicating decline in comparison to researches of 5 years ago is still sky-scraping - each second Roma household do not have a bathroom (considering that barely 9% of the respondents declare that there is functioning public bathroom). For example UNDP and ASSA provided data in 2003 that without bathroom are almost 70% of Roma households, at present along that indicator a certain improvement is evident, however the discrepancies between Roma and non Roma remains. The existing Bulgarian legislation regulating the housing and territorial matters do not address adequately the problems outlined above, although it has been defined in the policy documents. In the present the Bulgarian legislation do

*Existing legislation does not address appropriately the problems related with housing conditions of Roma, regardless to existing good strategic documents*

*During the last years there is a progress in regard with the legislation framework for improving of housing conditions of Roma, but not in the implementation of the adopted documents. The lack of financial resources is pointed out as a main problem. The resource of the OPHRD is the main opportunity for investments in improving the infrastructure and the housing conditions in the Roma neighborhoods.*

*Main goal of the programme is improving of quality of life and working environment*

not provide an efficient procedure for legalization of illegal housing dwellings and the local authorities do not reinforce legalization of housing buildings within Roma settlements, although some of them are conforming with the formal requirements. This aggravates the problem related to the legalization attempts in Roma ghettos where many years of non implementation of number of procedures have led to a chaos in the housing regulation situation. On the other hand even the nominal opportunities of the legislation remain misused by Roma minority because of ignorance on the procedures and insufficient legal culture. Last, but not least the problem deteriorates because of the inadequate preparation of different administrations for cooperation with Roma community in the process of exploitation of legal procedures for establishment of possibilities for legalization of housing regulation status.

In conclusion in the past years a moderate progress is noted in terms of legislative framework amendments for improving the living conditions of Roma community in Bulgaria. The adoption of key documents (like National programme for improving the living conditions of Roma), investments on behalf of the state by changing the Spatial Development Act, possibilities provided to local authorities through resolutions of Municipal Councils to regulate districts with minority population indicate development in comparison to previous years. Meanwhile the implementation of the above mentioned documents is minimal and real improvement of living conditions of Roma is rather far behind due to the permanent aggravating with the time delayed problems of Roma settlements. A process of ghettoization in many of the districts started, and adequate actions for its discontinuance and/or prevention are not in place. A major reason declared for past decades is the lack of enough financial resources. As far as that is the real cause for all those years in which the situation of Roma settlements was exacerbating is hard to estimate: it was pointed out in the years of economic growth, with evident investments in infrastructure refurbishment. Perhaps the lack of attractiveness of measures fostering minority integration and inconsiderate political will for implementation of such measures is also part of the actual justification. In that context the resources provided by OPRD were expected as an prospect – most probably the only one – for investments in improving the living conditions of Roma.

The principal goal of the operational programme is improving lifestyle and working environment with a better access to basic services and new opportunities for increased regional competitiveness and sustainable development. The major priorities of the programme include sustainable and integrated urban development, regional and local accessibility, sustainable development of tourism, establishment of regional and local networks, cooperation and capacity building. The total budget of the Programme is 1, 601 billion euro, the EU fund for Regional Development contribution is 1, 361 billion euro and the national co funding is 240 million euro.

The operational programme provides opportunities for support of activities in 5 priority axes – urban rehabilitation, funds allocated 839 million euro, regional and local accessibility – a budget of 400 million euro provided, sustainable development of tourism – 218 million euro, local development and cooperation – 89 million euro and technical assistance – 54 million euro.

The implementation of the programme is ongoing; however at that stage it is not sufficient in terms of achieving the outlined goals and priorities. The effect of the implementation of the Programme on improving the living conditions of Roma settlements and comprehensive execution of the integration policy is minimal.

In general 854 project proposals were received by Operational programme “Regional Development”, 828 of them was evaluated; approved for funding were 609 at the total amount of 1.5 billion Bulgarian leva. The executed payments are considerably low (a

problem that is commonly faced for all operational programs in Bulgaria): up to date 312 contracts are concluded under the different grants schemes with Programme's beneficiaries and payments made for 38 034 191, 19 billion leva. The concluded contracts are at the total amount of 937 657 906, 87 billion leva.

- Announced 21 calls for project proposals at the total amount of 1 741 505 465 Bulgarian leva.
- Approved for funding are 539 project proposals at the total amount of 1 569 108 407,73 Bulgarian leva
- Signed agreements/orders - 312 for financial support at the total amount of 937 657 906,87 Bulgarian leva
- The total amount of implemented payments on concluded agreements is 38 034 191,19 Bulgarian leva.

The indicated figures confirm that one of most serious problems for the comprehensive implementation of the Operational programme is the low amount of actual payments. Many of the interviewed beneficiaries during the terrain research defined two major problems: compound reporting documentation and delayed payments. The last feature place all beneficiaries in front of a practical impossibility to implement project, that most needed and for which they have adequate administrative capacity: in terms of the great value of the projects within OPRD the delayed payments with months face up to enormous financial problems for some of the largest municipalities in Bulgaria.

An alarming trend is to be noted – more municipalities will place moratorium on project application since there is no financial resources available to meet the delayed payments for long time. That is not valid only for small municipalities, but for larger one like district centers. A similar issue was raised by the National Association of Municipalities in Republic of Bulgaria, however up to date solution is not in place.

### Roma and the OPRD

In 2006 and 2007 Roma NGOs initiated an advocacy campaign for endorsement of texts promoting Roma integration in OPRD. Their demand was supported by the European Commission - General Directorate "Regional development" as well as partially from Ministry of Regional Development and Public Works.<sup>24</sup>

OPRD explicitly states that "All priorities and activities under Operational Programme "Regional Development" are based on the principle of equality and no discrimination. These principles should be followed through all stages of management and implementation according Article 16 of EU Regulation N1083/2006"<sup>25</sup> defining Roma as one of the most vulnerable groups in Bulgarian society (p.112), the Programme includes texts that are precondition for directing impact and resources towards Roma neighbourhoods.

In it's analytical part (3. Social – economic analysis) OPRD describes in a better manner the situation of Roma community and housing and infrastructure problems, standing in front of Roma integration. The strong side of OPRD design is the inclusion of a special paragraph "Situation of Roma" in the analytical part of the Programme: p.28-29. This subsection genuinely describes the major social and demographic features of Roma community, the key problems faced by Roma as well as challenges for Roma settlements: high percentage of illegal housing dwellings, administrative and financial obstacles for its legalization, lack of detailed regulation plans, unavailability of infrastructure comforts, water supply and sewerage network, and etc. (p.28). With the exception of paragraph "Situation of Roma" an analysis of the problems of Roma

*Defining Roma as one of the most vulnerable groups, OPRD includes texts that create preconditions for allocation of resource to the roma neighborhoods*

*In its analytical part, the OPRD describes in a correct manner the housing and living infrastructural problems of the Roma people*

*The strategic part of OPRD does not address sufficiently the challenges in front of the Roma integration*

*The programme does not contain measures specifically targeted at vulnerable groups: example activities targeted at Roma are included in measures 1.1 and 1.2*

community is also provided in other section: in description of the health infrastructure (p.34), social services infrastructure (p37.) and etc.

In the same time the strategic part of the programme (parts 4,5,6 and 7) that describe the goals, strategy, priority axes, measures and management structure) addresses the challenges for Roma integration however in a significantly modest way.

The section "Situation of Roma" from the analytical part is not complemented with a separate chapter in the strategic part, with developed targeted measures and example of activities that would contribute towards the improvement of the present situation in Roma settlements, as it was within Operation Programme Human Resources Development. Similar information is provided in part "6.6.5. Gender equity and antidiscrimination" (p.186), it is diminutive (6 lines) and relatively vague.

OPRD do not contain measures that are specifically addressing vulnerable groups (including Roma), exception is made with the presentation of "exemplary activities" within the separate measures. Such activities are set primarily in Priority axis 1: operation 1.2 "Housing" ( "Provision of contemporary social housing for accommodation of vulnerable, minority and socially groups in risk from the population and other groups in disadvantaged situation through renovation and change of use of existing buildings"<sup>26</sup>, as well as under Operation 1.1 "Social infrastructure"( Initiatives that aim to tackle social, educational and health problems of Roma minorities and measures for preserving the Roma cultural identity (such as Roma cultural centres etc.) will be encouraged.<sup>27</sup>

Within the rest of the Priority axes there are no exemplary actions directed at Roma community.

A strong side of OPRD is the inclusion of project selection criteria "(the project) give account of the needs of groups in disadvantaged situation, including Roma." This is reflected within selection criteria under Priority Axis 1 (p.115) and Priority Axis 4 (p.145). It provides the opportunity of reinforcing the effect of implementation of the above mentioned axes in Roma neighborhoods, as well as support mainly projects and reporting the achieved results in the Roma community.

### **Roma and the implementation of OPRD**

The information collected by the Managing authority on beneficiaries from Roma origin is inadequate and insufficient in regard to all open up to date calls. The data below do not pretend to be comprehensive, however a better starting point for addressing recommendations to the Managing authority for definition and establishment of a better monitoring system of achieved results, especially in regard to the implementation of concrete indicators, related to beneficiaries of ethnic minorities and Roma in particular.

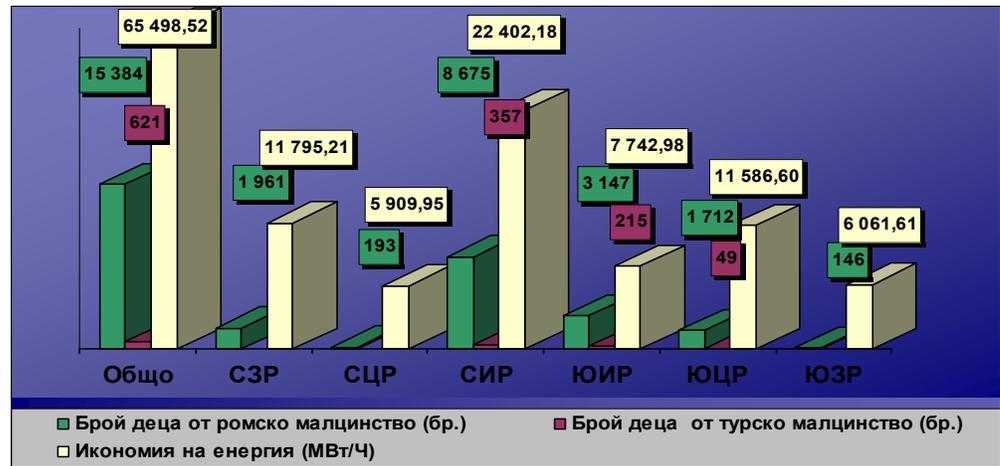
As it was pointed above in two of the Operations under Priority Axis 1 are set exemplary activities targeted at vulnerable groups, respectively in calls for projects similar measures must be supported. Up to date, however there is lack of open calls for provision of grants for implementation of Operation 1.2 "Housing", targeted at provision of contemporary social housing for accommodation of vulnerable, minority and socially excluded groups from the population and other groups in disadvantaged situation, through the renovation and change of use of existing buildings, owned by public authorities or non-profit operators. Within the present programme period OPRD do not support new housing of whatsoever buildings, only reconstruction, renovation and modernization of existing buildings.

