



*Structural Funds: Investing in Roma*

# EUroma Report

Roma and the Structural Funds



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Legal Deposit: M.15015-2010

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# Presentation

## The

EURoma network was created in the context of the 2007-2013 European Social Fund (ESF) programming period which increased the scope of transnational cooperation between the European Commission, Member States and other relevant actors. EURoma is constituted by 12 Member States: Bulgaria, the Czech Republic, Finland, Greece, Hungary, Italy, Poland, Portugal, Romania, Slovakia, Spain and Sweden. It was an initiative of the Spanish Government, through the ESF Managing Authority, together with the *Fundación Secretariado Gitano* (FSG), which acts as Technical Secretariat.

EURoma is an unprecedented, innovative and flowering initiative, which is playing a key role in reinforcing cooperation between Managing Authorities and public agencies responsible for policies tackling Roma inclusion. As we are reaching the mid-point of the 2007-2013 ESF programming period, it is an appropriate moment to pause and reflect on the achievements, shortcomings and challenges ahead for mainstreaming Roma-related issues in the implementation of programmes co-financed by Structural Funds, and for the EURoma network itself. Adding value to existing practice and offering a vision for the future is the aim of this 2010 report on EURoma's activities.

The present report provides a rigorous analysis of available data related to the use of Structural Funds for the improvement of the conditions under which the Roma population lives. Following an introduction of the context within which EURoma was created, tracing the economic, political and institutional transformations that conditioned its initial development, it expounds the process of constitution and activities of the Network before undertaking a critical analysis of Structural Funds as a policy and financial instrument for tackling Roma problems. It concludes by identifying the lessons learned and future challenges for the network.

Within the context of the recent ratification of the Lisbon Treaty<sup>1</sup> and of the Spanish Presidency of the European Union (EU), which will sponsor the adoption of the future EU 2020 Strategy, it is an ideal moment to stimulate reflection and debate, not only at the national level but EU-wide to ensure that the future Regulations of Structural Funds and their implementation not only have a more inclusive approach, but that they focus particularly on fighting social inequalities.

# Executive summary

**The Roma population** constitutes the most numerous ethnic minority in the European Union (EU), totalling close to 12 million citizens. The Roma are present throughout the European continent but are highly concentrated in Central and Eastern Europe. Demographic reasons but also the pressing need to achieve social cohesion justify the growing concern for and interest in Europe's Roma community. Indeed, the living standards of a high proportion of Roma persons remain characterised by extreme poverty, social exclusion and general rejection by the majority population.

The **recent EU enlargements**, which have been accompanied by **large-scale migratory processes**, have stimulated public and private initiatives designed to facilitate the integration of the Roma community and to reduce the social inequalities experienced by Roma persons. An increased interest by EU institutions in mainstreaming these initiatives prompted the issue of Roma inclusion to acquire political relevance on the European agenda in recent years. In addition to various resolutions by the European Parliament, it has been included on the agenda of the Council, the Commission has taken a number of measures and new political instruments and institutional mechanisms have been developed, including the Integrated Platform and the 10 Common Basic Principles for Roma Inclusion. The relevance of these actions will be further enhanced as the ongoing process of EU enlargement in the Western Balkans is likely to intensify migratory processes and will highlight the vast inequalities experienced by the Roma throughout the European continent.

The Roma population faces a number of **problems**, including poor health and inadequate access to healthcare, housing and educational segregation, and marginalisation from the labour market. It is disproportionately affected by discrimination and stereotypes. This situation in many countries has been worsening significantly in the past two decades. The **recent economic crisis**, which has shaved off all the advances made in terms of growth, poverty reduction and social inclusion in the past decade throughout the EU, is having particularly profound effects on the living conditions of many Roma communities.

Roma-related issues have acquired political relevance on the European agenda in recent years. In addition to various resolutions by the European Parliament, it has been included on the agenda of the Council, the Commission has taken a number of measures and new political instruments and institutional mechanisms have been developed. Following the first **European Roma Summit** held in Brussels in September 2008, the **Integrated Platform for Roma Inclusion** was created. The Platform is an open mechanism of cooperation between Member States, civil society actors and European institutions with the purpose of supporting initiatives, mutual learning and better understanding of Roma issues. The **ten Common Basic Principles** established within the framework of the Platform are intended to guide public policies and projects for Roma.

**Structural Funds, in particular the European Social Fund (ESF)**, are the main financial and political instruments at the disposal of Member States to design and implement policies aimed at enhancing social cohesion and reducing inequalities within the EU. Structural Funds are therefore a particularly relevant means of bridging the gap between the majority population and the Roma minority. The year 2007 was considered an ideal juncture to move forward jointly with initiatives, measures and programmes which take advantage of the experience gained and to set the stage for a shared strategy which allowed us to take a quantum leap in terms of the social inclusion of Europe's Roma population, by generalising the inclusion of Roma-related issues in the Operational Programmes (OP) of EU Member States.

It is within this social, regulatory and political context that the **EURoma** initiative took shape in 2007 under the impetus of the *Fundación Secretariado Gitano* and the Spanish ESF Managing Authority, which were joined by the ESF Managing Authorities of eleven other Member States. In accordance with the General Regulations of the ESF regarding the sustainable integration of minorities in the labour market,<sup>ii</sup> and in order to improve the social inclusion of the Roma in terms of political initiatives, regulatory development and the allocation of resources, it was decided that a transnational network would be established to develop a common approach under the Structural Funds.

EURoma was created in the context of the **2007-2013 ESF programming period**, which increased the scope of transnational cooperation between public authorities and civil society actors, and in light of 1) the need to guarantee the fundamental rights of the Roma population; 2) the enlargement of the EU through the incorporation of countries with the highest concentration of Roma populations; 3) the fact that Structural Funds, and particularly the ESF, were identified as the main financial instruments for the implementation, by Member States, of policies fostering social inclusion, cohesion and employment opportunities; 4) the growing importance of transnational exchange and learning, upheld by the ESF regulations for 2007-2013; and 5) the Spanish experience of effectively using the ESF for the inclusion of the Roma.

Within the framework of the new regulations of Structural Funds, many countries, especially those with a larger Roma population, have launched a number of **programmes and projects** aiming to improve Roma living conditions, to facilitate their social inclusion and to reduce the gap with the majority population. These programmes are not only oriented towards tackling Roma needs but are also working on systems and capacity building of the institutions dealing with Roma and other vulnerable groups.

Despite the fact that many programmes are still in an early phase of planning or implementation and although delays can be observed in several cases, it is beyond doubt that **Structural Funds are not only an opportunity for investing in Roma communities but also a pool for designing more effective long-term policies** involving different actors in close coordination with national social and employment policies.

The experience of the EURoma network is brief; nevertheless, it has created a lot of expectations not only among its Member States but also by Community institutions for its ability to take advantage of the opportunities offered by the new ESF regulations to undertake transnational activities and to add value to existing programmes and projects. Several seminars and workshops organised by EURoma have tackled relevant and interconnected issues, including horizontal and vertical coordination for the effective implementation of policies, local capacity building, strategies for labour market insertion and other related issues.

## This report shows that:

- Many Member States have actively tackled Roma needs within the framework of the new Structural Funds programming period, not only with the ESF but with other Structural Funds and other financial instruments.
- Roma are mentioned in different fields within Member States' Operational Programmes, to different extents, sometimes as an explicit target group, otherwise among vulnerable groups that benefit from Operational Programmes.
- Despite these efforts, there are few indications that general programmes aiming at inclusion, employment and local development are mainstreaming Roma issues.
- The report presents available results; however, the short period of time that has lapsed since the initiation of projects prevents the elaboration of a complete picture of achievements and shortcomings.
- In current projects implemented within the framework of Structural Funds, different types of Managing Systems can be observed. Either programmes are managed centrally and implemented countrywide, or they are managed at the regional and local levels and focused on a particular geographical area.
- Civil society participation, in particular Roma involvement, has been improving, especially in the planning process. There remains a need for further Roma participation in all the project cycle: planning, implementation, monitoring and evaluation.

At present, and as we are approaching the mid-point of the current programming period, it is time to reflect on past and present shortcomings and achievements, in order to **tackle future challenges:**

- Provide continuity and stability to existing projects in order to achieve not only short-term results but also sustainability.
- Improve the monitoring, evaluation and data collection systems to obtain a more accurate picture of the real impact of Structural Funds on Roma communities.
- Reinforce the role of EURoma not only as a space of information exchange but as a pivot for technical support involving the provision of instruments and the improvement of working methods.
- Highlight the opportunities offered by Structural Funds to strengthen the capacity of the Roma community, civil society as well as of the public bodies involved in Roma policies, especially at the local level.

A stylized, light green silhouette of a human figure with arms raised, set against a darker green background. The figure is positioned on the left side of the slide, with its arms reaching towards the top left corner where a semi-circle of stars is located. The figure's body is composed of several overlapping, curved shapes that suggest movement and energy.

Contextualising  
the creation  
of EURoma

1

## 1.1 Introduction

# The

Roma population has historically experienced widespread poverty, exclusion, discrimination and, occasionally, violence on the European continent. Within the EU's jurisdiction, despite a small number of effective private and public initiatives in specific contexts in the past decades, the Roma communities have not reaped the benefits of sustained economic growth. Except in particular Member States, where the manifest demographic weight of Roma citizens compelled an acknowledgement by civil society and state actors of the need to address the issues of inequality, segregation and discrimination specific to the Roma, Roma-related issues remained overwhelmingly absent from the political agenda of most Member States as well as the EU until the dawn of the twenty-first century. However, a number of transformations in political, institutional and economic fields have taken place since the turn of the century, which are generating adequate conditions for a qualitative leap in the social inclusion of, and the reduction of the inequalities experienced by, Roma persons. The expansion of the EU to countries with large Roma minorities, accompanied by large-scale Roma migratory movements towards Western Europe, has significantly increased the salience of Roma-related issues on the European agenda. Meanwhile, Central and Eastern European states have had an unprecedented opportunity to use Structural Funds, in particular the European Social Fund (ESF), for the economic and social development of the Roma population.

The achievements and shortcomings of the 2000-2006 programming period in EU Member States stimulated a renewed commitment to turn Structural Funds into a potent financial and political instrument for the inclusion of Roma persons. The Structural Funds regulations for the 2007-2013 programming period, to which we will return in the third chapter, were defined by enhanced flexibility in their operation; placed added emphasis on targeting ethnic minorities; and increased the importance of transnational projects. The Roma population,<sup>iii</sup> present throughout the EU, and sharing a situation of





exclusion and discrimination in all Member States, were a particularly pertinent target group for the 2007-2013 programming period. Indeed, the inequities lived by the Roma population are outstandingly transnational in nature, because they are common to all Member States, albeit to different degrees.<sup>iv</sup> Hitherto excluded from policies designed to combat social exclusion, both Roma and governments were therefore given an unprecedented opportunity to take advantage of the funds and actions targeting access to employment and social services, implemented within the framework of the Structural Funds.

This introductory chapter examines the context within which EURoma was created, tracing the economic, political and institutional processes that conditioned its initial development. It expounds the socio-economic conditions under which the European Roma minority lives, emphasising national divergences before focusing on the radical political and institutional transformations that have been taking place at the European level and that are facilitating a more effective use of Structural Funds for the reduction of the inequities experienced by the Roma.



## 1.2 Socio-economic context

The Roma minority experiences significantly lower living standards than the majority population in all EU Member States, historically determined by social prejudices, stereotypes,<sup>v</sup> ghettoisation and a lack of political commitment to their social inclusion. The European Council has therefore asserted that: «Although the Roma within the European Union and its neighbouring countries have the same rights and duties as the rest of the population, they in fact form a group that is disadvantaged in several respects and is particularly vulnerable to social exclusion, poverty and discrimination [...]».<sup>vi</sup>



The Roma population is heterogeneous and has been undergoing profound changes in the past decades, the most noteworthy of which being the elimination of traditional labour activities and of nomadic lifestyles in some Member States, urban migration, and more recently, migration from Eastern Europe to the rest of the EU as a consequence of the rise of unemployment rates and worsening living standards. However, generally speaking, a wide and in some cases widening gap defines the living conditions (in the fields of health, education, labour and housing) of the Roma and the majority population.<sup>vii</sup> Crucially, these social fields must not be taken as separate and determined by distinct factors, but as elements of a whole: each social field influences and is influenced by other fields. This understanding is increasingly informing the EU's integrated policy towards the Roma: it has repeatedly emphasised that a holistic approach, which seeks to redress geographical, national/ethnic and income inequalities EU-wide, should systematically and concurrently target education, professional training, employment, health and housing through effective and efficient fiscal and organisational instruments.<sup>viii</sup>

These socio-economic indicators demonstrate that Roma-related issues affect all Member States similarly, thereby constituting an essentially European situation, which requires a *European* response and EU leadership in accordance with the principle of subsidiarity. Despite a quite common labour market situation throughout the EU,<sup>ix</sup> the latter's expansion has shed light on diverging socio-economic tendencies for the Roma, which affects negatively the EU's territorial cohesion and undermines the social pillar of the Lisbon Strategy,<sup>x</sup> has been defined by rising living standards in Western Europe on the one hand, and stagnation or decline in Eastern Europe on the other, affecting particularly the Roma.<sup>xi</sup> While a manifest improvement occurred in countries such as Spain, home to more than 650,000 Roma,<sup>xii</sup> the post-1990 context in Central and Eastern European countries was highly detrimental to the Roma minority: the transition to a capitalist economy induced a significant deterioration of the Roma's socio-economic situation.<sup>xiii</sup>



## Demography and health

The health situation of the Roma is particularly troubling: a recent study undertaken within the framework of the EU's Public Health Programme reported that 15 percent of the European Roma population is suffering from a chronic illness or disability, while access to healthcare remains inadequate: 32.5 percent of those Roma persons surveyed had never seen a dentist, while close to 40 percent of Roma women aged 16 and over had never been to the gynecologist (15.9 percent) or had never gone for reasons other than pregnancy (23.9 percent). The systematic difficulties encountered by Roma in accessing health services are in part conditioned by geographical segregation and discrimination.<sup>xiv</sup>

The health situation of the Roma conditions their life expectancy and their demographic makeup. The European Roma population is significantly younger than the overall population (an average of 25.1 years old in seven Member States, compared to 40.24 years in the EU-27; 62.38 percent of the Roma population is under 29 years old, compared to 34.98 percent in the EU-27).<sup>xv</sup> Although exact figures are unavailable, the average life expectancy of Roma is expected to be significantly lower than the overall EU population (around 63 years old in Romania).<sup>xvi</sup> Only 2.65 percent of the Roma population is above 65 years old, while the elderly rate reaches 17.04 percent in the EU-27. The child dependency index is 57.77 compared to 23.33 in the EU, while the elderly dependency index reaches 4.11, starkly lower than the EU-27 (24.93).<sup>xvii</sup> Despite a gradual decline in birth rates among Roma, the replacement index (reflecting the population between 15 and 39 for every 100 people aged 40 to 64) remains significantly higher among Roma (231) than for the overall population (101). As pointed out by the European Commission, the fact that the Roma populations include such a large proportion of young people and children increases the urgent need to break the vicious circle of inter-generational transmission of poverty and severe social exclusion.<sup>xviii</sup>



## Education

Educational levels, affected by housing segregation, among other factors, are also profoundly deficient, and determine Roma's limited access to the labour market. According to recent comparative study of 7 EU Member States, 43.6 percent of surveyed Roma had not completed primary education, while only 23.7 percent had completed secondary studies and an insignificant minority had a university degree.<sup>xix</sup>

Segregated education and special-needs schools documented in several central and Eastern European states by the Roma Education Fund and the UNDP have perpetuated the educational inequities affecting the Roma. In Central and Eastern European states, according to respondents of a UNDP survey carried out in 2004, circa 14 percent of the children attend classes comprised mostly of Roma, in so-called «Gypsy schools» or «special schools for the mentally disabled».<sup>xx</sup>

However, desegregation efforts such as the Czech government's abolishment of special education schools targeting Roma and the Hungarian government's substantial investments in integrated schooling, supported by the European Union institutions and the Roma Education Fund,<sup>xxi</sup> are beginning to bear fruits despite the practical difficulties of overcoming de facto, spatial segregation.

## Employment

The European Roma population, because of low educational levels and a lack of professional training as well as discriminative practices by employers, remains significantly marginalised from the formal labour market. This labour market situation is conditioned by traditions and historical reasons, including high segregation levels, educational deficiencies (poor schooling and high early drop-out rates), low participation in regular training schemes, but also inter-subjective perceptions and de facto discrimination in training and employment.<sup>xxii</sup>

Roma unemployment is estimated at 64% in Slovakia, 51% in Bulgaria, 32% in Czech Republic, 25% in Hungary and Romania,<sup>xxiii</sup> 34% in Greece and 14% in Portugal.<sup>xxiv</sup> Roma women are also affected by higher unemployment rates and lower employment opportunities than Roma men. However, Roma participation in informal labour activities is on average four (or more) times more prevalent than in the majority population in the EU.<sup>xxv</sup> High unemployment, underemployment and inactivity rates among Roma are compounded by high poverty rates (including child malnutrition).<sup>xxvi</sup> The poverty rate of the Roma generates a cycle of dependency on state welfare that is difficult to break. However, the confinement in informal activities of a high proportion of Roma signifies that large numbers fail to pay the taxes required to finance social security: «This causes "asymmetrical" Roma participation in social welfare systems: active regarding benefits, limited regarding contributions. This asymmetry can further promote exclusion and ethnic intolerance.»<sup>xxvii</sup>

## Housing

A relatively high percentage of the Roma population lives in inadequate housing conditions (sub-standard housing or shanty towns),<sup>xxviii</sup> which negatively affects their health situation.<sup>xxix</sup> Roma persons also experience high levels of discrimination on ethnic grounds in their access to housing (from 1 percent in Bulgaria, a low response likely to be conditioned by extensive geographical isolation, to 32 percent in Greece).<sup>xxx</sup> Despite desegregation efforts in various Member States (Spain, Hungary), segregation remains manifest in many EU Member States, severely hindering Roma access to education, employment and healthcare.<sup>xxxi</sup>

The aforementioned demographic trends, combined with educational, labour, housing and health data, illustrate the severe challenges that the EU is facing with regards to the improvement of the living conditions of the Roma population. However demographic changes ought to be seen as an opportunity. The Roma have a higher activity rate than the general population (13 points difference in Spain, for example) and a longer and earlier active life. A young, dynamic, growing and *productive* Roma workforce can be an asset for the EU's ageing population, provided adequate measures are implemented, and a massive investment of human and financial resources is made to facilitate their active participation in a competitive, capital intensive and knowledge-based economy, which is the hallmark of the Lisbon Agenda and of the EU 2020 strategy<sup>xxxii</sup>.

Progress has been made, in terms of political awareness and involvement, data collection, grassroots intervention and practical know how. Furthermore, the increasing body of successful projects in education, housing and employment, thanks in part to the effective use of Structural Funds, can help to generate a *common* understanding of Roma-related issues –illustrated by the 10 Common Basic Principles engendered by the EU's First Integrated Platform for Roma Inclusion–, and the identification of best practices that can be transferred to other contexts.



## The impact of the global economic crisis

The economic downturn is indubitably affecting negatively the effectiveness of projects implemented within the framework of Structural Funds. It is introducing new pressures on OPs due to an increase in demand from beneficiaries, their type of needs and their profile, but has also had a negative impact in terms of the difficulty of responding with scarce resources, slowdown and greater difficulty when attempting to incorporate people into the job market or to generate direct job placements. Faced with these challenges, Managing Authorities are forced to adapt to the need of elaborating new strategies and services.

- **First of all, the economic downturn has contributed towards an acceleration of already deteriorating living conditions for many Roma.** It must be remembered that many Roma with previously low income levels and a very low educational levels, which signifies that the poverty experienced has worsened, forcing them to resort to informal economic activities. Problems related to health and the quality of life have also worsened, as have housing conditions (overcrowding, forced evictions...).
- **The main effect of the economic downturn has been to undermine already scarce opportunities to obtain employment contracts.** For those Roma as well as other vulnerable groups who had managed to obtain access to employment and had kept their jobs, the downturn has meant a regression in employment opportunities. Although the economic crisis affects society as a whole, it is likely that Roma have suffered disproportionately, although precise data on the concrete impact of the crisis on Roma is not yet available.
- Furthermore, faced with scarce resources, the climate of tension grows and tends to cause a feeling of rejection, particularly for Roma. According to the latest European barometer, the feeling of rejection from employment that people perceive has substantially increased.<sup>xxxiii</sup>



## The gender dimension

Working towards the promotion of the Roma population requires the systematic integration of a gender perspective by all actors, which takes into account the fact that problems are more acute among Roma women.<sup>xxxiv</sup> Roma women suffer a double discrimination; firstly for being women, and secondly for being Roma. As women, they are affected by the discrimination and the difficulties for work insertion and promotion, just as most other women in the EU. However, they also face a series of disadvantages for pertaining to an ethnic minority disregarded by the majority society, and because their feminine identity continues to be constructed within a patriarchal society. In order to address this multiple discrimination, any policy aimed at reducing inequalities should focus particularly on the specific conditions and needs of Roma women, as emphasised in principle 5 of the Ten Common Basic Principles for Roma Inclusion.<sup>xxxv</sup>

The Roma social organisation is founded on the family. It is the key institution and the foundation of its population, defined by patriarchy. The role and function of women is directly conditioned by family networks and its position regarding Roma men. In the Roma population, the authority of each sex is recognised and practiced in different fields; the public sphere is associated with men and the private sphere with women. The world of women is the world of the everyday, of the home, of the family, and involves scarce participation in public spaces. From childhood to adolescence, Roma women are prepared for their marriage. A series of values are instilled in them, such as: respect for the figures of the man and the elder, chastity, family care.

Nonetheless, the realities lived by Europe's Roma women are diverse, just as non-Roma women. Furthermore, the European Roma minority is in a process of intense transformation, and as a consequence of these changes, Roma women are beginning to develop new roles. Today's Roma women are struggling between



two worlds; their contribution to the perpetuation of the roles and traditions on the one hand, and the felt necessity of her cultural promotion. Therefore, traditional values coincide with emerging values of participation and realisation of the Roma woman in other societal fields.

