



# **Advancing the Education of Roma in Bulgaria REF Country Assessment – 2015**



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## PREFACE

This document is part of a series of Country Assessments produced by the Roma Education Fund (REF). It seeks to provide an analysis of education and the ongoing education reforms from the perspective of the inclusion of Romani children in the countries taking part in the Decade of Roma Inclusion and are under the mandate of REF. The document also reviews the different programs and activities REF has carried out since its establishment in 2005 and highlights the thematic and program areas on which REF plans to focus during the coming two years. In addition to serving as a tool for the Roma Education Fund's own programming, REF hopes that this document will offer a useful instrument for:

- Policy-makers seeking to improve education policies that address the education outcome gap between Roma and non-Roma.
- Civil society representatives who wish to improve the effectiveness of their educational programs by making them more relevant to the overall education reform of their country.
- The overall development and donor community, which needs to better understand the situation faced by Romani children in order to identify niche areas where available resources would produce the greatest impact.



## **ACKNOWLEDGEMENTS**

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## EXECUTIVE SUMMARY

Various surveys attest to a worsening socio-economic situation of Roma in Bulgaria in the past ten years. The tendency in this period marks a wider gap between the majority population and the Roma in all social spheres, including education. Despite the fact that the PISA study of 2012 indicated a deteriorating education performance of all Bulgarian students in comparison to previous periods, the divergence in performance levels between Roma and non-Roma has also grown. Roma represent the vast majority (67 percent) of the poorest 20 percent of the entire Bulgarian population and are the group with the highest rates of illiteracy and early school leaving in the country. Unchallenged ethnic segregation of Roma in the education system is exacerbated by an increasingly socially stratified education system that confines students from disadvantaged socioeconomic backgrounds to lower quality education compared to peers from better-off families.

Deteriorating conditions for Roma are a fact, notwithstanding the significant volume of policy documents for Roma integration, public discussions on the topic and governmental and international commitments. This environment created the impression that the Roma issues are at the center of public policy, and provoked a public backlash against Roma who are seen as a privileged group. At the same time real government action for the implementation of Roma integration policies was sporadic, uncoordinated and underfunded. As many observers have noted, tangible results are not present because real and consistent action is absent. Moreover, while during the pre-accession process to the European Union Bulgarian authorities were open to a progressive vision about the solution of Roma problems based on human rights and non-discrimination as evident in several policy documents (strategies) from this period, the adoption of the National Roma Integration Strategy (NRIS) in 2011 signaled a setback in this regard, especially in the area of education. School desegregation which was the main priority for the educational policy on Roma was downgraded in the NRIS and replaced by measures for support of segregated education.

Since Bulgaria's accession to the EU in 2007, the biggest resource for Roma inclusion policies is the EU structural funds. In the programming period 2014–2020, Bulgaria is expected to allocate resources for Roma inclusion in several operational programs, including the program Education and Science for Intelligent Growth that has funding priorities for Roma. These financial resources, however, are still inaccessible to a large number of potential beneficiaries among local authorities and nongovernmental organizations. Financial and bureaucratic barriers that were already evident in the previous programming period remain, creating obstacles for the effective use of EU funds.

With scarce or missing financial resources from and only few donors remaining in Bulgaria after its accession to the EU, the Roma Education Fund remains the single source of funding for a number of activities on Roma education such as school desegregation and scholarships for higher education students. The strategic directions for the future work of the REF are the following: (i) scaling up school desegregation; (ii) support for enrollment of Roma in preschool education; (iii) support to Roma for accessing higher education, including scholarships and preparatory work with high school students; (iv) advocacy for policy development and implementation.



# THE SITUATION OF ROMA: RECENT SOCIO-ECONOMIC DATA<sup>1</sup>

## 1. Demographic Profile

Roma are the second largest minority in Bulgaria, and represent the third largest ethnic group after Bulgarians (85 percent) and Turks (nine percent). In the 2011 census, 325,343 people in Bulgaria self-identified as “Roma” or 4.9 percent of the total population.<sup>2</sup> However, most scholars and researchers admit that the census data are inaccurate and use the Council of Europe estimations (2010) which place the Roma population in Bulgaria in the range of 750,000–800,000, the EU’s largest share of Roma population – approximately 10 percent.<sup>3</sup>

The 2011 Census counted 44.6 percent Roma in rural areas and 55.4 percent in urban areas. The increase of the urban Roma population in the post-communist period is slower compared to the other two major ethnic groups, Bulgarians and Turks. Roma are the only ethnic group in which the share of children and young people up to the age of 19 and who live in the rural areas is higher than the share of the entire Roma population. Most of these children attend rural and focal schools.<sup>4</sup> As indicated in the PISA study of 2012, there are serious disparities in the education of children in urban and rural areas with children in urban areas scoring higher in the equivalent of more than two years compared to children in rural areas.<sup>5</sup> Furthermore, the region identified by the EUROSTAT (2010) as the poorest in Europe is also the region with the highest proportion of Roma in Bulgaria.<sup>6</sup>

The Roma population is the youngest population in the country: Roma under age 30 are 57.33 percent from the total number of people who identified as Roma compared to 28.11 percent ethnic Bulgarians in the same age group.<sup>7</sup>

## 2. Poverty

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<sup>1</sup> This paper contains relevant data that is publicly available. In a number of areas data is not available or unreliable and it was not included in the text.

<sup>2</sup> Национален статистически институт. *Преброяване на населението в Република България 2011*. (Census 2011), at: <http://www.nsi.bg/EPDOCS/Census2011final.pdf>

However, this figure should be considered inaccurate. In the same census, 683,590 people (9.3 percent of the total population) refused to answer the question about ethnic belonging, and it is impossible to determine what proportion of them were Roma (See Ivanov, M. (2011) “Dannite na NSI zamagliavat etnicheskata kartina” *Obektiv*. 190: 17–20). Many Roma prefer not to disclose their Roma identity and so far no population census reflects their true number. The reasons for this phenomenon are varied and stem on one side from a desire to remain invisible in order to avoid discrimination, and on the other from the hierarchical structure of the Roma ethnic identity, which includes the phenomena of “ethnic mimicry” and “preferred ethnic identity” (See Marushiakova, E. and Popov, V. (1997) *Gypsies (Roma) in Bulgaria*. Frankfurt am Main: Peter Lang, pp. 67–68).

<sup>3</sup> European Commission. *An EU Framework for National Roma Integration Strategies*. COM (2011) 173 final, 5.4.2011, p 15, at: [http://ec.europa.eu/justice/policies/discrimination/docs/com\\_2011\\_173\\_en.pdf](http://ec.europa.eu/justice/policies/discrimination/docs/com_2011_173_en.pdf).

<sup>4</sup> Томова, И. *Нежеланите сънародници ромите в България – предразсъдъци и стереотипи, дискриминация и социално изключване* (The Unwanted Compatriots Roma in Bulgaria – prejudices and stereotypes, discrimination and social exclusion), с. 27–28, at: <http://www.project-redupre.eu/datoteke/Bulgaria/ROMAINBULGARIA-prejudicesandstereotypes.pdf>, last accessed 12.03.2015.

<sup>5</sup> World Bank (2014) “How Can Bulgaria Improve its Education System? An Analysis of PISA 2012 and Past Results,” p.1, at: [http://www-wds.worldbank.org/external/default/WDSContentServer/WDSP/IB/2014/10/10/000442464\\_20141010125520/Rendered/PDF/913210WP0P14620garia0ONLINE0Sept026.pdf](http://www-wds.worldbank.org/external/default/WDSContentServer/WDSP/IB/2014/10/10/000442464_20141010125520/Rendered/PDF/913210WP0P14620garia0ONLINE0Sept026.pdf), last accessed 10.03.2015.

<sup>6</sup> Национален статистически институт. *Преброяване на населението 2011*. Census data 2011, at: <http://www.nsi.bg/EPDOCS/Census2011final.pdf>

<sup>7</sup> Томова, И. *Нежеланите сънародници ромите в България – предразсъдъци и стереотипи, дискриминация и социално изключване*, с. 28.



Bulgaria is the EU member state with the highest share of population in risk of poverty. According to statistics by Eurostat covering 2008 to 2011, almost half of Bulgarians (49.1 percent) risk falling into poverty or social exclusion.<sup>8</sup> Poverty in Bulgaria is disproportionately concentrated in two ethnic minority groups: Roma and Turkish minority groups.<sup>9</sup> According to a World Bank study, in March 2010, nearly nine out of 10 Bulgarian Roma had per capita incomes equal to the incomes experienced by the poorest four-tenths of the population, with 67 percent of Roma being among the poorest 20 percent of all people in Bulgaria.<sup>10</sup>

### 3. Education

#### 3.1. Basic Facts about School Participation and Performance of Bulgarian Students, Including Roma

UNICEF Bulgaria's annual report in 2013 informs that Bulgaria is the country with the lowest average age of early school leavers: 14.3 years. Every nine out of 10 children who did not attend school are illiterate. The poor people who have primary or lower level of education are three times more (44.3 percent) than the poor people whose highest level is secondary education (13.1 percent). Twenty percent of five-year-old children and 11.5 percent of six-year-old children are not enrolled in a kindergarten or school, although the law mandates two years of preschool education. In the last five years (2008–2013), 7,000 children annually never attended school or dropped early. Out of this number 1,000 children never enrolled at school. The number of children who are affected by the phenomenon of “hidden dropout” is much higher than the number of children registered as dropouts or not enrolled in the education system.<sup>11</sup>

##### 3.1.1. The PISA 2012 Study

An analysis of PISA 2012 results by the World Bank shows that Bulgaria's performance has not made significant progress since 2000 and its performance gap with the OECD accounts for more than one year of schooling.<sup>12</sup>

The World Bank analysis points out that PISA 2012 results suggest that the opportunities for obtaining a good education are highly unequal in Bulgaria, and mostly depend on students' background characteristics. Social stratification in Bulgarian schools is the highest among EU countries. Students from linguistic minorities lag behind Bulgarian-speaking students the equivalent of three years of schooling in reading (121 points) and two years of schooling in math (75 points) and science (82 points). Furthermore, linguistic minority students are much less likely to be enrolled in general profiled schools, tend to be concentrated more in rural areas and have parents who are less educated and less likely to participate in the labor market.

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<sup>8</sup> According to the same data, at risk of poverty are 40.3 percent of Romanians and 36.6 percent of Latvians.