Total of 21 announced call for project proposals were launched up to date, a serious impact on the Roma community could be found within 2 grant schemes: "Support to

the provision of adequate and rentable educational, social and cultural infrastructure, contributing towards the development of sustainable urban areas” and “Support to the provision of appropriate and rentable educational infrastructure, contributing towards the development of sustainable local development”. Within these two grant schemes is expected that more than 180 buildings will be renovated and 65 000 students, persons in disadvantaged position and citizens will benefit from its implementation.

According data provided by the Managing authority, 15 384 of them are from Roma origin and 621 from Turkish origin.

*Source: Presentation by Anitza Ruseva, MRPW, National Forum “Structural funds and Roma integration”, December 2009*



There are no open schemes under operation 1.2 "Housing policy" targeted at provision of social houses for vulnerable groups

2 out of 21 invitations for project proposals have more serious effect on the Roma community: for educational, cultural and social infrastructure

The indicated above could be reviewed in a positive way: amongst the end beneficiaries of the implemented projects are also children from minorities, subject of the principle of non discrimination and social inclusion of vulnerable groups. In meanwhile a weakness of the implementation of municipal projects under these two schemes is to be noted, they were not bound with the execution of municipal strategies/plans for educational integration of ethnic minority children. In accordance with the approved by Ministry of Education, Youth and Science – Strategy for educational integration of children and students from ethnic minorities, many local authorities adopted its own strategies/plans. A positive practice was endorsed by the requirement of approved municipal strategy for educational integration from municipalities, interested in inclusion in some of the projects financed by PHARE Programme. Regretfully, that practice was not continued through the announced by OPRD calls, therefore there are no guarantees that they have assisted in all cases the municipal efforts for fostering educational integration.

During the conducted terrain research in Popovo Municipality it was clear that OPRD have renovated schools that are central for the implementation of the municipal policy on education integration. The renovation changed completely the architecture environment within these schools, and complimented the project with the execution of “soft measures” for provision of full time training, free optional training “Folklore of ethnic groups – Roma folklore” and diverse extracurricular activities in these schools. All interviewed respondents confirmed that the positive effect is evident and undisputable. The renovated buildings were in apparently in good condition, as it was obvious that the number of Roma students is high and yet they maintain very well the school facility.

The terrain research was conducted in a municipality which in the same time is also a

*Among the final beneficiaries of the approved projects there is a large share of Roma students*

*Approved projects are not bound with municipal plans for educational integration*

*In most of the cases there is no serious bounding with the "soft measures", funded by the OPHRD*

district center and it came out that the supported and renovated by OPRD schools are central urban schools in which the number of trained students from minority origin is insignificant. The schools defined as "hosting" and "integrated" in the Municipal plan for educational integration were not included in the approved project. The Municipal management intends to apply with a new project if another call for proposal is going to be launched, in order to include these schools with the clarification that it needs to receive all payments on the already implemented project, which have been delayed with months.

In regard to call BG161PO001/1.1-01/2007<sup>28</sup> Support for provision of adequate and rentable educational, social and cultural infrastructure, contributing to the development of sustainable urban areas" data are available at the Operational Programme Regional Development internet webpage. It is evident that from totally 274 projects submitted only just 57 were contracted; the division in the six planning regions is extremely uneven. Concrete accent is put on the Northeastern region with the most approved projects – 13, the amount of the concluded contracts is **58 768 594, 79 BGN**. In researches conducted in regard to Roma integration and in the Programme itself is noted that the problems related to the provision of rentable educational, social and cultural infrastructure are most acute in Northeastern region where the drop out percentage of children from minority origin is the largest in the educational system. Northwestern Bulgaria is the poorest region within EU that was announced by the European Statistical Service EUROSTAT<sup>29</sup>.

The produced GDP per capita in comparison to the average for EU in 2007 was between 26% for the Northwestern region in Bulgaria, while in the same period data show 334% measured in the central living areas in London. According the data except that region in Bulgaria another two are also pointed as relatively poor – North Central and South Central Region.

From the information provided it is evident that 56 projects from the SouthWestern region were submitted, and only 4 were contracted. In that regard many beneficiaries pointed out the lack of transparency in the decision making process.

In addition to that it is important to mention also a report produced by Prime Microfond assessing the implementation of OPRD: according the monitoring organization certain gaps in the evaluation are registered such as lack of expertise and professional experience of evaluations in accordance to the announced calls for funding. A clear methodology on the evaluation is also missing. From the contracts concluded it is not clear for the beneficiaries that they are obliged to implement certain indicators reflecting the outlined goals of OPRD. The data inform that the total number of beneficiaries – children from Roma origin from the six planning regions are 15 384 while the number of Turkish children is estimated at 621. This disproportion is shocking, however, enlightening since different civil society organizations maintain information for the provision of equal access to education of children from Roma origin in the last years that has been hindered due to different factors. Amongst the main reasons is the lack of adequate infrastructure for assisting the process of active inclusion of children and students from Roma origin. An indirect confirmation for this is the fact that municipalities are actively searching for alternative way of improving schools in which Roma children are integrated and the announced calls within OPRD were a great opportunity for this although an explicit accent on Roma students is not placed.

For researchers and potential beneficiaries of OPRD activities a special interest represents the method of identification and data collection of beneficiaries and their

ethnic origin. In the application guidelines the process of identification of end beneficiaries is not clear. Clarity on the applied methodology by OPRD on identification of ethnic affiliation of end user is missing. This problem was also pointed out by representatives of the Managing authorities of other Programs – and apparently a credible solution must be endorsed.

### **Monitoring of OPRD implementation**

In accordance to the provided information on behalf of the OPRD's Managing authority the Programme's implementation is being monitored and assessed permanently as during the observation quality and quantitative data for the application of specific policy is collected, and the progress is being compared to the preliminary set expectations. For the implementation of OPRD projects comprehensible procedure for observation and reporting of implementation of projects/frameworks programme indicators is not in place. Thus, it is necessary the application's guidelines to include a special section for indicators of the scheme that explains the significance and effects of their execution, the potential linkage with non recovery of funds, the way of which the Managing Authority requires information on their implementation.

From the presented immediate objectives is clear that there is lack of clarity within the monitoring process for collecting information on ethnicity. The generated information in this aspect is entrusted exclusively to reports submitted by beneficiaries, which is incorrect as definitions and direct evidence are not set by the Managing Authority. It is thus necessary to undertake specific measures in setting analogous for all priority axes mechanisms for collection of a similar type of information. A similar recommendation is directed by the assessing organization Prime Microfund<sup>30</sup>: "Setting up a clear procedure for monitoring and reporting on the implementation of the outlined projects' indicators".

### **Consultations with civic organizations**

Until now specific consultations with civil society organizations were not held in regard to the announced funding schemes within OPRD as well as for updating the needs of the conducted policy by Ministry of Regional Development and Public Works with financial support provided by the Structural funds. Periodically however information days are being held whose objectives are to rather inform on the announced schemes and not to consult on in advance these schemes with the civil society. Thus it is necessary to confer the whole process in opening, defining and design of applications' guidelines as well as conduct trainings for the implementation of similar projects in terms of preventing possible omissions during the project's execution and in terms of achieving the placed indicators within OPRD.

It is necessary to ensure publicity of the information from the information system for management and observation of the resources of the Structural instruments of EU, administered by the Ministry of Finance. In addition to this, and as part of government's policy for ensuring openness and transparency is necessary to endorse a system of good practices from already approved and implemented projects in order to achieve full public awareness on measures taken to improve the living environment of all Bulgarian citizens.

### **Building OPRD beneficiaries's capacity**

While this measure is provided in Priority Axis 'Technical Assistance' on OPRD a sole beneficiary of her is the Managing Authority of OPRD. Further investments of financial resources and activities of OPRD are needed in order to build beneficiaries' capacity in

implementing the placed objectives and indicators for Programme's success.

### **Incorporating the changes endorsed by the EU Fund for Regional Development**

According to the amendment of Regulation 1080/2006 of the European Parliament voted in February, 2010, will be possible for poor communities in all Member States to receive funding from EU Regional Funds for repair or replacement of existing housing dwellings within an integrated approach that includes action, particularly in the areas of education, health, social affairs and employment and security measures for desegregation.

Up to now for improvements of housing dwellings in urban areas only 12 new Member States were able to apply for financial support from the European Fund for Regional Development (see Action 1.2 of OPRD). The adoption of amendments of Regulation, negotiated between Parliament and Council will allow to all 27 Member States to utilize resources administered by this Fund (in addition to other sources) for renovation of existing housing dwellings of marginalized communities and their replacement with new ones regardless of the region they are situated in (urban or rural). The legislation refers to all "marginalized communities" amongst these are Roma – the largest, marginalized ethno – social groups in Europe. Thus, specific measures are needed to endorse this particular EU decision within OPRD and complement existing measures in Priority Axis 1, Action 1.2.

### **Conclusions and recommendations**

At that stage of implementation, OPRD assisted insignificantly the efforts of integration of Roma and improving housing conditions in particular and infrastructure of Roma settlements. Major reasons are the omissions in the strategic part of the Programme (lack of measures targeting integration of vulnerable groups, inclusion of exemplary activities in that direction is noted only in two priority axes) and inertness in regard to integration activities – within its execution (not announcing calls within Action 1.2, lack of targeting approach within calls under Action 1.1, non observance of requirements of the Programme for priority approval of projects, improving Roma situation, etc.).