The involvement of Roma women in the activities carried out within the framework of Structural Funds, for instance training courses, vocational guidance, job placements and education at all levels allows them to improve their personal development, enhances their independence and improves their social status by interacting with broader society.

## 1.3 Political Context

*Entering the twenty-first century: placing the Roma issue on the EU agenda*

In the past decades, a general process of democratisation has been under way in many current EU Member States, in Mediterranean countries and post-Soviet regimes. This process has been accompanied by the establishment of Constitutions acknowledging the equality of all citizens under the law, which has provided an unprecedented opportunity for the exercise of the Roma community's civil rights. In legal terms, Roma persons are recognized as full-fledged rather than second-class citizens, which signals an improvement on the historical legacy of legal oppression throughout Europe.

Since the turn of the century, the admission of central and Eastern European countries with significant Roma population has stimulated the EU's growing interest in Roma-related issues. Furthermore, the Lisbon Agenda's focus on cohesion, inclusion and the drastic reduction of poverty levels by 2010,<sup>xxxvi</sup> as well as the ratification of the European Council's 2000/43 Race and Ethnicity Directive,<sup>xxxvii</sup> accentuated the relevance of actions targeting Roma exclusion and discrimination.



The years preceding the admission of Central and Eastern European states in the EU were therefore characterised by a qualitative leap in the interest and involvement of international organisations in Roma-related issues, including the Council of Europe,<sup>xxxviii</sup> the OSCE (through its Office for Democratic Institutions and Human Rights [ODIHR]),<sup>xxxix</sup> the World Bank,<sup>xl</sup> and the United Nations.<sup>xli</sup> At the same time, some national administrations, in collaboration with private organisations increasingly placed Roma inclusion on their social agenda. The EU in particular has constituted a crucial vector for placing the Roma on administrations' political agenda, and demonstrated a willingness to take leadership in addressing problems specific to the Roma. While prior to 2007 the Parliament spearheaded legislative attempts to bring prominence to the Roma issue, in 2007 the Council openly enhanced the prominence of the «very specific situation faced by the Roma» on the EU's social agenda<sup>xlii</sup>. This crucial political moment coincided with the 2007-2013 ESF programming period and the «2007 European Year of Equal Opportunities for All», which stimulated the EU to «significantly contribute to national action to promote Roma equality».<sup>xliii</sup>

This new context of political impulse and the creation of financial instruments more prone to act in favour of Roma provided the Managing Authorities of Structural Funds with the opportunity to constitute a transnational network that would work towards developing a common approach under the Structural Funds.

### *2008 and beyond: mainstreaming the Roma on the EU's political agenda*

Thanks to the initiatives of the European Commission, the European Parliament, national governments and civil society stakeholders, the year 2008 witnessed the occurrence of new high-level political events such as the EU Roma Summit (Brussels, 16 September 2008)<sup>xliv</sup> to mainstream Roma-related issues in social policy implementation. Commission reports and various legal initiatives by the European Parliament and Council have also helped to «funnel» conceptual principles and a common approach to



tackle Roma exclusion and inequalities.<sup>xlv</sup> This process has been consolidated in the EU's 10 Common Basic Principles for Roma Inclusion:<sup>xlvi</sup>

- 1.** Constructive, pragmatic and non-discriminatory policies
- 2.** Explicit but not exclusive targeting
- 3.** Inter-cultural approach
- 4.** Aiming for the mainstream
- 5.** Awareness of the gender dimension
- 6.** Transfer of evidence-based policies
- 7.** Use of Community instruments
- 8.** Involvement of regional and local authorities
- 9.** Involvement of civil society
- 10.** Active participation of the Roma

However, the renewed thrust to place the specific problems faced by the Roma on the EU's agenda has occurred within a profound economic crisis, which enhanced the relevance of the Lisbon Strategy's social pillar and the EU's commitment to social inclusion and cohesion. The present recession and its disproportionate effect on vulnerable groups are likely to inform the coming EU 2020 objectives,<sup>xlvii</sup> which, according to the European Commission's proposal, should put a strong emphasis on «empowering people in inclusive societies». In his Policy Guidelines for the next Commission, José Manuel Durão Barroso emphasised the need for a

*«Much stronger focus on the social dimension in Europe, at all levels of government. Immediate action will be required to fight unemployment today, but also to look ahead to those facing long-term structural barriers to employment, such as the young and low skilled. At the same time, we need to remember the needs of our ageing population and the most vulnerable in our society. This is the only way for us to ensure strong social cohesion as the hallmark of the European model of society».*<sup>xlviii</sup>

EU resolutions and summits have been translated into a number of concrete initiatives and programmes targeting Roma populations, as well as the creation of new institutional mechanisms for Roma inclusion. The number of studies, conferences and events has increased significantly in the past two years, contributing not merely to giving more visibility to Roma issues but to achieving consensus in terms of the focus of actions targeting Roma.

## 1.4 Strengthening institutional mechanisms

A process of increasing coordination, alignment, harmonisation and information exchange has been taking place in the past few years between public and private organisations, between different governance levels, and between the EU and other international organisations.

- **Alignment:** common objectives.<sup>xlix</sup>
- **Harmonisation:** common quantifiable indicators.
- **Coordination:** identification of the specific competencies of each institution. In this sense a clear division of labour between different organisations, taking into account their respective capacities and roles, is deemed crucial for an effective and efficient implementation of social inclusion policies, and in order to avoid the duplication of programmes.
- Transparent and systematic exchange of information between all stakeholders.

Along these lines, the European Commission has initiated an internal process of coordination between its Directorates-General, and is promoting a multilateral approach to issues specific to the Roma. Vladimir Spidla, former EU Commissioner responsible for Employment, Social Affairs and Equal Opportunities, thus stated that: «The Commission is keen to ensure that the situation of the Roma is taken into account



in all EU programmes and policies that could be significant in this context. To this end, a group has been set up comprising representatives of all the relevant Directorates-General, with the aim of exchanging best practices, coordinating policies and engaging in dialogue with participants from outside the institutions. The Commission also cooperates with other international organisations working to promote inclusion of the Roma, and is in regular contact with the Council of Europe, the OECD, the World Bank and other major players».<sup>i</sup>

These principles have defined, for example, the EU's Open Method of Coordination in the social field.<sup>ii</sup> A potentially crucial, if only incipient institutional mechanism promoting active Roma participation as well as adding substance to the notions of alignment, harmonisation and coordination is the Integrated Platform for Roma inclusion, which has emphasised the mobilisation of EU Structural Funds to implement policies to improve the situation of the Roma.<sup>iii</sup>



Coordination mechanisms ought to involve both public and private agents. An important example of public-private partnerships was the Decade of Roma Inclusion (2005-2015), a private initiative of the Open Society Institute involving initially eight European governments and the World Bank.<sup>liii</sup>

The *Acceder* programme developed by the *Fundación Secretariado Gitano* in Spain and co-financed by the ESF and Spanish municipalities and regional governments was, on its side, a salient example of functioning public-private partnerships.<sup>liv</sup>

The latter initiative, among others, demonstrated the opportunities of Structural Funds to 1) correct structural disadvantages and discrimination, but also to 2) articulate policies with a long term perspective, focusing on partnerships and synergies between public and private agents, and between European, national and local levels of governance; and to 3) generate mutual exchange and learning between stakeholders through transnational networks. These opportunities were acknowledged and crystallised in the Structural Fund regulations for the 2007-2013 programming period.<sup>lv</sup>

The creation of EURoma adequately incorporates the principles of the Open Method of Coordination as well as the opportunities offered by the Structural Funds for Roma inclusion.



The background is a solid dark blue. In the upper left, a series of white stars of varying sizes curves across the top. A large, light blue stylized figure of a person with arms raised is positioned on the left side. The text 'The EURoma network' is centered in white serif font.

# The EURoma network

2

## 2.1 What is EURoma?

**In** **June 2007**, the Spanish Government, through its ESF Managing Authority, together with the *Fundación Secretariado Gitano* (FSG) organised a seminar in Madrid inviting all EU Member States, primarily those harbouring large Roma minorities, to propose the creation of a European transnational network that would aim to improve the use of Structural Funds for the inclusion of the Roma population. Representatives of twelve EU Member States attended the seminar, and Commissioner Vladimir Spidla opened the proceedings, thereby demonstrating the strong commitment of the European Commission to this initiative. All participating Member States committed themselves to joining the Network. EURoma was born.

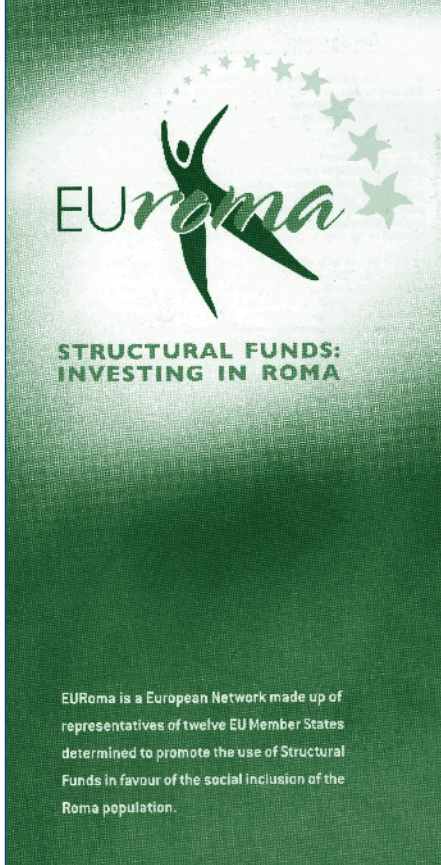
The working seminar concluded, in accordance with the new ESF regulations (2007)<sup>vi</sup>, that a coordinated, integrated approach was the most adequate means to improve the effectiveness of social policies targeting the Roma population in the European Union (EU). It was therefore decided, with the active participation of twelve Member States, that **a transnational network**, which includes organisations demonstrating experience and competences in the management of Structural Funds and in the field of Roma inclusion would be established.

It was decided that the over-arching objective of this European Network would be **to promote the use of Structural Funds to enhance the effectiveness of policies targeting the Roma community and promote social inclusion by developing a common work approach and creating a forum for debate**. Its primary aims include the sharing of strategies, initiatives and approaches, learning based on positive experience and practices and the dissemination and standardisation of such knowledge.<sup>vii</sup>

EURoma was created in the context of the 2007-2013 ESF regulations for the programming period, which increased the scope of transnational cooperation







between public authorities and civil society actors in a horizontal fashion, with the active engagement of the EU and the prominence of civil society.<sup>lviii</sup>

In its initial phase, EUroma has placed a particular emphasis on fine-tuning institutional and information-sharing mechanisms, as well as data collection. It welcomes the advances made in recent years at the EU level –in particular the Ten Common Basic Principles on Roma Inclusion agreed by the European Council– to accelerate its search for common principles and methodologies as a way to promote mutual learning, coordinate activities and improve the use of Structural Funds for Roma inclusion.

### Functions and added value of EUroma

- Horizontal cooperation between Member States, with the involvement of the European Commission and other actors.<sup>lix</sup>
- Transnational space for joint cooperation between the Managing Authorities of Structural Funds and Roma-related public bodies.<sup>lx</sup>
- Meeting space for stakeholders for data gathering and exchange, mutual learning and training.



In line with EURoma's objectives, **two working lines** are being undertaken:

- **Transmission and exchange of information**, through internal and external communication channels. Two instruments have been created for this purpose:
  - An Electronic newsletter (focusing on internal communication): a three-monthly communication via e-mail to basically report on Network member activities in their respective States and on the Network's own activities.
  - A Webpage (external communication): for the purpose of reporting on Network objectives and activities; updated with new information on a regular basis.
- **Mutual learning and training**, focusing on the following primary objectives:
  - Sharing of approaches and strategies.
  - Identification and transfer of experiences.
  - Creation of a forum for the organisation and management of projects.
  - Development of common and transversal products.

## Membership

Given that the EURoma network works within the framework of the Structural Funds and policies targeting the Roma community, **Network Members** represent two different areas within government administrations. In each of the participating States, the following agencies may be Network Members:

1. The European Social Fund Managing Authority or the administrative body to which the latter delegates its authority; and
2. The body of the state administration responsible for policies targeting the Roma community or the body to which it delegates its authority.



## EURoma Members

### Bulgaria:

- Ministry of Labour and Social Policy.
  - European Funds, International Programmes and Projects Directorate General.
  - Demographic and Family Policy and Equal Opportunities Directorate.

### Czech Republic:

- Ministry of Labour and Social Affairs. ESF Unit.
- Office of the Council for Roma Issues.
- Agency for Social Inclusion of the Roma Localities.

### Finland:

- *Ministry of Social Affairs and Health.*

### Greece:

- Ministry of Labour and Social Insurance. ESF Coordination Unit.
- Managing Authority for Mainstreaming EQUAL Principles and for Managing Actions Funded by the O.P «Human Resources Development».
- Ministry of Education.

### Hungary:

- Ministry of Social Affairs and Labour. DG for Roma Integration.
- National Development Agency.



**Italy:**

- Ministry of Labour and Social Policy.
  - DG Guidance and Training.
  - DG Immigration.
- ISFOL – National Structure for Transnational Cooperation.
- National Office Against Racial Discrimination (UNAR) of the Presidency of the Council.

**Poland:**

- ESF Implementing Authority: Implementing Authority for European Programmes in the Ministry of Interior and Administration.
- Ministry of Interior and Administration. Division of National and Ethnic Minorities.

**Portugal:**

- High Commission for Immigration and Inter-cultural dialogue (ACIDI).
- ESF Managing Authority.

**Romania:**

- Ministry of Labour, Family and Equal Opportunities. ESF Implementing Authority.
- National Agency for Roma - NAR.

**Slovakia:**

- Ministry of Labour, Social Affairs and Family. ESF Unit.
- Office of the Plenipotentiary for Roma Issues.

**Spain:**

- Ministry of Labour and Immigration. ESF Managing Authority.
- Ministry of Health and Social Policy. DG Social Policy, Families and Childhood.

**Sweden:**

- Swedish ESF Council.

## Network Operational Structure

*The Network is structured around three organs:*

- The Management Committee,
- The Working Groups and
- The Technical Secretariat.

The three organs of EURoma are designed to act a coordinated manner, in accordance with the need to achieve network effectiveness.

### Management Committee

EURoma's decision-making body. It is constituted by all Network members, the European Commission and the Technical Secretariat. Each Network member appoints a representative who acts as the main interlocutor regarding Network activities.

The Management Committee meetings are held in each of the Network Member States on a rotating basis.

#### **Duties:**

- Issuing guidelines and recommendations on a regular basis regarding Network operation and the actions implemented within its framework;
- Planning and scheduling Network actions;
- Choosing representatives at the Network's different participatory levels;
- Follow-up and evaluation of actions;
- Decision-making regarding the management of expenses for actions undertaken jointly by participating countries.

## Working Groups

The Network's Working Groups are identified as the most effective way to promote the Network's working line of **Mutual Learning**.

*The Working Groups' **main objectives** are:*

- To share specific information on concrete issues in specific social, economic and institutional fields (employment, education, social inclusion);
- to generate a pool of knowledge and instruments (assessment indicators, management tools, methodologies, etc.) to standardise experiences and transfer best practices;
- to propose and organise actions (seminars, conferences, study visits, awareness-raising actions, etc.) fostering specialisation and the training of key agents;
- to provide non-Network member organisations an opportunity to participate in information sharing and other actions.

*Within the framework of **Mutual Learning**, three Working Groups were created:*

- **Social inclusion**
- **Employment**
- **Education**

*The Working Groups fulfil the following **functions**:*

- Exchanging specific information on their particular area;
- planning and designing actions;
- debating and reflecting on each specific theme;
- promoting transnationality and the sharing of experiences among participants (study visits);
- seeking input from Roma organisations;
- identifying best practices and foster their transfer;
- drafting proposals and recommendations for submission to the Committee;
- promoting the creation of shared projects;
- proposing and designing Thematic Conferences.

### **Technical Secretariat**

EURoma is supported by a Technical Secretariat, which coordinates and administers the activities of the network, facilitates the active participation of Network members, acts as an intermediary in the transmission and exchange of information, and communicates the Network's results.

The Technical Secretariat is managed by the *Fundación Secretariado Gitano* and supported financially by the Spanish ESF Management Authority (through the OP for Technical Assistance and Transnational and Interregional Cooperation) as a contribution of the Spanish Government to the Network.

The **Working Group on Social Inclusion** covers all aspects relating to social inclusion which are not within the realm of employment or education.

Examples include:

- Infrastructure (housing, utilities, service accessibility).
- Health.
- Social protection.
- Migration.
- Gender equality.
- Access to social services.

The **Working Group on Employment** addresses all those areas linked to the Roma community's access to the labour market. For example:

- Salaried employment.
- Self-employment.
- Vocational training.
- Gender equality.

The **Working Group on Education** addresses all the different facets of educational mainstreaming, issues relating to access and permanence in school, and the academic achievement of Roma children and youth. Some examples are:

- Preventing and combating absenteeism and early school-leaving.
- Support for permanence in school and pursuance of higher studies.
- Pre-school education.
- Compulsory education (primary).
- Non-compulsory education (secondary and higher).
- Gender equality.

## 2.2 Activities and results



Recognising the existence of positive experiences in EU countries as well as the opportunity to take advantage of the latter, Network members decided at the Management Committee's third meeting (Mytelene, September 2008) to work on the basis of **Positive Experiences**, selected by each Member States through well-defined criteria such as the effectiveness and impact of the projects, their transferability to other contexts and countries, their sustainability, and their empowerment capacity.

Another positive result has been the decision to start creating a **Bank of Positive Experiences** commonly agreed by Network members, which would be available on the EURoma website.<sup>lx</sup>



## Timeline of activities

**Madrid (7-8 June 2007):** Seminar «Transnational cooperation on Roma Community and Social Exclusion. New opportunities for the upcoming period of Structural Funds (2007-2013)».

### **Management Committee meetings**

- Seville (24-25 January 2008).
- Bucharest (6-7 May 2008).
- Mytelene (2-3 October 2008).
- Budapest (7-8 May 2009).
- Stockholm (24-25 September 2009).
- Rome (24th February 2010). Extraordinary.

*Planned:*

- Córdoba (7 April 2010).
- Poland (21-22 October 2010).

### **Working groups meetings and thematic conferences**

#### **Employment**

- Study Visit Acceder (12-13 March 2009).

*Planned:*

- Participants will gather in Cordoba together with Management Committee and will work on the proposed topic «Building partnerships».

### Education

- Mytelene (2 October 2008).
- Budapest (7-8 May 2009).

### Social Inclusion

- Mytelene (2 October 2008).
- Budapest (7-8 May 2009): Thematic conference on data collection I.
- Stockholm (24-25 September 2009): Thematic conference on data collection II.
- Rome (25-26 February 2010): Seminar «Structural Funds: investing in Roma inclusion at the local and regional level». First Open Activity to Local and Regional Administrations for administrative capacity building.

#### *Planned:*

- Coordination and follow-up mechanisms (second semester of 2010).

## Themes addressed by the Management Committee

The first Management Committee (MC) meetings mainly focused on defining and agreeing the objectives, structure and functioning of the network.

Each MC, hosted by a different Member state partner, has been dealing with different issues regarding the Roma and social inclusion: each host partner presents the situation of the Roma community in their country, the way Structural Funds are being used for their social inclusion and the existing policies and programmes in this regard. Rounds of

interventions are also carried out on a regular basis for all Member States and European Commission to provide updates on recent developments of issues related to Roma and Structural Funds. The MC plans network activities and makes proposals for further development. Each time a specific topic is discussed. So far discussions have focused on the following topics:

- **In-depth analysis of the situation of the Roma** in each of the 6 host countries up to this point. It allows Network partners to have a broad overview of the Roma situation in the country hosting the MC since there has always been a session devoted to explain not only the use of the Structural Funds for Roma inclusion, but the broader context of the national policies concerning the Roma population.
- Overview of developments in respective National **Actions Plans for Social Inclusion (NAPin)** 2008-2010 and its link to Structural Funds.<sup>lxii</sup>
- **Results of the EU EQUAL programme**, which highlighted persistent gaps in the delivery of policies to foster the vocational integration of migrants and to combat ethnic discrimination in employment.<sup>lxiii</sup>
- **«Data collection for better monitoring»** addressing the issue of ethnic data collection to assess appropriately the impact of Structural Funds on Roma inclusion was discussed on two occasions. A brief on ethnic data collection was one of the bases for discussion. Available on EURoma's web page.<sup>lxiv</sup>



## **Ethnically disaggregated data collection in EURoma Member States**

The international and European institutions have taken positions regarding data protection and the possibility to produce ethnically disaggregated statistics, pointing to a growing consensus on the matter.

However, «subject to the provision of suitable safeguards, Member States may, for reasons of substantial public interest, lay down exemptions». Thus, it is for the Member States to decide whether or not ethnic data should be collected to produce statistics for combating discrimination, provided that the safeguards set out in the Data Protection Directive are respected.

Despite methodological divergences, sharing existing data gathering instruments in each partner country could be an appropriate starting point to obtain relevant evidence regarding socio-economic indicators concerning Roma. Since partner governments and their statistics institutes are working at different speeds in terms of ethnic data collection, it was agreed in Stockholm that those moving forward will keep the rest of the Network partners informed about national and local developments. Systematic information exchange for the measurement and reworking of categories and indicators, as well as the identification of any changes of those variables conditioning inclusion and the inequalities experienced by Roma will facilitate the achievement of comparable statistics and the generalisation of a methodology for ethnic data collection. Some governments carry out censuses with disaggregated data on «ethnic groups» and census forms include fields related to sensitive personal data such as race, ethnicity, religion or language.

Censuses in Poland, Romania, Slovakia, Bulgaria, the Czech Republic and Hungary include «ethnicity» in different forms. Nonetheless, the completion of fields related to ethnicity is generally optional.