<sup>9</sup> World Bank (2013) *Bulgaria: Early Childhood Development*, SABER Report 2013, at: [http://www-wds.worldbank.org/external/default/WDSContentServer/WDSP/IB/2014/08/25/000442464\\_20140825135443/Rendered/PDF/900840WP0Box380IgariaOCR0Final02013.pdf](http://www-wds.worldbank.org/external/default/WDSContentServer/WDSP/IB/2014/08/25/000442464_20140825135443/Rendered/PDF/900840WP0Box380IgariaOCR0Final02013.pdf)

<sup>10</sup> World Bank (2010) “Roma Inclusion: An Economic Opportunity for Bulgaria, Czech Republic, Romania and Serbia,” Policy Note, September 2010, at: [http://siteresources.worldbank.org/INTROMA/Resources/Policy\\_Note.pdf](http://siteresources.worldbank.org/INTROMA/Resources/Policy_Note.pdf)

<sup>11</sup> УНИЦЕФ България. *Годишен доклад 2013*, с. 19. (Annual Report 2013), at: [http://www.unicef.bg/assets/PDFs/\\_UNICEF\\_Bulgaria\\_Annual\\_Report\\_2013.pdf](http://www.unicef.bg/assets/PDFs/_UNICEF_Bulgaria_Annual_Report_2013.pdf)

<sup>12</sup> World Bank (2014) “How Can Bulgaria Improve its Education System? An Analysis of PISA 2012 and Past Results,” p.1.



Overall, the large gap in educational opportunities between language groups can be summarized by large differences in their socio-economic backgrounds.<sup>13</sup>

Disparities in performance by school type are large and are exacerbated by the early streaming of students. The consequence is that most students in general profiled schools, which have a very low share of disadvantaged students, tend to fare quite well. General profiled school students tend to come from families with higher socio-economic status and interact with similarly better-off peers. But over half of Bulgaria's 15-year-old student population struggles in the worse performing vocational or general non-profiled schools.<sup>14</sup>

The World Bank recommendations based on the PISA 2012 results include<sup>15</sup>:

- *Delaying the tracking of students to reduce segregation in schools.* Bulgaria streams its students into general profiled, general non-profiled and vocational education schools when they are 13-years-old through a high-stakes exam. Existing admission policies on a number of primary schools suggest that this mechanism leads to sorting as early as first grade. Most countries do this at a later stage, usually when students are 16-years-old. A recent World Bank report found that the prospective of high-stakes exams creates incentives for parents to invest in private tutoring to help their children increase their scores, leading to sorting among families, which raises important equity concerns.
- *Continue improving the quality of educational resources* to ensure that all students learn in an environment with books, lab equipment and technological hardware and software.  
The analysis of the improvement in performance in math and reading between 2006 and 2012 shows that the two key drivers were the evolution of students' socio-economic status and the improved quality of educational resources.
- *Encouraging longer pre-primary education for all children.* Pre-primary education increases school readiness and has a positive and significant effect on the student achievement of Bulgarian 15-year-olds. The PISA 2012 study found that attending at least two years of preschool education raises low achievers' scores by up to 10 points and the scores of those who speak a different language at home by up to 19 points.
- *Learning from successful schools to improve accountability mechanisms for schools* countrywide, particularly in rural areas. There is a need to further understand: (i) why the autonomy reform did not function as expected; (ii) why the reform was more successful in urban areas; and (iii) why PISA scores were positively affected by greater autonomy in the management of school resources, but not by greater autonomy in curriculum development and assessment.

*Reevaluating the curriculum and assessment framework* to better align student learning to the envisaged country goals. PISA results present a good opportunity to engage in an in-depth debate about a curriculum and assessment framework reform, as well as how to better align the education system with national social and economic development goals.

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<sup>13</sup> Ibid., p.18.

<sup>14</sup> Ibid., p.17.

<sup>15</sup> Ibid., pp. 3-4.



*Promoting effective classroom management and strengthening teaching practices.* Teacher development programs could be implemented to improve management techniques in the classroom for the current and future teaching workforce, yielding rapid improvements in the quality of learning.

### 3.2. The Extent of Roma Exclusion from Education

In a recent article, Romani Studies professors Elena Marushiakova and Vesselin Popov concluded that, “For more than 20 years after the onset of changes, the existing educational problems of Roma are not only unresolved, but in many respects the situation has significantly deteriorated in comparison to previous historical periods. All available studies, regardless of methodological approaches and obtained data, show that the situation worsened in terms of basic indicators, such as the percentages of illiterate Roma, school dropouts in the early grades, secondary school graduates, and recipients of vocational education.”<sup>16</sup>

This conclusion is corroborated by the data on Roma education in 11 EU Member States, including Bulgaria, provided by the Fundamental Rights Agency (FRA) survey in 2011, in cooperation with the UNDP and the World Bank. The survey data shows the extent and the implication of Roma exclusion from education, which begins as early as preschool. FRA noted that failure to attend preschool dramatically cuts the chances of students’ completing compulsory education later on. The survey results also show that Roma face three major inter-related education problems: low preschool attendance, a high risk of segregated schooling compounded by prejudice and discrimination, and high dropout rates before completing secondary education and low literacy rates.<sup>17</sup>

Comparative data about educational status of the three main ethnic groups in Bulgaria – Bulgarians, Turks, and Roma, derived from the National Census – show significant disparities and lack of progress in the educational integration of Roma in the period 2001–2011.

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<sup>16</sup> Marushiakova, E., Popov, V. (2013) “The Shades of Incomplete: Roma Education Policy in Bulgaria,” in Miskovic, M. (ed.), *Roma Education in Europe: Practices, Policies and Politics*. Routledge, 2013.

<sup>17</sup> Fundamental Rights Agency (2011) *Roma Survey – Data in Focus Education: The Situation of Roma in 11 EU Member States*, at: [http://fra.europa.eu/sites/default/files/fra-2014\\_roma-survey\\_education\\_tk0113748enc.pdf](http://fra.europa.eu/sites/default/files/fra-2014_roma-survey_education_tk0113748enc.pdf)



Highest Completed Level of Education	Bulgarians (Percent)		Turks (Percent)		Roma (Percent)	
	2001	2011	2001	2011	2001	2011
Higher	19.2	25.6	2.4	4.9	0.2	0.5
Secondary	47.6	52.3	21.9	29.7	6.5	9
Primary	24.9	18	46.9	44.5	41.8	40.8
Elementary	6.9	3.4	18.6	13.4	28.3	27.9
Incomplete elementary	1.4	0.9	10.2	7.5	23.2	21.8

Source: National Statistical Institute.<sup>18</sup>

The table indicates that the disparity in educational achievement between Roma and the rest of the population has increased despite numerous government commitments for integration of Roma in education over the ten year period 2001–2011. While the educational status in the two other main ethnic communities, the Bulgarian and the Turkish, improved substantially in the ten-year period under review, this tendency is hardly visible among the Roma community.

### 3.2.1. School Attendance

#### Preschool education

Household survey data from the UNDP/World Bank/EC regional Roma survey indicate that enrollment rates in preschool education are much lower for Roma compared to non-Roma. The attendance rate for Roma was 45 percent, while for non-Roma it was 81 percent.<sup>19</sup> Although pre-primary education is free of charge and compulsory, nearly four out of ten Roma children aged six do not attend school or preschool. Belarus and Hungary are amongst the top performers in the sub-region, with enrollment of 99 percent and 85 percent, respectively.<sup>20</sup>

#### Compulsory Education:

The findings from the UNDP/World Bank/EC Regional Roma Survey (2011) indicate that there are statistically significant differences in primary education attainment of Roma in Bulgaria between 2004 and 2011 – a higher share of Roma aged 14 to 20 completed primary education in 2011 than in 2004. Primary education attainment rate of Roma increased nine percentage points from 77 percent in 2004 to 86 percent in 2011.<sup>21</sup>

<sup>18</sup> See Bulgarian Helsinki Committee (2012) *Submission to the Committee on Economic, Social and Cultural Rights regarding the consideration of the Fourth and Fifth periodic reports of Bulgaria, 49th session* (12-30 November 2012), Geneva, p. 8, at: [http://tbinternet.ohchr.org/Treaties/CESCR/Shared%20Documents/BGR/INT\\_CESCR\\_NGO\\_BGR\\_13979\\_E.pdf](http://tbinternet.ohchr.org/Treaties/CESCR/Shared%20Documents/BGR/INT_CESCR_NGO_BGR_13979_E.pdf), last accessed 9.03.2015.

<sup>19</sup> Brüggemann, C. (2012) *Roma Education in Comparative Perspective. Analysis of the UNDP/World Bank/EC Regional Roma Survey 2011*, p. 33, at: <http://www.unesco.org/new/fileadmin/MULTIMEDIA/HQ/ED/pdf/Roma-Education-Comparative-Perspective-UNDP.pdf>.

<sup>20</sup> World Bank. *Bulgaria: Early Childhood Development*, p. 20.

<sup>21</sup> See above, note 19, pp. 20–21.



Nevertheless, the FRA Roma Survey (2011)<sup>22</sup> found that compared to their non-Roma peers, Roma children are at a greater risk of leaving education before the end of compulsory school age without acquiring the basic skills necessary for achieving full participation in their societies.<sup>23</sup> At least 12 percent of Roma children aged seven to 15 in Bulgaria were identified in the Survey as not attending school, meaning that they are either still in preschool, not yet in education, skipped the year, stopped school completely or are already working. For comparison, in the central eastern European countries (Hungary, Czech Republic, Slovakia and Poland) and in Spain this rate is between five percent and seven percent. This figure is three percent of non-Roma children. The share of Roma who left school before reaching 16 years of age is 73 percent compared to 26 percent of non-Roma.<sup>24</sup> The share of Roma above 16 years of age who have never been to school is nine percent, compared to zero percent for non-Roma.<sup>25</sup> For the age group 16–24, the share of persons who never attended school is three percent, for the age group 25–44 it is nine percent, and for the age group 45 and above, it is 11 percent.<sup>26</sup>

### Secondary Education:

The findings from the UNDP/World Bank/EC Regional Roma Survey (2011) indicate that there are statistically significant differences in both lower and upper secondary education attainment of Roma between 2004 and 2011 in Bulgaria. A higher share of Roma aged 17 to 23 have completed lower secondary education in 2011: as of 2004, lower secondary education was completed by 40 percent, and by 56 percent as of 2011.<sup>27</sup> Similarly, a higher share of Roma aged 20 to 26 has completed upper secondary education as of 2011, in comparison to 2004: upper secondary education was completed by 10 percent of Roma in 2004 and by 18 percent in 2011.<sup>28</sup>

Nevertheless, the FRA Roma Survey found that a large majority of Roma respondents in Bulgaria had left school before completing secondary education. The share of Roma who attended school but left before reaching 16 years of age was 73 percent, compared to 23 percent non-Roma.<sup>29</sup> Furthermore, a large majority of Roma respondents in Bulgaria had not completed upper secondary education – 85 percent Roma from the age group 18–25, compared to 32 percent non-Roma in the same age group.<sup>30</sup>

### 3.2.2. Segregated Education

*De facto* segregated Roma schools remain a significant barrier to improving the educational outcomes of Roma children. Despite the fact that the 2004 Protection against Discrimination Act requires the Minister of Education, Youth and Sciences and local government bodies to take such measures as are necessary to exclude racial segregation in educational

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<sup>22</sup> The FRA Roma Survey was conducted in parallel to the UNDP/World Bank Survey in 2011. The two surveys included a random sample of Roma and non-Roma households living in areas with higher density (or concentration) of Roma populations in the EU Member States of Bulgaria, Czech Republic, Hungary, Romania, Slovakia and the non-EU Member States of Albania, Bosnia and Herzegovina, Croatia, FYR Macedonia, Montenegro, Republic of Moldova and Serbia. In each of the countries, approximately 750 Roma households and approximately 350 non-Roma households living in proximity were interviewed.