In addition the administrative impediments and the immense payments delay emblematic for all projects of OPRD restricts the opportunities of different beneficiaries to realize projects within the Programme that additionally decrease the chance for executing projects targeted at Roma settlements. At that stage the execution of OPRD does not assist the realization of the National Programme for improving the housing conditions of Roma. There is a real danger to overlook the chance through OPRD to accelerate the process of integration of Roma and integration in the sphere of housing conditions and development.

In order to overcome the above problems we recommend actions in the following directions:

- **Simplification of administrative procedures in preparation and reporting of projects and speeding up of payments**

Investments on behalf of the state administrations are required for endorsement of clearer mechanisms and procedures for management and observation of disbursements within the Programme, related to simplification of the larger part of administrative requirements in preparation and reporting projects in particular.

It is necessary to find a reasonable balance between ensuring the correct usage of funds and prevention of abuses on the one hand and provision of a real opportunity for

*There is no clarity in regard with the information collected on ethnic principle*

*There is no information for consultations with the civic organizations regarding the announced schemes: design, scope, implementation*

*In February 2010 the EU parliament amended Regulation 1080/ 2006: means of the EFRD could be used for houses of vulnerable groups*

*It is necessary to apply the approved changes in Bulgaria through OPRD, operation 1.2*

*At this stage, the implementation of OPRD supports in a too low level the efforts for Roma integration*

*It is necessary to:*

*Simplify the administrative procedures for acceleration of payments*

beneficiaries to devote adequate attention to project implementation, not just gathering the required supporting documentation. Speeding up of intermediate payments is a must.

- **Implementation of Priority Axis 1, Action 1.2**

Within the indicative programme of OPRD for 2008 and 2009 actions/schemes for implementation of Action 1.2 Housing policy are missing – Provision of contemporary social housing dwellings for accommodation of vulnerable groups of the population through investments and change of use of existing buildings owned by public authorities and non profit association. Therefore the launch of grant schemes related to Action 1.2 directed at improving the quality of life of communities in disadvantaged and vulnerable situation through the construction of social housing dwellings. Additional allocation of financial resources within the framework of this Action for implementation of the National Programme for Housing Conditions of Roma in Bulgaria is needed as part of the commitment of the Bulgarian country in the international initiative “Decade of Roma Inclusion”.

- **Budget increase within Axis 1, Action 1.1 and adoption of targeting Roma integration approach**

Considering the achieved results of the implementation of funding schemes for supporting Action 1.1 and because of the large number of projects submitted an increase of finances is needed. It is necessary to undertake announcement of analogues calls for improving educations, cultural and social infrastructure within Axis 4 in order to reach smaller municipalities.

In mean time interdependence is required for implementing the National Programme for improving the housing conditions of Roma in Bulgaria with the implementation of Action 1.1 Social Infrastructure, Priority Axis 1 – Sustainable and integrated urban development, where the investment measures are 99.77% of the total value of the Programme and that include improvement of existing and construction of new technical infrastructure (water supply, sewerage, streets and adjacent facilities, electricity and street lightening).

In order to achieve that objective relevant calls must be announced, explicitly directed at settlements inhibited mainly by vulnerable groups. This would be possible through the launch of specific calls or by separation of a specific component in the general calls, however a guarantee is needed that all these neighborhoods will be reached.

In addition to that is necessary to expand the field of model activities within forthcoming calls in Action 1.1 of OPRD: establishment of Roma cultural and information centers, as described in OPRD exemplary activities but not implanted so far.

- **Implementation of priority selection criteria on projects targeted at vulnerable groups (including Roma):**

The criteria for selection on Priority Axes 1 and 4 include priority selection of projects, considering needs of vulnerable groups and Roma in particular. Regretfully up to date this has not be implemented and the existing opportunities were not utilized. It is necessary this criterion to be included in the announced calls for projects within the targeted axes and projects primarily submitted and targeted at integration of vulnerable groups to be approved as priority. Thus, a complementarily effect will be obtained between calls launched by OPRD and OPDHR.

*Implementation of operation 1.2 regarding provision of houses for vulnerable groups*

*Increase of the budget of operation 1.1.*

*Implementation of the criteria for priority selection of projects, targeted at vulnerable groups*

*Monitoring of the effect of OPRD on the Roma integration*

*Amendments and changes in the present OPRD*

*Bounding OPRD with Roma integration in the next programme period*

- **Reporting OPRD efficiency on implementing the programme with an emphasis on Roma community integration:**

Within the elaboration of midterm assessment on OPRD implementation the effect on improving the housing conditions of Roma and Roma settlements' infrastructure must be reported, as well as of the overall process of Roma integration. Indicators must be reported also within the implementation of each project proposal.

**Add-ons and amendments of OPRD:** Addendums are needed in OPRD text for the present programme period targeted at:

- Inclusion of exemplary activities, related to Roma integration along Actions 1.4, 1.5, 2.1, 2.2, 4.1 and etc.
- Inclusion of selection criteria for projects, reporting on the impact on vulnerable groups within Priority axis 2

**Inclusion of all challenges related to Roma integration within OPRD for the following programming period:** the new OPRD must address the matters related to improving the housing conditions of Roma as well as the infrastructure of Roma settlements have to be set through relevant analysis, measures, model activities and indicators. In order to achieve that the following is needed:

- Inclusion of Roma NGO representatives and experts with adequate expertise in the sphere of Roma integration in working groups, elaborating the new OPRD. Conduct of specific discussions with Roma NGOs, experts and leaders in regard to the new Programme;
- Addition of adequate text section in the analytical part of the Programme;
- Inclusion of measures, targeting impact on vulnerable groups (including Roma): in the present Programme such measures are not in place, as one of the reasons is its low efficiency in regard to Roma integration;
- Enclosure of relevant model activities for impact on vulnerable groups along the different Actions.

Inclusion of a special chapter for impact of the Roma community within the strategic section of the Programme, describing the planned intervention, indicators for its accomplishment and indicative financial allocations.

## **RURAL AREAS DEVELOPMENT PROGRAMME**

### **Roma and the rural areas in Bulgaria**

The national definition of rural areas, defines rural areas as municipalities (LAU1), in which no settlement has a population over 30 000 people. This definition has been used under SAPARD Programme and is also applied in the Rural Development Programme 2007-2013 for territorially based interventions for the period 2007-2013. According to this definition, 231 out of total of 264 municipalities in Bulgaria are classified as rural. The rural areas represent 81% of the Bulgarian territory and 42% of the population. In 2004 the population of rural areas is 3,2 million people.

According the data of the last census of the population (NSI, 2001) the distribution of

the Roma population by “region” and “village/town” in Bulgaria is 365 797 or 4.68%, and 46% of these are living in rural areas. These are official statistical data, however a survey of the National Council for Collaboration on Ethnic and Demographic Issues towards the Council of Ministers adds to the estimation of 370 000 Roma, approximately 350 000 people identified by the rest of the population as Roma, the latter however reject that identification and recognize themselves as representatives of other ethnic groups. The difference is being calculated due to the methodology applied by the National Statistic Institute to collect its data. The statistics would not assign anybody to the Roma community if he himself does not self-identity as such. A significant part of Roma in Bulgaria have preferred ethnic identity, some of them are Bulgarians, Turks or Romanians, but not Roma. That would mean that unofficially Roma are approximately 800 000 people or 10% of the total population. It is difficult to estimate what percentage of the real number of Roma inhabits rural areas. According UNDP report for Roma in Central and Eastern Europe, 2001, 42,9% of Roma live in rural areas, and 21.1% in towns that would suggest that over 60% of Roma lives on the territory of rural areas. Almost all municipalities with high share of Roma are in rural areas: regardless of the used criteria the data of the census or the expert evaluation. This does not traverse the well known fact that Roma inhabit some of largest urban areas, gradually turned into “ghetto” areas (Faculteta, Stolipinovo, Lozentez, Maksuda, and etc.), however clearly indicates another indisputable fact that Roma in rural areas are not undersized in number and their issues are not of diminutive significance.

In a report produced by the NCCEDI Secretariat towards the Council of Ministers of Republic of Bulgaria and published in materials for the conference “Roma in Expanding Europe – challenges for the future”, June 30 – July 1, 2003, Budapest, is stated that “...Roma minority faces difficulties in adapting in the context of transition to market economy and economic reform and presently constitutes a vulnerable group in disadvantaged situation that is basis for a serious concern and motivates active interventions on behalf of Bulgarian government”.

In the area of employment significant part of Roma registered at the Labor Bureaus are long term unemployed people, lasting longer than one year. According to data of the World Bank the unemployment amongst Roma community in 2001 reaches 70%. The inequality of Roma on the labor market is related mainly to the comparatively low education and qualification. After the land restitution to its proprietors and the liquidation of the functioning until the start of the transition period cooperative farms, the Roma population in rural areas that do not possesses land left with no means of subsistence.

Unfortunately there is no statistic available for the number of Roma registered as agricultural producers, and the previous counting of agricultural farms in 2003 do not refer to comparable information. There are unofficial data for the representatives of Roma community involved in agricultural activities, breeders and cultivating land. And still it is not clear what part of them are officially registered and therefore included in the beneficiaries list of the Programme and what part do not meet the requirements for financial support and are employed in the informal sector.

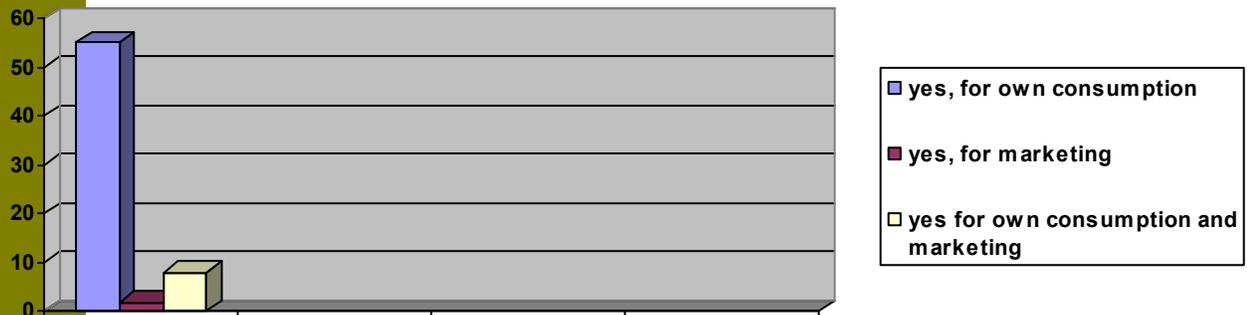
In the conducted sociological research amongst representatives of the Roma community for the purposes of the present study completed by the application of the method face to face interview were made 150 semi standardized interviews in areas with predominant Roma population. To the question “Are you engaged with activities in agricultural farming?” positively responses are provided by 55% of the respondents, 8% answered “yes, but for our consumption” and only 2% indicated that they work

*Rural area is a municipality with no village above 30 000 inhabitants*

*46 % of the Roma live in rural villages, more that % - in rural areas*

and market the production, as part of the respondents considered they work in their personal gardens (Fig.1). These 10% are possible beneficiaries of RADP. The other 55% give reason to propose that there are certain attitudes and probably skills in the community that require development and potential generation of activities for targeted work with them.