The collection of data through a national census is thus accepted by several governments, but outside national censuses, the regular collection of statistical data disaggregated by ethnicity in most sectorial fields relevant to social inclusion is lacking in all EURoma partner states. However, in Greece, Italy, Portugal, Sweden and Spain, particular interpretations of the legislation in force, including the lack of recognition of ethnic minorities do not favour the collection of ethnically disaggregated data.

In the case of the Roma it is widely accepted that the figures provided by census data in those cases where this information is gathered are much lower than actual figures.

## Themes addressed by Working Groups

### Employment

The *Acceder* Programme developed by the *Fundación Secretariado Gitano* since 2000 was selected as a positive practice, and resulted in the organisation of a study visit to Spain in March 2009. More than 30 participants, representatives of eight countries and of the European Commission travelled to Madrid, Spain, to observe in situ the *Acceder* programme, financed by the European Social Fund (ESF), and which



aims to promote the access of the Roma population to the labour market. The main objective of this study visit was to share the methodologies, strategies and results of *Acceder*, and resulted in the publication of a final report including the papers and documents presented during the visit, which was discussed at the MC meeting in Budapest (May 2009).<sup>lxv</sup>

The next step for the Employment Working Group (WG) will be the development of a Workshop on *Building Partnerships for Roma Access to the Labour Market*, involving experts and practitioners from national, regional and local administrations whose experience could contribute to the identification of concrete partnerships aimed at improving socio-labour initiatives for Roma in Member States.

## Education

*The fundamental problems identified in many Member States were:*

- Social disadvantages and under-education of Roma.
- Selection and segregation in the public education system.
- Over-representation of Roma children in the «special schools» for the mentally disabled in several Member States.

The analysis of different experiences of positive practice have focused mainly on two levels: on the one hand, nation-wide anti-segregation policies,<sup>lxvi</sup> inducing structural changes in public educational systems and the instruments used by some Member States to address this issue; on the other, small-scale initiatives and projects being developed by public or private bodies (pilot projects, local initiatives, etc).<sup>lxvii</sup>

## Social Inclusion

The Social Inclusion WG has held three meetings to date. Considering the plurality and breadth of themes addressed by this WG, some issues have not yet been addressed. The issues discussed so far have been the following:

- How to create partnership, how to involve Roma organisations in the projects and provide capacity building.
- How to engage local and regional authorities in the social inclusion of Roma.
- The projects' coordination, monitoring and follow-up mechanisms in different Member States, including the instruments used to address the problem of lack of synergy and coordination in each case.
- Strategies to improve the housing situation of the Roma, taking into consideration examples of urban rehabilitation as well as rural initiatives. In this regard, the Network is seeking support from the ERDF and DG Agriculture in order to have more accurate information on available funds.
- How to approach the health situation of the Roma population in terms of life expectancy, wellbeing but also the access to healthcare systems.

Participants agreed as a first step to focus on the third issue – coordination, monitoring and follow-up mechanisms and on the procedures and mechanisms used in each country for the coordination and monitoring of projects. Later on the discussion focused on two key issues:

1. Municipalities and administrative capacity, considering the central role of the latter in the implementation of social inclusion policies.
2. Coordination and follow-up mechanisms.

*1) Improving the capacity of local and regional authorities/administrations for the social inclusion of the Roma*

Considering the key role played by local and regional administrations when addressing the issue of Roma social inclusion, Working Group participants agreed to organise a seminar on this topic. The seminar «Structural Funds: investing in Roma inclusion at the local and regional level» took place in Rome on the 25-26 of February 2010, and brought together close to 100 public authorities coming from many European countries. It has been the first event of EURoma opened to other stakeholders.

*2) Coordination and follow-up mechanisms of actions aimed at the Roma population supported by Structural Funds*

Following the debate held in the previous WG session, where partners presented their national situation concerning the mechanisms of coordination and follow-up of projects co-financed by Structural Funds, there was an agreement to gather all this relevant information. Consequently, TS drafted a questionnaire to be filled by partners and presented a document based on responses regarding «Coordination and follow-up mechanisms of actions aimed at the Roma population supported by SF», which offers a comparative analysis of the ways vertical and horizontal coordination is established in 10 EU Member States, and the way these institutional frameworks condition the use of Structural Funds to address Roma-related issues.<sup>lxviii</sup>

Agreement was reached on the need to use the aforementioned document for a future working session studying some models in more depth, to discuss the weaknesses and strengths of each case and to identify the key elements for improvement in each country.



## 2.3 Achievements and steps forward

EURoma constitutes a novel and creative initiative that is only beginning its process of constitution. Despite its incipience, it has a rich potential for the effective use of Structural Funds to alleviate socio-economic discrepancies between Roma and the majority population. Significant work has been undertaken by the Technical Secretariat, Network partners and the European Commission to stimulate qualitative and quantitative progress – through the consolidation and the intensification of exchanges, the involvement of other public agencies (mainly through thematic conferences), and regular attempts to achieve an expansion of the network beyond its 12 members.

The newsletter and website of EURoma can be considered as a success. The newsletter increased its individual subscriptions to 613 in January 2010 throughout the 12 EURoma partner countries (from 27 subscriptions in July 2008, 477 subscriptions in October 2008). The website has achieved a total of 11, 945 visits (and 43,913 pages visited within the web) up to December 2009. Visits have been done mainly from Spain, UK, Italy and USA.<sup>lxix</sup> The website is offering a user-friendly and up-to-date source of information regarding news, events, relevant publication and country information. It is currently building a relevant database that hopefully will be useful for other stakeholders. Both the newsletter and the web page have been edited in English and Spanish. The potential of EURoma is significant, and it has achieved significant progress since its creation by sharing working methodologies and by tackling issues of administrative coordination and data collection. However, in order to give it more substance and to provide added value to stakeholders, EURoma intends to make improvements in the following areas:

- Intensify the activities of Working Groups by focusing their work on key, specific issues that are close to the daily actions of EURoma members.
- Produce concrete outputs (i.e. policy documents) for issues which show the greatest added value to network members.
  - Reach out to civil society actors and local administrations and build a dynamic engagement of stakeholders within and beyond the network itself.



The background is a solid green color. On the left side, there is a large, light green silhouette of a human figure with arms raised, reaching towards a series of small, light green stars that form a curved path across the top left. On the right side, there are several larger, light green star shapes of varying sizes, some overlapping each other. The text is centered in the middle-right area of the page.

Structural Funds  
as a policy and financial  
instrument for  
tackling Roma  
problems

3

The

present section focuses on the concrete use of Structural Funds in favour of Roma inclusion and for the reduction of inequalities experienced by Roma. It begins by analysing the conceptual elements, which are grounded in previous experience, that make Structural Funds a crucial financial and political instrument for tackling Roma issues, pointing out the profound qualitative progress that has taken place in the 2007-2013 programming period. It then expounds how Roma appeared in Operational Programmes of the respective EURoma Member States in 2007, pointing out some ambitious plans and opportunities, and analyses the different managing models and coordination mechanisms for Structural Funds, as well as forms of Roma participation. We provide available information on some on-going projects and up-to-date results in the different EURoma Member States.

### 3.1 Different contexts and backgrounds

Structural Funds, in particular the European Social Fund (ESF), are the most important financial instruments at the EU's disposal to support Member States' efforts to reduce territorial inequalities and to **reinforce economic and social cohesion**,<sup>lxx</sup> by modernising the labour market, by improving employment rates, by activating and supporting the capacity of human resources and by **combating discrimination and facilitating access to the labour market for disadvantaged persons**.<sup>lxxi</sup> Furthermore, it aims at **promoting transnational partnerships** for reform in the fields of employment and inclusion (see table 3.1). As such, **Structural Funds constitute a powerful instrument for the social and labour market inclusion of the Roma population.**

In the **preceding 2000-2006 programming period**, Structural Funds were grouped around 3 Objectives:<sup>lxxii</sup> Objective 1 promoted the development of regions where the GDP per capita was below 75% of the EU average; Objective 2 supported areas adjusting to change in the industrial and services sector and economica-



lly depressed rural and urban areas, including areas heavily dependent on fisheries; Objective 3 provided funding throughout the EU to help adapt and modernise policies and systems of education, training and employment.

ESF supported activities related to five Policy Fields: (i) the development and promotion of active labour market policies; (ii) the promotion of equal opportunities for all in accessing the labour market, with particular emphasis on those exposed to social exclusion; (iii) the promotion and improvement of training, education and counselling as part of lifelong learning policy; (iv) the promotion of a skilled, trained and adaptable workforce; and (v) the improvement of women's access to and participation in the labour market.

Some of the 15 EU Member States such as Spain, Italy and Greece had implemented, since 2000, specific projects targeting Roma. In 2004, the new Member States became eligible for Structural Funds. Most of these countries carried out projects and programmes addressed to the Roma community.

When analysing how Structural Funds are benefitting the Roma population, it must be pointed out that different contexts and realities are conditioning the ways that different Member States are able to use these funds for the promotion of the Roma communities. Among these different circumstances, it must be emphasised that for some EU Member States, as is the case of Hungary, Romania, Slovakia, the Roma issue is preeminent from the demographic viewpoint, given that in some of these countries more than 5% of the population is Roma. By contrast, in most countries, especially Northern Europe but also others such as Italy, the Roma represent less than 0.3 percent of the total population.<sup>lxiii</sup> This fact conditions the need for Operational Programmes to target explicitly Roma in some countries, whereas in most others mainstream policies are more practical. It is precisely the countries where a higher percentage of Roma are concentrated that have more regions characterised as «Convergence» regions. This means that countries with large Roma population receive larger funds and are required to co-finance a smaller percentage of total allocated funds.

## 3.2 Structural Funds as an opportunity for Roma inclusion and the reduction of inequalities

As part of the EU's reformed cohesion policy for 2007-2013 and as a salient expression of the EU's commitment to social cohesion and inclusion, a total of 308.041 billion Euros, equivalent to approximately one third of the European Union's budget was allocated to the Structural Funds.<sup>lxxiv</sup>

If in practice, Structural Funds historically focused almost exclusively on economic development, the creation of infrastructures and professional training, it has progressively expanded its scope, flexibility and openness since 2000, and particularly for the 2007-2013 programming period, by explicitly incorporating anti-discrimination, the social inclusion of disadvantaged groups and ethnic minorities, and the promotion of transnational partnerships in its regulatory framework.<sup>lxxv</sup>

Structural Funds: the main financial instruments for 2007-2013			
Financial instruments	Aims	Scope	Total eligible costs
<b>European Social Fund (ESF)</b>	Strengthen economic and social cohesion by: 1) increasing the adaptability of workers and enterprises; 2) improving employment opportunities and participation in the labour market and enhancing human capital; 3) reinforcing social inclusion by promoting equality, combating discrimination and facilitating access to the labour market for disadvantaged persons; and 4) promoting partnership for reform in the fields of employment and inclusion.	1) Adaptability: lifelong learning and increased investment in human resources by enterprises; promotion of entrepreneurship and business start-ups; innovative and more productive forms of work organisation. 2) Employment opportunities and prevention of unemployment: modernisation and strengthening of labour market institutions, in particular employment services; early identification of needs with individual action plans and personalised support; mainstreaming and specific action to increase the participation of economically inactive persons, including ageing, migrants, and women. 3) Social inclusion: employability measures, including in the field of the social economy, access to vocational education and training, and accompanying actions and relevant support; acceptance of diversity through awareness-raising. 4) Networking of relevant stakeholders, such as the social partners and non-governmental organisations, at the transnational, national, regional and local levels.	<b>€ 118 billion</b>
<b>European Regional Development Fund (ERDF)</b>	Promote economic and social cohesion by correcting the main regional imbalances and participating in the development and conversion of regions.	1) Investment which contributes to creating sustainable jobs. 2) Investment in infrastructure. 3) Measures which support regional and local development, including support and services for businesses, in particular small and medium-sized enterprises (SMEs). 4) Technical assistance.	<b>€ 120 billion</b>
<b>Cohesion Fund</b>	Strengthen the economic and social cohesion of the Community in the interests of promoting sustainable development.	1) Trans-European transport networks. 2) Areas related to sustainable development which clearly present environmental benefits.	<b>€ 70 billion</b>



Taking into consideration the profound inequalities and exclusion suffered by the Roma population, the Structural Funds have increasingly become a pivotal **financial and political instrument** to tackle the disadvantages encountered by Roma **in an effective and practical way**. Furthermore, they constitute a **powerful mechanism for the articulation and alignment of national Roma policies through transnational cooperation and with the active participation of all stakeholders**.

For the first time, many countries with a high percentage of Roma have begun to manage Structural Funds, which thus offer the potential to add significant value to labour market, welfare and inclusion policies.

### What is the added value?

- **Long term sustainable projects:** a long-term approach is a prerequisite for and an opportunity within the framework of the Structural Funds.
- **Extensive financial support,** while **co-financing** entails more than investing money: it stimulates the active involvement of all participant entities.
- Opportunity for **combining action levels:** actions implemented concurrently at the national (policies) and local levels (grassroots) have a significant impact: the nation-wide dimension allows for a combination of bottom up - top down grassroots interventions in line with of the policy strategy.
  - **Top down – bottom up:** Structural Funds allow for localised implementation that feed back into EU's holistic approach to economic development and social cohesion.
  - **Local – national:** integration of various levels of policy design and implementation.
  - **Grassroots – policy strategies:** it is possible to work not only with the Roma community but also with society at large, in line with the Basic Principle of targeted yet mainstreaming action.



- **Opportunity for strong partnerships:** a strong partnership between public and private organisations (public authorities, businesses, the media and the non-profit third sector) is possible and desirable for policy design, implementation, monitoring and evaluation.
- **Opportunity to target the most excluded groups while mainstreaming Roma issues** by placing them on the policy agenda and by achieving the implementation of targeted yet non-segregated services. Action adapted to target groups guarantees and increases impact, within an integrated and multidimensional approach, which emphasises the close linkages between education, employment and inclusion.
- **Opportunity for capacity building:** administrative capacity, training of Roma professionals and managers.
- **New models of policy design and implementation:** privately designed and managed programmes such as *Acceder* in Spain for instance, have come to form part of public policies rather than to be considered as complementary programmes towards the Roma. They increasingly constitute a foundational approach and working methodology; an example is the region of Andalusia where Roma beneficiaries confirm that in their opinion «Regional employment policy towards the Roma is the *Acceder* Programme».

### 3.3 Initial plans

The Structural Funds regulation for the 2007-2013 period placed particular emphasis on social inclusion, notably for minorities and vulnerable groups. The ESF, in accordance with Article 2(1) of Regulation 1081/2006, «shall contribute to the priorities of the Community as regards strengthening economic and social cohesion by improving employment and job opportunities» and in so doing shall support Member States policies aiming to «reinforce the so-



*cial inclusion of disadvantaged people with a view to their sustainable integration in employment and combating all forms of discrimination in the labour market». Particular attention was given to ethnic minorities.*

The current programming period features 117 OPs for all 27 Member States. Half of the programmes concern Regional Competitiveness and Employment (59 OPs), while 42 OPs belong to the Convergence objective. The remaining 16 OPs include initiatives for both objectives. The total co-funded budget available for ESF related interventions in the period 2007-2013 is € 118 billion, including € 76 billion by the ESF. The Roma community is included among targeted groups within the current programming period, as will be shown in the annex. The activities co-funded under the main ESF programmes have raised attention to the problems this community is facing and several Member States have identified the Roma as one of the targets of their programmes.

Although data remains scant, there are clear indications that a significantly higher proportion of activities target Roma directly or as part of vulnerable groups in the current programming period in relation to the 2000-2006 period. Some EURoma Member States, notably Hungary and Romania potentially benefited Roma in more than 50% of their co-funded activities. Some Member States have dedicated budget lines for activities aimed exclusively at Roma.

This is the case of Bulgaria, the Czech Republic, Spain, Poland, Romania and Slovakia, as will be elaborated below. To varying extents, all countries associated with the EURoma network involve Roma in programmes.



## 3.4 Types of activities and areas of intervention

The Operational Programmes (OPs) of EURoma Member States, compiled in 2007 by the European Commission's Inter Service Group focused on Roma, expressed significant progress in targeting Roma, whether directly or indirectly. The **key activities** that can be identified in OPs, consistent with the Structural Funds regulations, included:

1. Access of Roma to employment, to self-employment and to occupation at all levels of the professional hierarchy;
2. Access of Roma to all types and to all levels of vocational guidance, vocational training, advanced vocational training and retraining, including practical work experience;
3. Education, Health and Training of Roma including ESF activities in the sphere of primary or special education;
4. Access to administrative and social services, social infrastructure by Roma persons.

*In turn, three key areas of intervention may be identified in Member States' respective OPs:*

1. Assistance to systems;
2. Assistance to local communities, enterprises and organisations;
3. Assistance to persons.

However, these activities and areas of intervention were conditioned by 1) the reference made to Roma, or lack thereof, in OPs; and 2) the different managing models for the implementation of programmes targeting or indirectly benefiting Roma. This section presents an analysis of the inclusion of Roma as a target group in OPs, while the following section will focus on the managing models.

In the annexes, we compile the data provided by EURoma partners on their respective OPs 2007-2013 to the European Commission and reviewed by the Commission's Inter-Service Group. We organise the tables according to a threefold categorisation of programmes:

1. Explicit reference made to the Roma and specific measures targeting Roma inclusion in OPs;
2. Indirect reference made to the Roma within the framework of excluded or vulnerable groups, with programmes indirectly benefitting the Roma;
3. No reference made to Roma in OPs.

Two points ought to be made regarding the tables in the annexes. In certain cases, Member States, either within the framework of Structural Funds or as laboratory and pilot projects undertaken within the EQUAL initiative (2000-2006),<sup>lxxvi</sup> targeted Roma directly and indirectly prior to the 2007-2013 programming period.<sup>lxxvii</sup> Nevertheless, in most cases they tended to provide relatively limited quantitative and qualitative investment in Roma inclusion. Secondly, the figures in all cases represent Community funding for the whole OPs. At the time OPs were presented to the Commission for the 2007-2013 programming period, data on individual priority axes was not provided. Besides, only part of the funding targets the Roma minority within specific Priority Axes.

In **eight cases**, OPs are defining Roma people as an explicit target group, while in all cases Roma may benefit indirectly through funding for socially vulnerable or excluded communities, or through investment in system/administrative and infrastructural improvements. In two cases (Finland, Portugal), Roma are not mentioned explicitly, raising the question of whether they would benefit indirectly from such programmes, even through they are not excluded as potential recipients.



As can be observed from the data presented in table 1 of the annex, a significant number of countries mention Roma explicitly as target groups in their respective OPs and address specific projects and measures to Roma communities and individuals.<sup>lxviii</sup>

We may discern three predominant areas of action for programmes explicitly targeting Roma: **education, employment and community-level social integration.** Education aims primarily at desegregation actions (Czech Republic, Hungary), inter-cultural education, prevention of early school leaving (Bulgaria, Romania, Spain) and bridging the gap between formal schooling and access to the labour market. In turn, employment focuses primarily on training activities and access to the labour market, labour adaptability, self-employment, and in some cases the promotion of entrepreneurship, including the creation of cooperatives and social community work (Bulgaria, Slovakia). A few employment programmes are targeted at individuals though personalised insertion pathways to the labour market (Romania, Spain) while programmes targeting educational needs tend to focus primarily on systems and communities.

In a number of cases (Czech Republic, Poland, Romania, Slovakia), relatively widespread situations of geographical segregation and marginalisation has induced the implementation of integrated actions at the community level aimed at achieving inclusion, including through the provision of housing and healthcare as well as education and professional training. Social integration actions for segregated or excluded villages and neighborhoods are implemented through system and infrastructural improvements (access to services), the promotion of community level social economy and personal labour insertion pathways.

Programmes directly benefitting Roma persons and communities are often based on the principle of Equal Opportunities and Anti-Discrimination, focusing primarily on equal opportunities in the access to quality education and to the labour market (Hungary, Portugal, Romania, Spain, Slovakia). These are often accompanied by sensitising and awareness-raising cam-

paigns, mediation projects (Poland, Portugal, Romania, Spain), as well as anti-discrimination measures (Hungary, Romania, Spain) targeting the majority population in accordance with the EU's Anti-Discrimination Directives (EC/2000/43 and EC/2000/78).

In the case of 4 countries (Greece, Finland, Sweden and Italy) Roma are not explicitly mentioned in OPs. In some of these cases, Structural Funds were not planned to be used for projects targeting Roma explicitly because the latter are not defined as an ethnic minority. However, some projects co-financed by the ESF are explicitly targeting Roma (Greece, Italy, Sweden). Nevertheless, this does not signify that Roma have not been beneficiaries of these Member States' respective OPs. In information provided later by Managing Authorities on specific projects, especially in the case of Sweden and Greece, projects have or will target Roma directly at the local level. In the case of Greece, even if Roma are not mentioned in OPs specifically (usually they are included in the reference «groups with cultural differences» and in some cases are explicitly mentioned as Roma, among other groups), Calls for Tenders are specifically addressed to Roma in actions that concern them. This will be described subsequently. In the case of Spain, integrated actions targeting immigrant Roma populations from Eastern European countries are being implemented both at the national and regional levels.

The data provided in table 3.3 shows that the majority of Member States invest indirectly in Roma inclusion and development through **administrative and infrastructural improvements** –including improvements in the quality of and access to social services. Qualitative enhancements of social services focus on health provision and access to education (Bulgaria, Greece, Hungary) as well as the development of methods to improve employment prospects and the productivity of labour (Italy). In turn, assistance to persons, local communities, enterprises and organisations is provided primarily through education and health services, access to employment– i.e demand-driven projects for active employment and human capacity building – and professional training.





Most of the countries that include indirectly Roma needs in their respective OPs do it by prioritising measures aimed at vulnerable or socially-excluded groups. This category usually includes people with disabilities, immigrants, the ageing and women (Finland, Greece, Poland, Sweden). In some cases (Hungary, Greece, Poland) reference is made to special cultural groups or groups with specific cultural needs. Whenever Roma and other vulnerable groups are included in OPs, it tends to be through flexible forms of implementation that are likely to bridge the gaps between such groups and the majority.