<sup>23</sup> See above, note 17, p. 31.

<sup>24</sup> *Ibid.*, p. 19.

<sup>25</sup> *Ibid.*, p. 30.

<sup>26</sup> *Ibid.*, p. 31.

<sup>27</sup> See above, note 19, pp. 21–23.

<sup>28</sup> *Ibid.*

<sup>29</sup> See above, note 17, p. 34.

<sup>30</sup> *Ibid.*, p. 38.



institutions,<sup>31</sup> the government's desegregation plans remained mostly on paper. The government has failed to elaborate and fund a desegregation program that has meaningful impact on Roma education.<sup>32</sup>

Segregated "Roma schools," located in or near the segregated Roma neighborhoods are the largest system of segregated schooling of Roma children. According to different estimates, it comprises between 44 percent and 70 percent of the Roma children in school age, i.e., between 44,000 and 70,000 students.<sup>33</sup> Research by Open Society Institute–Sofia revealed that the total number of segregated Roma schools increased in the period 2001–2005 due to migration and "white flight" from mixed schools. In 2005, they were 554, out of the total 2,657 schools in Bulgaria, i.e., almost 20 percent of their total number.<sup>34</sup>

Overrepresentation of Roma in the schools for children with developmental disabilities ("remedial schools") is another pattern of segregation in education that seriously affects the chances of the students to find employment upon graduation. According to the 2002 comprehensive study of the Bulgarian Helsinki Committee (BHC) of the system of remedial schools, more than 50 percent of the students enrolled in them at that time were Roma and in some schools 80–90 percent were Roma.<sup>35</sup> In November 2008, new research by the BHC in three remedial schools for children with developmental disabilities – in Vratsa, Karnobat and Lom. According to the school principals, Roma constituted 80 percent of the students in Vratsa, 70 percent of the students in Karnobat and 50–60 percent of the students in Lom.<sup>36</sup>

### 3.2.3 The Impact of the 2007 Government Decentralization Reform

In 2007, Bulgarian government introduced a decentralization reform to promote greater autonomy in schools with respect to financial and personnel management.<sup>37</sup> Shortly after the reforms were introduced, the negative impact of the reforms on pupils from vulnerable groups was evident. An assessment by the Center Amalipe at the end of 2008 alerted that the reforms resulted in abrupt reduction of school enrollment, led to lower quality of education in the rural areas and hindered the advancement of integrated and intercultural education. The reason for this development was the lack of appropriate mechanisms to buffer the negative impact on the most vulnerable students.<sup>38</sup>

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<sup>31</sup> Закон за защита от дискриминация (Protection against Discrimination Act), чл. 29(1), (2), в сила от 1.01.2004, последна поправка 20.05.2011, [http://kzd-nondiscrimination.com/layout/images/stories/pdf/zakon\\_za\\_zashtita\\_ot\\_discriminacia\\_2012.pdf](http://kzd-nondiscrimination.com/layout/images/stories/pdf/zakon_za_zashtita_ot_discriminacia_2012.pdf)

<sup>32</sup> See above, note 18, p. 8.

<sup>33</sup> For a detailed analysis of the findings of different estimates see: OSI/EUMAP (2007) *Equal Access to Quality Education for Roma*, Vol. 1, Budapest, p.42–45.

<sup>34</sup> OSI/EUMAP (2007) *Equal Access to Quality Education for Roma*, p. 45.

<sup>35</sup> БХК, *Помощните училища в България* (BHC, *Remedial Schools in Bulgaria*), Sofia, 2002, pp. 7, 557-559.

<sup>36</sup> *Written Comments of the Bulgarian Helsinki Committee and the European Roma Rights Centre Concerning Bulgaria for Consideration by the United Nations Committee on the Elimination of Racial Discrimination at its 74th session*, December 2008, at: <http://www.errc.org/cms/upload/media/03/A3/m000003A3.pdf>

<sup>37</sup> The education system became highly decentralized in resource allocation matters after the reform. Schools now have the autonomy to manage their own budgets, a role transferred from the central government to municipalities and from municipalities to schools based on per-capita financing principles. Schools may have their own revenues in addition to those received from the government, although the share of schools' own revenues in their budgets is modest. School principals have the authority to hire and fire teachers and to decide individuals' workloads, remuneration, and bonuses within broadly defined central regulations. School principals are hired by the Ministry of Education and its regional structures (See World Bank (2011) "Benchmarking School Autonomy and Accountability in Selected European Countries." World Bank, Washington, D.C.).

<sup>38</sup> For a detailed analysis, see Center Amalipe (2007) *Annual Report. Roma Integration in Bulgaria 2007-2008*, pp. 50-59, at: [http://amalipe.com/files/publications/doklad-engl\\_2007\\_8.pdf](http://amalipe.com/files/publications/doklad-engl_2007_8.pdf)



A World Bank assessment in 2011 also concluded that the impact of the school autonomy reform on student achievement “is worse than expected.”<sup>39</sup> The results have shown that principals’ greater autonomy in the allocation of resources (such as policies regarding teachers or budget decisions) had a moderately positive impact on all students’ performance, and especially that of low-achieving students. This impact was stronger in urban than in rural areas.<sup>40</sup>

#### 4. Early Childhood Development

The European Commission in its 2011 Communication noted that: “Participation rates of Roma children in ECEC are generally significantly lower than for the native population, and expanding these opportunities is a key policy challenge across the EU. ECEC can play a key role in overcoming the educational disadvantage faced by Roma children.”<sup>41</sup> For Bulgaria, the World Bank suggested that additional policy measures related to social benefit services could ensure that vulnerable children enroll in kindergarten – such as developing some conditionality binding the access to social benefits (as income replacement in case of unemployment) with enrollment of children in preschools. Such actions would motivate those parents to enroll their children at least for the period of the social benefit programs, but attention should be given to vulnerable children in families that are outside of the labor market and social benefit system. A significant number of Roma children live in such families.<sup>42</sup>

According to an analysis by the World Bank in 2013, the Bulgarian government has not yet developed an explicitly stated comprehensive multi-sectoral early childhood development (ECD) strategy.<sup>43</sup> A *National Child Strategy* (2008–2018) was developed in consultation with various ECD stakeholders. Although the strategy refers to children zero to seven years of age, the strategy does not address the specific ECD activities related to this critical period of a child’s development. The World Bank recommended that the government should consider strengthening the legal framework for ECD; develop an explicitly stated multi-sectoral ECD strategy; ensure the level of ECE finance is adequate to meet the needs of the population; and ensure that essential ECD interventions are provided to poor children and to those who are hard to reach, mostly in the rural areas.<sup>44</sup>

#### 5. Health Care

Roma life expectancy rates are over 10 years less than the average.<sup>45</sup> According to 2001 census data, just 5.4 percent of Roma were between 60 and 100 years of age, while the national average was 22.3 percent. According to data by the National Statistics Institute for 2003, child mortality is 9.9 per 1,000 among Bulgarians; 17 per 1,000 among those of Turkish background and 28 per 1,000 among the Roma.

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<sup>39</sup> World Bank (2011) “Benchmarking School Autonomy and Accountability in Selected European Countries.” World Bank, Washington, D.C.

<sup>40</sup> Ibid.

<sup>41</sup> *Communication from the Commission – Early Childhood Education and Care: Providing all our children with the best start for the world of tomorrow*, COM(2011) 66 final, Brussels, 17 February 2011, at <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2011:0066:FIN:EN:PDF>

<sup>42</sup> See above, note 9.

<sup>43</sup> Ibid., pp. 15–26.

<sup>44</sup> Ibid.

<sup>45</sup> Tarnev, I. (2011) “Ensuring Minorities Access to Health Care in Bulgaria: Concept of health mediators – history, job description and mediator’s activities,” at: [http://www.vhpb.org/files/html/Meetings\\_and\\_publications/Presentations/SOFS25.pdf](http://www.vhpb.org/files/html/Meetings_and_publications/Presentations/SOFS25.pdf)



Recent research indicates that over the past years there has been a growing restriction of access to health for Roma citizens. A study by the Open Society Institute–Sofia in 2011 indicated that the share of Roma without health insurance is estimated at 45 percent (two percent did not know whether they had been insured). Uninsured Roma make up 14.6 percent of the overall population without health insurance. According to information gathered during the OSI study, health care is the most criticized sphere of life in terms of discrimination among Roma in Bulgaria. The quality of care they receive by medical personnel and social workers is usually assessed as low or very low. Three quarters of the interviewed Roma stated that their health is poor and many suffer from chronic conditions or disabilities.<sup>46</sup>

## 6. Housing

One of the most serious problems of Roma access to adequate housing is the widespread lack of security of habitation, which is due to the fact that many Roma live in houses that are formally considered “illegal” and on this basis may be destroyed at any time. While several changes to the legal framework – particularly to the Law on Territorial Organization – were made in 2003–2007, the need for prompt property legalization, which is necessary to alleviate the housing situation, was not met and conditions regarding property ownership were made even more difficult.<sup>47</sup> A 2009 report by the Fundamental Rights Agency (FRA) notes that the Roma housing situation in Bulgaria is worsening instead of improving.<sup>48</sup> The deteriorating conditions reflect not only the persisting segregation, but growing *ghettoization* and limited access to services and infrastructure.<sup>49</sup>