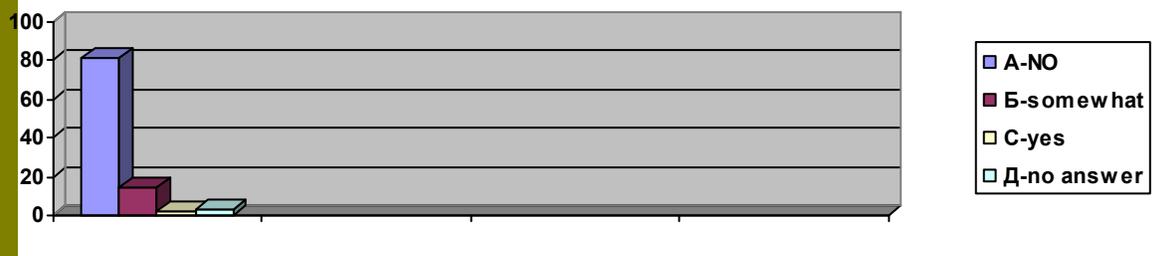
**Figure 1 Question “Are you engaged in activities in the area of agricultural farming?”**



*There is no information for the number of Roma that are registered as agricultural producers, however, there are Roma who are doing agricultural business*

In the same research to the question “Have you ever heard anything for the Rural Development Programme” 81% of the respondents answered back that they have not never heard of it (Fig.2), and to the question “Do you have information on the schemes and interventions you could apply for?”, 93% of the interviewed replied that they do not have whatsoever information on the interventions and activities included in the Programme. Only 2% of the respondents answered positively to both questions.

**Figure 2. Question: „Have you ever heard anything for the Rural Development Programme?”**



### Rural areas development programme

The National Strategic Plan for Rural areas in Republic of Bulgaria reflects the vision of the country in regard to the rural development and defines common objectives for the period 2007-2013:

- Development of competitive and based on innovating agriculture, forestry and food processing industry;
- Preservation of natural resources and environment of the rural areas;
- Improving the quality of life and diversification of employment possibilities in rural areas.

Specific interventions within the four priority axes of the Rural Development Programme are targeted at achieving these objectives. It has been developed in the period 2006-2007 and the inserted measures are conforming with the requirements,

*RADP is not known by Roma*

principles and procedures of EU Regulation 1698/2005 for supporting the development of rural areas through the EU Agricultural Fund for Rural Development, Annex VII on the Act of EU Accession of Bulgaria and Romania, EU Regulation 1463/2006, adapting Regulation 1698/2005 because of Bulgaria and Romania's accession to EU and EU Regulation 1974/2006, laying down specific detailed rules for application of EU Regulation 1698/2005 and EU Regulation 434/2007, amending EU Regulation 1974/2006, as well as other applicable regulations of the European Community.

The Rural Development Programme is approved by the Agriculture and Rural Development Committee of the European Commission at a session held on December 19, 2007. On February 19, 2008 an official statement 755 was adopted, approving the Programme.

The Rural Development Programme 2007-2013 included 23 measures divided in 4 priority axes. The programme is being applied on the whole territory of Republic of Bulgaria, however with priority consideration of rural areas, in case of territorially based interventions. The total budget of the Programme for the period 2007-2013 is 3 241,94 euro (table 1).

Table 1. Priority Axes Budget for the period 2007-2013 (mln, euro in current prices)

<u>Priority axis</u>	<u>EU financial resources /mln. €/</u>	<u>National cofunding /mnl. €/</u>	<u>Total (EU +national budget ) /mln. €/</u>
Axis 1	963,89	240,97	1204,87
Axis 2	637,46	139,93	777,39
Axis 3	702,13	175,53	877,67
Axis 4	61,59	15,40	76,99
Technical assistance	98,54	24,64	123,18
Complements to direct payments	145,47	36,37	181,84
<b>TOTAL – EAFRD</b>	<b>2 609,10</b>	<b>632,84</b>	<b>3241,94</b>

*National strategic plan for development of rural areas defines the vision for development of the rural areas*

*RADP defines measures for achievement of the vision for development of the rural areas*

The application of RADP is regulated by 'instructions of the Minister of Agriculture and food, representing subdelegated legislation based on reason &35, article 3 from the Law of amendments and addendum of the Law for the support of agricultural producers.

Axis 1 of RADP and the measures included are aiming at increasing the competitiveness of agriculture, forestry and food processing industry and are targeted at responding to the main needs of these sectors:

- Modernisation of physical assets/production factors;
- Investments for compliance with EU standards;

- Structural adjustments in farming structures;
- Improvement of human capital potential.

For the implementation of Axis 1 are allocated 42% Community funds from all the funds for the three priority axes and based on analysis and experience from SAPARD programme are included the following measures:

- 111 – Professional training, information activities and distribution of science knowledge;
- 112 – Establishment of young farmers and their holdings;
- 121 - Structural adjustments in farming structures;
- 122 - Improving the economic value of the forest;;
- 123 - Adding value to agricultural and forestry products;
- 141 - Supporting Semi-Subsistence Farms;
- 142 - Setting up producer groups;
- 143 - Provision of farm advisory and extension services in Bulgaria and Romania (2007-2009)

**The overall objective of Axis 2** is associated with the development of agricultural methods consistent with the protection and preservation of the environment, and on compensating the producers in the mountainous and other less favoured areas for keeping their land in good condition, and preventing the abandonment of land in these areas. Sustainable development of the forests will be addressed mainly through improvement of forest resources and restoration of forest potential.

To **Axis 2 is allocated 27% of the Community contribution** under the three Axes and are included the following measures:

- 211- Natural handicap payments for farmers in mountain areas;
- 212- Payments for farmers in areas with handicaps other than mountain areas;
- 214- Agri-environmental payments;
- 223- First afforestation of non-agricultural land
- 226- Restoring forestry potential and introducing prevention actions

Axis 3 is aiming at improving the quality of life and diversification of job opportunities in the rural areas of Bulgaria. They address the major problems of rural areas, identified in the analysis of the baseline situation, which are summarised as follows:

- Declining quality and accessibility of basic services and infrastructure;
- Lack of job opportunities;
- High dependency on agriculture.

To **Axis 3 is allocated 31% of the Community contribution** under the three Axes and the following measures are included:

- 311- Diversification into Non-Agricultural Activities;
- 312- Support for the Creation and Development of Micro-Enterprises;

*The envisaged measures are grouped in 4 Axis*

*Axis 1 includes measures for promotion of the competitiveness of Bulgarian agriculture*

- 313- Encouragement of Tourism Activities;
- 321- Basic Services for the Economy and Rural Population;
- 322-Settlements Renewal and Development.

The major objective of the interventions under Axis 4 Leader approach will be to build a sustainable capacity at local level for rural development policy design, implementation, monitoring and evaluation. To achieve this objective, the Programme will support actions relating to:

- activating the involvement of various groups of rural stakeholders and building sustainable partnerships through Local Actions Groups (LAGs).
- informing and training local people to prepare and implement local development strategies including the management of their LAGs
- promotion of cooperation among Leader groups within Bulgaria, as well as international cooperation.

*Axis 2 – measures for development of ecological agriculture*

The Leader Axis will be used to deliver 2.6% of the Community contribution allocated to the other three Axes. Measures included in Axis 4 are as follows:

- **41** – Implementation of local development strategies
- **411** – *including Axis 1- Improving competitiveness*
- **412** – *including Axis 2 – Improving environment and rural nature*
- **413** - *в м.ч. OC 3 –Improving the quality of life in rural areas and encouraging diversification*
- **421** – National and transnational collaboration;
- **431** – Administrative expenses for the establishment of LAG, skills development and territory revival:
- **Sub measure 431-1** „LAG management, skills development and achievement of public activeness and approved Local Action Groups”;
- **Sub measure 431-2** „Skill development and achievement of public activeness on the territory of potential local action groups”

Additional measure 511 towards the RADP is included “Technical assistance” as well as measure 611 “National extra payments to the direct payments”.

Another set of seven measures will be endorsed on a later stage through RADP amendment.

*Axis 3 – measures for improve of the quality of life in rural areas (incl. infrastructure)*

### **Roma participation and Rural areas development programme**

RADP and the NSPR are developed in compliance with the principle of partnership. Article 6 of the EU Council Regulation 1698/2005 and article 2 (p.4) from the Law on assisting the agricultural producers declare that “ the policy documents for development of rural areas for the period 2007-2013 must be prepared in close collaboration with all competent state, regional, local and other public authorities, economic and social partners, as well as all others relevant bodies, representing civil society, non governmental organizations, including organizations for preservation of nature, representatives of minority groups, partners and organizations, encouraging equality between men and women”. In that regard during the development process of programme documents were conducted a series of consultations. In the list of institutions and partners consulted in the process of preparation of the programme documents for development of rural areas for the period 2004-2005 are enlisted the following Roma non governmental organizations:

- National center of Roma in Bulgaria;

*Axis 4 applies the LEADER approach and is targeted at mobilizing local communities in the definition of policies for development of rural areas*

- Integro association, United Roma Union.

In point 14.2 Results of RADP consultations –key questions raised by the partners, subsection **Roma/Minority groups** is recorded that:

- „Roma non governmental organizations expressed a concern that the lack of sufficient information will obstruct the access to support of minority groups.
- Representatives of non governmental organizations of Roma in Bulgaria must be included in the Monitoring Committee of RADP”

*(Statement provided by: National Center of Roma in Bulgaria)*

In reply the Managing Authority (MA) stated: “A targeted information campaign is being under preparation for minority groups. Representatives of non governmental organizations of Roma will be included in the working group with Axis 3 of the Monitoring Committee as well within National Rural Development Network”.