Some of the programmes for which Roma may be indirect beneficiaries have a Territorial or Regional approach (Czech Republic, Greece, Hungary, Poland), developing local integrated or local development initiatives in areas where there is a high concentration of Roma or other socially-excluded groups. Finally, in the case of Italy, Poland, Spain and Sweden, an Equal Opportunities and Anti-Discrimination principle is the preferred driver for programmes benefitting Roma – as part of groups that are subject to unequal treatment or to discrimination. Combating stereotypes and awareness-raising for the majority population is integral to several OPs.



## 3.5 Managing models and coordination mechanisms

The present section offers a brief overview of existing institutional setups in the countries participating in the network with regard to the social inclusion of Roma and inter-departmental coordination mechanisms, with a particular focus on the relationship between the latter and the implementation mechanisms of the EU Structural Funds. Two intermeshed issues will thus be addressed here: national policies towards Roma and the management of Structural Funds targeting Roma.

In terms of the type of the organization for managing SF a mix of methods may be observable in certain cases (for instance, in Romania where projects are managed centrally by the government or managed centrally or locally by private or governmental organisations [i.e. the National Agency for Roma]). However, managing models may be categorised broadly as:

- Centralised public management: Poland, Bulgaria, Greece.
- Decentralised public management: Italy, Sweden, Slovakia.
- Private centralised management within the context of national public-private partnerships: Spain.
- Private decentralised/local management within the context of national public-private partnerships, Slovakia.

Relevant information was gathered through questionnaires completed voluntarily by representatives of the institutions which are part of EURoma network. There were two questionnaires addressed to national Roma-related bodies on the one hand, and the Managing Authorities Structural Funds on the other. The questionnaire requested:

- 1) basic descriptions of the body or administrative units primarily responsible



on the social inclusion of the Roma in each country; 2) the institutional mechanisms of coordination between ministries in relation to Roma issues; 3) the formal or informal relations between the central government and regional and local bodies in relation to Roma issues; 4) the relationship between the Structural Funds Managing Authorities and the key institutions responsible for the social inclusion of Roma.

Ten countries submitted replies to one of both questionnaires and five of these (i.e. Spain, Czech Republic, Sweden, Poland and Greece) submitted both.

It is beyond the scope of this section to assess the effectiveness of these mechanisms, and initial results shown merely summarise the information gathered and indicate some observations that may stimulate a future improvement in the effectiveness of such mechanisms.

#### *Administrative units responsible for Roma, specialised Roma-related bodies and horizontal coordination mechanisms*

The majority of the countries examined have recently established institutional mechanisms for addressing Roma issues. Part of them were set up during the pre-accession period in pre-accession countries, while others have been more recently established with a view to improve the implementation of projects co-financed by Structural Funds. The only member state that lacks a department specifically concerned with the social inclusion of Roma is Italy.

*Some different basic types of units and coordination mechanisms are observable:*

- Administrative departments, secretariats, offices, or specialised bodies agencies.
- Interdepartmental coordination mechanism and/or consultative mechanisms with mixed representation of line ministries and Roma representatives.
- Ad hoc working groups.



In some cases (Spain, Czech Republic, Hungary, Greece), several of these structures coexist and a participatory body fulfills primarily coordinating or consultative functions, whereas an administrative department holds administrative responsibilities.

In other Member States (Sweden, Poland, Portugal) departments exist for the design of a specific minority policy, with responsibilities regarding Roma-related issues and undertaking diverse tasks. This is particularly salient in countries with a structured minority policy such as Sweden or Poland.

*Horizontal Coordination mechanisms between specialised Roma-related bodies and EU Structural Funds Implementation mechanisms*

One form of coordination and dialogue in several countries is through the participation of specialised Roma-related bodies in the Operational Programmes Monitoring Committees. For instance:

- In **Romania**, the Government *National Agency for Roma* is part of both the monitoring committee and the evaluation steering committee of the OP «Human Resources Development» the Managing Authority of which is under the Ministry of Labour, Family and Social Protection. It is also an intermediary body for the implementation of 6 major projects targeting Roma.
- In the **Czech Republic**, the *Office of the Government Council for Roma Community Affairs* is represented also at various management commissions of EU operational programs, which directly or indirectly target Roma (such as the Operational Programme Human resources and employment, or the integrated operational programme).

On the other hand, in certain cases (Hungary, Slovakia), relevant Structural Funds implementation mechanisms are included in the inter-ministerial structures re-



levant to Roma-related issues, which were referred to in the previous subsection, or undertake direct cooperation with specialised Roma-related bodies.

In other countries cooperation appears to be more occasional; for example in **Greece** the ESF Managing authority reports formally to the Inter-Ministerial committee. In Portugal there is no formal mechanism of cooperation either between the ACIDI and the Managing Authorities, although ACIDI takes part in some projects financed by the European Social Fund. In **Italy**, where no specialised Roma-related body or structure exists, only occasional inter-departmental debates have taken place on Roma inclusion. Since 2008, the Directorate-General for Guidance and Training Policies of the Ministry of Labour and Social Policies in cooperation with Isfol (National Institute for the Development of the Vocational Training of Workers) has promoted a National Network on Roma with the following objectives: to share the information regarding the initiatives carried out in Italy, to promote cooperation between those who operate for the inclusion of the Roma, to contribute in the activities of the EURoma Network and diffuse its results and to collect and transmit information to the network of national interlocutors. This Network for the Social Inclusion of the Roma brings together the main representatives of national institutions, regional representatives and other non-governmental stakeholders, including the La Sapienza University. This informal Network and the participation of Italy in EURoma are playing an appreciable role in sustaining these horizontal coordination mechanisms.

Positive practices identified by EURoma included the cases of the Czech Republic and Slovakia through the creation of Adhoc Roma Working Groups promoting Roma participation and effective horizontal coordination between OPs and Ministries.<sup>boxix</sup> For instance, in Slovakia, the Managing Authority for OP Employment and Social Inclusion signed the «Agreement on Mutual Cooperation and Coordination in Fulfilling Horizontal Priority Marginalized Roma Communities» with the Office of the Plenipotentiary of the Slovakian Government for Roma Communities in April 2008, in which both parties agreed on procedures for the implementation of the Horizontal Priority Marginalized Roma Communities for using EU funds in the 2007–2013 programming period.

*Vertical coordination between specialised Roma-related bodies and regional and local administrations*

In various countries representatives have been appointed at the regional or local levels to address Roma-related or more generally minority issues. Whether in the form of «Coordinators of Roma affairs» (Czech Republic), of a network of «County Offices for Roma», of representatives for national and ethnic minorities in «voivodes» (Poland's 16 provinces), or local mediators of the national *Roma Community Support Cabinet* (Portugal), EURoma Member States have undertaken laudable efforts to expand and intensify coordination mechanisms between specialised Roma-related bodies and regional and local administrations.

Another type of mechanism is observable in Greece, where a «Rom network» comprising local municipalities with Roma settlements within their constituency. This network acts predominantly as a consultative body. Spain, which is characterised by a context of extensive administrative decentralisation in the field of social policy, the relationship between the Roma Development Programme Unit and regions and municipalities is of an administrative type, and concerns the management of covenants for the implementation of *Roma Development Programme* actions.

*Vertical coordination in relation to the implementation of EU Structural Funds for Roma*

- In **Romania**, the Managing Authority relates with regions and municipalities by means of the so-called Regional Pacts and Local Partnerships on Employment and Social Inclusion, constituted by representatives of public institutions, unions and NGOs that are financially supported by the Human Resources Development OP for the maintenance of technical secretariats. The National Agency for Roma deserves special mention again for managing the implementation of six projects within the OP.
  - Given that **Spain** is a country with high levels of political and administrative decentralisation, a high proportion of EU resources are managed by Autono-



mous Communities. The Operational Programme Fight Against Discrimination (*Programa de Lucha contra la Discriminación – POLCD*) is one of Spain's three Operational Programmes managed at the national level. For the execution of the POLCD, the Spanish government designated relevant public institutions in this field as well as five private organisations with significant experience in working with vulnerable groups, including Roma. The Managing Authority coordinates its activities predominantly with intermediary bodies at the regional level, one of which is a non-state non-profit organisation specialised on working with Roma (i.e the *Fundación Secretariado Gitano*), and which is responsible for the Roma-targeted actions of the OP «Fight against Discrimination». However, the Managing Authority (MA) has acknowledged that coordination on Roma issues remains limited since *«there is still a lack of information at the local and regional levels, where the information data systems and indicators are not designed to specifically visualise the Roma, as they are generally included in the category "Other vulnerable groups"»*. Nonetheless, some actions have been recently taken to stimulate some improve in terms of vertical coordination. The MA has distributed a questionnaire among regional Intermediary Bodies with a view to obtaining specific information on budget and activities benefiting Roma.

- In **Italy**, which is also characterised by a decentralised structure, and where 21 out of 24 OPs co-financed by the ESF are of a regional nature, each Regional OP Monitoring Committee foresees the analysis of the initiatives undertaken for the social inclusion of the Roma and Sinti minorities.
- In **Slovakia**, a platform has been established by the *Office of the Plenipotentiary for Roma communities* where regional government bodies are represented. At the same time these regional bodies are also members of the Monitoring Committee of the OP Employment and Social Inclusion. In addition, local bodies are linked to the Managing Authority mainly as beneficiaries, allowing the latter to have an overview of proposals for demand-driven projects and to obtain feedback at the local level through on-the-spot checks.

- In **Hungary**, the Managing Authority coordinates actions vertically with lower levels through intermediary bodies and an Expert Network of Micro Regions. Local beneficiaries receive technical guidance on the implementation from mentors in the field during the full cycle of the project. The intermediary bodies, regional development agencies and final beneficiaries at local level are required to use the guidelines on horizontal equal opportunity issued by the Managing Authority.
- In the **Czech Republic** the recently established Government pilot project of the *Agency for Social Inclusion of Roma* must also be in socially excluded localities. This agency acts at the local level by providing assistance in the preparation and implementation of projects which target socially excluded Roma communities, and by providing services. This Agency is connected to the Structural Funds since one of its tasks is to assist in the project identification and implementation of the EU funds for the benefit of socially excluded Roma at the local level.

The extent to which Roma individuals and organisations representing Roma are consulted in the planning phase of projects often remains unclear. No hard evidence on systematic monitoring and evaluation by Roma representatives is available either, limiting the assessment of Roma involvement and inclusion in projects targeting Roma directly or indirectly.

### Roma participation

In eight cases, projects allow for planning, monitoring or implementation of OPs by Roma representatives and Roma-related NGOs. The participation of Roma representatives takes different forms: in some cases consultation in project design takes place (Spain, Romania), in other cases Roma organisations may be responsible for managing projects as intermediary bodies or final beneficiaries (Spain, Czech Republic); in three, participation occurs through representation in the OP Monitoring Committees by Roma agencies and NGOs along with Equality Bodies (Bulgaria, Hungary, Romania).



However, participation in MCs tends to be confined to a status of observers lacking formal voting rights.

The creation of adhoc committees are observable in some cases (Bulgaria, Czech Republic, Finland), in other cases manuals and guides for Roma participation have been developed (Hungary, Italy, Spain); the role of participating Roma organisations tends to focus predominantly on mediation between local Roma communities and public institutions (Portugal, Spain).

## 3.6 Results: current examples

This section reports the current state of projects implemented within the context of national Operational Programmes. Although it does not cover all projects due to a lack of evidence, it provides a representative exposition of activities so far.

### Bulgaria



The Bulgarian Managing Authority of Structural Funds provided data on two projects co-financed by the ESF and aimed directly at ethnic minority groups, in particular the Roma population, which both have a national scope of implementation.

1. The Education and Social inclusion Project «Creation of optimum multicultural social environment for practical applying of intercultural education and upbringing» is investing €2,850,043.97 over two years (30.07.2007 to 31.12.2009) on a desegregation project that aims to include 3000 Roma children in «foster schools» outside the Roma quarters

and to provide training for 300 teachers who will be qualified to work in an intercultural social environment. 157 project proposals have been received to this day and 67 contracts have been concluded. The project is facilitating the reintegration of Roma pupils into regular schools, tackles early school leaving, facilitates Bulgarian language learning and is expanding the coverage of the formal educational system by including pupils who are not currently schooled.

2. «Integration of children and students from the ethnic minority groups in the Educational system», with a total budget of €6 million. At the end of December 2009, 414 project proposals have been received. The project aims to include 3000 children from ethnic minorities, supporting better social and labour inclusion, improving circumstances for an equal access to the education and training system.

The integration of children of Roma origin will be implemented through measures for deinstitutionalization and optimization of the school network and establishment of «focal schools» ensured with all-day classes, social measures for assisting socially disadvantaged families and launching measures for facilitating the access to them. During application of the approach for focal schools the ethno cultural specifics of the Roma will be taken into account».

## Czech Republic

The Managing Authority of the Czech Republic provided EURoma with the description of one project managed centrally by the state and co-financed by the ESF and the ERDF. The project aims to promote the social inclusion of members of socially excluded localities by improving the accessibility, quality and





inspection of services, including the removal of barriers of their access to education, employment and investment support. A total of €19,897,500 is being invested throughout the Czech jurisdiction with the exception of Prague, which benefits from a specific OP. The project is being implemented over the long term (15/05/08 to 31/08/2015). No preliminary results and assessment have been provided and no figures have been provided regarding total or Roma beneficiaries. This may be explained in part by the systemic nature of this reform, for which a quantitative target and hard results are difficult to specify.

Activities developed under this project include: training for workers and reinforcement of professional knowledge of contracting authorities; training for service users to reinforce their skills, thereby facilitating their integration in the labour market; the implementation of specific activities culminating in the social integration of vulnerable persons; identification of problematic phenomena and provision of service in particularly vulnerable localities; and development of services promoting social integration.

## Finland

No data.





## Greece

Projects are being planned with particular relevance for the social inclusion of Roma within the framework of Structural Funds. No project is currently under implementation, but the Greek Managing Authority provided information on six pending projects, half of which will target Roma explicitly. All projects are managed centrally by the state, co-financed by the ESF or the ERDF, and target education, training and access to employment and entrepreneurship. According to the data provided by Greece's Managing authority, projects targeting Roma directly in the fields of education, employment and entrepreneurship will have a total allocated budget of circa 41 million EUR, whereas projects benefitting the Roma as part of vulnerable groups will have a combined budget of 205 million EUR. The present section focuses on the former, whereas information on the latter is presented in the annexes.



The first project, titled **«Multi-cultural Education»**, focuses upon upgrading the quality of Education and Promoting Social Inclusion in the 8 Phasing in and Phasing out Regions of Greece. With a planned budget of €9,000,000 and an implementation phase lasting three year (September 2010 – December 2013), the project aims to intervene in schools with Roma children in 80 municipalities. It aims to increase the school enrolment and to decrease the drop-out rate of Roma children, by providing support to children and parents and assisting the school system and educators through the provision of extra support when needed with a second teacher inside the class, enforcing the attendance for early school learning, creating special supportive learning classes, offering specialised training for teachers, using innovative methods for learning and developing sensitisation campaigns for local communities and the educational community. The project illustrates the high level of geographical segregation for Roma communities in Greece (see chapter 1), and is exclusively targeting these communities.



The second project, titled «**Centers for the Promotion of Employment and Inclusion**» and co-financed by the ESF, will be implemented between 2010 and 2013 **with a budget of approximately €15,000,000**. It is a revision of the project of «Socio-Medical Centres» implemented in the preceding programming period, and some of its objectives will change. It focuses on the provision of services at the community level in the sectors of employment and social inclusion with priority given to Roma settlements, although no estimate of beneficiaries is yet available.

Actions will target the promotion of employment, self-employment and entrepreneurship. It will focus on creating the necessary environment for entering the labour market and assisting the youth on issues such as employment orientation, development of entrepreneurship especially through the third sector of the economy as well as other actions that promote social inclusion.

The third project, titled «**Encouraging Entrepreneurship of Rom**», co-financed by the ERDF and with a total budget of €12,120,137, will directly benefit Roma through the development, strengthening and promotion of entrepreneurship by funding new and sustainable businesses and by modernising or expanding existing ones. It is expected to benefit 180 enterprises over two years of implementation (2009-2010).

## Hungary



Hungary has provided the provisional results of the following projects implemented under its OP and benefitting Roma. Hungary's Managing Authority confirmed that 15 projects targeting or benefitting Roma have been under implementation in the past three years.

Hungary has implemented social integration projects through its Structural Funds management authority in coordination with the Ministries of Health, of Education and of National Development and Economy. Under this arrangement, combined interventions were programmed within the framework of the ERDF based Regional Operative Programs and Social Infrastructure Operational Programme (SIOP). In Hungary, the large scale ESF type «constructions» are financed within the Social Renewal Operational Program (SROP), between 2007 and 2013.<sup>box</sup>

### **Results in the area of health:**

In two «constructions», SROP 6.1.2 and SROP 6.1.3 training and screening projects aim to reach a better understanding of lifestyle preventing good health, and promoting screenings. Health monitoring and screening are free of charge in Hungary, these projects promote these possibilities for the Roma living in the most underprivileged areas in Hungary. SROP 6.1.2. is expected to reach at least 2,000 Roma people in 33 micro-regions, and will involve at least 10 NGOs working towards improving the health status of Roma.

Developing infrastructure is crucial in those areas of Hungary, where there is no active health care unit within 20 km area and/or 25 minutes of travel. Financed through SIOP 2.1.2 and 2.1.3 active care units will be constructed in those areas where the mentioned criterion has not been met yet.

### **Results in the area of start-up business development for Roma:**

Developing SMEs and micro business is expected to effectively facilitate employment creation in regions where the long term, structural unemployment rate is high. The Ministry of National Development and Economy has rearranged the requirements in response to the current economic crisis, enabling businesses



to gain funds for complex technology projects, including know-how, training, consulting, and TQM services. The Ministry established a supporting network in 2005 for the better use of funds, which is open to micro-businesses and SMEs of Roma people.

### **Results in the area of education:**

Under SROP, more than 300 school buildings and pre-school facilities were renewed or renovated, and at the same time, the teaching staff has been re-trained for more inclusive, cooperative method of instructions. Individual schools, but also networks could benefit from SROP 3.1.4, which is a 360' degree, holistic tool to improve a complete school district or school results, including the BPR of those special committees orienting students between «special» (usually segregated, homogenous Roma) classes and «normal» classes. Annually more than 1,300 Roma students will receive support from special tuition and mentoring networks financed by SROP 3.3.4 and SROP 4.1.2.

Furthermore, school preparation will be promoted through SROP 3.3.5 (Tanoda) programs, which are open to NGOs working to improve the academic results of Roma students. Second Chance Schools, based on the results of EQUAL Community Initiative will receive support from SROP 3.2.1. These opportunities mean that projects could combine training, school education, vocational education and trial periods of employment. Also, under this priority it is worth mentioning the co-financing of a substantial study on cooperative education, including 4,000 students and 60 schools.

### **Results in the area of social inclusion, housing and labour:**

«SureStart» know-how from the UK as a social innovation has been implemented in Hungary, (Biztos Kezdet) supported through SROP 5.2.2. More than 44 municipalities had

already implemented early child-support oriented facilities. Within the framework of these projects the families in need could benefit from social care, pre-schooling, legal and psychological aid. Under priority I. in SROP, in North –Hungary 1,478 Roma persons have been trained or re-trained in order to improve their position on the labour market. In all seven regional labour centers, freshly graduated youth with Roma background from the university are employed to promote social integration.

Typically, low educational levels are the main obstacle to employment. To meet this challenge, SROP 2.1.1 (Step Ahead!) gives special support for adults with low educational levels. Based on estimates, more than 1,600 people attended these courses to finish the primary level of education.

For a complex housing intervention, the Ministry of Social Affairs and Labour is leading the project preparation, in order to de-segregate 100 ghetto-like shanty towns between 2010 and 2014, under SROP 5.3.6. The National Development Agency since 2007 has been coordinating a multi-level complex intervention, targeting EU Funds for 33 Underprivileged Micro Regions in Hungary (LHH).

## Italy

- The Italian Ministry of Labour and Social Policies is engaged in co-operation with ISFOL in the process of mapping project experiences for the 2007-2013 period. The activity started in October 2009. The various experiences and projects have been funded under the ESF. Hence, the Mapping also concerns other projects funded at the local level with the support of regional laws. A complex set of materials has been organised (i.e. workshops, leaflets, handbooks, analyses, cultural events, guide, etc.).



It is not possible to trace back all the experiences, since they are not all related to a so-called project experience activity, which is difficult to be reported on a data sheet, such as the experiences that have been carried out in same regions. A major segment refers to activities related to the projects that are now being assessed. In particular, in the region of Sardinia, as many as six ESF calls for proposals, devoted to the Roma and Sinthi communities, are now being evaluated. In the region of Piedmont, 20 projects are at the moment being assessed to be funded under regional law. This early Mapping is to be regarded as a work in progress and data is likely to be further updated in the future.

Among the activities planned within the ESF, there are specific initiatives that are managed by the UNAR, the National Office for the fight against Racial Discrimination (Department of Equal Opportunities, Presidency of the Council of Ministers).

In particular, within the framework of ESF PON GAS 2007-2013, Axis D «Equal opportunities and non discrimination», the following action, to be managed directly by UNAR, has been envisaged: «Promotion of the governance of policies and tools for social inclusion and fight against discrimination of Rom, Sinti and Camminanti communities». The aim of the action is to eliminate any discrimination and favour a larger participation in the processes of economic and social development of Rom, Sinti and Camminanti communities in the regions under the Convergence Objective (Campania, Basilicata, Calabria, Sicilia, Puglia). The action aims to promote the enhancement of strategies in favour of the aforementioned communities by supporting the Regions with regard to regulations, administration and management and by identifying, planning and monitoring, providing regional guidance and support in order to locally overcome obstacles to the social inclusion of these communities. Due to its innovative and experimental nature, the action requires

a previous elaboration of fact-finding analyses related to social, demographic and economic characteristics of the communities present in the regions under the Convergence Objective, mappings of local institutions and services in their favour for education, vocational training, access to work, health and social services, as well as the identification of local interventions for social inclusion to be carried out by councils and the private sector. The action is also addressed to the promotion of the capacity building of Roma people and their associations, for the improvement of their involvement in the decision making of local and regional policies. The promotion of effective partnerships and local and Regional Task Force between Roma communities and public and private sector will be developed to overcome the situation of social and economic exclusion and for the implementation of political guidelines and an Action Plan for the South of Italy. For the 2007-2013 period a total budget of € 4,000,000 has been allocated.