Another serious problem is the quality of habitation. The 2011 census demonstrates that 55.4 percent of the Roma population lives in urban areas, with the remaining 44.6 percent living in rural areas. According to a RAXEN report, “the urban Romani population, concentrated in around ninety municipalities, faces the worst cases of discrimination.”<sup>50</sup> Approximately 50 to 70 percent of Roma in urban areas live in illegally built homes or shelters.<sup>51</sup> On average, according to official data, every Roma has 10.6 m<sup>2</sup> of dwelling space, as compared to 23.2 m<sup>2</sup> for non-Roma.<sup>52</sup> FRA’s Regional Roma Survey shows that nearly 80 percent of Roma households in Bulgaria continue to lack at least one of the basic amenities.<sup>53</sup> This is also emphasized in the 2012 National Roma Integration Strategy (NRIS), which notes that 40 percent of Roma continue to live in houses without plumbing, using water from street

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<sup>46</sup> It can be assumed that the poor living conditions and lack of basic hygiene lead to poor health. The following can be considered as major characteristics of poor housing and unsanitary living conditions: the lack of running water (plumbing), electricity, indoor toilet and bathrooms. See Open Society Institute (2012) *Final Report*, 26 January 2012, at [http://osi.bg/downloads/File/2012/Final%20Report\\_FNS\\_26\\_Jan\\_2012.pdf](http://osi.bg/downloads/File/2012/Final%20Report_FNS_26_Jan_2012.pdf)

<sup>47</sup> Petkova, D. (2009) *Analysis of National and Regional Level Documents, Reflecting the Roma Integration Policies on Improving Housing Conditions*, p. 9, available at: [www.mfsofia.ngorc.net/html/osi\\_analyze\\_final.doc](http://www.mfsofia.ngorc.net/html/osi_analyze_final.doc). One of the conclusions in this analysis is that publicly funded projects are not implemented where they are most needed – in the Roma ghettos.

<sup>48</sup> EU Fundamental Rights Agency (2009) *Housing Conditions of Roma and Travellers in the EU*, Vienna, p. 42, at: [http://fra.europa.eu/fraWebsite/attachments/Roma\\_Housing\\_Comparative-final\\_en.pdf](http://fra.europa.eu/fraWebsite/attachments/Roma_Housing_Comparative-final_en.pdf)

<sup>49</sup> EU Fundamental Rights Agency (2009) *RAXEN Thematic Study - Housing Conditions of Roma and Travellers - Bulgaria*, p. 14, at: [http://fra.europa.eu/fraWebsite/attachments/RAXEN-Roma%20Housing-Bulgaria\\_en.pdf](http://fra.europa.eu/fraWebsite/attachments/RAXEN-Roma%20Housing-Bulgaria_en.pdf)

<sup>50</sup> EU Fundamental Rights Agency (2009) *RAXEN Thematic Study - Housing Conditions of Roma and Travellers - Bulgaria*, p. 5, at: [http://fra.europa.eu/fraWebsite/attachments/RAXEN-Roma%20Housing-Bulgaria\\_en.pdf](http://fra.europa.eu/fraWebsite/attachments/RAXEN-Roma%20Housing-Bulgaria_en.pdf)

<sup>51</sup> US Department of State, Civilian Security and Democracy (2011) *2010 Human Rights Report: Bulgari*, at: <http://www.state.gov/j/drl/rls/hrrpt/2010/eur/154417.htm>; US Department of State, Civilian Security and Democracy. (2012) *2011 Human Rights Report: Bulgaria*, at: <http://www.state.gov/j/drl/rls/hrrpt/humanrightsreport/index.htm#wrapper>.

<sup>52</sup> Ibid.

<sup>53</sup> EU Fundamental Rights Agency (2012) *The Situation of Roma in 11 EU Member States – Survey Results at a Glance*, p. 23, at: [http://fra.europa.eu/fraWebsite/attachments/FRA-2012-Roma-at-a-glance\\_EN.pdf](http://fra.europa.eu/fraWebsite/attachments/FRA-2012-Roma-at-a-glance_EN.pdf).



fountains; 60 percent of Roma buildings are not connected to the central sewage system; and 80 percent of Roma buildings do not have a toilet.<sup>54</sup> Many studies illustrate the poor quality of Roma housing.

On October 18, 2006, the European Committee of Social Rights (ECSR) issued a decision on the Collective Complaint 31/2005 submitted by the *European Roma Rights Centre (ERRC) v. Bulgaria*. It ruled that “Bulgaria discriminates against Roma in the field of housing with the result that Roma families are segregated in housing matters, lack of legal security of tenure, are subject to forced evictions and live in substandard conditions.”<sup>55</sup> The Committee ruled that the state also failed to give due consideration to the specificity of their living conditions and reminded Bulgaria of the need of positive action measures to ensure Roma integration.<sup>56</sup>

## 7. Employment

According to a World Bank study, the vast majority of working-age Roma lack sufficient education to participate successfully in the labor market.<sup>57</sup> Unemployment rates in Roma communities are disproportionately high. Those with jobs are frequently in low-skilled, low-income labor sectors – the only means of making a living for many Roma who are commonly excluded from other labor markets.

The table below presents the levels of employment among Roma provided by an Open Society Institute–Sofia study (2011) in comparison to the levels of employment for the general population from the 2011 Census.<sup>58</sup> The data shows significantly lower levels of employment for Roma. For example, the employment coefficient for all Bulgarians for the second trimester is 45.3, which is almost 15 percentage points higher than the employment coefficient for Roma in the same period.

### Employment Coefficient for Roma (16+) and for all Bulgarian citizens (15+)

Study period	Feb 2010	June 2010	Oct. 2010	Feb. 2011	May 2011	June 2011
OSI Sofia, data on Roma*	28.6	32.9	33.3	25.4	30.9	35.4
Census data, general population**	46.1	47	46.3	44.7	45.3	45.3

\*Source: OSI Study, 2011

\*\*Source: National Statistical Institute, 2011.

According to the OSI study, employment among Roma with primary education (32.89 percent), who comprise almost half of the entire Roma population above 16 years of age (48.2 percent) is considerably lower compared to the average for the country for people with this level of education (45.3 percent). Furthermore, the study shows the share of employed

<sup>54</sup> *National Strategy of the Republic of Bulgaria on Roma Integration 2012–2020*, at: <http://www.nccedi.government.bg/page.php?category=125>

<sup>55</sup> The full text of the European Committee of Social Rights decision in Collective Complaint 31/2005, *ERRC v. Bulgaria*, is at: [http://www.coe.int/t/dghl/monitoring/socialcharter/Complaints/Complaints\\_en.asp](http://www.coe.int/t/dghl/monitoring/socialcharter/Complaints/Complaints_en.asp)

<sup>56</sup> *Ibid.*

<sup>57</sup> World Bank (2010) *Economic costs of Roma exclusion*, April 2010, at: [http://siteresources.worldbank.org/EXTROMA/Resources/Economic\\_Costs\\_Roma\\_Exclusion\\_Note\\_Final.pdf](http://siteresources.worldbank.org/EXTROMA/Resources/Economic_Costs_Roma_Exclusion_Note_Final.pdf)

<sup>58</sup> Институт “Отворено общество.” *Доклад относно публичните политики за интеграция на ромите в България и основните проблеми на социално-икономическото включване на ромската общност*, с. 36–37.

<sup>58</sup> European Parliament, at: <http://www.europarl.europa.eu/sides/getDoc.do?pubRef=-//EP//TEXT+MOTION+B6-2009-0112+0+DOC+XML+V0//EN>



Roma with basic and lower education (18.85 percent) who are almost four times more than the Roma with higher education. Roma with higher education are almost certain to find employment but they are below one percent. The probability of Roma with secondary education to find employment is two times higher than the Roma with primary education and almost 3.5 times higher than the Roma with basic or lower education.<sup>59</sup>

## 8. Migration

The European Parliament resolution on migrant children left behind in the country of origin from March 2009, stresses that the children that are left behind by parents working in another Member State face the “risk of general lack of care as regards physical and mental health, and mental-health related effects such as: depression; losing free time to play and develop; lack of school participation and general participation in education and training; malnutrition; and child abuse” and calls on EU Member States to take steps to improve the situation of the children left by their parents in the country of origin and ensure their normal development in terms of education and social life and to set up cooperation mechanisms to prevent the detrimental effects on families, especially children, of living apart and of the distances they have to bridge.<sup>60</sup>

According to a representative survey for Roma conducted by the Open Society Institute–Sofia in 2011, 12 percent of the interviewed Roma persons indicated that they have worked abroad after 1989. Almost 17 percent of the interviewed indicated that a second member of the family has also worked abroad after 1989.<sup>61</sup>

UNICEF Bulgaria highlights the problem of children who are being raised temporarily or permanently by persons other than their parents due to labor migration of parents. According to their data, 26 percent of all children in Bulgaria are being raised in such circumstances, over half of them below 14 years of age.<sup>62</sup>

Bulgarian Ministry of Education and Science assesses that the number of students who left school due to migration increased by 49.4 percent for the period 2008/2009–2011/2012. The Ministry notes that the mechanism for exchange of information between Bulgaria and the countries with the highest intake of migrants, does not allow Bulgarian institutions to track the students who continue their education in the new country of residence.<sup>63</sup>

A study by the Bulgarian Helsinki Committee from 2011 shows that the consequences for the Roma children are even more worrisome because parents’ labor migration is one of the factors for the placement of Roma children in institutional care.<sup>64</sup>

## 9. General Climate

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<sup>59</sup> Ibid.

<sup>61</sup> See above, note 58, p. 52.

<sup>62</sup> УНИЦЕФ България. *Годишен доклад за България 2013*, at: [http://www.unicef.bg/assets/PDFs/\\_/UNICEF\\_Bulgaria\\_Annual\\_Report\\_2013.pdf](http://www.unicef.bg/assets/PDFs/_/UNICEF_Bulgaria_Annual_Report_2013.pdf)

<sup>63</sup> Министерство на образованието и науката. Стратегия за намаляване дела на преждевременно напусналите образователната система 2013-2020 (Strategy for Reducing the Share of Early School Leavers.).