The Monitoring Committee of the Programme is appointed by the Minister of agriculture and food in accordance to article 77 of EU Council Regulation 1698/2005. In the list of institutions, invited for membership at the Monitoring Committee (members with voting rights) are not included any representatives of Roma organizations. Permanent working groups on thematic basis of the 4 axes are set up towards the Committee. These working groups are preparing the technicalities of the Committee’s decisions based on the information received by the observation and assessment sent to the MA. The working groups are chaired by representatives of partners’ organizations. The working groups include a wider selection of partners organizations (in addition to those represented in MC). Members of the working group of Axis 1 are the following Roma organizations: Civil association “Center Civil Society”, National Center of Roma in Bulgaria, Association “Diverse and Equal”. In the membership list of the working group of Axis 3 is included a representative of Association “Diverse and Equal”. In the other working groups no representatives of Roma non governmental organizations are included. The protocols of the sessions held, accessible on the internet page of MAF there are no statement, opinions or proposals by representatives of Roma organizations related to specific problems of Roma community, their integration in activities and measures and provision of opportunities for better access to the Programme resources. Perhaps the included Roma organizations (described above) did not attend the sessions nor did not actively participated – through statements and advocated positions.

*Roma organizations participated in the elaboration of RADP*

### **Roma and the RADP**

In RADP section 15. Equality between men and women and avoiding discrimination is stated that “All measures under the programme will be open to all beneficiaries on an equal basis, regardless of race, ethnic origin, religious conviction or belief, disability, age or sexual orientation”. Furthermore in subsection 15.2 Avoiding discrimination: “In pursuance to the need to ensure that the principle of non-discrimination is upheld in the preparation of the RADP the MA has sought to involve in the programme consultations the National Council for Cooperation in Ethnic and Demographic Issues under the Council of Ministers (a consultative body involving representatives of the state administration and NGOs active in the work with or representing ethnic minorities)... The monitoring and evaluation of the RADP implementation shall also seek to ensure that the principle of non-discrimination is pursued.... The Roma NGOs and NGOs working with the minorities shall also be able to take part in the activities of the National Rural Development Network and use this platform to seek ways to improve access of minority groups to RADP benefits”.

*There are no Roma NGOs in the MC of the RADP*

*There are Roma organizations in the working groups of the priority axis, but they do not participate very actively*

*To this moment the implementation of RADP "skips" Roma and does not contribute to the process of Roma integration*

Up to date the National Rural Development Network is not established and is not functioning. Although the principles of partnership and non discrimination towards Roma minority has been set up - at least in some degree – in the preparation of and within the programme documents related to the rural areas development so far it is not clear how and whether it is actually applied. Even more – **alarming facts giving reasons to claim that the RADP implementation until now is rather “overlooking” Roma and do not contribute in fact to the process of Roma integration.**

The preliminary assessment of Programme for Rural Development 2007 -2013 is conducted in the period June 2006 – March 2007 by a team composed of Bulgarian and foreign experts from “Scanagri Denmark and Partners”. Its methodology is following the procedures defined by the *Guidelines for Common Framework for Monitoring and Observation, July 2006, Guide + Annotations from A to O*. The final assessment report is based on the RADP version dated from December 2006.

A major recommendation of the Preliminary Programme assessment is: “In order to reach out to potential beneficiaries from minority origin is needed specific steps. The information campaign must seek technical solutions for appropriate and direct work with them considering the regional concentrations of minority groups”. In response to that recommendation on behalf of the MA is written that MA has developed a special module for the information campaign targeted specifically to minority groups. Up to date that module has not been used in the information campaign.

The MA is obliged to provide publicity within RADP and inform potential candidates for the possibilities provided by the Programme as well as for the rules for receiving financial support. The RADP’s communication plan for 2007-2013 states: “For groups in disadvantaged situation such as Roma communities’ specific efforts are targeted in order to inform them on directions and opportunities for support by the Programme. Specific actions are envisaged for the inclusion of Roma community included in the RADP information campaign.” No detailed specifications are pointed out such as special means, methods, actions that will be utilized, official data for the number of informed/trained, consulted representatives of Roma community is also missing.

Until now the MAF has conducted a large scale information campaign that includes series of public discussions, training meetings, workshops, events through media, presentation of good practices. At the internet page of MAF is been published and periodically updated materials and information on regulations, drafts of regulations, manuals and etc. needed for applying within RADP. There is also a manual, describing all steps of the application process. At the reception room of MAF an information center is opened for provision of information by experts of the Ministry. In October 2008 a large scale information campaign “Traveling teams for advices in agriculture – door to door” was held. Although data provided by the sociological survey conducted in the period November – December 2009 for the purpose of the present study **an insignificant part of Roma population is included or affected by MAF’s information activities.**

According the official data of the Payment Agency (PA) – State Fund “Agriculture” towards November 2, 2009 total 10 672 applications for support were submitted to RADP amounting at 4 725 597 053 BGN and size of the subsidy provided is 3 730 374 391 BGN (Annex 2). Some of the applications 5 431 were submitted within Measure 112 “Establishment of young farmers and their holdings” amounting at 265 532 452 BGN. The projects within Measure 121 “Structural adjustments in farming structures” are 2 595 on the total amount 1 374 250 708 BGN and the size of the subsidy is 687 125 354 BGN. The approved projects within Measure 112 are 2 566 and within Measure 121 – 1 427.

The information on the measures within which beneficiaries are municipalities is as follows:

Measure 321 “Major services for population and economy in rural areas”- 511 submitted project proposals amounting at 1 883 942 858 BGN and under Measure 322 “Renovation and development of rural areas”- 295 projects for 429 037 082 BGN. The approved projects with concluded contracts are 72 within Measure 321 and 144 under 322.

There are no data provided by PA on the number of applicants with Roma origin within the different measures, as well as if there are municipal projects directed at improving living conditions of Roma or if there will be any impact on the Roma community.

To each application form a blank for project observation and assessment is enclosed, however a requirement/ question for self identification of the ethnic affiliation of applicants is missing or if the projects will impact Roma/groups in disadvantaged situation. Within the project ranking requirements (criteria for evaluation/project selection) there is no specific criterion for additional weight in evaluation of projects if the latter are submitted by Roma or municipal ones with positive impact on ethnic minorities.

And yet there are unofficial data submitted by Roma non governmental organizations, representatives of the National Council on Advices in agriculture (NCAG) and representatives of municipal administrations for an insignificant number of projects submitted for support to RADP – approved within Measure “Young farmer” and Measure “Structural adjustments in farming structures”, however the data state that these are less than 1% of the approved project proposals with concluded contract.

There are available data on presented projects currently being evaluated, for instance under Measure “Supporting Semi-Subsistence Farms”. The projects within Measure “Young Farmer” and if additional activities are envisaged under Measure “Structural adjustments in farming structures” are prepared for free by NCAG that actually supports the successful application of more active and entrepreneur oriented representatives of Roma community. The process in large degree is dependent on the representatives of the relevant MAF’s municipal and district administrative structure aware of the situation in the different regions and in direct contact with potential beneficiaries.

There is information for projects (in Plovdiv and Pazardzhik) of large agricultural producers in the area of market gardening and establishment of durable plantation for hiring labour from the local Roma communities, that guarantees the labour relationships within the national legislation, since PA exercises strict control and verification of data and that has impact on the process of integration.

In regard to municipal projects under Measures 321 and 322 (these are the most attractive “infrastructure projects” there is not available information for these that would be implemented in Roma settlements. Since the projects have been recently started and a larger part is in process of tendering in accordance to the Law for public tenders it is not possible to describe the effect on Roma integration. Most probably part of the projects will have certain influence because they are directed mainly to construction, renovation and/or rehabilitation of road, water supply and sewerage infrastructure or provision of different social services. In others Roma representatives will be hired as labour or the project itself will be implemented in areas with Roma population. Despite all that, one for certain can claim that the **infrastructure projects will “pass by” the Roma settlements in rural areas and that is RADP’s significant**

*It is necessary to undertake specific steps for the RADP to reach the roma people*

*Small part of the Roma population has been involved/outreached by the information campaigns of the MAF*

## weakness.

According MAF's data within Axis 4 Leader approach sub measure 431 -2 "LAG management, skills development and achievement of public activeness and approved Local Action Groups" were concluded contracts for 102 projects that represent 68% of the territory and 72% of the rural areas population. Compared to the data provided by NSI in 2001 in these areas are living approximately 121 152 Roma as the unofficial data are indicating that their number is double. The projects are on total amount and size of subsidy 16 542 108 BGN. Invitation is sent to potential Local Action Groups for MIG selection within Measure 41 "Application of strategies for local development" Measure 431 -1 "Management of local initiative groups, skills development and achievement of public activeness on the relevant territory for local action groups, applying strategies for local development" with a deadline May 31, 2010. Yet, a negative fact must be brought up that in two of the districts in which according NSI are with higher number of Roma – Vidin and Sliven there are no approved projects within Measure 431-2.

Since the Leader approach provides opportunity for decentralized financial management of RADP's funds and integrated development of populated areas through planning interventions from bottom –up, there are real chances for utilizing this instrument for Roma minority integration and the solution of many local social issues. This in some degree is related to active Roma non governmental organizations, as well as to the attitude and disposition of municipal administration and other local stakeholders. In order to render positive impact on the process and respond to EU requirements for elaboration/ planning of strategies for local development (Annex 2 towards Ordinance 23/18.12.2009, Content and structure of strategy for local development) must describe "Conformity with EU horizontal policies for gender equity and non discrimination, contribution for confirmation of the principle of equal opportunities and establishment of conditions for prevention of discrimination."

Unofficial data provided by representatives of Roma communities, in some regions where projects are being implemented under preparatory measure 431-2, state that Roma are excluded from the process of elaboration of strategies for local strategies and establishment and registration of local action groups. For instance in municipality located in Northeastern Bulgaria the Roma community is not being allowed to take part in the preparatory projects within Leader. In this region part of Roma is literate and has possibilities, willingness and position to take part in the project activities as well as chances to be potential beneficiaries during the application of local development strategy since they are engaged with agriculture. Thus a pessimistic image of the Programme is being brought and negative effect on Roma population is generated since it feels isolated.