As for activities also referable to the ERDF PON GAT, support action for the Regions has been envisaged. The activities of the Regions aim to ensure equal access to social and local services by populations at risk of social exclusion, in particular of Rom and Sinti origin, in conformity with the new European programme for the period 2007-2013 envisaging specific areas of intervention aiming at increasing social and local cohesion.

The interventions are planned for four regions under the Convergence Objective (Calabria, Campania, Puglia and Sicilia) and the economic resources available amount to €1,410,000.

With reference to the intervention lines for the Calabria region, with the support action no. 3 «Support and definition of models to ensure objectives of equal access to services for immigrants, Rom and Sinti», actions are being planned to support and enhance the institutions in charge of protecting the rights of Roma, Sinti and





Camminanti communities, to enhance existing tools for equal treatment and to increase the effectiveness of the actions for social, cultural and economic inclusion and participation of aforementioned communities.

Intervention line no. 2 for the Campania region «Technical support for the definition of intercultural policies and provisions of services towards social inclusion for immigrants, Rom and Sinti» refers to the support for the definition of models to ensure information and awareness-raising in favour of the access to services by people at risk of discrimination and the creation of maps of social opportunities.

Intervention line no. 3 aims at reaching similar objectives for the Puglia region, «Technical assistance and support to information and awareness actions to ensure access to services for the people more at risk of discrimination and also enhancement of the capacity to manage intercultural policies». The same applies to intervention line no. 2 for the Sicilia region «Support for the identification of innovative models to ensure equal access to services for the population at risk of social exclusion».

As for awareness-raising initiatives, an area of intervention that UNAR considers vital for the fight against stereotypes of Rom and Sinti, the Dosta Campaign is being launched, promoted by the Council of Europe and focusing on the fight against prejudice and stereotypes against Rom and Sinti through a global strategy based on dialogue and mutual knowledge. In order to adapt and integrate the contents of the mentioned campaign with Rom and Sinti associations, the Office has already set up, by means of the relevant decree, a technical panel for a permanent coordination with the associations. This panel has already met several times and has drawn up the essential profiles of the campaign, gathering ideas, projects and initiatives to be organised throughout the country. The first activities of the campaign, funded with a budget of € 200,000, will start in May 2010.

- The Italian Ministry of Interior finances a project aimed at improving skills of social workers and officials employed by Prefectures and local authorities to help them assisting the process of integration of Roma community in the Phasing-in Regions. The project, funded for € 936,720.00, includes training courses for officials in the Prefectures. Roma representatives of associations and mediators help social workers of the Ministry of the Interior and local authorities regarding issues related to Health and social care, safety and legality. The project will promote the development of relations between institutions, local associations and social environments to encourage the acquisition of «best practices» to support the process of integration of Roma people.
- The Italian Ministry of Economic Development –upon request by the Ministry of Labour and Social Policies– amended code 3 on the MONITWEB Single monitoring System the table context referring to «Vulnerable Groups» from «Migrants: Nomads» to «Migrants: Roma, Sinti and traveling communities». This change will allow the monitoring of many other project experiences that have been implemented in the framework of Structural Funds.

Within the 2007-2013 programming period, at regional level 3 projects have been co-financed by the ESF for a total budget of 220,000 Euros. Data was also provided on 10 projects implemented directly by the Italian government and Regions since 2007, and 2 projects implemented between 2005 and 2007.

- Social inclusion projects, co-financed by the ESF and focused on the creation of a social cooperative committed to vocational guidance, pathways to insertion in the labour market, and certification of competences were implemented by the autonomous province of Bolzano and the Region Emilia Romagna. Overall, more than €220,000 have been invested since 2007. With a budget of €18,800, a





vocational guidance project reached 44 beneficiaries; a €16,280 project reached 13 beneficiaries by bridging the gap with the labour market and helping them obtain a title; while a € 185,000 project to set up a cooperative is currently under implementation and has not yet been evaluated. With regional law, Region Lazio funded six projects on training pathway and internship for working inclusion in different contexts (health care, cultural mediators, retail sales). The objective is to contribute to the process of integration of young Roma. With a budget of €360,000, the projects last one year benefitting 92 Roma persons in total.

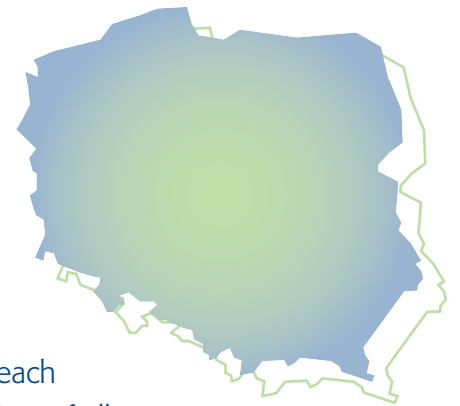
- Two other projects ought to be mentioned because they lasted from 2005 to December 2007, thus bridging the 2000-2006 and 2007-2013 programming periods. Titled «The long march of the Sinthi and the Roma» (€700,520), and «ROMA Citizens of Europe» (no budget provided) focusing on access to the net-

work of services and labour market insertion for nomad populations (in particular Roma and Sinthi) in the Region Emilia Romagna and Region Piemonte, through both system interventions and individualised and «on the spot» training courses aimed at vocational integration. Both projects took place within the framework of EQUAL. The former provided professional guidance to 204 users, organised 20 training courses totaling 3,394 hours and involving 102 users; and achieved apprenticeships in businesses for 27 users and 13 vocational placements with contracts. 180 companies have been reached by the sensibilisation campaign. The latter unfortunately presented no quantitative results and nor a measurable impact. It was mentioned that the project improved the vocational placement of nomadic Roma in formal employment and the achievement of guidance, training and placement services adapted to Roma needs. Two types of products resulted from the project: videos and manuals.

- In 2009, Region Piemonte and Provincial Authority of Turin financed a project for social and work integration of Roma people for € 480,000.00 with Migration Policies National Fund of Ministry for Labour and Social Policies.

## Poland

In Poland, a total of 20 social inclusion projects targeting Roma have been implemented or are under implementation nationwide, regionally or at the local level (specific cities or neighbourhoods). All projects are managed centrally by the Polish government. No budget was provided by the Managing Authority but several ambitious projects are being implemented, although no preliminary results are available yet. The aggregate number of beneficiaries should reach 2,678, of which circa 87 percent are Roma. The budget of all 20



projects amounts to €2,922,716.94. The highest value for individual projects is €487,800.46 and the lowest €58,167.18.

Projects directly and indirectly benefiting Roma focus primarily on 1) inter-cultural exchange, the promotion of and anti-discrimination; 2) vocational activation, professional training and qualification for Roma accompanied by childcare during training, but also training for teachers and labour office employees; 3) other projects focus on health and hygiene by imparting workshops and other forms of training to Roma women and men.

*Two particular projects stand out due to their scale and ambitions:*

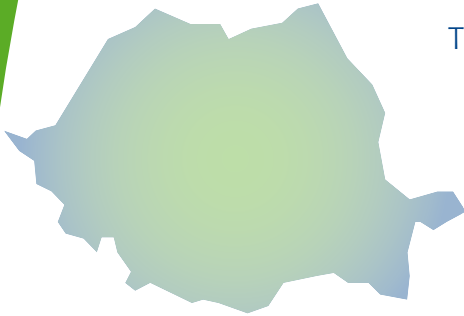
- First, a «Project for social integration and vocational activation of Roma People in Wałbrzych, Kłodzko and Wrocław City». This integrated project combines employment activation (including professional training and qualification) and education (including a campaign against analphabetism, pre-school education and the prevention of early school dropouts) in Dolnoslaske voivodeship, which began in June 2009 and ended on the 31st of January 2010, and which intended train 36 project staff members for actions aimed at Roma, and benefitting 90 families (a total of 643 beneficiaries). No evaluation of the project has yet been undertaken.
- The second project, titled «The innovative Roma on the labour market» was initiated in May 2009 and will last 17 months, focusing on social integration and vocational activation for unemployment Roma. It will involve the recruitment of 17 participants amongst Roma with a higher level of education to be professionally trained as Socio-Vocational Assistants (AZ-S), in order to provide adapted counseling services to Roma concerning the labour market. It is planned that the services of AZ-Ss will benefit 800 Roma persons nationwide, and of these 800 Roma supported by the AZ-Ss, 107 will obtain employment contracts.

## Portugal

No data.



## Romania



The Romanian government ought to deserve special mention for investing particularly large amounts of resources in projects targeting directly Roma needs. Most projects co-funded by the ESF are managed centrally and focus primarily on education (including early childcare), vocational and professional training, labour market insertion and social inclusion. According to the information provided by the Romanian Managing Authority, a total of 11 projects are being or will be implemented multiregionally or statewide with an aggregate budget of 37,819,853 Euros and are planned to benefit 61,634 Roma men and women. Most projects are short-to-medium-term (2-3 years). We can note that 6 major projects (employment and early education) are directly managed by the National Roma Agency. The combined results of such projects could have a positive ripple effect.

### Several integrated projects deserve mention:

A transnational pilot project, «Together on the labour market», is managed by the National Roma Agency is being implemented in 8 localities in partnership with the *Fundación Secretariado Gitano* from Spain as transnational partner during the period 2008-2010.

In the following period 2010-2013 the project aims to be expanded nationwide. At a cost of 4,908,749 € for a period of two years, the project has ambitious aims: to benefit 6,670 Roma women and men through personalised support



for labour insertion, vocational training adapted to the demand of the Romanian labour market. No preliminary results have yet been provided. With a budget of 4,770,000 Euros, another employment activation project, «Strategic steps for improving access to education for Roma children», presents ambitious outcomes and outputs: to increase the qualification on the labour market of 2,000 persons, including 1,000 Roma, the development of social economy structures, the increase of job opportunities addressed to vulnerable groups, the establishment of 8 Regional Centres to supporting social economy structures, the creation of 8 Regional Partnerships, and the development of 80 social economy projects.

Within the education field, the «All in kindergarten, all in the first grade. Integrated programmes for increasing the access to education and the educational level of the children within under-privileged communities, mainly Roma, during 2008-2009» project, is managed by the central government with a budget of 5,000,000 Euros. Although no data is yet available on its results, it sets ambitious and specific targets. The general objective of the project is to prevent and correct early school leaving for children aged 5 to 8 within 420 disadvantaged communities (a high proportion of them being Roma children). It seeks to increase access to pre-school and school education for 8,000 children within disadvantaged communities, mainly Roma, through participation in «Summer kindergarten» and «School after school» educational programmes. Its potential outputs are ambitious: A 75% decrease in school drop out rate for pupils in the first grade belonging to the 420 disadvantaged communities; 6,000 Roma children benefiting from the school-after-school programme and 10,000 Roma parents receiving counseling regarding child education.

Three other projects target pre-school education. Two are managed respectively by the «Amare Romentza» Roma Centru and the National Agency for the Roma, with more than 4,000 combined beneficiaries. The third, titled «Strategic steps for improving access to



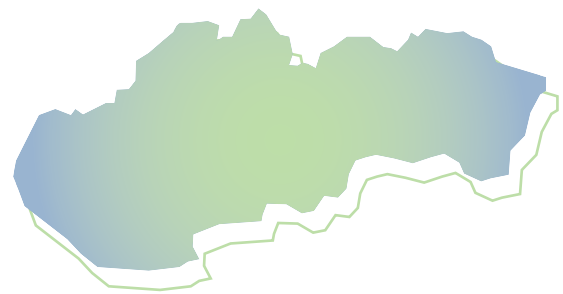
education for Roma children» is managed by Romani CRISS and will have as a general objective the reduction of early school leaving risk among Roma pupils. With a budget of 4,872,060 Euros, it will develop desegregation plans within 90 schools from 4 regions of the country –North-West, Centre, South-East and Bucharest-Ilfov over three years, including intercultural training for 150 teaching staff and awareness-raising initiatives regarding the benefits of education to 20,000 planned Roma beneficiaries.

Finally, an integrated project, «Education of Roma children- the way to a guaranteed employment» is being managed by the National Roma Agency and implemented for three years (no exact dates provided). It aims to increase of the educational level of the Roma children from rural and urban areas nationwide and the development of human resources. With a budget of 4,943,831 Euro and targeting 4,800 beneficiaries (50% women), it could help to find ways to articulate education and employment policies through effective local implementation of equal opportunity and desegregation measures, and if it demonstrates long-term sustainability.

## Slovakia

The Slovakian government has undertaken an ambitious and comprehensive set of actions targeting Roma needs, mainly focused on access to employment and vocational training, including for secondary school students and in order to bridge formal education and employment. The

Slovakian Managing Authority deserves a special mention for providing relatively detailed results (including beneficiaries) and outputs of most projects that have been completed. Some doubts remain regarding a number of data sheets, which do not clarify whether the results provided are planned or consolidated. Results and impacts from this OPs still need to be evaluated. 265 projects had been approved by



January 2009 within the Employment and Social Inclusion OP (E&SI OP), of which 51 included the Horizontal Priority Marginalised Roma Communities (HP MRC). A significant proportion of the total allocated funds (non-repayable financial contribution) within the E&SI OP (27,558,131 Euros for approved requests) was invested within the frame of the HPMRC (13,659,741 Euros), an encouraging sign, although far off the planned budget for these activities, which totalled €151,994,119 in 2007.

Additionally, 8 pilot projects concerning Social Enterprises within the HP MRC were approved by the Managing Authority for OP E&SI in 2008, with a total budget of 23,793,811.76 Euros. The volume of the investment in Roma inclusion is significant in both absolute and relative terms, and if effectively implemented, could produce noticeable effects in localities and regions targeted by the projects.

The overwhelming majority of projects targeting Roma directly or with a Roma dimension in the 2007-2013 period have been managed regionally or locally, with ESF-cofinancing. The Slovak Structural Funds Managing Authority provided information on 70 projects initiated in 2007 and completed in 2008 (and 11 additional projects bridging the 2000-2006 and 2007-2013 programming periods), for a total investment of 12,709,541 Euros. Of these 81 projects, 17 projects targeted Roma directly. Projects have predominantly focused on professional training, job placements, individualised vocational activation for persons, and often involved awareness-raising and inter-cultural training for staff in labour offices (59 projects). A majority of these projects focused on establishing partnerships between labour offices and companies for job placements and «in house» professional training for vulnerable populations, including Roma. A total of close to 53,000 beneficiaries were observed or planned for all projects. Projects targeting Roma directly benefitted or aimed to benefit an aggregate total of 7,907 persons. A significant number of persons (12,375) received professional training or vocational counselling, of which 4,304 beneficiaries could be identified in projects directly addressed to Roma.

The number of jobs obtained for all reviewed projects totalled 257, some of which may have benefitted Roma jobseekers. However, employment generation may have taken place but has not been accounted for.

22 projects involved the development of career guidance and systems for anticipating changes of qualification needs, targeting primarily secondary school students. 21 projects involved mainstreaming and indirectly benefitted Roma students as part of targeted vulnerable groups. 34,424 students received counselling, and 197 teachers and educators received training as educational advisors. One project targeted Roma adolescents and young adults directly and benefitted 767 students.

**Three projects**, designed to support access to employment and professional training deserve special mention. These projects were respectively managed centrally, multiregionally and locally:



One nationwide project, «Increased employability of groups endangered by social exclusion via Local Partnerships of Social Inclusion creation», benefitted from significant investment (€1,981,791). Implemented in all regions except Bratislava over a four year period (01/07/04 to 30/09/08), it targeted 9,000 persons excluded from the labour market and in long-term unemployment through local partnerships and training. A majority of approved individual projects (54 out of 97) directly benefitted Roma. The results provided by the Managing Authority are positive: 9,000 persons participated in training programmes, of which 35 percent (more than 3,150) were placed on the labour market. 300 jobs were created in the social economy sector, while 130 local partnerships were created, of which 70 were still functional one year after the completion of the project.

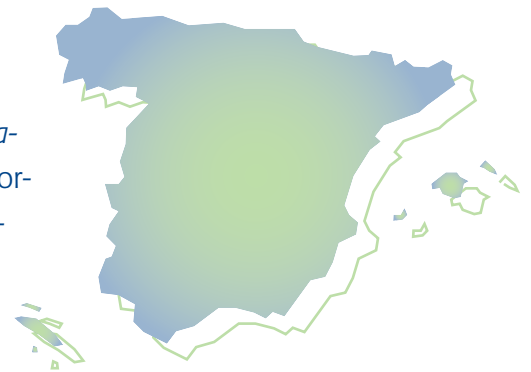
The «Development of community social work and social centres in municipalities in Eastern Slovakia», targeted 1,000 Roma beneficiaries (8 percent of the total Roma population in the region) in situations of socio-economic marginalisation in 35 municipalities of the Košice self-governing region. With a budget of 475,818 Euros and implemented over a one year period (20/11/2007 to 30/11/2008), its objectives included: the 1. development of community social work in municipalities of eastern Slovakia, 2. development and networking of community centres in micro regions of eastern Slovakia, 3. training and counselling activities, 4. information about the community work and improvement of community life on local and regional levels.

The project achieved relatively positive results: 36 partnerships between community centres, 1,050 participants, inter-cultural training provided to social workers in each of the participating municipalities and the creation of 42 through personalised counseling and training, amounting to a 1 percent reduction in unemployment rates for Roma communities in the region.

Another smaller project co-financed by the ESF, «Training as a phenomenon at the labour market», also achieved positive results. Implemented in the Prešov municipality at a cost of € 153,026 (01/10/05 to 31/03/07) and managed by the private foundation Nadácia Pro Humanitas in collaboration with a business association (Združenie podnikateľov Slovenska), the programme targeted directly 300 Roma beneficiaries through skills-development and vocational training. It resulted in the completion of a training programme by 120 Roma workers, of which 48% achieved a job placement within 1 month (50% within 6 months) after the finalisation of the training programme.

## Spain

Within the Multiregional Operational Programme «Fight Against Discrimination», the project Acceder implemented by the *Fundación Secretariado Gitano* (FSG) focuses on facilitating and supporting Roma access to employment with the objective of improving social inclusion and equal treatment for members of the Roma community. The Acceder Programme has achieved significant quantitative and qualitative results:



### In quantitative terms:

- For the 2008-2013 period, a total budget of 41,700,000 € has been allocated. In total, 72,222,833 € have been invested since 2000.
- By 2007, the FSG had attracted 32,944 users, of which 72% are Roma and 53% women, and obtained 23,452 employment contracts.
- Within the context of the 2007-2013 programming period, 18,040 persons (of which 54.5% are women) used the resources provided by the FSG, and 12,290 employment contracts were obtained by a total of 6,680 persons between



January 2007 and December 2009. Of the 6,680 persons in employment through Acceder, 4,746 were Roma and 2,459 Roma women.

- In total and for its first decade of existence, the programme had therefore reached a total of 50,984 users and achieved 35,742 contracts, with 35,337 persons in personalised labour insertion pathways and 10,966 persons trained or in professional training.
- The FSG, furthermore, develops its activities with an active participation of Roma: of its 1,255 contracted workers, 40% are Roma and 53% women.

### **In qualitative terms:**

- Acceder has effectively adapted vocational training to the demands of the labour market and established direct links between Roma workers employers and the state by promoting a partnership network with administrations and companies.
- It has begun to change Roma employment prospects within the Roma community and in mainstream society. By eliminating obstacles to training and paid employment, Acceder upholds the principle of equal opportunities and improves the standard of living for tens of thousand Spanish Roma individuals and their families.
- The project has also worked towards raising awareness about prejudice and discrimination and standardised proactive policies targeting the Roma population.

Apart from this national OP, there are a number of regional OPs in at least 7 regions who have directly targeted Roma with an investment of 5,366,587 Euros since 2007. This regions are: Aragón, Asturias, Cantabria, Castilla-Mancha, Extremadura, Galicia, and Rioja. The main fields of action are being: access to employment, professional training and social inclusion.

## Sweden



As emphasised by the Swedish Managing Authority, no programme co-financed by Structural Funds targets Roma directly. The Swedish Managing Authority provided data on 2 small-scale, awareness-raising and equal treatment projects (directly and indirectly benefitting Roma) and one major project directly focusing on employment activation for Roma.

- The «Open doors» and «Roma in the north of Sweden» projects, co-financed by the ESF, and managed at the regional level, were implemented in the course of 2008 for relatively short periods of time (respectively January-October 2008; May-November 2008) and small budgets (total budget for both projects: €144,0421). The former indirectly benefitted Roma workers and children by financing awareness-raising workshops and fora involving stakeholders in order to promote equal treatment and non-discrimination. The latter aimed to increase awareness of the importance of inter-cultural exchange and multiculturalism to facilitate labour market integration for Roma and Sinti minorities.
- The «Romans in Norrköping», co-financed by the ESF, the Swedish government and municipality of Norrköping, has invested significant resources (€2,068,442) to facilitate the labour market insertion of Roma immigrants from the former Yugoslavia in the city of Norrköping through education and training – including knowledge on Swedish society, Swedish language courses, information and job counseling to facilitate entry in the labour market. The project has been managed by the local government over a two-year period (1st August 2008 to 31st of July 2010). It initially aimed to benefit 150 Roma (of which 75 Roma women). By late 2009, 50 Roma participants had obtained a job, and 50 other participants had begun occupational training, indicating a high degree of success in relation to the project's objectives.



A stylized, light blue silhouette of a human figure with arms raised, set against a dark blue background. The figure is positioned on the left side of the frame, with its arms reaching towards the top left corner. The background is decorated with a circular pattern of light blue stars in the upper left and several larger, light blue floral or star-like shapes scattered across the top and right sides.

Conclusions.  
Lessons learned  
and challenges  
ahead

4

## 4.1 Findings

**As** can be noted from the preceding analysis, significant efforts have been made and undeniable progress has taken place in the 2007-2013 programming period. This is manifest in a substantial increase in the financing of projects directly and indirectly benefiting Roma as well as the number of projects addressing Roma needs directly.