<sup>64</sup> Български хелзински комитет. *Ромските деца в риск и системата за закрила на детето в България* (Roma Children at Risk and the System for Child Protection in Bulgaria), p. 40–41, at: [http://www.bghelsinki.org/media/uploads/documents/reports/special/2011-06\\_romani-children-at-risk-in-the-child-protection-system-in-bulgaria\\_\[bg\].pdf](http://www.bghelsinki.org/media/uploads/documents/reports/special/2011-06_romani-children-at-risk-in-the-child-protection-system-in-bulgaria_[bg].pdf)



Social distances between Roma and non-Roma are widening and over the past five years the situation in this respect has been deteriorating, not improving. Cases of hate speech and of direct discrimination on the part of institutions and individuals are frequent and are supported by the majority of the population in Bulgaria.<sup>65</sup> A study conducted by the Bulgarian Commission for Protection against Discrimination shows that discriminatory attitudes are widespread in the Bulgarian educational system. According to the research, 25 percent of Bulgarian teachers believed that children from different ethnic backgrounds should study in separate schools and 20 percent were convinced that children from different ethnic backgrounds have different abilities.<sup>66</sup>

In its 2014 Country Report on Bulgaria the Commission against Racism and Intolerance noted that, “racist and intolerant hate speech in political discourse continues to be a serious problem in Bulgaria and the situation is worsening” and “the main targets of racist hate speech are Roma, Muslims, Jews, Turks, and Macedonians.”<sup>67</sup>

During the election campaigns in 2013 and in 2014, two ultra-nationalist/anti-minority parties – the NFSB (National Front for Salvation of Bulgaria) and VMRO-BND (Internal Macedonian Revolutionary Organisation – Bulgarian National Movement) made increasingly hostile and racist statements. A section of VMRO’s program was entitled “Solving the Gypsy question” and proposed to address the “problem” through mandatory labor for Roma. The program also called for “voluntary patrols for the protection of the Bulgarian population,” which, in essence, would be paramilitary groups for vigilantism. The seventh chapter of NFSB’s program was entitled “Treatment of ethnic communities” and argued that the existence of different ethnicities in Bulgaria threatens the country’s national identity.<sup>68</sup>

After the elections in October 2014, the government coalition included both the NFSB and the VMRO. They continued to make open and aggressive anti-Roma statements that were not challenged by either the other coalition parties or the responsible prosecutorial organs.

## I. THE EDUCATION SYSTEM IN BULGARIA

### 1. Update on legislation

In 2013, a new draft Law on Preschool and School Education had been under preparation. It was the result of a wide process of consultations, including with Roma NGOs,<sup>69</sup> and was largely viewed as an important step forward, but has been set aside following the political changes in 2013. The same draft Law was introduced in parliament again, in 2015, and was adopted at the first reading in February 2015. Below are highlighted the main aspects of the

<sup>65</sup> Институт “Отворено общество.” *Обществено мнение и социални нагласи.* (Public Opinion and Social Attitudes), at: <http://www.opendata.bg>

<sup>66</sup> Darik News, 7 August 2012: [http://dariknews.bg/view\\_article.php?article\\_id=944172&audio\\_id=115600](http://dariknews.bg/view_article.php?article_id=944172&audio_id=115600)

<sup>67</sup> Council of Europe. European Commission against Racism and Intolerance. ECRI Report on Bulgaria (2014), p. 15, at: <http://www.coe.int/t/dghl/monitoring/ecri/Country-by-country/Bulgaria/BGR-CbC-V-2014-036-ENG.pdf>

<sup>68</sup> Bulgarian Helsinki Committee. “Bulgarian Parties Want Concentration Camps, Forced Labor for Roma,” in European Liberties Platform, at: <http://www.liberties.eu/en/news/bulgarian-parties-roma>, last accessed 10.03.2015.

<sup>69</sup> Roma organizations working in the education sector participated actively in the preparation of the new law. They formulated proposals for inclusion of the topic of educational integration in the law by introducing a standard for intercultural education, a ban on the formation of classes and schools along ethnic lines, introducing a mechanism for goal-oriented funding policy for educational integration at school level and by providing opportunities for knowledge validation, lifelong learning, support for education in small towns, etc. Source: Center Amalipe (2012) “The Committee on Education Passes the School Law at First Reading,” 12.04.2012, at: <http://www.amalipe.com/index.php?nav=news&id=1150&lang=2>, last accessed on 9.03.2015.



draft with relevance to Roma education that were analyzed by a group of NGOs working on Roma education:<sup>70</sup>

#### Positive aspects:

- Among the positive changes introduced by the Draft Law is the specific ban on the separation of children by ethnic background or by special educational needs in groups in the kindergartens and classes in the schools (Articles 60(4), 97(4)(5)). Importantly for the Bulgarian context, however, the draft Law does not ban the existence of ethnically segregated schools (e.g., all-Roma schools based in all-Roma neighborhoods).
- The draft envisages also a national standard for intercultural education. A requirement for each school is to elaborate and agree on its own program for educational integration and dropout reduction whereby targeted funding for the implementation of these programs will be provided beyond the delegated budget, thus giving hope that they will be fulfilled in practice.
- The draft provides opportunity for the development of rural education because it envisages transformation of primary schools (up to grade eight) into secondary schools (up to grade ten). It is assessed that in this way many schools in small rural areas will be developed and the percentage of young people enrolled in the secondary stage will increase.<sup>71</sup>
- An initial version of the draft Law envisaged compulsory preschool education from the age of four as a measure for reducing the early school leavers. This text was dropped after protests from parents' organizations. The current draft contains a text for a day-long teaching in the primary stage of education, which is also meant to reduce the number of early school leavers.
- Envisaged is the establishment of a National Inspectorate on Education in Bulgaria with a mandate to conduct external evaluation of the quality of education in the schools and to organize the national assessment. It will support kindergartens and schools to maintain and improve the quality of education that they offer; will prepare public reports on the quality of education; and will reliable information for education and feedback whether reforms are successful or not.

#### Issues of concern:

- One of the problematic points of the draft Law is that it preserves the system of the streaming of students into general profiled, general non-profiled and vocational education schools when they are 13-years-old through a high-stakes exam. A recent World Bank report found that the prospective of high-stakes exams creates incentives

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<sup>70</sup> See for example, *Становище на Центъра за междуетнически диалог и толерантност "Амалипе" относно законопроекта за предучилищното и училищното образование* (Opinion by the Center for Inethnethnic Dialogue and Tolerance Amalipe on the draft law for preschool and school education, dated 16/12/2014, published at the website of Bulgarian National Assembly, at: <http://www.parliament.bg/pub/cW/20141216043456Amalipe.pdf>

<sup>71</sup> Center Amalipe (2012) *Round Table to Discuss the Draft of Preschool and School Education Law*, 27.02.2012, <http://www.amalipe.com/index.php?nav=news&id=1090&lang=2>, last accessed on 9.03.2015.



for parents to invest in private tutoring to help their children increase their scores, leading to sorting among families, which raises important equity concerns.<sup>72</sup>

- Another major concern is the reduction of the duration of basic education by one year – the draft Law envisages that basic education will be completed at grade seven instead of grade eight as it used to be. Roma NGOs and education experts consider that given the high rate of dropout from school after grade eight among minorities, the envisaged change would reduce by one year the time spent at school for vulnerable children thus decreasing their chances at the labor market.<sup>73</sup>
- The draft Law does not eliminate a number of normative obstacles for reintegration of pupils who dropped out of school due to migration outside the country. The number of these pupils is growing.<sup>74</sup>

## 2. Administration of the Education System

The administration of education is organized at four levels – national, regional, municipal and school. The *Ministry of Education and Science* (MES) administers the education system as a specialized body of the Council of Ministers. There are 28 *Education Inspectorates* at the regional level which act as specialized territorial bodies of the MES. They have planning, coordination and monitoring functions over the schools within their jurisdiction. *Municipal bodies* for education represent an element of the government territorial structure and are responsible for the compulsory education until 16 years, for preschool education and extracurricular activities, financing material and technical assets, transportation as well as for scholarships. At school level, the *Principal* and the *Pedagogic Council* are the administrative bodies. There is a tradition of establishing boards of trustees comprising the school principal, teachers, parents, businessmen and cultural workers.

The *National Agency for Vocational Education and Training* (VET) established in 2000 is a specialized body within the Council of Ministers which is tasked with maintaining the quality of the VET system.

The *State Agency for Child Protection* established in 2001 under the Child Protection Act (2000) is responsible for the development of unified state policy for child protection.

## 3. Structure and Organization of the Education System

The education system serves over 1.2 million students from pre-primary school through tertiary education. According to UN estimates, Bulgaria's school-age population is projected to shrink by 10 percent between 2015 and 2030, reflecting the impact of low fertility and migration.

Bulgaria's education system consists of four levels. Pre-primary education is offered to children

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<sup>72</sup> See above, note 5, p. 3.

<sup>73</sup> See Център “Амалипе.” *Предложения към Закона за предучилищното и училищното образование*. (Proposals to the Law on Preschool and School Education), at [http://www.amalipe.com/files/bulletin/predlojenia\\_ZPUO.pdf](http://www.amalipe.com/files/bulletin/predlojenia_ZPUO.pdf), last accessed on 9.03.2015.

<sup>74</sup> Ibid.



between three and six (or seven) years old and since 2010, two years of preschool are compulsory, starting from age five.<sup>75</sup> For children up to three years of age, daycare nursery services are provided. They are not part of the pre-primary education system and are regulated by the Ministry of Health.<sup>76</sup>

Primary education comprises grades one to eight, usually starts at age seven, and is offered by state, municipal, and private school providers. Although lower secondary does not end until the end of grade eight, most students change schools after grade seven, once they take a high-stakes exam that streams students into general profiled schools, vocational education and training (VET) schools, or general non-profiled schools. Upper secondary education is provided by non-profiled, profile-oriented, and technical (vocational) schools. Education is compulsory for students up to the age of 16.<sup>77</sup>

The new higher education system, established in 1995 is organized as follows: (i) non-university education in colleges with three-year programs leading to the diploma of specialist; (ii) university higher education instituted with four- or five-year programs leading to the award of bachelor's degree; an additional one to two years of study lead to the award of a master's degree; (iii) university higher education institutes offering five- or six-year programs; (iv) postgraduate three-year programs leading to the award of a doctoral degree.

#### 4. Financial Resources for Education

General government expenditure on education is the second-lowest in the EU and well below the EU average. Approximately 11 percent of total government expenditures go towards education in Bulgaria representing 3.9 percent of GDP in 2010. Of the entire education budget, 22 percent is allocated to pre-primary education.<sup>78</sup> For comparison, public expenditure on education in the EU-27 in 2010 was equivalent to an estimated 5.4 percent of GDP, while the expenditure of both public and private sources of funds on educational institutions amounted to 6.3 percent of GDP.<sup>79</sup> Public expenditure per student is also among the lowest in EU.<sup>80</sup>

State and municipal budgets cover the essential costs of early childhood care and education. The state is primarily responsible for costs of staff salaries, training, medical prevention, and safe and healthy working conditions. The municipality covers the additional costs for maintenance of heating, lighting and other supplies, major repairs, medical care, and partly for children's food. While national law guarantees free pre-primary education, there is a chronic shortage of places in kindergartens, particularly in big cities including the capital city. In addition, state and local authorities expect parents who can afford to contribute financially for the provision of quality early child care and education services to preschool-aged children. Each municipality autonomously determines and regulates the amount of fees collected from parents or legal guardians of children who attend kindergartens or nursery schools, based upon the type of services provided. Parents do not pay tuition fees, but some

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<sup>75</sup> Закон за народната просвета, чл. 20 (Public Education Act).