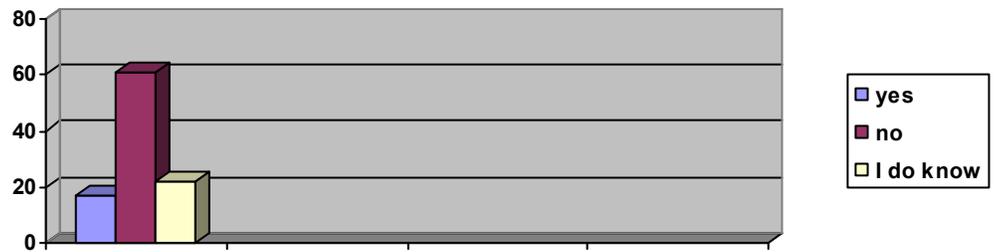
A number of good practices in that regard are existing – in part of the projects within the preparatory measure certain activities related to training and capacity building of Roma community are set, the active representatives are included and within the processes of development of construction work and LAG establishment. These data are from regions with operating Roma non governmental organizations or at least such that working the field of human rights protection of Roma.

In the sociological survey amongst representatives of Roma community for the purpose of the present study to the question "Have you ever heard of the Leader approach?" more than 60% replied negatively and 22% stated that they do not know (fig.2) which means that the projects under the preparatory measure have not either included the relevant activities for popularization or that Roma communities were not involved in the process of communication and project activities popularization.

*There are no data for the number of applicants under the different measures with Roma background, and also what share of the projects of the municipalities are targeted at improvement of living conditions of Roma*

*Small part of the projects under the infrastructural measures will be implemented in Roma neighborhoods*

**Fig.2 Question: “Have you ever heard of the Leader approach?”**



To the question: “Are you aware of the implementation of a project for establishment of Local Action Group?” 98% of Roma have answered “NO”.

RADP’s Managing Authority is responsible for the LAG’s selection and the approval of strategies for local development. It is also responsible for the monitoring and projects’ evaluation within the preparatory measure, currently operating. It is necessary that MA exercises strict control on the project implementation and activities set within, including activities and requirements for publicity in order to guarantee the preservation of all principle of transparency, partnership and non discrimination lay out in RADP as well as that the planning process of local strategies will be inclusive and consider the involvement of all interested parties. Even more to the question asked as an open one: “What do you think should be changed within RADP in order to reach out to Roma community?” Larger part of the interviewed answered: “Giving the possibility to Roma to receive land and equipment, to repair streets in Roma settlements, to be established youth clubs in the villages, to be created ethnographic complexes for presenting Roma traditional crafts”, that is evident for a position to the issues and vision for the socio-economic development of the areas they are living in.

*At large, Roma do not participate in the preparation of the Local initiative groups. Good exclusions are result from the activity of civic organizations*

### **Framework programme for equal integration of Roma in Bulgarian society**

The strategic objective of the Programme for Equal Integration of Roma is the eradication of unequal treatment of Roma in Bulgarian society. In that regard RADP the way it is written is compliant with the above strategic objective. Although efforts were in place during the time of RADP’s implementation it is not enough and exact evidences are not presented how that is being realized in practice. It is necessary to improve the conduct of the information campaign in regard to Roma communities as well as to find appropriate means and methods to guarantee that the support provided will reach the representatives of that community as well. This could be possible through the active inclusion of representatives of Roma non governmental organizations and better publicity of the Programme, and also better communication between the different state institutions and specific interaction with local authorities in order to identify crossing point and possibilities for intervention on minority issues as well as utilization of different European funds and possibilities they provide.

For instance the FP for equal integration of Roma present detached the following sectors/problems that need to be addressed by a concrete decision:

1. Employment – the high level of unemployment amongst Roma population is well known, as well as that a larger part of it is in sector of the long term unemployed persons. RADP provides the possibility of self employment of community

*ПРСР съответства на стратегическата цел на Рамковата програма за интеграция на ромите*

*RADP could support the implementation of 5*

areas of FPEIRBS

*RADP could support the implementation of the National action plan for implementation of the Decade for Roma inclusion*

*RADP does not include measures, specifically targeted at Roma*

**It is necessary:**

*Special efforts for information and increase of capacity for applying under RADP in Roma community*

*Creating contacts with representatives of Roma community from rural areas*

*Monitoring of RADP regarding the effect in Roma community*

*Inclusion of Roma representatives in the MC*

*Inclusion of Roma in the Local initiative groups*

representatives for development of agricultural and non agricultural activities, including the ones in the area of public services and employment provision during the implementation of different projects. Directly related to the activities of the Operational Programme Development of Human Resources that contribute towards the integration of vulnerable groups belonging to ethnic minorities from the rural areas at the labour market are activities for “lifelong learning” of all employed in agriculture within RADP.

2. Land settlement – it is well known that large part of land in some regions is deserted and is not cultivated. In most cases these regions are classified as “poorer and lagging behind”, it is also well known that there is compact Roma population. It is not necessary in all cases to exercise a state mechanism for landing landless and indigent Roma in order to apply for support by RADP, since it provides also support on the ground of presented documents for contract relationship of land managing. In order to organize such a process it is necessary Roma representatives to be included in training activities and qualification attainment in the areas of agriculture farming. The National Rural Development Network could have a major role in that process;

3. Health care – RPD’s measures provide indirect opportunities for improving the living conditions of Roma population through betterment of the technical and social infrastructure, as well as improvement of access to diverse social and cultural needs and services;

4. Protection of ethnic specificity and culture of Roma in Bulgaria – the affirmation and preservation of traditional for the country culture, traditions and crafts there are a number of possibilities for activities within the different RADP’s measures, and as beneficiaries are recognized non governmental organizations, community centers and etc. These measures could be utilized for the preservation and popularization of Roma crafts, traditions and culture;

5. Roma woman – specific activities related to the complete individual and socio-economic participation in public life by Roma woman could be included in CMW developed and applied within Axis 4 Leader approach of RADP. The information campaign led by MAF for RADP could include specific modules and measures for impact of this process.

The above mentioned opportunities provided by RADP could be object of impact on behalf of the National Rural Development Network. Since the Network has the obligation to provide: application of good practices and exchange of experience and knowledge including the area of administrative rules, procedures and applicable RADP’s mechanisms, consumers’ information, through the preparation and conduct of workshops and provision of experts support; and assistance for the building and strengthening capacity of local action groups in Axis 4 “Leader”, to pursue needs, necessities and problems of Roma and other vulnerable minority groups to identify their adequate place for working within the Network and therefore guarantee results in regard to the EU horizontal policies.

**National Action Plan for Decade of Roma Inclusion 2005 -2015 (NAP) and RADP**

The National Action Plan for the Decade of Roma Inclusion does not have any direct relation and commitment to RADP and NRDN. Although the resources of the Programme and funding opportunities provided for financing a great number of activities aiming at improving the quality and standard of life in rural areas in the country as well as the fact that more than 60% of Roma is inhabiting these areas could and must be utilized for resolving local problems, related to integration of Roma.

Three of the NAP's priorities and activities included in it could be directly financed by projects within RADP, precisely through the measures in Axis 3 or Axis 4 (integration within strategies for local development).

Priority 1 of the NAP: Education – 4.1. Popularization of Roma culture and 4.11 Activities for familiarization of different ethno cultures, could be placed in the measure “Basic services for population and economics of rural areas” in Axis 3 of RADP – activities for construction of new or improving the existing centers delivery cultural services (cultural centers, theaters, libraries), including establishment of mobile ones and could be referred to Axis 4 Leader and be placed as actions in measure “Preservation and improving rural heritage” from EU Regulation 1698/2005 (researches and investments, related with maintenance, renovation and rehabilitation of cultural rural heritage) and respectively included in strategies for local development within LAG.

Priority 2 of the NAP: Health care – 1.1. Early registration of pregnant women, observation during the period of pregnancy and timely placement in hospital of young women; 1.1.2 Implementation of gynecological examinations and consultations in cabinets, including mobile ones, operating closely to areas with compact Roma population and 1.1.3 Provision of opportunities for access of ambulances to young mothers' homes for timely transportation to specialized medical institution could be realized by projects within measure Basic services for population and economy in rural areas – activity construction or improvement of centers delivering services related to the utilization of information and communication technologies (health consultations, support to business, municipal services and etc.), including establishment of mobile centers as well as inclusion of opportunities/ activities in local development strategy (Axis 4).

Activities 1.1.3 of NAP could be financed through project proposals within the same measure by activities construction/ reconstruction/ rehabilitation of water supply and sewerage systems and facilities and measure “Renovation and development of settlements”- activity reconstruction and construction of street network, side walks, squares, street lightening and activity preparation of integrated plans for renovation of the settlement if the plan includes some of the presented within the Ordinance investment activities.

Priority 3 of NAP: Housing conditions – 1.3. Improving the existing and construction of new technical and social infrastructure financed by measure “Basic services of population and economy in rural areas”- activities:

- construction, reconstruction and rehabilitation of existing municipal roads and bridges, and when possible within the project could be presented vital social and economic benefits the Programme allows construction of new roads as well;
- construction/reconstruction/rehabilitation of water supply and sewerage systems and facilities;
- Construction and improving centers for relaxation, spare time and sport (sports and youth centers and etc.);
- Construction and improvement of centers for social services (children's care, kindergarten, day nursery, including purchase of specialized transport and care of elderly and people with disabilities);
- Construction and improving centers delivering services related to the utilization of information and communication technologies (health

consultations, business assistance, municipal services and etc.)

And measure “Revitalization and development of settlements” – activity reconstruction and construction of street network, side walks, squares, street lightening and activity preparation of integrated plans for renovation of populated area, if the plan includes some of the listed in the Ordinance investment activities.

Here is also admissible the inclusion of activities and measures within strategy for local development in Axis 4 of RADP.

In order to avoid the overlap financing for one and same activities between Operational Programme for Regional Development, OP Environment, OP Transport and RADP should be taken in consideration that some of the activities in Axis 3 there are some restrictions on territorial principle like municipalities that are within the so called agglomeration areas and that have similar activities, are subject to financial support by Operational programme.

Although Roma are pointed out within the preliminary evaluation and analysis of the Programme for rural areas development as target group with its specificity, RADP does not have measures targeting Roma. That is so because the common measures laid in the Programme have a larger scope and possibilities for resolving a greater part of Roma’s specific problems, most the ones in described in Axis3 with beneficiaries municipalities, non governmental organizations and community centers (chitalishta), as well as Axis 4. It is necessary though to develop concrete mechanisms for guaranteeing the reach out to Roma and Roma settlements.