### Lack of data and evaluation of projects

- In spite of some positive results and potentially significant impacts, it is difficult to obtain precise information on the concrete impact of projects under implementation due to a **lack of disaggregated data**. We can note a delay in the implementation or evaluation of projects in many cases, which implies that their **impact cannot be assessed** yet in a reliable way.
- The analysis of different Member States illustrated the **scarce knowledge** that many local and regional administrations have regarding Roma needs, which hinders adequate project design.
- Scarce information is likely to result in a **dispersion of activities** (and funding) and **ineffective project implementation**. Such bottlenecks constitute one of the fundamental issues affecting negatively the use of Structural Funds for Roma inclusion, which clearly constitutes one of the areas for improvement in the future.
- In some countries this situation may be compounded by the fact that **Roma are not recognised as a specific group** but rather are included in the «vulnerable or excluded groups» category.
  - Furthermore, in some cases local and regional authorities may encounter certain constraints when trying to have access to Structural Funds related to **complex administrative procedures, co-finance requirements**, etc. In some other cases it may be due to lack of political interest from local and regional authorities.

- Political will cannot be translated into effective policies without the existence of **broader national plans** that would imply obligations to implementing agencies to demonstrate the real impact of Structural Funds within localities. This is not possible if no reliable data is available on the investments made and the impact on beneficiaries.

### Managing models, coordination mechanisms and implementation bottlenecks

The majority of countries have succeeded in establishing functional structures dealing with Roma issues. Most of the models explored are recent and are still assuming new functions and a new modus operandi, since it is not an easy task to cope with the different dimensions of Roma social inclusion.

Significant challenges remain with regard to **vertical relations between administrative levels and to horizontal relations** between the key agencies designing and managing policies affecting the Roma).

- Although evident efforts to connect more effectively the Structural Funds implementation structures and the mechanisms in place for addressing Roma issues are observable, a question remains on whether the **synergy between implementation of the Structural Funds and the government strategies for Roma** could improve in the future. Cooperation between ESF Managing Authorities and the Specialised Roma units and Roma-related coordination structures varies. In some cases it appears to be limited to, for example, information exchange on Roma-related projects. The degree to which specialised Roma units and coordination mechanisms are participating in the management of the Structural Funds varies between countries. The main roles observed include:
  1. Participation in occasional consultations;

2. participation in the monitoring and evaluation committees of the relevant operational programmes;
  3. in the case of the Plenipotentiary for Roma communities in Slovakia: this body undertakes a role of coordinating the horizontal priority on Marginalised Roma groups.
- In most cases, a certain degree of **dialogue and contact between Managing Authorities, relevant line ministries and consultative bodies** occurs at various levels. Whenever a relation exists within ESF implementation mechanisms (e.g. intermediary bodies, co-funders), the relationship is likely to be more structured; whereas in other cases more administrative dispersion is manifest, many projects are implemented in parallel without the existence of a coherent planning process and coordination between Roma policies and Structural Funds programmes.
  - In the majority of cases, there nevertheless appears to be **limited vertical cooperation** on Roma issues between the central government (including ESF Managing Authorities) and regional and local authorities responsible for the implementation of actions for Roma inclusion.
  - It can be emphasised that existing **inter-ministerial coordination structures**, which often include Roma representatives, provide an opportunity for Roma to be involved in high-level policymaking. However, the participation of Roma in the planning, implementation, monitoring and evaluation processes has been stimulated yet remains insufficient.

The existence in certain Member States of a **nation-wide guidance system** to stimulate the effective use of Structural Funds for Roma, and the existence of mechanisms for cooperation between different OPs on Roma issues indicate potentially productive directions in the management of Structural Funds for Roma.

In sum, improvements need to take place regarding coordination mechanisms; by creating more instruments at all administrative levels and by setting efficient monitoring and evaluation schemes for projects financed by Structural Funds, among other measures.



## 4.2 Recommendations for Member States and European Institutions

The current assessment of Structural Funds invested for Roma inclusion and the reduction of inequalities experienced by Roma helps to identify both positive and negative trends, as well as the significant coming challenges for Structural Funds benefiting Roma and for the EURoma network itself.

Significant progress has been taking place in the past decade, and within the 2007-2013 programming period.

- The volume of funds invested for Roma has increased significantly. Roma are more visible in programmes.
- A number of projects have achieved substantial evidence-based results, and helped to generate information, methodologies and know-how, which have in turn supported a better understanding of Roma-related issues, the refinement of working tools and the training and employment of skilled workers, Roma and non-Roma, specialised in Roma inclusion.
- Roma-related issues are being incorporated more systematically on the political agenda of Member States and EU institutions, as evidenced by the voluntary participation of twelve Member States in the EURoma network.
- New coordination mechanisms and managing models are being built.
- Targeted approaches to Roma inclusion are being fine-tuned within the general objective of mainstreaming, and positive results can be observed in several national and local contexts.

However, many challenges remain, and in order to guarantee the sustainability and transferability of projects co-financed by Structural Funds additional efforts are required. Short-term

achievements may very well stop and backslide in the medium-term if monitoring and evaluation mechanisms are not put in place in order to secure the transparent and effective implementation of projects. We have identified **five key recommendations** that require particular attention for current and future initiatives co-financed by Structural Funds:

**1. To consolidate the function of Structural Funds as political instruments** as well as financial resources for Roma inclusion in order to implement actions at the local level that achieve long-term, sustainable results and that feedback in local initiatives in other Member States. To this end, progress must be made in several directions:

- a. A long-term approach is a prerequisite for and an opportunity within the framework of the Structural Funds. Given that real transformations can only be achieved in the medium-term, stakeholders must plan programmes over the full seven-year period.
- b. It is necessary for Structural Funds to combine national and local approaches by acting through programmes that concurrently operate with a national strategy and provide local responses to concrete needs.
- c. A tight coordination between the departments or agencies managing the Funds (i.e. Managing Authorities) and the authorities responsible for planning policies for Roma is indispensable.
- d. A national programme and local projects that are mutually supportive must be developed. Actions coordinated at the EU level and implemented concurrently at the national (policies) and local levels (grassroots) have a proven impact: launching a nation-wide programme helps to cover the entire country, but also allows the articulation and strengthening of Roma policies, the creation of synergies, economies of scale and therefore achieves a feedback between top-down and bottom-up approaches.

EU-sponsored coordination accelerates such feedback and helps to correct deleterious practices.



- 2. Operational Programmes must achieve «explicit but not exclusive targeting»** within the broader objective of mainstreaming Roma participation in society.
- a. Targeted programmes are necessary whenever special circumstances force specific actions aimed at correcting disadvantages, but they must lead to normalisation.
  - b. General programmes should be adapted and open to Roma in order to achieve mainstreaming. Equally, programmes targeting Roma should include other potential beneficiaries, particularly the vulnerable and marginalised.
  - c. Desegregation must be a key criterion of all programmes.
  - d. Actions must secure the involvement of Roma as agents of change and the majority society in order to raise awareness.
  - e. The heterogeneity of Roma populations suggests that no single strategy for all should be elaborated, but a set of strategic approaches providing specific solutions to problems in their geographical, economic, social and legal context. Individualised integration pathways within an integrated and community approach, which entails the provision of tailored but not segregated services must therefore be developed.
- 3. Existing measures, monitoring and evaluation mechanisms must be significantly improved.** Sometimes inadequate evidence has affected the elaboration of the present report. Agencies and organisations implementing projects co-financed by Structural Funds and targeting Roma directly or benefitting Roma indirectly should be held accountable and implement actions in a transparent manner.

The need for evidence-based policies leads invariably to reflect on three issues affecting the effectiveness of actions and the acquisition of know how: ethnic data collection, the monitoring of actions and the evaluation of results based on measurable indicators.



- **Ethnic data collection:** the positions of Member States are hard to reconcile, as some legal constraints render ethnic data gathering difficult and methodological approaches are sometimes divergent. There is indeed no single way of collecting data; yet without information, policies lack credibility as there is no possibility of demonstrating and tracing progress. As different Member States are using diverse tools to obtain relevant information, sharing existing tools in each partner country could be an appropriate starting point to eventually build a common methodology. However, it should be emphasised that processing ethnically disaggregated data is not unlawful within the EU, and that policies aiming at social inclusion require a solid evidentiary basis.
- **Monitoring and evaluation:** in the context of the implementation of EU-funded projects benefiting Roma, debates regarding information gathering have important implications for the improvement of monitoring and evaluation mechanisms. Project monitoring must be systematically integrated into the existing Open Method of Coordination. This will facilitate the design and implementation of evidence-based policies and facilitate the development of adapted interventions supported by mainstream programmes. Good design, monitoring and evaluation would contribute to the overall effectiveness of public policy action, would help to achieve better outcomes with available resources and therefore create a positive perception of inclusion policies. It also should be emphasised that in the interest of transparency and effectiveness, projects should be given visibility and be widely publicised and disseminated.
- **Information and accountability:** as emphasised in the preceding chapter, there is an urgent need to verify whether activities undertaken within the framework of Operational Programmes are actually implemented in accordance with the original plan and what their actual results and outcomes are, in order to allow for a redefinition of approaches and priorities and the reallocation of resources whenever necessary. Ethnically disaggregated data collection, which itself is subject to methodological questions, induces an identification of minimal quantitative and qualitative in-



dicators that ought to be used for the monitoring and evaluation of project effectiveness. For each OP and for each project, minimal indicators, such as the number of beneficiaries disaggregated by gender, key outputs such as the number of enterprises and employment contracts created, the number of Roma trained, among others, should be included in the planning process and measured in annual reports.

- 4. A strong partnership and better coordination between stakeholders** is a prerequisite for the implementation of such policies, and would facilitate the mobilisation of all relevant agents. In this sense, it requires progress along the following lines:
- a. Horizontal coordination between Managing Authorities and Ministries dealing with Roma issues.
  - b. Horizontal coordination between Managing Authorities and agencies responsible for Roma issues when applicable.
  - c. Vertical coordination between the different administrative levels: national, regional and local. Harmonisation of national plans and programmes with regional and local projects.
  - d. Partnership between public administrations, private companies and the information media.
  - e. Partnerships between public administrations and NGOs.
  - f. Active involvement of the Roma NGOs and Roma leaders.

**5. Qualitative progress in the implementation of EU-funded projects must be made to gain efficiency and impact. Different actions must be carried out in the following fields:**

- a. The transfer of good practices into other contexts while achieving adaptability and increasing the existing know how.
- b. The specialisation of professionals and civil servants at all administrative levels.
- c. The design of working tools based on the knowledge acquired.
- d. The improvement of independent, on the ground evaluation and monitoring systems.
- e. Streamlining managing models to avoid overlaps and duplication of projects.
- f. Harmonising national plans and programmes with regional and local projects.



## 4.3 Challenges ahead for the EURoma network

*The EURoma network was created with the following central aims:*

- To increase the prominence of Roma-related issues on the agenda of Structural Funds.
- To consolidate transnational coordination mechanisms – i.e. increasing the intensity of the coordination from a horizontal perspective of exchange and cooperation between participant Member States and also among different level administrations within Member States, within the framework of Structural Funds and Social Inclusion for Roma. This entails intensifying the activities and outputs of EURoma.
- To make efforts as to develop further tools and training as well as to intensify the follow up and assessment for network members.

*In order to make progress along these lines, EURoma still has a number of challenges ahead:*

- **To make progress in relation to data gathering:** insufficient data has been collected from Network members on the impact of Structural Funds on Roma inclusion – which affects negatively the raison d'être of EURoma. Because of existing difficulties, including national restrictions and/or in some cases resistance from Roma population itself, ethnic data collection remains a key challenge for EURoma. Yet **limitations remain in terms of the clarity to reflect what is actually happening on the ground as well as the scarcity of some of the data provided by some partners.**
- **To achieve a more active engagement of EURoma partners,** by providing support of the activities of the EURoma network, by diffusing its outputs and making use of the opportunities offered by EURoma, and by applying its methods to the national level.



Partners must also make more efforts to provide valid and reliable information on projects implemented within the context of Operational Programmes, using the sheets especially designed for compiling such information (EU projects sheet).

- **To find working mechanisms that accommodate the diversity of EURoma members, while facilitating the achievement of a common purpose:** EURoma is working at different speeds, mainly in terms of data collection procedures and in terms of the dynamics of Working Groups. This can be seen as a challenge but not necessarily as a liability.
- **To make substantial progress in the exchange of experiences,** through the identification of positive experiences and methodologies in order to maximise the know how required to generalise them while adapting them to different contexts.
- **To reach a far greater number of stakeholders,** particularly within civil society and among local administrations in its activities – through EURoma meetings and existing sharing tools (newsletter, website) in order to build sustained partnerships and achieve an active involvement of stakeholders. Thematic conferences are important instruments to increase the visibility of the issues addressed by the network and of the network itself. This was planned to happen after a phase of consolidation of the network so next steps will focus in this direction.
- **To attract the partnership of other EU Member States.** Nevertheless, considering that EURoma members include the highest concentration of Roma in the EU and the highest proportion of Structural Funds allocation, its relevance is hardly disputable. However, large-scale Roma migration to Western Europe may constitute an opportunity to stimulate greater interest by recipient countries to join the network with the aim of directing Structural Funds towards Roma migrants, while the network may provide benefits to future Member States with significant Roma populations.



The background is a solid green color. In the upper left corner, there is a semi-circular arc of small, light green, five-pointed stars. A large, stylized silhouette of a person with arms raised is positioned on the left side. To the right of the person, there are several large, overlapping, light green leaf-like shapes. The word "Annexes" is centered in the middle of the page in a white, serif font.

# Annexes

2007-2013 Operational Programmes and Roma. Direct inclusion in policy documents	
Roma included directly in policy documents	Programmes
<b>Bulgaria</b>	
Human Resources Development OP (ESF): specific chapter on assistance to the Roma community. Roma benefit through labour market inclusion, entrepreneurship development, training, education (intercultural education, reduction of early school drop-out; development of extra-class activities); improving the quality of services, facilitating access to them and development of social economy, improving the access to healthcare services and development of prevention campaigns for socially significant diseases (tuberculosis, syphilis, HIV).	4 out of 8 Priority Axes identify Roma as a target group of activities developed under these axes: 1) PA1: Job creation and inclusive labour market (€216,675,719); 2) PA3: Improving quality of education and training for labour market needs of «knowledge based economy» (€206,357,828); 3) PA4: Improving access to education and training (€165,086,262); 4) PA5: Social inclusion and promotion of social economy (€144,450,479).
<i>Bulgaria, the economic crisis and measures addressing Roma needs.</i>	One of the most attractive schemes directly targeting Roma is the Anti-crisis grant BG051PO001-4.1 «Integration of children and pupils from ethnic minorities in the educational system» with a total budget of BGN 12 million (EUR 6 million). The scheme has been prolonged until 2011. The main goal of this operation is to promote the motivation and improve the circumstances for equal access to the education and training system in Bulgaria.
<b>Czech Republic</b>	
In programming period 2007-2013, Roma directly included in 3 OPs. 1) Human Resources and Employment OP (ESF); 2) Education for Competitiveness OP (ESF); 3) Integrated OP (ERDF).	OP Human Resources and Employment - Priorities: «Active Labour Market Policies» (605,776,330 EUR); «Social Integration and Equal Opportunities» (398,606,070 EUR). Specific mention of Roma in second priority – 3.2 Support of social integration of socially excluded Roma communities. OP Education for Competitiveness - Priority «Initial education» (612,077,738 EUR); «Modernize Initial Education» (31,610,056 EUR). Different fields of support. There is one specific measure – 1.2 Equal Opportunities for children and pupils with special educational needs, expected to be also targeted for Roma children. Integrated OP (ERDF): expected to bring investments into socially excluded Roma communities – 3.1 Social Integration Services – part of this field is specifically targeted to socially excluded Roma communities and localities; 3.2 Employment Services.
<b>Finland</b>	
No information provided on the 2007-2013 OP in the EC Inter-Service Group document.	



Greece	
Roma directly targeted in 3 OPs: 1) Education and Life Long Learning ([EL] ESF funding); 2) Human Resources Development ([HRD] with ESF funding); 3) Competitiveness (ERDF funding).	<p>OP EL, Axis «Upgrading the quality of Education and Promoting Social Inclusion in the 8 Phasing in and Phasing out Regions». The project «Multi-cultural Education» plans to intervene in schools with Roma children in 80 municipalities over three years (2010-2013), with a budget of €9,000,000.</p> <p>OP HRD, Axis «Full Integration of the total Human Resource Capacity in a society with equal opportunities». Project: «Centers for the Promotion of Employment and Inclusion». Its implementation phase will last three years (2010-2013) for a budget of approximately €20,000,000, and will focus on the provision of services at the community level in the sectors of employment and social inclusion with priority given to Roma settlements, although no estimate of beneficiaries is yet available.</p> <p>OP «Competitiveness», Axis II: «Supporting and Encouraging Entrepreneurship». The Project «Encouraging Entrepreneurship of Rom», co-financed by the ERDF and with a budget of €12,120,137, and implemented between 2009 and 2010 focuses on strengthening and promoting entrepreneurship by funding new and sustainable businesses and upgrading existing ones. It is expected to benefit 180 enterprises.</p>
Hungary	
Social Renewal OP (ESF) - Roma are directly (desegregation programme in education) and indirectly (employment, education, training, access to social services) targeted in 8 measures within Priority Axis 3.	1 measure (Priority Axis 3.3.3) targets the Roma exclusively: Decreasing the segregation of severely disadvantaged and Roma pupils, promoting their equal opportunities in public education.
Italy	
<p>At the national level, Roma are not included directly in any policy documents.</p> <p>At the regional level, three Regions – Abruzzo, Calabria and Liguria – identified Roma people as categories for actions within Social inclusion Axes.</p>	In the OP ESF of 2007-2013 programming period, the Abruzzo, Liguria and Calabria Regions have identified Roma as a target group of activities developed under Priority Axis 3 «Social Inclusion», which is devoted to developing integrated pathways for the social and professional insertion of disadvantaged people and to fight against all forms of discriminations in the labour market ( <i>Obiettivo specifico: Sviluppare percorsi d'integrazione e migliorare il (re)inserimento lavorativo dei soggetti svantaggiati, per combattere ogni forma di discriminazione nel mercato del lavoro</i> ).
Poland	
Human Capital OP (ESF) mentions Roma as direct beneficiaries (target group). Projects in the following spheres of activity are obtaining financial support: education, health, Roma and civil society, counteracting unemployment, knowledge about the Roma society. More detail: <a href="http://www.euromanet.eu/facts/pl/30552.html">http://www.euromanet.eu/facts/pl/30552.html</a>	Priority 1, «Employment and social integration» (ESF €430 mln): includes a Sub-measure 1.3.1 titled «Projects for Roma Community», that explicitly aims at providing a multifaceted response to Roma-related issues (€22 mln; ESF: €18,7 mln). Central implementation. Subsection 1.3.1 is also known under the name «Roma component».