<sup>76</sup> Закон за здравеопазването, чл. 118 (Public Health Act).

<sup>77</sup> Закон за народната просвета; Summary in: World Bank. "How Can Bulgaria Improve its Education System? An Analysis of PISA 2012 and Past Results."

<sup>78</sup> UNESCO. Bulgaria. *General Information*, at: <http://en.unesco.org/countries/bulgaria>.

<sup>79</sup> European Commission. Eurostat. *Data from October 2013*, at: [http://ec.europa.eu/eurostat/statistics-explained/index.php/Educational\\_expenditure\\_statistics#Main\\_statistical\\_findings](http://ec.europa.eu/eurostat/statistics-explained/index.php/Educational_expenditure_statistics#Main_statistical_findings)

<sup>80</sup> EUROSTAT. *Annual expenditure on public and private educational institutions per pupil/student*.



of them have significantly high contributions, despite having to partially cover the daily needs of their children, including food and educational materials.

According to the World Bank regional study “Closing the Early Learning Gap” (2012), in Bulgaria, the average Roma parent with a child in preschool reports spending EUR 15.4 per month on preschool related fees; a very substantial amount for poor Roma families. In comparison, Hungarian Roma report spending only EUR 1.3 on average. These out of pocket expenses and huge variations in the costs for kindergartens are an important barrier to accessing preschools. The Hungarian experience shows that free kindergartens, with a priority access to vulnerable children when places are insufficient, may lead to better alleviation of differences in cognitive outcomes – for example, between ethnic Hungarian children and ethnic Roma children in Hungary.<sup>81</sup>

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<sup>81</sup> World Bank. *Toward an Equal Start: Closing the Early Learning Gap for Roma Children in Eastern Europe*. June 2012, at: [http://siteresources.worldbank.org/EXTROMA/Resources/RomaECD\\_FinalReport.pdf](http://siteresources.worldbank.org/EXTROMA/Resources/RomaECD_FinalReport.pdf) , p. 30.



## GOVERNMENT AND DONOR COMMITMENTS

A number of NGOs in Bulgaria actively participating in the implementation of programs and projects for Roma inclusion observed a serious setback of the government's commitment to Roma integration in general compared to the early years of Bulgaria's pre-accession to the European Union. Already in 2006, the Center Amalipe concluded in its annual report that there was a "significant decrease of the efforts towards the integration on the part of most institutions." The Center expressed concern that, "the debate concerning the integration was taken years back that put in danger even the few things achieved during the previous periods."<sup>82</sup> In their report on Roma integration policies (2011), the Open Society Institute–Sofia noted that, "from the large number of strategic documents on Roma integration, it can be concluded that political will is not absent for the creation of strategic documents, but the main problem with their implementation remains unresolved. The main obstacle for achieving tangible results is the inadequate funding for Roma integration activities."<sup>83</sup> Similar conclusions are drawn in the Civil Society Monitoring Report on the Implementation of the National Roma Integration Strategy and the Roma Decade Action Plan (2012). It states that there has been no significant progress in the relevant priority areas related to Roma integration of both the Decade Action Plan and the National Roma Integration Strategy.<sup>84</sup>

### 1. Mainstream Policy Documents and Measures of Relevance for Roma Education

The **National Programme for the Development of School Education and Preschool Upbringing and Preparation (2006–2015)** was approved through a Resolution of the National Assembly on June 7, 2006. None of the measures in the Programme to increase the quality of education relate to Roma educational integration. Roma children are partially included in some of the measures directed towards guaranteed equal access to education, but this is done in a very unbalanced way, "children whose mother tongue is not Bulgarian" The measures included in the Programme to address the needs of "children whose mother tongue is not Bulgarian" focus primarily on additional language supports in Bulgarian as well as preschool training and placing children in an ethnically mixed environment. These measures are outlined but no details are given. Roma educational integration is not mentioned at all in the document.<sup>85</sup>

The **National Youth Strategy (2010–2020 г.)** NYS responds to the EU Council Resolution (2009 / C 311/01) on a renewed framework for European cooperation in the youth field (2010-2018), which sets the following general objectives: creating more equal opportunities for all young people in education and on the labor market and promoting their active citizenship, social inclusion and solidarity. The NYS envisages measures for individual assistance to young people in professional development and job orientation with the purpose

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<sup>82</sup> Center Amalipe (2007) *Annual Report about the implementation of the policies for Roma integration in Bulgaria for 2006*, Veliko Tarnovo, 2007. София, 2012.

<sup>83</sup> Институт "Отворено общество." *Доклад относно публичните политики за интеграция на ромите в България и основните проблеми на социално-икономическото включване на ромската общност*, p. 64. (Report on the public policies for Roma integration and on the main socio-economic aspects of social inclusion concerning Roma.) Unofficial translation from Bulgarian by the author. at: <http://www.osf.bg/?cy=38&lang=2>

<sup>84</sup> *Civil Society Monitoring Report on the implementation of the National Roma Integration Strategy and Decade Action Plan. Bulgaria*, p.1, at: [http://www.romadecade.org/cms/upload/file/9270\\_file4\\_bg\\_civil-society-monitoring-report\\_en.pdf](http://www.romadecade.org/cms/upload/file/9270_file4_bg_civil-society-monitoring-report_en.pdf)

<sup>85</sup> For more details, see above note 82.



of achieving the objectives and implementing the measures for young people's development within the European Union.

The NYS does not entirely omit Roma, but makes reference to Roma youth in the least relevant policy areas. Roma are mentioned only in the analysis of the challenges for youth policy in Bulgaria, not in the vision and strategic objectives. The analysis of the challenges itself contains review of (i) demography; (ii) formal and non-formal learning, (iii) employment, (iv) economic activity and entrepreneurship; (v) access to information and services; (vi) civil activity; (vii) youth volunteering; (viii) healthy lifestyle; (ix) young families; (x) social inclusion of young people; (xi) juvenile delinquency; (xii) young people in small towns and rural areas; and (xiii) management of youth policy. In this analysis the problems affecting Roma youth are mentioned only in the context of access to information and young people living in small towns and rural areas.<sup>86</sup>

The **Strategy for Reducing the Share of Early School Leavers (2013–2020)** was adopted by the Ministry of Education and Science in 2013. Roma children are identified as one of the largest groups at risk of early school leaving and the document proposes additional measures, some designed to promote vocational training among groups at risk and to raise parental awareness about the importance of education.<sup>87</sup>

Under the terms of an amendment to the Education Act made in 2010, from the 2012/2013 school year all children aged of five must be enrolled in preschool education. A series of sanctions, mostly financial, are envisaged for those parents who fail to ensure the presence of their child in preschool education. The purpose of making preschool education compulsory was to raise enrolment rates, especially of Roma children, in the educational system, but the negative stimuli that were introduced as measures to coerce parents are not efficient. The majority of Roma families that would be punishable are already living in poverty and would not be able to pay the fine. In practical terms this provision does not motivate parents to enroll their children in preschool education.

In 2011–2014, the Ministry of Education introduced the measure of all-day schooling for all pupils grades one to eight in the focal-point schools with the purpose of retaining enrolled children. The program was funded from the EU structural funds.<sup>88</sup>

## 2. The National Roma Integration Strategy (NRIS)

The most important government commitment aimed at Roma integration is the National Roma Integration Strategy 2012–2020 (NRIS) adopted by the Bulgarian Council of Ministers in December 2011, in response to the requirements of the **European Framework for National Roma Inclusion Strategies**. The NRIS has an **Action plan for implementation of the National Roma Integration Strategy of the Republic of Bulgaria (2012–2020)**.<sup>89</sup>

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<sup>86</sup> National Youth Strategy, at: [http://www.youthpolicy.org/national/Bulgaria\\_2010\\_National\\_Youth\\_Strategy.pdf](http://www.youthpolicy.org/national/Bulgaria_2010_National_Youth_Strategy.pdf), last accessed 10.03.2015.

<sup>87</sup> See above, note 63.

<sup>88</sup> Министерство на образованието и науката. Проект "Подобряване качеството на образованието в средишните училища чрез въвеждане на целодневна форма на обучение" (Project Improving the quality of education in focal-point schools by introducing all-day schooling), at <http://allday.mon.bg>

<sup>89</sup> The Council of Ministers approved the NRIS in December 2011 and submitted it to the National Assembly, where it was adopted in February 2012, therefore becoming a legislative document. The National Council for Cooperation on Ethnic and Integration Issues is the governmental structure responsible for implementation, monitoring and evaluation.



The NRIS incorporates into a single policy-document the objectives and measures contained in previous strategies and plans, including the Strategy for Educational Integration of the Children from the Ethnic Minorities, the Health Strategy for Disadvantaged Persons belonging to Ethnic Minorities, and the National Programme for Improvement of the Housing of Roma in the Republic of Bulgaria.

Six priorities are identified: education, health care, housing, employment, rule of law and non-discrimination, and culture and media. A set of goals is proposed for each priority and the Action Plan describes the tasks (122 different activities in total), responsible institutions, timeframe and financing.<sup>90</sup> A general weakness of the Program in the education priorities is that most of the activities planned have not been budgeted, 27 out of 40 activities.<sup>91</sup>

Until recently, school desegregation was a leading goal in all strategic documents of the Bulgarian state on Roma integration. The NRIS (2012–2020) reversed this strategic policy orientation. It does not see a problem in the actual segregation of Roma and does not treat this as a problem that must be addressed by means of state policy. For example, within Objective 1 “Guaranteeing the right to equal access to quality education, including the integration of Roma children and students in ethnically mixed kindergartens and schools” (i.e., the desegregation objective) four tasks are set.<sup>92</sup> They relate to encouraging ethnically mixed education at preschool and university level only; desegregation in primary education is not envisaged. This is a serious gap given that the main efforts in previous years have been around desegregation and ethnically mixed schooling in elementary (grades one to four) and primary education (grades one to eight).