### **Key recommendations to MA of RADP 2007-2013**

1. To place special effort for identifying the adequate manner through measure technical assistance to reach out the Roma community in order better informing, training and capacity strengthening for applying at RADP;

2. Possibilities needs to be sought for direct and quality contacts with representatives of Roma community in order to develop a systematic and holistic approach for working with Roma communities and provision of collaboration and technical assistance in applying and development of project proposals;

3. To create possibilities for gathering statistic information on behalf of PA and MA through observation and evaluation in applications and/or through questions referring to the project impact on Roma community, expected effect and population that will benefit or included in it;

4. Within the midterm evaluation of RADP an analysis must elaborated, of all approved projects disaggregated by type of beneficiaries, activities, measures for applying RADP in regard to the EU horizontal priorities including minority integration and provision of equality when applying, which on one hand will provide the opportunity for taking the correct and right decisions and measures for overcoming identified omissions.

5. In case of changes of RADP additional, specific for the programme indicators and quality objectives, monitoring the impact of the projects on the Roma community must be introduced – number of Roma population that will benefit from the constructed buildings/facilities or related to services – cultural, sports, connected to the utilization of information and communication technologies and etc.;

6. To be involved representatives of the Roma organizations in the permanent working groups in Axis 2 and 4 of RADP that will support the Monitoring Committee’s activity for observation of the programme and their representative to be

sitting at the Committee itself in order to engage Roma organizations as active partners and participants in order to improve the possibilities for Roma integration. Organizations included in the working groups in Axis 1 and 3 to start actual participation in the working groups' activities.

7. To keep track of the evaluation and approval of local action groups and strategies for local development to what extent the requirements for minority integration have been preserved.

In order to achieve complete integration of the issues faced by the Roma community in RADP is extremely important to activate the work of MAF in that direction, but also activities on behalf of the Roma activists as an essential condition for success.

**ANNEXES:**

*Annex 1*

Scheme for provision of financial support	Finance plan of OPHRD	Budget (BGN)	Number of concluded contracts	Contracted financial resources at the date of contracting (BGN)
<b>TOTAL for OPHRD</b>	<b>2 374 122 531</b>	<b>1 528 755 933</b>	<b>1 367</b>	<b>991 409 955</b>
Increasing employment of youth through their long term inclusion on the labour market in Bulgaria		15 000 000	1	15 000 000
Providing conditions for active working life for people over 50 and long term unemployed persons	50 000 000	282 103	4	282 103
Development		250 000 000	1	250 000 000
Qualification services and promotion of encouragement		36 000 000		
Back to work		64 000 000	1	63 928 738
Promotion of projects commence for development of self dependent economic activity – Component 1		20 000 000	1	20 000 000
Promotion of projects commence for development of self dependent economic activity – Component 2		40 000 000		
Promotion of projects commence for development of self dependent economic activity – Component 3		10 000 000		
<b>Total Priority Axis 1</b>	<b>498 565 732</b>	<b>435 282 103</b>	<b>8</b>	<b>349 210 841</b>
Qualification services and training of employed persons	35 204 940	18 144 129	181	17 896 091
Qualification services and training of employed persons /phase 2/		50 000 000	187	24 441 401
Prevention occupational safety and health at work		15 000 000	1	14 925 146
Adaptability		90 000 000	1	89 922 250
I can		26 000 000	1	25 998 502
Increasing flexibility and efficiency of the labour market by active actions of the social partners - CITUB		8 902 959	1	8 902 805
Increasing flexibility and efficiency of the labour market by active actions of the social partners – CL "Podkrepa"		8 902 959	1	8 898 809
Increasing flexibility and efficiency of the labour market by active actions of the social partners - BICA		8 902 959	1	8 902 959
Increasing flexibility and efficiency of the labour market by active actions of the social partners - BIS		8 902 959	1	8 902 959
Increasing flexibility and efficiency of the labour market by active actions of		8 902 959	1	8 901 782

the social partners - BCCI				
Increasing flexibility and efficiency of the labour market by active actions of the social partners – BUPE "Vazrazhdane"		8 902 959		
Increasing flexibility and efficiency of the labour market by active actions of the social partners - CEIBG		8 902 959	1	8 902 889
Increasing flexibility and efficiency of the labour market by active actions of the social partners - SSI		8 902 959	1	8 896 177
<b>Expected</b>	<b>25 000 000</b>			
<b>Total Priority Axis 2</b>	<b>427 342 055</b>	<b>270 367 801</b>	<b>378</b>	<b>235 491 770</b>
Information and communication technologies (ICT) in education		39 116 600	1	39 116 600
Enhancement of qualification and creation of conditions for professional development of teachers, university lecturers in university and principals		9 779 150	3	9 779 150
Development of system for evaluating secondary schools and ranking system of higher education in Republic of Bulgaria		3 911 660	2	3 891 163
Assistance in the introduction of delegated budgets		7 823 320	1	7 823 318
Development of mechanisms for school and students practices		3 911 660	62	3 964 393
Support for the development of Phd students and Phd graduates, post doctoral students, and young scientists		3 911 660	20	3 896 383
Pupils and students practices		3 911 660	50	3 389 189
Support to the development of PhD students, post-doctoral students, post-graduate students and young scientists		9 779 150	21	9 659 678
To turn knowledge in skills		8 000 000		
Science and business		5 000 000		
<b>Total Priority Axis 3</b>	<b>474 824 506</b>	<b>95 144 860</b>	<b>160</b>	<b>81 519 875</b>
Establishment of a favourable multicultural environment for practical application of intercultural education		5 574 116	64	5 324 086
Educational services to students, lagging behind with curriculum and children with prominent talents		4 889 575	2	4 889 575
"Let's make the school attractive to the young people"		9 779 150	251	9 785 201
Students scholarship for provision of equal access to education and increasing motivation for better results		39 116 600	1	39 116 600
"Let's make the school attractive to the young people"		21 120 000	144	20 514 241
"Support for the education of children and students with special educational needs"		10 000 000		
"Integration of children and students from ethnic minorities within the educational system"		12 000 000		

Students scholarship and awards		46 799 600		
Development of distance learning forms within the university educational system		30 000 000		
"Let's make the school attractive to the young people"		100 000 000		
Adult literacy		15 000 000		
<b>Total Priority Axis 4</b>	<b>379 859 605</b>	<b>294 279 041</b>	<b>462</b>	<b>79 629 704</b>
Care in family environment for independent and decent living of people with different types of disabilities and people living alone – activities “Social assistant” and “Domestic assistant”		44 337 450	252	23 361 304
Improvement of the service “Personal assistant” for people with different types of disabilities and for people who live along		38 747 500	2	38 747 498
Better future for children		19 558 300	43	8 693 328
Health information campaigns		4 693 992	1	4 692 754
National campaign for early diagnostics of oncologic diseases		19 558 300	1	19 558 282
Social entrepreneurship – popularization and support to social enterprises /Pilot phase /		15 680 000	43	9 966 010
Social services for social inclusion		23 015 000		
National information and promotion campaigns for encouraging health life throughout physical activity		3 500 000		
<b>Total Priority Axis 5</b>	<b>332 377 153</b>	<b>169 090 542</b>	<b>342</b>	<b>105 019 176</b>
Specialized survey and analysis of intervention possibilities on vulnerable groups on the labour market, inactive and discouraged persons		1 564 664	1	1 558 584
Development and introduction of information systems and databases, supporting the system for social assistance and provision of social services and social inclusion		16 624 555	1	16 624 555
Development of an integrated system of MLSP		24 917 274	1	24 916 867
Support of accreditation of the medical institutions, specializations and continuance of the medical personnel training	7 823 320	3 312 536	1	3 312 536
Increasing the professional qualification through introduction of good clinical practices in the system of emergency medical aid		6 258 656	1	6 258 656
Modernization of the system of service delivery		7 400 000	1	7 399 464
Improvement of the capacity of the NEA to conduct effective active policy on the labour market through development of modern system for telecommunication and data transfer		3 324 000	1	3 323 739
Increasing the efficiency of the monitoring activity of Executing		6 500 000		

Agency “General Labour Inspectorate”				
Improvement of quality and increasing efficiency of services in social sphere in Bulgaria		10 000 000		
Model of coordination mechanism of the bodies for child protection		1 800 000		
Improving efficiency and effectiveness of instruments through which policies for social inclusion and social services are implemented		6 500 000		
Development planning skills for alternative services supporting child and family		925 000		
Creation of unified management system of the whole process for realization of state policy for working with people with disabilities in Bulgaria		2 000 000		
Improving health care services through the creation of a platform for information and distance training		10 000 000		
<b>Total Priority Axis 6</b>	<b>118 706 127</b>	<b>94 626 685</b>	<b>7</b>	<b>63 394 402</b>
Support for the “Structural funds and international education programmes” Directorate in MES for the management of Priority Axes 3 and 4 of OPHRD		20 105 389	2	18 291 813
Support for the Employment Agency for the management of Priority Axes 1 and 2 of OPHRD		21 780 837	2	16 350 839
Support for the Social Assistance Agency for the management of Priority Axis 5 of OPHRD		7 818 763	2	7 306 110
Support for “European funds, International programs and projects” General Directorate for the management of OPHRD		27 575 406	2	17 510 919
Support for the provision of information of “Human Resources Development” Programme		15 646 640	1	15 646 640
Strengthening the capacity of potential beneficiaries of “Human Resources Development” Programme		2 037 867	1	2 037 867
<b>Total Priority Axis 8</b>	<b>94 964 901</b>	<b>94 964 901</b>	<b>10</b>	<b>77 144 187</b>