Portugal	
<p>Several projects involving ACIDI are implemented with co-financing by the ESF. Various actions oriented towards promotion and social insertion, in fields of education, housing, employment/training and health.</p> <p>The National Strategy for Social Protection and Social Inclusion 2008-2010 recognises the need to overcome discrimination and reinforce the integration of specific groups (inc. Roma), and need to adopt additional measures specially aimed at Roma.</p>	<p>ACIDI, public institute responsible for creation, implementation and evaluation of sectorial and crosscutting public policies concerning the integration of immigrants and ethnic minorities (including Roma), and the promotion inter-cultural dialogue, created the Support Office for Roma Communities (GACI) in 2007. ACIDI takes part in some projects financed by the ESF: for example, the «Choices» Programme, which promotes the social inclusion of children and young people with immigrant and Roma background through 120 nationwide projects, is funded by the Institute for Social Security, by the Institute for Employment and Professional Training and by the ESF OP for Human Potential.</p> <p>Pilot Project for Municipal Mediators, which aims at providing inter-cultural training (14 October 2009 to 15 February 2010): fifteen Roma municipal mediators. Evaluation report pending at first year-end.</p>
Romania	
<p>Human Resources Development OP (ESF) mentions Roma explicitly in 4 Priority Axes. EC-Romania Joint Inclusion Memorandum (JIM) gives high priority to development and inclusion of Roma. National Strategic Report concerning Social Inclusion/Social Protection submitted by Romanian Ministry of Labor in September 2006 identifies the improvement of living conditions for Roma as one of three priorities for 2006-2008 period. Envisaged measures: improvement of access to education, to labour market, to housing.</p>	<p>Priority Axis 1 («Education and Training in support for growth and development of knowledge based society»): includes institutional development for Roma re/integration into education (€1,002,046,290 - ESF contribution: €797,803,989). Priority Axis 2 («Linking lifelong learning and the labour market»): Roma main target group under second area of intervention (preventing and correcting school leaving) (€1,053,460,619 - ESF contribution: €911,775,778). Priority Axis 3 («Increasing adaptability of workers and enterprises»): provides support to Roma (among other vulnerable groups) regarding health conditions and improvement of health and safety at work (€578,885,022 - ESF contribution: €450,189,271).</p> <p>Priority Axis 6 («Promoting social inclusion»): increasing Roma access to the labour market, through re/training, social services, personalised support, awareness raising activities, developing partnerships and new methods to combat discrimination. Target of 150,000 people to be trained, out of which 65,000 Roma. (€661,122,255 - ESF contribution: €540,608,927).</p>

Slovak Republic	
<p>4 horizontal priorities tackled in all OPs, one of priorities explicitly concerns marginalised Roma communities (MRC). Purpose: strengthen and increase efficiency of coordination of activities and financial resources aimed at improving living conditions of MRC. 4 priority areas do they all horizontally address Roma?: 1) education, 2) employment, 3) healthcare and housing, 4) poverty, discrimination and gender equality. Office of the Plenipotentiary for Roma Communities of Slovak Government coordinates the horizontal priority and drafted the «complex projects» concept for 2007-2013 programming period. Complex projects represent an overall development strategy for a specific area and should be implemented with a significant involvement of the local Roma community.</p>	<p>Employment and Social Inclusion OP: 2 measures mentioned: 1) «Supporting the social inclusion of persons at risk of social exclusion or the socially excluded through the development of care services with special regard to marginalised Roma communities»: Access to quality social services; professional training and access to employment; community work. 2) «Promoting equal opportunities in access to the labour market and supporting the integration of disadvantaged groups in the labour market with special regard to marginalised Roma communities»: employment, education and training for disadvantaged groups. Indicative allocation for implementation of complex projects intended exclusively for MRC for both ESF and ERDF programmes is €200,000,000. €151,994,119 allocated for the 2 aforementioned measures. How many Roma are planned to benefit from the programme? What is exact total amount? What other measures? What proportion ESF and ERDF?</p>
Spain	
<p>The National Multi-objective Operational Programme «Fight Against Discrimination 2007- 2013» is one of the 22 Operational Programmes to be implemented in the current period. The overall objective aims at promoting social cohesion, in particular, by means of supporting the inclusion of disadvantaged groups and fighting against any kind of discrimination based, among others, on ethnic origin. This national Programme is focused on the following priorities:</p> <p><i>Priority 2:</i> to enhance employability, social inclusion and equal opportunities for men and women.</p> <p><i>Priority 4:</i> to promote transnational and inter-regional co-operation.</p> <p><i>Priority 5:</i> technical assistance.</p>	<p>At the national level this programme considers the following actions aimed at Roma Population: 1) Personalised labour insertion pathways. 2) Promotion of social economy enterprises for people excluded from labour market. 3) Support social responsibility among enterprises in favor of social inclusion. 4) Preventive actions, follow-up and monitoring in order to fight against early school-leaving. 5) Professional training formulas adapted to the specific needs of the target group and the request of the labour market. 6) Accompaniment measures and social intervention for Roma immigrants. 7) Sensitising campaigns aimed at raising awareness on diversity in social and labor context. 8) Observatories, studies and entrepreneurial prospecting on exclusion issues.</p> <p>At the regional level: Regional OP's in at least 10 regions have directly targeted Roma with an investment of 5,366,587 € since 2007. These include: Aragon, Asturias, Cantabria, Castilla-La-Mancha, Extremadura, Galicia, Rioja, Murcia, Cataluña, Murcia and Ceuta. The available data on the number of Roma beneficiaries for these programmes is close to 3,927 people, of which 2,058 are men and 1,869 are women. Main fields of action: access to employment, professional training and social inclusion.</p> <p>Please note that these data have been collected from the different regions in Spain except for Andalucía, which has the largest Roma population in Spain. Due to administrative reasons we are unable to provide information on this region.</p>
Sweden	
<p>No information provided on the 2007-2013 OP in the EC Inter-Service Group document.</p>	

2007-2013 Operational Programmes and Roma. Indirect benefits from Structural Funds	
Roma included indirectly in programming documents	Programmes
<b>Bulgaria</b>	
<p>OP Administrative Capacity (OPAC): indirectly as part of vulnerable ethnic groups for which OPAC plans to facilitate access to administrative services.</p> <p>OP Human Resource Development (HRD): Indirect beneficiaries under two OP related to labour productivity and transnational cooperation.</p>	<p>1) PA 2: Raising the productivity and adaptability of the employed persons (€ 218,496,523);</p> <p>2) PA 7: Transnational and interregional cooperation (€ 24,277,392).</p>
<p><i>Bulgaria, the economic crisis and measures regarding Roma.</i></p>	<p>Five anti – crises procedures of total value of 238 mln. euro (about BGN 466 mln) have been approved at the last meeting of the OP Monitoring Committee held on 11. 11. 2009 in Sofia. The main goal is to preserve employment, to promote mobility of the labour force, to provide support and training for employers, employees and unemployed persons including Roma and in accordance with the 10 Common Basic Principles on Roma Inclusion.</p> <ul style="list-style-type: none"> <li>• <i>GS BG051PO001-1.1.03 Development</i> with a budget of BGN 250 mln. will ensure training for improvement of the professional qualification of unemployed persons subject to mass redundancies after 1 November 2008, unemployed persons up to 50 years old and long-term unemployed persons. The activities will be implemented through training vouchers. The duration of the procedure is 2009 – 2012.</li> <li>• <i>GS BG051PO001-1.1.04 Qualifications services and promotion of employment.</i> The operation budget amounts to BGN 36 mln. The scheme will support trainings of unemployed with special focus on vulnerable groups in order to improve their professional qualification for better labour market inclusion. The duration of the procedure is 2009 – 2011.</li> <li>• <i>GS BG051PO001-1.1.05 Back to work</i> with a budget of BGN 64 mln. aims to employ unemployed persons registered in the labour bureaux to provide child-care services to families where parents are working on labour contract. The main goal of this operation is to support and encourage the combination between vocational and family life. The duration of the procedure is 2009 – 2012.</li> <li>• <i>GS BG051PO001-2.1.11 «I can»</i> aims to provide an opportunity to the employed persons on a labour contract to take part in vocational trainings in order to upgrade their professional qualification, key skills and better answer the requirements of the labour market. The budget of the operation is BGN 26 mln. The duration of the procedure is 2009 – 2011.</li> <li>• <i>GS BG051PO001-2.1.12 Adaptability</i> of total value of BGN 90 mln. is target at persons who started working on a part-time basis due to the global financial crisis. On the other hand through the implementation of this procedure the OP HRD will support the Bulgarian employers to overcome the crises and keep their qualified workers. The duration of the procedure is 2009 – 2011.</li> </ul>

Czech Republic	
Roma Indirectly targeted in 1) Prague – Adaptability OP (ESF); 2) Regional OP (ERDF) 7 Regional Councils of the Cohesion Regions.	1) OP Prague Adaptability - Priority: «Promote Entry into the Labour Market» (31,610,056 EUR): No specific field targeted at the Roma population in Prague. Roma are one of the target groups disadvantaged on the labour market and supported under the Priority Axis 2 – Support for entry in the labour market. 2) Regional OP (ERDF) 7 Regional Councils of the Cohesion Regions: little expectation of support for Roma communities within this investment programme.
Finland	
Roma have not been involved in ESF OP 2007–2013 and are not specifically mentioned in the programming document. However, Roma are a potential target group among those groups in weakest labour market situation. Includes measures for intermediary labour market (indirect benefit).	
Greece	
Roma can benefit indirectly from 3 projects within the OP Human Resource Development, co-financed by the ESF. Greek National documents refer to Roma implicitly, as target group among other vulnerable groups, under the definition «special cultural groups». Yet in most cases it is difficult to clearly identify this financing because Roma are not recognised as ethnic or national minority group. <i>«Within 2007-2013 programming period integrated actions targeted specifically to Roma will be also developed within the main ESF Sectoral Programmes».</i>	<p>Axis: «Full Integration of the total Human Resource Capacity in a society with equal opportunities». Project: «Local Initiatives for the Promotion of Employment of Vulnerable groups». Budget: 90,000,000 €. Period of implementation: 2010–2013. Implementation of business plans aiming at the promotion of employment and local economic development through integrated projects and by adopting a flexible approach. A pallet of actions eligible within the ESF could be selected along with the provision of supportive services.</p> <p>Axis: «Full Integration of the total Human Resource Capacity in a society with equal opportunities». Project: «Third Sector economy actions for vulnerable groups». Budget: 30,000,000 €. Period of implementation: 2010–2013. Promotion to employment and the development of cooperatives for people facing difficulties in entering the labour market in the field of the third sector of economy.</p> <p>Axis: «Full Integration of the total Human Resource Capacity in a society with equal opportunities». Project: «Vocational Training with guaranteed employment». Budget: 85,000,000 €. Period of implementation: 2009–2013. Vocational training and promotion to employment for vulnerable groups, with 9,500 expected beneficiaries, 15% of whom will be promoted to employment.</p>
Hungary	
	7 measures target Roma indirectly: 1) Labour market activation, prevention and training (615,133,760€); 2) Facilitating access to training (615,123,748€); 3) Improving efficiency of the public education system; 4) Supporting education of groups with different educational needs, integration of pupils with special educational needs, intercultural education (756,138,748€); 5) Developing the human capacities of the most disadvantaged territories; 6) Improvement in access of increasingly disadvantaged groups to social services, in order to promote their integration into the labour market; 7) Development of local communities and the civil society (377,315,000€).

Italy	
<p>«Governance» and «System Actions» OP financed by the ESF and managed by the Ministry of Labour and Social Policies, envisage measures from which Roma can benefit, being categorised as groups suffering from inferior status in labour market. Roma will benefit through actions targeting discrimination, employment, and transnational partnerships. Furthermore, the 21 OPs run by the Regional MAs can envisage further activities targeting Roma people.</p>	<p>«Governance» and «System Actions» OPs allow to carry out activities designed for the Roma population specifically through three Priority Axes:  <i>Axis B</i> «Employability» (both OPs): creating models and shared tools to enhance employability of disadvantaged people, including Roma.  <i>Axis D</i> «Equal opportunities and non discrimination» («Governance» OP): overcome stereotypes informing discrimination, including against Roma.  <i>Axis D</i> («Azioni di Sistema» OP) and <i>Axis F</i> («Governance» OP): «Transnationality» support partnerships and networks, to exchange models and best practices, which can support activities favouring Roma.</p>
Poland	
<p>The Roma are entitled to benefit from the actions carried out under the Priority 7 on equal terms with all other groups potentially threatened with unemployment and social exclusion.</p>	<p>Regional level of implementation: Priority 7 «Promotion of Social Integration» (ESF €369 mln): within framework of Sub measure 7.2.1 titled «Economic and social activation of people at risk of social exclusion» (ESF €231 mln): national and ethnic minorities are among direct beneficiaries, though encompassing the Roma with support within the regional Priority rests on the regional Intermediate Bodies' decisions.</p>
Portugal	
<p>No information provided.</p>	
Romania	
<p>Roma are eligible for interventions under other priorities (e.g. active employment measures), but not with preferential treatment.</p>	
Slovak Republic	
<p>Beyond this explicit allocation, MRC will be supported through regular national and demand-driven projects (within framework of long-term unemployed or disadvantaged groups).</p>	
Spain	
<p>Regional Operational Programmes</p>	<p>Regional OPs in at least 9 regions have indirectly benefitted Roma by targeting vulnerable or excluded persons and communities primarily through training and labour insertion projects. A total of 21,215,767 Euros have been invested. No data is available on the number of Roma beneficiaries for these programmes. Please note that this data has been collected from the different regions in Spain except for Andalucia, which has the largest Roma population in Spain. Due to administrative reasons we are not able to provide information about this region.</p>



Sweden	
Indirect beneficiaries of ESF OP.	<p>One ESF OP for the whole of Sweden, under Regional Competitiveness and Employment objective (ESF €691.5 million). Focus on skills supply and increased labour supply by ensuring adequate skills in enterprises, better integration of people in working life and access of young people to labour market. Four guidelines: 1) promotion of competence development ensuring adaptability of people in employment; 2) making it easier for people far from the labour market to enter and remain on the labour market, 3) preventing and combating discrimination and exclusion from the labour market and 4) preventing long term sick-leave and facilitating reintegration in labour market for people on long term sick-leave.</p> <p>Guidelines 2 and 3 potentially facilitate Roma applications for funding, as Roma will have the same possibilities as others to apply for funding.</p>

Roma participation in OPs 2007-2013: Monitoring Committees, project design and implementation	
<b>Bulgaria</b>	<p>One of the basic sources that will provide those adequate instruments is the system for monitoring and evaluation of the implemented measures, targeted to the Roma community that was developed under the National Council for Cooperation on Ethnic and Demographic Issues (NCCEDI). The system will include database from RCCEDI, that is currently established in the 28 districts, and the information provided by the state institutions, carrying out the Roma integration policies. This mechanism follows the approach for systematic collection of information and analysis of the measures for achieving social cohesion. Based on information, received from the monitoring and evaluation system (needs surveys), positive measures targeting the Roma community will be applied, and part of them should be financed by the HRD OP.</p> <p>At the level of Monitoring Committee representatives of Roma NGOs participate as observers in advisory capacity in the Monitoring Committees (MC). This helps to ensure that interventions proposed for financing are in conformity with the specific needs of the Roma community. In addition, the National Council for Cooperation on Ethnic and Demographic Issues sits in the HRD OP Monitoring Committee with a permanent voting member. Under the Council a Commission on Roma integration is established and it is expected that also through the council's nominated member Roma-related issues are taken into account during operations programming.</p>
<b>Czech Republic</b>	<p>Field Social Work Programme administered especially by NGO People in Need Foundation. The working group established in preceding programming period is continuing its work.</p>
<b>Finland</b>	<p>National structures include the Advisory Board on Romani Affairs. The task of the Advisory Board on Romani Affairs is to enhance the equal participation of the Roma population in the Finnish society, to improve their living conditions and socio-economic position and to promote their culture. The Advisory Board functions in conjunction with the Ministry of Social Affairs and Health.</p>



<b>Greece</b>	There is no formal mechanism for ensuring Roma's participation in the designing and implementation of projects. Nevertheless, the «Rom network» which is comprised by all the local municipalities that have Roma populations within their territories is a body that operates as a consultative agent. In addition, Roma associations are also often invited to participate in the consultative process with regards to the planning of policies concerning Roma.
<b>Hungary</b>	Representatives of Roma NGOs take part in the meetings of the Monitoring Committees (MC). In order to enhance Roma access to projects, the establishment of a network of Roma experts in each sector was planned. A manual on horizontal issues was edited by the National Development Agency; a sub-group on horizontal issues in the framework of MC was established; and <i>rapporteurs</i> were included for horizontal issues.
<b>Italy</b>	National Strategic Framework (NSF) is a general referent for improving the situation of Roma, through Priority 4 «Social inclusion» and specifically objective 4.1.1. in the field of equal opportunities and antidiscrimination.
<b>Poland</b>	Group for Roma Community established under the Joint Commission of Government and National and Ethnic Minorities, which is consulted for the 'Roma component' in the Human Capital OP.
<b>Portugal</b>	ACIDI supports cross-cutting dialogue on public policies for the integration of minorities and immigrants: adhoc group Roma Community Support Cabinet (GACI) created. Yet no participation in project design and monitoring of OP.
<b>Romania</b>	Priority Axis 3 encourages partnerships (key area of intervention «Development of the partnerships and encouraging initiatives for social partners and civil society»). National Agency for Roma and representative NGOs is to participate in OP Monitoring Committee.
<b>Slovak Republic</b>	No information in this regard.
<b>Spain</b>	Participation of NGOs that may play a mediation role to bring programmes closer to the Roma community was envisaged. «Aide-mémoire for desk officers: Roma and Structural Funds programming 2007-2013».
<b>Sweden</b>	No information provided in this regard.

A stylized, light blue graphic of a human figure with arms raised, set against a dark blue background. The figure is positioned on the left side of the frame. Above the figure, a series of light blue stars of varying sizes form a curved arc across the top of the image. The overall design is minimalist and symbolic.

# Notes and references

<sup>i</sup> European Union (2008) *Consolidated version of the Treaty on European Union and the Treaty on the Functioning of the European Union* (2008/C 115/01). Available at: <http://eur-lex.europa.eu/JOHtml.do?uri=OJ:C:2008:115:SOM:EN:HTML>.

<sup>ii</sup> See Structural Funds and ESF regulations. *Regulation (EC) No. 1081/2006 of the European Parliament and of the Council of 5 July 2006 on the European Social Fund and repealing Regulation (EC) No. 1784/1999; Council Regulation (EC) No. 1083/2006 of 11 July 2006 laying down general provisions on the European Regional Development Fund, the European Social Fund and the Cohesion Fund and repealing Regulation (EC) No. 1260/1999.*

<sup>iii</sup> *European Parliament resolution on the situation of the Roma in the European Union.* P6\_TA(2005)0151. Available at: <http://www.europarl.europa.eu/sides/getDoc.do?type=TA&reference=P6-TA-2005-0151&language=EN>

<sup>iv</sup> Transnational processes transcend and interlink domestic contexts and should therefore not be considered as matters that affect and are resolved exclusively by national administrations. New processes such as large-scale migrations of Roma from Eastern and central European Member States to the rest of the EU have increased the salience of the notion of transnationality with regards to the Roma.

<sup>v</sup> The information media, for instance, has been identified as a key agent of anti-Roma sentiment and discrimination. See European Parliament Committee on Employment and Social Affairs (EMPL) (2008) *The social situation of the Roma and their improved access to the labour market in the EU* (IP/A/EMPL/ST/2008-02), pp.24-26.

<sup>vi</sup> *Council Conclusions on inclusion of the Roma.* 2914th GENERAL AFFAIRS Council meeting. Brussels, 8 December 2008. 16862/08 (Presse 359). Available at: [http://www.eu-un.europa.eu/articles/en/article\\_8359\\_en.htm](http://www.eu-un.europa.eu/articles/en/article_8359_en.htm) and <http://register.consilium.europa.eu/pdf/en/08/st15/st15976-re01.en08.pdf>

<sup>vii</sup> Data collection remains scant regarding the Roma population, but thanks to the efforts of various public and private institutions (including, among others, the EU Fundamental Rights Agency, the OSCE, the Decade for Roma Inclusion, the Roma Education Fund, the European Roma Rights Centre and NGOs such as the *Fundación Secretariado Gitano*) an incipient European 'map' of the inequality and poverty experienced by Roma is emerging.

<sup>viii</sup> Vladimir Spidla's speech at the Second European Platform for Roma Inclusion (Brussels, 28 September 2009), which is premised on the implementation of integrated policies, emphasised that: «... It is vital that policies for Roma education are not dealt with in isolation from those in employment and social affairs, housing and public health.» Available at: <http://europa.eu/rapid/pressReleasesAction.do?reference=IP/09/1365&format=HTML&aged=0&language=EN&guiLanguage=en>. Accessed 2 October 2009.

<sup>ix</sup> This situation is defined by an insufficient volume of employment and a high degree of temporality, a very intense acceleration in the flow of immigrants, significant differences in the employment rates for women, young people and workers with lower educational levels, a large and increasing proportion of short-term contracts, a deceleration of EU economy's productivity and its consequent impact and repercussion on the quality of employment. These processes highlight the need to keep active training and employment policies «focused» on combating the exclusion and discrimination of vulnerable population groups.



<sup>x</sup> The social pillar of the Lisbon Strategy (2000-2010) aimed to modernise the European social model by investing in human resources and combating social exclusion. The Member States were expected to invest in education and training, and to conduct an active policy for employment, facilitating the move to a knowledge-based and competitive economy. See paragraph 5, Presidency Conclusions, European Council, *ibid*.

<sup>xi</sup> This is manifest in Roma perceptions of a deterioration of their situation since the collapse of the Soviet system: 69.9 percent of respondents in 5 countries considered that their situation worsened in the past 15 years (UNDP 2004: 93).

<sup>xii</sup> In Spain, a sustained social and political *mobilisation in favour of the Roma Community* took place from the 1970s. Until the 1960s, a large percentage of Roma lived on the fringes of Spanish society. During the last stage of the dictatorship and the early years of democracy, the formation of associative movements helped to increase the visibility of Roma in society and to put their issues on the political agenda. Desegregation efforts, including public housing schemes in the 1970s and 1980s benefitted many Roma. Spanish Roma today are sedentary, urban dwellers, concentrated mostly in large cities and towns. A rational balance between targeted and mainstreaming approaches facilitated urban migration defined by low levels of segregation. *The debate target versus mainstreaming has largely been resolved in Spain in a practical way, i.e. by trying, with varying degrees of success, to encourage Roma to take part in existing programmes available to the entire population while at the same time implementing, to a greater or lesser degree depending upon the situation, programmes and initiatives targeting those Roma who are especially disadvantaged or who, for some reasons, fail to take advantage of universal measures.* However, private initiatives such as the Acceder programme placed salaried employment as the core of intercultural dialogue and the breakdown of prejudices. Salaried employment has been considered as the most effective way of incorporating more Roma people into the labour market (in terms of the investment/outcomes ratio of such a strategy, relative to other approaches focusing on self-employment). Yet high percentage of Roma in Spain remains in traditional professions and self-employment (more than 50 percent, some in recession or requiring re-conversion). See <http://www.gitanos.org/acceder/>.

<sup>xiii</sup> The transition was accompanied by a significant increase in unemployment rates in Eastern Europe, which disproportionately affected the Roma. While universalisation of welfare provision (especially health) occurred in countries such as Spain, democratisation and market transition were accompanied by privatization of welfare and reduced redistribution in Eastern and Central Europe. Unlike Spain, the Roma are living in both urban and rural areas, with higher levels of segregation, further isolating them from a dwindling, and less inclusive social protection infrastructure. The lack of progress (in some cases regression) that took place in the living conditions of Roma persons in the decade following the collapse of the Soviet bloc was in part defined by inadequate policy instruments: scant expertise in and traditions of working with relatively isolated Roma communities induced an oscillation between targeted and mainstreaming approaches, identified by the Commission as one of the pitfalls of working towards Roma inclusion. See *Commission Staff Working Document accompanying the Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions. Non-discrimination and equal oppor-*

*tunities: A renewed commitment. Community Instruments and Policies for Roma Inclusion. COM(2008) 420. Available at: <http://ec.europa.eu/social/main.jsp?catId=88&langId=en&eventsId=105&furtherEvents=yes>.*

<sup>xiv</sup> Fundación Secretariado Gitano (2009) *Health and the Roma Community, analysis of the situation in Europe. Bulgaria, Czech Republic, Greece, Portugal, Romania, Slovakia, Spain* (Madrid: Fundación Secretariado Gitano, Ministerio de Sanidad y Política Social), p.70.

<sup>xv</sup> Fundación Secretariado Gitano (2009), *ibid*, p.20

<sup>xvi</sup> UNDP Report (2004) *Avoiding the Dependency Trap: The Roma in Central and Eastern Europe*. Available at: <http://europeandcis.undp.org/Home/show/62BBCD48-F203-1EE9-BC5BD7359460A968>

<sup>xvii</sup> Fundación Secretariado Gitano (2009), *op.cit.*, p.20.