Moreover, the NRIS envisages preservation of all-Roma kindergarten and schools in its Objective 2 which states: “Raising the quality of education in kindergarten and in schools located in large Roma neighborhoods and rural areas, where predominantly Roma children are enrolled.” This Objective is clearly not in compliance with the European Framework (2011) with regards to the principal issues such as the need to eliminate segregation of Roma in the educational system.

A recent report by leading NGOs in Bulgaria concluded that “the NRIS lacks synergy, coherence and equal distribution in its envisaged activities, measures and financial allocations. It overlooks major areas such as housing conditions, health care and educational integration.”<sup>93</sup>

## 2.1. Funding resources for the NRIS

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<sup>90</sup> The main objectives regarding Roma educational policy, according to the Action Plan, are: (1) Ensuring the right to equal access to quality education, including integrating Roma children and students in ethnically mixed kindergartens and schools; (2) Raising the quality of education in kindergartens and schools located in large Roma neighborhoods and rural areas, where predominantly Roma children are enrolled; (3) Education in kindergartens and schools in the spirit of tolerance and nondiscrimination by preserving and developing the cultural identity of Roma children; (4) Prevention of early school dropouts and teaching the illiterate and barely literate adult Roma citizens; (5) Applying various programs for work with children who drop out of school or have learning difficulties and disabilities with the purpose of (re)integrating them into the educational system; (6) Making Roma parents partners in the educational process and promoting their involvement in school life; (7) Raising the qualifications of specialists who work in multiethnic educational environments, developing the intercultural competences of school principals, teachers and other pedagogical specialists.

<sup>91</sup> *Национална стратегия на Република България за интегриране на ромите* (National Strategy of Republic Bulgaria for Integration of Roma), at: <http://www.nccedi.government.bg/page.php?category=125&id=1740>, last accessed 10.03.2015.

<sup>92</sup> Ibid.

<sup>93</sup> *Civil Society Monitoring Report on the implementation of the National Roma Integration Strategy and Decade Action Plan. Bulgaria*, p.1, at: [http://www.romadecade.org/cms/upload/file/9270\\_file4\\_bg\\_civil-society-monitoring-report\\_en.pdf](http://www.romadecade.org/cms/upload/file/9270_file4_bg_civil-society-monitoring-report_en.pdf)



Budget allocations for implementing the NRIS were not included in the state budget for 2012, 2013 or 2014.<sup>94</sup> The only modest support from the state budget for Roma integration activities in the areas of education was the support for the Centre for Educational Integration of Children and Students from Ethnic Minorities, within the budget of the Ministry of Education. The allocation for the Center is approximately EUR 500,000 annually for this period.<sup>95</sup>

The main resources for implementation in the area of education came from the Operational Program Human Resources Development (OP HRD). This was done through the Roma/minorities targeted calls and to a much lesser degree through the mainstream calls. In 2012, five Roma targeted calls were implemented within OP HRD and one new one was approved. In 2013, no new calls were announced.<sup>96</sup>

In 2011 and 2012 two additional European (but not EU) sources were prepared to contribute to the implementation of NRIS. These were the EEA Financial Mechanism and Norwegian Financial Mechanism and the Swiss Contribution to Bulgaria has a specific Roma component (see below under “Other Donors Commitments”).

## 2.2. Implementation of the NRIS as of 2014

In its assessment of the implementation of the NRIS by Member States in 2014, the European Commission stated that “For Member States with a significant Roma population priority should be given to combating segregation, fighting early school leaving and making mainstream education systems more inclusive.”<sup>97</sup> For Bulgaria, the Commission noted that since 2011, implementation of the NRIS in the area of education took the form of small projects targeted at the most disadvantaged including the Roma (e.g., summer schools, school projects on tolerance, attention to disadvantaged families in kindergartens, work with parents and pupils to fight early school leaving, etc.).<sup>98</sup>

An NGO monitoring report analyzed the steps taken and the lack of action in the area of education in 2012–2013.<sup>99</sup> The report noted that the most important action were mainstream policies with impact on Roma such as the introduction of a two-year obligatory preschool education and the full-day schooling for all pupils grades one to four and for all pupils grades one to eight in the focal-point schools. Some of the targeted Roma inclusion actions included funding calls under the OP Human Resources Development in 2011–2013 on the integration of Roma in education and support for municipal school desegregation projects by the Center for Educational Integration of Children and Students from the Ethnic Minorities in 2012–2013. At the same time, no action was undertaken for support of Roma students in secondary education and in higher education. Activities in these two areas were covered entirely by private donors.

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<sup>94</sup> *Updated Civil Society Monitoring Report on the implementation of the National Roma Integration Strategy and Decade Action Plan in 2012 and 2013 in Bulgaria*, p. 28, at: [http://www.romadecade.org/cms/upload/file/9270\\_file28\\_bg\\_updated-civil-society-monitoring-report.pdf](http://www.romadecade.org/cms/upload/file/9270_file28_bg_updated-civil-society-monitoring-report.pdf)

<sup>95</sup> *Ibid*; see also “Roma Decade Passes Bulgarian Roma By,” at <http://www.balkaninsight.com/en/article/roma-decade-passes-bulgarian-roma-by>

<sup>96</sup> See above, note 94, p. 27.

<sup>97</sup> European Commission. *Report on the Implementation of the EU Framework for National Roma Integration Strategies*, EU 2014, p. 5, at: [http://ec.europa.eu/justice/discrimination/files/roma\\_implement\\_strategies2014\\_en.pdf](http://ec.europa.eu/justice/discrimination/files/roma_implement_strategies2014_en.pdf).

<sup>98</sup> *Ibid*.

<sup>99</sup> See above, note 94, pp.9-11.



### 3. Other Donor Commitments

The **America for Bulgaria Foundation** assists in strengthening a vibrant market economy and the institutions of democratic society in Bulgaria, helping the country to realize its full potential as a successful, modern European nation. It has selected six areas of grant-making: Arts and Culture; Agriculture and the Environment; Civil Society and Democratic Institutions; Economically Disadvantaged; Education and Libraries; and Heritage Tourism. In 2009-2013, the Foundation supported several projects focusing on Roma under the priority area “Economically Disadvantaged.”<sup>100</sup> For example, the Foundation supported the projects “Integrated Education for Roma children in the Vidin District (2010–2013)” led by the Drom Foundation and “Desegregation in Education from an Early Age” (2011–2012) led by the Amala-R Foundation based in Pleven, both former REF grantees.<sup>101</sup> In 2010–2013, America for Bulgaria also funded the “Student Society for Development of Interethnic Dialogue,” another former REF grantee, for support to Roma pre-university applicants and university students, including stipends that cover application and matriculation fees as well as first semester tuition fees.

The **Trust for Social Achievement** was created by the America for Bulgaria Foundation. The Trust tests and supports innovative, results-driven approaches that increase self-sufficiency and improve life outcomes for Bulgaria’s poor, with a focus on the Roma.<sup>102</sup> The Trust funds projects in the areas of Family Economic Success Program, Early Childhood Development, and Educational Achievement. For example, in 2012 the Trust financed several NGOs to carry out a Scholarship Program for Secondary School Students. Within the program, textbooks and transportation passes (for students from the rural areas) was provided.

The **EEA Financial Mechanism** is aimed at reducing economic and social disparities and strengthening bilateral relations with 16 EU countries in Central and Southern Europe, including Bulgaria. For the period 2009–2014, Bulgaria received EUR 126.6 million for several key areas, including “Improving the situation for vulnerable groups, including Roma.” The NGOs Program in Bulgaria is part of the EEA Financial Mechanism with a total budget of EUR 11,790,000. Through this Program grants were provided in three open calls in 2013–2014 focusing on: democracy, human rights and good governance; social inclusion and empowerment of vulnerable groups; sustainable development and protection of the environment; and capacity-building for NGOs. Vulnerable groups, including children and youth, minorities and Roma in particular, were targeted. The Fund Operator of the NGO Programme for Bulgaria is the Open Society Institute–Sofia – in partnership with the “Workshop for Civic Initiatives” Foundation.<sup>103</sup>

In 2013-2015, the Ministry of Social Affairs is implementing the project “Social Inclusion” which is funded from the **World Bank** with a commitment of USD 59 million. The project objective is to promote social inclusion through increasing the school readiness of children below the age of seven, targeting low-income and marginalized families.<sup>104</sup> The project is implemented in 68 municipalities. There is no final assessment of the project. A preliminary

<sup>100</sup> For more information see America for Bulgaria Foundation, at: <http://www.americaforbulgaria.org/grants/view/ufjaLIQn>

<sup>101</sup> These are two of the ten NGO school desegregation projects that started in Bulgaria in 2000 with support from the Open Society Institute – Budapest and continued their operation in 2005-2010 with support from the Roma Education Fund.

<sup>102</sup> See Trust for Social Achievement, at: <http://socialachievement.org/en/>

<sup>103</sup> For more information see <http://ngogrants.bg/public/portfolios/view.cfm?id=1>.

<sup>104</sup> For more information see, World Bank, Projects and Operations. *Social Inclusion Project*, Bulgaria, at: <http://www.worldbank.org/projects/P100657/social-inclusion-project?lang=en>, last accessed 10.03.2015.



observation suggests that it is attractive for the municipalities mainly because of its “hard” component that allows them to make renovations in the buildings. Less attention is paid to introducing new methodologies and new community-based social services for supporting the family, although this should be the core of the project.<sup>105</sup>

**The Swiss Contribution to Bulgaria** amounts to CHF 76 million.<sup>106</sup> It covers six thematic funds, one of which is “Promotion of Social Inclusion of Roma and other vulnerable Groups.” The purpose of this fund is to support the Bulgarian Government in implementing the National Strategy for the Integration of Roma in Bulgaria (2012–2020). The fund allocated CHF 6,920,000 for Roma inclusion in the period 2013–2019 with the following objectives:

- The improvement of living conditions through better access to services and rights for the Roma community;
- The empowerment of Roma through strengthened cultural integration and identity, improved acceptance and enhanced Roma participation in decision making/policy institutions.