**Annex 2**

<b>Reference on the accepted applications for support within the launched measures of RADP toward November 2, 2009</b>			
<b>Measure</b>	<b>Number of accepted applications</b>	<b>Expenses applied for</b>	<b>Subsidy</b>
<b>Priority Axis 1</b>			
<i>111 " Training, Information and Diffusion of Knowledge "</i>	91	30 137 365	Data are not entered
<i>112 " Setting up of Young Farmers "</i>	5 431	265 532 452	265 532 452
<i>121" Modernisation of Agricultural Holdings "</i>	2 595	1 374 250 708	687 125 354
<i>122 " Improving the Economic Value of Forests "</i>	-	-	-
<i>123 " Adding Value to Agricultural and Forestry Products "</i>	138	357 518 245	178 759 122
<i>141 " Supporting Semi-Subsistence Farms Undergoing Restructuring "</i>	663	9 725 365	9 725 365
<i>142 " Setting up of Producer Groups "</i>	1	58 675	58 675
<i>143 " Provision of Farm Advisory and Extension Services in Bulgaria and Romania (2007-2009)"</i>	-	-	
<b>Priority Axis 2</b>			
<i>223 " First afforestation of non-agricultural land "</i>	45	7 096 265	6 737 708
<i>226 " Restoring forestry potential and introducing prevention actions "</i>	45	4 627 623	4 238 948
<b>Priority Axis 3</b>			
<i>311 " Diversification into Non-Agricultural Activities "</i>	45	23 107 566	16 175 296
<i>312 " Support for the Creation and Development of Micro-Enterprises "</i>	787	361 430 391	253 001 274
<i>313 " Encouragement of Tourism Activities "</i>	25	9 269 823	9 269 823
<i>321 " Basic Services for the Economy and Rural Population "</i>	511	1 883 942 858	1 871 237 104
<i>322 " Village Renewal and Development "</i>	295	429 037 082	428 513 269
<i>511 "Technical assistance"</i>	-	-	
<b>TOTAL:</b>	<b>10 672</b>	<b>4 725 597 053 ЛВ</b>	<b>3 730 374 391 ЛВ</b>
<b>TOTAL in euro:</b>		<b>€ 2 416 159 407</b>	<b>€ 1 907 310 140</b>
<b>Reference towards 02.11.2009 г.</b>			

<b>Projects with signed contracts by Executive director/Deputy executive director</b>			
<b>Measure</b>	<b>Number</b>	<b>Approved expenses</b>	<b>Subsidy</b>
112	2 566	123 965 038 BGN	123 965 038 BGN
121	1 427	685 956 871 BGN	366 386 798 BGN
223	20	1 434 222 BGN	1 193 119 BGN
226	18	1 660 258 BGN	1 660 258 BGN
321	72	241 469 016 BGN	241 305 474 BGN
322	144	159 137 382 BGN	158 829 842 BGN
	<b>total:</b>	<b>1 213 622 787</b> BGN	<b>893 340 529</b> BGN

<b>Approved projects with no signed contracts</b>			
<b>Measure</b>	<b>Number</b>	<b>APPROVED EXPENSES</b>	<b>SUBSIDY</b>
112 With approval order	61	2 988 512	2 988 512
121 With approval order	9	2 277 864 BGN	1 158 706 BGN
223 With approval order	-	- BGN	- BGN
226 With approval order	-	- BGN	- BGN
321 With approval order	-	- BGN	- BGN
322 With approval order	-	- BGN	- BGN
	<b>total:</b>	<b>5 266 376</b> BGN	<b>4 147 218</b> BGN

112 Total:	2 627	126 953 550 BGN	126 953 550 BGN
121 Total:	1 436	688 234 735 BGN	367 545 505 BGN
223 Total	20	1 434 222 BGN	1 193 119 BGN
226 Total	18	1 660 258 BGN	1 660 258 BGN
321 Total	72	241 469 016 BGN	241 305 474 BGN
322 Total	144	159 137 382 BGN	158 829 842 BGN
<b>Total:</b>	<b>4 317</b>	<b>1 218 889 163</b> BGN	<b>897 487 748</b> BGN

## ***LIST OF ACRONYMS***

<b>NSRF</b>	National Strategic Reference Framework
<b>OPHRD</b>	Operational Programme Human Resources Development
<b>OPRD</b>	Operational Programme Regional Development
RADP	Rural Development Programme (2007-2013)
NSRD	National Strategy for Rural Development
MAF	Ministry of Agriculture and Food
MLSP	Ministry of Labour and Social Policy
MEYS	Ministry of Education, Youth and Science
MRADPW	Ministry of Regional Development and Public Works
MA	Managing Authority
MC	Monitoring Committee
PA	Payment Authority
LAG	Local Action Group
SLD	Strategy for Local Development
NSI	National Statistic Institute
NAAS	National Agriculture Advisory Service
OP	Operational Programme
NCCEDI	National Council for Cooperation on Ethnic and Demographic Issues
FPWIRBS	Framework Programme for Equal Integration of Roma in Bulgarian Society
NAP	National Action Plan for implementation of the Decade of Roma Inclusion 2005-2015
EC	European Community
EC	European Commission
EU	European Union
EAFRD	European Agricultural Fund for Rural Development
ESF	European Social Fund

## ENDNOTES:

- <sup>1</sup> See more in: Център „Амалипе“, *Годишен доклад за изпълнение на политиките, насочени към ромска интеграция в България – 2006*. В. Търново: Астарта, 2007, р. 33-35. Available at: [http://amalipe.com/files/publications/080108\\_Doklad-bg.pdf](http://amalipe.com/files/publications/080108_Doklad-bg.pdf); Center Amalipe, *The Roma Strategies in the Eve of EU Accession*. 2006
- <sup>2</sup> Център „Амалипе“, *Годишен доклад за изпълнение на политиките, насочени към ромска интеграция в България – 2006*. В. Търново: Астарта, 2007, р. 134 - 154. Available at: [http://amalipe.com/files/publications/080108\\_Doklad-bg.pdf](http://amalipe.com/files/publications/080108_Doklad-bg.pdf)
- <sup>3</sup> <http://amalipe.com/index.php?nav=news&id=220>
- <sup>4</sup> More for the concrete aspects of the campaign and the achieved results Център „Амалипе“, *Годишен доклад за изпълнение на политиките, насочени към ромска интеграция в България – 2006*. В. Търново: Астарта, 2007, с. 134 – 154. Available at: [http://amalipe.com/files/publications/080108\\_Doklad-bg.pdf](http://amalipe.com/files/publications/080108_Doklad-bg.pdf)
- <sup>5</sup> OPHRD, p. 72. Available at [http://ophrd.government.bg/view\\_doc.php/1433](http://ophrd.government.bg/view_doc.php/1433)
- <sup>6</sup> Ibid, p. 72
- <sup>7</sup> Ibid, p.72
- <sup>8</sup> Operational Programme “Regional Development”, p. 27
- <sup>9</sup> Нунев, Й. 2006. Ромите и процесът на десеграция в образованието. Изд. „Куна“, С., стр. 64
- <sup>10</sup> This term is for the children between 7 and 16 years., who – under the Constitution of Bulgarai have to visit school in compulsory manner
- <sup>11</sup> „Concrete beneficiaries” are institutions, indicated in the OP. They are eligible to receive sources from the so called “procedure of direct provision of resources”, and not through procedure of competitive selection of projects, which gives them the opportunity to receive larger amounts and to realize larger interventions.
- <sup>12</sup> See more in: Adam Kullman, *Roma integration with EU funds in Hungary, with focus on the least developed micro-regions*. Available at: <http://amalipe.com/files/file/news/Kullmann.pdf>
- <sup>13</sup> In the Monitoring Committees of the rest of the Ops the Roma organizations elected their representatives but entering into groups of other NGOs.
- <sup>14</sup> By itself, the provision of a solid financial resource to the social partners through procedure for provision of fund should be greeted. The approach is in accordance with the published in the internet page of the European Commission (DG EMPL) technical fiche “The social partners as beneficiaries – support from the ESF to the social partners in the period 2007 -2013”
- <sup>15</sup> *Годишен доклад по изпълнението на ОПРЧР за 2008 г.*, с. 40
- <sup>16</sup> Ibid, p. 103
- <sup>17</sup> MEYS, Announcement for open procedure for competitive selection of projects *BG051PO001/07/4.1-01*. Available at: <http://sf.mon.bg/index.php?w=multicultural280707141739>
- <sup>18</sup> See detailed analyses of the programme in: Център „Амалипе“, *Годишен доклад за изпълнение на политиките, насочени към ромска интеграция в България – 2006*. В. Търново: Астарта, 2007, с. 59 – 70. Available at: [http://amalipe.com/files/publications/080108\\_Doklad-bg.pdf](http://amalipe.com/files/publications/080108_Doklad-bg.pdf)
- <sup>19</sup> *Годишен доклад по изпълнението на ОПРЧР за 2008 г.*, с. 74
- <sup>20</sup> *Годишен доклад по изпълнението на ОПРЧР за 2008 г.*, с. 41
- <sup>21</sup> *Годишен доклад по изпълнението на ОПРЧР за 2008 г.*, с.115
- <sup>22</sup> Справочник за ромите, Институт Отворено общество – София, 2008
- <sup>23</sup> National Housing Strategy, 2002
- <sup>24</sup> Bulletin of Center Amalipe
- <sup>25</sup> OPRR, p. 186
- <sup>26</sup> Ibid, p. 120
- <sup>27</sup> Ibid, p. 118
- <sup>28</sup> Source: DG “Programming of regional development”, Department “Implementation of regional priorities”: “Invitations for selection of project proposals under OPRR 2007 - 2013, evaluation of project proposals, contracting, problems and gained experience”, April 30<sup>th</sup>, 2009
- <sup>29</sup> The North-West region is the poorest region in the EU: [http://webcafe.bg/id\\_1191176596](http://webcafe.bg/id_1191176596)
- <sup>30</sup> Review of the first open schemes under OPRR 2007 – 2013, Summary, January 2010

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## ***References to section “Rural Development Programme”***

1. Council regulation (EC) 1698/2005
2. National Strategic Plan on Rural Areas Development 2007-2013;
3. Annexes to National Strategic Plan on Rural Development 2007-2013;
4. Rural Areas Development Programme 2007-2013;
5. Annexes to Rural Development Programme 2007-2013;
6. Communication Plan of the Rural Development;
7. Decisions of Monitoring Committee sessions on Rural Development Programme;
8. List of members of the Monitoring Committee on RDAP
9. Protocols of sessions of Working groups of the Monitoring Committee of RADP;
10. State Fund “Agriculture”, Paying Agency -- “Progress in the implementation of SAPARD Programme and Rural Development Programme 2007 – 2013”
11. National Audit Office – Report on the results of audit of systems for application of the National Strategic plan on Rural Development and the National Strategic Plan on Fisheries and Aquaculture for the period 1.1.2006 to 30.06.2008
12. UNDP Report on Human Development of Roma in Central and Eastern Europe, 2001
13. Report “Roma in Expanding Europe – challenges for the future”, 30 June – 1 July, 2003, Budapest
14. Census of agriculture farms, 2003, Ministry of agriculture and food, Directorate Agro statistics.