<sup>xviii</sup> *Commission Staff Working Document accompanying the Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions. Non-discrimination and equal opportunities: A renewed commitment. Community Instruments and Policies for Roma Inclusion. COM(2008) 420. Available at: <http://ec.europa.eu/social/main.jsp?catId=88&langId=en&eventsId=105&furtherEvents=yes>*

<sup>xix</sup> FSG (2009), p.21

<sup>xx</sup> 2.5 percent in Bulgaria, 4.7 percent in Romania, 12 percent in the Czech Republic, 16 percent in Hungary, 19 percent in Slovakia, and 27 percent in the Czech Republic. UNDP (2004: 92).

<sup>xxi</sup> Roma Education Fund (2007) *Advancing Education of Roma in the Czech Republic: Country Assessment and the Roma Education Fund's Strategic Directions* (Budapest: REF), p.10; Roma Education Fund (2007) *Advancing Education of Roma in Hungary: Country Assessment and the Roma Education Fund's Strategic Directions* (Budapest: REF), p.10.

<sup>xxii</sup> UNDP (2004).

<sup>xxiii</sup> UNDP Report (2004) *Avoiding the Dependency Trap: The Roma in Central and Eastern Europe*. Available at: <http://europeandcis.undp.org/Home/show/62BBCD48-F203-1EE9-BC5BD7359460A968>

<sup>xxiv</sup> For data on Greece and Portugal, see *Fundación Secretariado Gitano* (2009) *op.cit.*, pp.24-25. In Spain, at the height of the economic boom (2005), the Roma population registered significantly higher unemployment rates than the general population (13.8 percent compared to 8 percent overall). However, The profound crisis affecting the Spanish labour market (17.8 percent unemployment rate in late 2009) has affected unemployment rates among Roma to a greater extent than the general population (35 percent reduction in contracts in 2009, compared to a 18 percent decline overall for Spain). See *Fundación Secretariado Gitano* (2005) *Roma population and employment, a comparative study* (Madrid: Fundación Secretariado Gitano), p.104. Available at: <http://www.gitanos.org/publicaciones/estudioempleo/madrid/06.pdf>. On recent Roma labour developments, see <http://www.gitanos.org/acceder/>.

<sup>xxv</sup> A recent study by the UNDP reported that 41 percent of the Roma active population worked in informal activities in Bulgaria, 22 percent in the Czech Republic, 42 percent in Hungary, 42 percent in Slovakia, 50 percent in Spain and 70 percent in Romania. UNDP (2004) *op.cit.*, p.35. See also European Parliament study on Roma employment: EC EMPL/ST/2008-02: pp.22-23.



<sup>xxvi</sup> According to recent data, the poverty rates of the Roma reached 83.5 percent in Bulgaria (REF 2007), 35 percent in Hungary (REF 2007, p.9), and 56 percent in Romania in 2006. <http://www.unicef.org/romania/overview.html>.

<sup>xxvii</sup> The level of dependency of Roma households on state welfare for their survival is extremely high: if pensions are included as part of state benefits, the level of dependency reaches 24 percent of households in the Czech Republic, 48 percent in Bulgaria, 55 percent in Hungary. See UNDP Report (2004), p.4; Roma Education Fund (2007) *Advancing Education of Roma in Bulgaria: Country Assessment and the Roma Education Fund's Strategic Directions* (Budapest: REF), p.68.

<sup>xxviii</sup> Sub-standard housing signifies homes featuring a number of deficiencies such as lack of access to running water, sewage or electricity. European Union Agency for Fundamental Rights (FRA) (2009a) *Housing conditions of Roma and Travellers in the European Union. Comparative Report* (Brussels: FRA), p.10. According to another survey (FSG 2009, op.cit. pp.25-27), more than 30 percent of the Roma population live in shanty towns (3.6 percent) or sub-standard housing. Wide discrepancies exist between EU Member States: while 92 percent of the Spanish Roma population lives in standard houses or flats, 31 percent of Roma are confined in shanty towns in Portugal. EU-wide, 22 percent on average live in neighbourhoods or areas that are distant or separated from cities. Geographical isolation is particularly acute in Bulgaria (47 percent) and Greece (54 percent).

<sup>xxix</sup> FSG (2009), op. cit., pp.25-27.

<sup>xxx</sup> Only 27 percent of respondents were aware of anti-discrimination legislation in relation to ethnicity and race (from 13 percent in Greece to 36 percent in the Czech Republic). FRA (2009b) *Housing discrimination against Roma in selected EU Member States – An analysis of EU-MIDIS data* (Brussels: FRA), p.9. However, the FRA report demonstrates that forced evictions of Roma are prevalent in all EU-Member States.

<sup>xxxi</sup> According to the FRA, 54 percent of Roma live in segregated (i.e. predominantly immigrant/minority) neighbourhoods, despite considerable variations between the Member States surveyed (72 percent in Bulgaria, 66 percent in Romania, 32 percent in the Czech Republic). FRA (2009b) *Housing discrimination against Roma in selected EU Member States – An analysis of EU-MIDIS data* (Brussels: FRA), p.20.

<sup>xxxii</sup> Presidency Conclusions, European Council, 23-24 March 2000, Lisbon. Available at: [http://www.consilium.europa.eu/ueDocs/cms\\_Data/docs/pressData/en/ec/00100-r1.en0.htm](http://www.consilium.europa.eu/ueDocs/cms_Data/docs/pressData/en/ec/00100-r1.en0.htm)

<sup>xxxiii</sup> European Commission (2009) *Discrimination in the EU in 2009. Special Eurobarometer 317. November*.

<sup>xxxiv</sup> *European Parliament resolution on the situation of Roma women in the European Union* (2005/2164(INI). P6\_TA(2006)0244. (1 June 2006). Available at: <http://www.europarl.europa.eu/sides/getDoc.do?type=TA&language=EN&reference=P6-TA-2006-0244>. Accessed 15 September 2009.

<sup>xxxv</sup> *10 Common Basic Principles* annexed to Council Conclusions 8 June 2009. Available at: [http://www.euromanet.eu/upload/21/69/EU\\_Council\\_conclusions\\_on\\_Roma\\_inclusion\\_-\\_June\\_2009.pdf](http://www.euromanet.eu/upload/21/69/EU_Council_conclusions_on_Roma_inclusion_-_June_2009.pdf)

<sup>xxxvi</sup> «Steps must be taken to make a decisive impact on the eradication of poverty» by 2010. Paragraph 32, Lisbon *European Council 23 and 24 March 2000 Presidency Conclusions*. Available at: [http://www.europarl.europa.eu/summits/lis1\\_en.htm](http://www.europarl.europa.eu/summits/lis1_en.htm).

The Lisbon Objectives, agreed in 2000, fixed the objective of drastically reducing poverty levels by the year 2010. The launching of the European Social Inclusion and Social Protection Process, the successive rounds of National Action Plan on Social Inclusion (NAPS Inclusion) developed by Member States, and the initiatives related to the Open Method of Coordination, allowed not only to maintain inclusion strategies on the political agenda, but also to acquire knowledge on the physiognomy of poverty, to deepen our understanding of the key problems at hand, to identify priorities and coming challenges, and to promote mutual learning. Despite these advances though, and despite high growth rates in the EU area, poverty levels remained stable, while the situation of the Roma population continued to deteriorate in many countries.

<sup>xxxvii</sup> Council Directive 2000/43/EC implementing the principle of equal treatment between persons irrespective of racial or ethnic origin. 29 June 2000. Available at: <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:32000L0043:en:HTML>.

<sup>xxxviii</sup> The Council of Europe's Committee of Experts on Roma and Travellers was established in 1995. See [http://www.coe.int/T/DG3/RomaTravellers/Default\\_en.asp](http://www.coe.int/T/DG3/RomaTravellers/Default_en.asp).

<sup>xxxix</sup> See the 2003 OSCE Action Plan on Improving the Situation of Roma within the OSCE Area, described on ODIHR's webpage: <http://www.osce.org/odihr/18149.html>

<sup>xl</sup> World Bank (2005) *Roma in an expanding Europe: breaking the poverty cycle* (Washington DC: World Bank). Available at: [http://siteresources.worldbank.org/EXTROMA/Resources/roma\\_in\\_expanding\\_europe.pdf](http://siteresources.worldbank.org/EXTROMA/Resources/roma_in_expanding_europe.pdf).

<sup>xli</sup> UNDP (2006) *At Risk: Roma and the Displaced in Southern Europe* (Bratislava: UNDP). <http://hdr.undp.org/es/informes/regionalreports/europacei/name,3460,es.html>

<sup>xlii</sup> *Presidency Conclusions of the European Council*. 14 December 2007, Paragraph 50. Available at: [http://www.consilium.europa.eu/ueDocs/cms\\_Data/docs/pressData/en/ec/97669.pdf](http://www.consilium.europa.eu/ueDocs/cms_Data/docs/pressData/en/ec/97669.pdf).

<sup>xliii</sup> European Parliament Committee on Employment and Social Affairs (2008), op.cit., p.xii

<sup>xliv</sup> European Roma Summit agenda, Conference Report and MEMO. Available at: <http://ec.europa.eu/social/main.jsp?catId=88&langId=en&eventsId=105&furtherEvents=yes>. The Second European Roma Summit will take place in Córdoba, 8 April 2010.

<sup>xlv</sup> These initiatives include a *Resolution of the European Parliament (31 January 2008)*, a *Commission Report on Roma social inclusion (July 2008)*, the *Conclusions of the Council of Ministers of the EU (8 December 2008)* and *Conclusions of the Council of Ministers of the EU (8 June 2009)*.

See *European Parliament resolution on a European strategy on the Roma*. P6\_TA(2008)0035. 31 January 2008. Available at: <http://www.europarl.europa.eu/sides/getDoc.do?type=TA&reference=P6-TA-2008-0035&language=EN>; *Commission Staff Working Document accompanying the Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions. Non-discrimination and equal opportunities: A renewed commitment. Community Instruments and Policies for Roma Inclusion*. COM(2008) 420. Available at: <http://ec.europa.eu/>



[social/main.jsp?catId=88&langId=en&eventId=105&furtherEvents=yes](http://www.eu-un.europa.eu/articles/en/article_8359_en.htm); *Council Conclusions on inclusion of the Roma. 2914th GENERAL AFFAIRS Council meeting*. Brussels, 8 December 2008. 16862/08 (Presse 359). Available at: [http://www.eu-un.europa.eu/articles/en/article\\_8359\\_en.htm](http://www.eu-un.europa.eu/articles/en/article_8359_en.htm) and <http://register.consilium.europa.eu/pdf/en/08/st15/st15976-re01.en08.pdf>; *Council Conclusions on Inclusion of the Roma. 2947th Employment, Social Policy, Health and Consumer Affairs Council meeting*. Luxembourg, 8 June 2009. Available at: [http://www.euromanet.eu/upload/21/69/EU\\_Council\\_conclusions\\_on\\_Roma\\_inclusion\\_-\\_June\\_2009.pdf](http://www.euromanet.eu/upload/21/69/EU_Council_conclusions_on_Roma_inclusion_-_June_2009.pdf);

<sup>xlvi</sup> Prague, 24 April 2009. *10 Common Basic Principles* annexed to Council Conclusions 8 June 2009. Available at: [http://www.euromanet.eu/upload/21/69/EU\\_Council\\_conclusions\\_on\\_Roma\\_inclusion\\_-\\_June\\_2009.pdf](http://www.euromanet.eu/upload/21/69/EU_Council_conclusions_on_Roma_inclusion_-_June_2009.pdf)

<sup>xlvii</sup> *Consultation on the future «EU 2020» strategy*. Available at: [http://ec.europa.eu/dgs/secretariat\\_general/eu2020/consultation\\_en.htm](http://ec.europa.eu/dgs/secretariat_general/eu2020/consultation_en.htm)

<sup>xlviii</sup> José Manuel Durao Barroso, *Political Guidelines for the Next Commission* (Brussels, 3 September 2009), p.15.

<sup>xlix</sup> For instance, Article 21 of the European Parliament's *Resolution on a European strategy on the Roma* «Urges the Commission and Council to align EU Roma policy with the Decade of Roma Inclusion and to make use of existing initiatives such as the Roma Education Fund, the OSCE Action Plan and the recommendations of the Council of Europe to heighten the efficacy of their efforts in this area». *European Parliament resolution on a European strategy on the Roma*. P6\_TA(2008)0035. 31 January 2008. Available at: <http://www.europarl.europa.eu/sides/getDoc.do?type=TA&reference=P6-TA-2008-0035&language=EN>. Accessed 5 September 2009.

<sup>i</sup> European Parliament Committee on Employment and Social Affairs (2008), *op.cit.*, p.xii

<sup>ii</sup> The Open Method of Coordination, defined as an instrument of the Lisbon strategy, is a framework of coordination allowing Member States to elaborate a common strategy, based on common objectives, measurements and benchmarking (comparison of Member States' performance and exchange of best practice, monitored by the Commission). More information is available at: [http://ec.europa.eu/employment\\_social/spsi/the\\_process\\_en.htm](http://ec.europa.eu/employment_social/spsi/the_process_en.htm) and [http://europa.eu/scadplus/glossary/open\\_method\\_coordination\\_en.htm](http://europa.eu/scadplus/glossary/open_method_coordination_en.htm)

<sup>iii</sup> Prague, 24 April 2009. *10 Common Basic Principles* annexed to Council Conclusions 8 June 2009. Available at: [http://www.euromanet.eu/upload/21/69/EU\\_Council\\_conclusions\\_on\\_Roma\\_inclusion\\_-\\_June\\_2009.pdf](http://www.euromanet.eu/upload/21/69/EU_Council_conclusions_on_Roma_inclusion_-_June_2009.pdf)

<sup>iiii</sup> There are currently 12 governments collaborating with the Decade: Albania, Bosnia and Herzegovina, Bulgaria, Croatia, the Czech Republic, Hungary, Macedonia, Montenegro, Romania, Serbia, Slovakia and Spain. More information on the Decade is available at: <http://www.romadecade.org/about>.

<sup>lv</sup> More information on the Acceder programme is available at <http://www.gitanos.org/acceder/>.

<sup>lv</sup> See Structural Funds and ESF regulations. *Regulation (EC) No. 1081/2006 of the European Parliament and of the Council of 5 July 2006 on the European Social Fund and repealing Regulation (EC) No. 1784/1999; Council Regulation (EC) No. 1083/2006 of 11 July 2006 laying down general provisions on the European Regional Development Fund, the European Social Fund and the Cohesion Fund and repealing Regulation (EC) No. 1260/1999.*

<sup>lvi</sup> 2007 regulations ESF.

<sup>lvii</sup> A *Positive Practice or Experience* can represent any type of project, large or small. It must be however a tried and proven project or programme that broadly benefited Roma. A *Positive Practice or Experience on Social Inclusion of Roma* should also prove its impact on the improvement of the living conditions and/or of the enjoyment of full citizenship and human rights of its final beneficiaries, the Roma Community.

<sup>lviii</sup> Article 3.1.e, ESF Regulations (2006) *Regulation (EC) No. 1081/2006 of the European Parliament and of the Council of 5 July 2006 on the European Social Fund and repealing Regulation (EC) No. 1784/1999.*

<sup>lix</sup> ESF regulations (2006), *ibid.*, Paragraph 12.

<sup>lx</sup> ESF Regulations (2006), *ibid.*, Article 3.1.e.

<sup>lxi</sup> See <http://www.euromanet.eu/>.

<sup>lxii</sup> For instance, the Czech Republic presented a new publication on «*Success stories of the ESF projects in the Czech Republic focused on support and integration of Roma community*». The Czech version with a summary in English is available at: [www.euromanet.eu/resource\\_center/search/29677/index\\_1.html](http://www.euromanet.eu/resource_center/search/29677/index_1.html)

<sup>lxiii</sup> *Good practice and strategic lessons from EQUAL regarding the integration of ethnic minorities and migrants in the labour market.* Presentation and draft report available at: [www.euromanet.eu/resource\\_center/archive/31030.html](http://www.euromanet.eu/resource_center/archive/31030.html)

<sup>lxiv</sup> Concept note available at: [http://www.euromanet.eu/upload/29/80/BRIEF\\_ON\\_ETHNIC\\_DATA\\_COLLECTION.pdf](http://www.euromanet.eu/upload/29/80/BRIEF_ON_ETHNIC_DATA_COLLECTION.pdf)

<sup>lxv</sup> The description of the visit and report are available at: [http://www.euromanet.eu/newsroom/archive/learning\\_from\\_experience\\_acceder\\_study\\_visit.html](http://www.euromanet.eu/newsroom/archive/learning_from_experience_acceder_study_visit.html)

<sup>lxvi</sup> An example of good practice was presented by the Hungarian representative, who analysed how legal changes on the one hand, and Structural Funds on the other, are backing the inclusion of disadvantaged children, including Roma, in the Hungarian public educational system. Future plans of the Hungarian government for the desegregation of Roma children in pre-school and primary education, with Structural Funds, were also presented. The presentations are available at: [http://euromanet.eu/documents/EDU\\_EducationprogrammeGOV060509.pdf](http://euromanet.eu/documents/EDU_EducationprogrammeGOV060509.pdf); [http://www.euromanet.eu/documents/MCM\\_CountryPresentation\\_080509.pdf](http://www.euromanet.eu/documents/MCM_CountryPresentation_080509.pdf)

<sup>lxvii</sup> Two projects were presented by the Hungarian hosts: on the one hand, the National Educational Integration Network (OOIH), a pilot project established by the Hungarian Ministry of Education in 2002, involving several dozens schools and aiming at promoting integrated and quality education for disadvantaged and Roma children in elementary schools. Available at: [http://www.euromanet.eu/documents/EDU\\_IntegrationProgramme\\_060509.pdf](http://www.euromanet.eu/documents/EDU_IntegrationProgramme_060509.pdf) and the Bridge project focusing on vocational training, developed in Hungary under the EQUAL programme on the other. Presentation available at: [http://www.euromanet.eu/documents/EDU\\_equalbrigde060509.pdf](http://www.euromanet.eu/documents/EDU_equalbrigde060509.pdf)

<sup>lxviii</sup> Discussion document available at: [http://www.euromanet.eu/upload/30/81/Mechanisms\\_of\\_coordination\\_and\\_follow-up.pdf](http://www.euromanet.eu/upload/30/81/Mechanisms_of_coordination_and_follow-up.pdf)

<sup>lix</sup> Data provided by ECliente, February 2010.

<sup>lxx</sup> The General Regulations of the European Council regarding the Structural Funds noted that «Article 158 [Article 174 in the consolidated version] of the Treaty provides that, in order to strengthen its economic and social cohesion, the Community is to aim at reducing disparities between the levels of

development of the various regions and the backwardness of the least favoured regions or islands, including rural areas. Article 159 [currently Article 175] of the Treaty requires this action to be supported by the Structural Funds, the European Investment Bank (EIB) and the other existing Financial Instruments». Council of the European Union (2006) *Council Regulation (EC) No 1083/2006 of 11 July 2006 laying down general provisions on the European Regional Development Fund, the European Social Fund and the Cohesion Fund and repealing Regulation (EC) No 1260/1999*. Paragraph (1).

<sup>lxxi</sup> Council of the European Union (2006) *Council Regulation (EC) No 1083/2006 of 11 July 2006 laying down general provisions on the European Regional Development Fund, the European Social Fund and the Cohesion Fund and repealing Regulation (EC) No 1260/1999*.

<sup>lxxii</sup> <http://europa.eu/scadplus/leg/en/lvb/g24203.htm>

<sup>lxxiii</sup> Specific country-by-country information is available on EURoma web page <http://www.euromanet.eu/facts/index.html>

<sup>lxxiv</sup> Council of the European Union (2006) *Council Regulation (EC) No 1083/2006 of 11 July 2006 laying down general provisions on the European Regional Development Fund, the European Social Fund and the Cohesion Fund and repealing Regulation (EC) No 1260/1999*. Chapter 5, Article 18. The EUs' reformed cohesion policy is founded on the three objectives of «Convergence», «Regional Competitiveness and Employment» and «Territorial Cooperation». 82% of the total budget allocated to Structural Funds is concentrated on the Convergence objective, under which the poorest Member States and regions are eligible. In the remaining regions, about 16% of the Structural Funds will be concentrated to support innovation, sustainable development, better accessibility and training projects under the «Regional Competitiveness and Employment» objective. Another 2.5% finally are available for cross-border, transnational and interregional cooperation under the «European Territorial Cooperation» objective.

<sup>lxxv</sup> European Parliament and Council (2006) *Regulation (EC) No. 1081/2006 of the European Parliament and of the Council of 5 July 2006 on the European Social Fund and repealing Regulation (EC) No 1784/1999*: Articles 3 (c) and 3 (e).

<sup>lxxvi</sup> For information on EQUAL, see: [http://ec.europa.eu/employment\\_social/equal/index\\_en.cfm](http://ec.europa.eu/employment_social/equal/index_en.cfm)

<sup>lxxvii</sup> Examples include the 2004-2006 Human Development OP in Hungary, 2004-2006; 7 ESF and ERDF financed measures and EQUAL in Slovakia, the 2000-2006 *Acceder* Programme in Spain; The CIP Equal programme, 2000-2007 in Finland; OPs in the Czech Republic 2004-2006.

<sup>lxxviii</sup> For a detailed exposition of specific programmes co-financed by Structural Funds, see European Commission (2008) *Commission Staff Working Document accompanying the Communication from the Commission to the European Parliament, the Council, the European Social and Economic Committee and the Committee of Regions. Non-Discrimination and equal opportunities: A renewed commitment. Community Instruments and Policies for Roma Inclusion*. COM 2008/420.

<sup>lxxix</sup> EURoma (2009) *Coordination and Follow-up mechanisms of actions aimed at the Roma population supported by Structural Funds*. Discussion note for EURoma Management Committee Meeting. Stockholm. 24-25 September 2009. Available at: [http://www.euromanet.eu/newsroom/archive/vi\\_euroma\\_management\\_committee\\_meeting\\_stockholm\\_sweden.html](http://www.euromanet.eu/newsroom/archive/vi_euroma_management_committee_meeting_stockholm_sweden.html)

<sup>lxxx</sup> Further information in English is available on the following website: [http://www.nfu.hu/the\\_new\\_hungary\\_development\\_plan](http://www.nfu.hu/the_new_hungary_development_plan)

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