#### 4. The Use of EU Structural Funds for Roma

##### 4.1. EU Funds in the funding period 2007–2014

Over the 2007–2013 funding period, Bulgaria was allocated €6.9 billion under the European Regional Development Fund (ERDF), the Cohesion Fund and the European Social Fund (ESF). Bulgaria allocated 3.2 percent (EUR 37 million) of its total ESF budget of EUR 1.4 billion towards integrating disadvantaged people. These funds were meant to support a wide range of sectoral investments, including those that concern Roma, such as financial help for housing and school infrastructure.<sup>107</sup> According to some sources only EUR 2.5 million was earmarked for Roma education initiatives.<sup>108</sup>

The main resources for Roma integration were concentrated in the Operational Program Human Resources Development (OP HRD). The OP emphasized the importance of improving education and schooling for Roma children and enhancing the skills of Roma to improve employability. Despite the fact that this OP included Chapter 6 “Field of action in regard with the Roma community,” it did not have clearly defined sources of funding because it was not programmed as a separate priority axis. Priority axis four envisaged actions to enhance the education levels of vulnerable groups through improving their access to those services and improving their educational level. The specific activities in this direction were targeted, among others, at providing opportunities for children from the Roma residential areas to get quality education in schools either in their areas and outside those areas in order to get integrated in society and to reduce the risk for their exclusion from the labor market in future; developing of adequate measures for pupils’ motivation; literacy and providing opportunities for continuing education for representatives of the Roma community, who are in active working age.

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<sup>105</sup> See above, note 94, p. 9.

<sup>106</sup> For more information on the Swiss contribution to Bulgaria, see <https://www.eda.admin.ch/erweiterungsbeitrag/en/home/countries/bulgaria.html>

<sup>107</sup> European Commission. *Roma Integration by EU Country*, at: [http://ec.europa.eu/justice/discrimination/roma-integration/bulgaria/index\\_en.htm](http://ec.europa.eu/justice/discrimination/roma-integration/bulgaria/index_en.htm)

<sup>108</sup> See “Roma Decade Passes Bulgarian Roma By,” at <http://www.balkaninsight.com/en/article/roma-decade-passes-bulgarian-roma-by>



Roma and pro-Roma organizations highlighted the main problems related to the use of the funds from OP HRD:

- The projects are only locally based (municipal ones), which limits their effectiveness regarding the national aspect of the policy.
- The bureaucratic procedures for reporting discourage many beneficiaries to implement projects.
- Financial rules are limiting the possibilities for participation of smaller beneficiaries: smaller schools and NGOs.
- There was one discouraging example: the scheme “Integration of children and students from ethnic minorities in the school system” was converted from desegregational to segregational one because of a mistake in interpretation by the Ministry of Education. This was a sign of very low political commitment.<sup>109</sup>

In its assessment of the Bulgarian NRIS, the European Commission noted “the considerable reliance on Structural Funds to support projects addressing the identified priorities” and recommended “a significant improvement of the absorption capacity.”<sup>110</sup>

#### 4.2. EU Funds in the Funding Period 2014–2020

For the 2014–2020 period, Bulgaria is allocated a total of EUR 7.2 billion in EU Funds out of which EUR 5.1 billion will come from the ESF and from the ERDF. At least 28.7 percent of this amount will be spent on the ESF, with at least 20 percent of that going towards promoting social inclusion and combating poverty. The latter amount could also finance Roma-related measures.

The OP HRD contains the investment priority “Integration of marginalized communities such as Roma.” This priority will support the implementation of integrated multi-sectorial projects that cover three sub-priorities: improving access to employment; improving access to social and health services; development of local communities and overcoming stereotypes.

This provides a unique opportunity to finance integrated projects for implementing the “soft measures” envisaged in the Municipal Roma Integration Plans. Nevertheless, a serious problem is that “Access to education” dropped-out from this investment priority after January 2013 when the government decided to form a new Operational Program “Science and Education for Smart Growth.” With this arrangement, the municipalities would need to apply for implementing their Municipal Plans before three different programs – OP Human Resources Development, OP Science and Education for Smart Growth, and OP Regions in Development. This complex process will discourage most of them from applying at all.

The draft of Science and Education for Smart Growth OP (as of March 2015) also contains the investment priority “Integration of marginalized communities such as Roma.” The last

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<sup>109</sup> See above, note 94, p. 10.

<sup>110</sup> European Commission (2012) *National Strategy for Roma Integration. Bulgaria*, at: [http://ec.europa.eu/justice/discrimination/files/country\\_factsheets\\_2012/bulgaria\\_en.pdf](http://ec.europa.eu/justice/discrimination/files/country_factsheets_2012/bulgaria_en.pdf)



draft also contains a special Priority Axis for supporting the educational integration of minority children and children with disabilities.<sup>111</sup>

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<sup>111</sup> Министерство на образованието и науката. *Оперативна програма “Наука и образование за интелигентен растеж” 2014-2020*. (Operational Program Science and Education for Intelligent Growth), at: <https://www.mon.bg/?go=page&pageId=13&subpageId=706>



## REF IN BULGARIA<sup>112</sup>

In the period 2005–2015, REF committed EUR 6,143,022 and supported the implementation of 102 projects for Roma education in Bulgaria. Some of the major supported projects include:

### 1. School Desegregation

Since the establishment of the REF in 2005, school desegregation activities comprised the biggest investment of the REF in the education of Roma in Bulgaria.<sup>113</sup> As of 2015, REF was also the biggest donor of school desegregation action in Bulgaria. After 2010, when the REF decreased its support for school desegregation, there was a sharp decline in these activities nationwide. As of 2015, due to lack of political will on the part of the state to support school desegregation, school desegregation as an organized activity continued only in three cities Sofia, Kyustendil and Vidin. The scope of the action has only local implications and it is not stimulating a larger process.

In 2010–2012 REF funded the Center for Educational Integration of Children and Pupils from Ethnic Minorities at the Ministry of Education and Science to support municipalities to lead the process of reorganizing their school network by transferring Romani children to mainstream schools and closing the Roma-only schools. In 2011–2013, REF supported school desegregation activities in Sofia and in Kyustendil. In Kyustendil, REF co-finances a desegregation project that is being managed by the municipality in partnership with a Roma NGO (2013–2017).<sup>114</sup>

### 2. Preschool education

The *Romani Baht Foundation* based in Sofia implemented the project “Education for All” 2011–2012. The project objectives were to provide conditions for quality early childhood education for the Roma children in Samokov by enrolling them in mainstream kindergartens and to increase the motivation of the parents to send their children to kindergarten as well as the level of family involvement with the education of the children.

The *New Future Foundation* based in Montana implemented the project “My dream” (2013–2014) targeted at the youngest representatives of the Roma population in “Ogosta” neighborhood. The objectives of the project were to build intellectual and social habits, language skills, as well will develop the artistic potential of the children through arts.

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<sup>112</sup> All information in this section is derived from REF’s website unless indicated otherwise.

<sup>113</sup> In 2005-2010, REF has been actively supporting the implementation of desegregation projects by Roma-led grassroots NGOs in Bulgaria. These activities followed a model of integrating Romani children from Roma-only schools into mainstream schools developed in 2000 with the launch of the first NGO desegregation project in the town of Vidin. The number of such initiatives has been growing from one in 2000, three in 2001, to 11 in 2009.

The projects involved actions to enroll Romani children in integrated schools, retain them at these schools and ensure achievement comparable to their non-Romani peers; development of methodological tools for integrated education; training of teachers to work with Romani children in integrated schools and other activities to create supportive educational environment for Romani children in mainstream schools; and public campaigns for mainstreaming school desegregation in national educational policies. For more information see, Roma Education Fund (2013) *Making Desegregation Work*.

<sup>114</sup> For more information on the funding of school desegregation projects in Bulgaria, see Roma Education Fund Annual Reports 2010, 2011, 2012 and 2013, at: <http://www.romaeducationfund.hu/publications/annual-reports>



*Nangle – 2000 Foundation* based in Berkovitsa implemented the project “Early childhood integration of Roma children in Berkovitsa town,” 2013–2014. The project objectives were to support enrollment of Roma children (ages three to six) from the Roma quarter “Rakovitsa” in all kindergartens in Berkovitsa town.

The *Center for Local and Regional Policies* based in Nikola Kozlevo, northeast Bulgaria, is implementing the project “Let’s Make Education Our Common Value” (2013–2015). The project objectives are to facilitate enrollment of Roma children in kindergartens; to remove the language barrier and improve the social skills of Roma children enrolled in kindergartens; and to improve the educational outcomes of Roma first grade pupils.

The *Equal Opportunities Initiative* based in Sofia is implementing the project “Equal Access to Early Years Education for Roma Children in Sofia” (2013–2015). The project objectives are to increase the enrolment and attendance rates in mainstream kindergartens and preschools of Roma children and to facilitate a smooth transition of the Roma children into elementary education in an integrated school environment.

### 3. Secondary Education

*Association Integro*, based in Razgrad, implemented the project “Making high school accessible and attractive for Roma youths from rural areas,” 2011–2012. The project objectives were to attract, retain and integrate young Roma in the secondary education system, to decrease the dropout rate of young Roma from secondary schools, and to provide additional support to students with after school activities.

The *Resource Center for Education and Culture Sham Foundation* implemented the project “Complex measures for prevention of risks for early school leaving for Roma students in Secondary education, town of Montana,” 2013–2014. The objective of the project was to prevent the school dropout and support higher graduation rate of Roma secondary school students from the municipality of Montana.

### 4. Support for Roma higher education students

As of 2015, REF remains the only donor in Bulgaria who provides scholarships for Roma university students. Roma university students are also eligible for student loans under Bulgarian law.<sup>115</sup> The loans, however, cover only the costs for tuition fees, while most of the Roma students need also support for living expenses because they enroll in universities outside their home town.<sup>116</sup>

The *Roma Memorial University Scholarship Program (RMUSP)* was launched in Bulgaria in 2001. During the 2012/2013 academic year the RMUSP has provided scholarships to 92 Roma university students from Bulgaria; in 2013/2014, 210 Roma students received scholarships; and in 2014/2015 this number was 232.<sup>117</sup>

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<sup>115</sup> Закон за кредитиране на студенти и докторанти (Law on the crediting of higher education students and doctoral students), in force from 2.08.2013.

<sup>116</sup> Living expenses are awarded only to students who have a child. Ibid., Article 5(2).

<sup>117</sup> Source: Roma Education Fund, [www.romaeducationfund.org](http://www.romaeducationfund.org)



The *Roma Health Scholarship Program* started in 2009 with financing from the Roma Education Fund and OSI is implemented by the Open Society Institute–Sofia, the Amalipe Centre and the IntelDay Foundation. The RHSP achieved its main goal: to increase the number of Roma students in medical universities. In 2009 there were 23 students; in 2011, a total of 56 students received scholarships; in 2012 – 75; in 2013 – 65; and in 2014 – 39. Although it started as an NGO initiative (of OSI and Amalipe), at present it is recognized by the Ministry of Health as one of the three leading practices for Roma health integration. For this reason, it was included in the memorandum for the Healthcare component in EEA Grants/Norwegian Grants and was supported within it.<sup>118</sup>

*The RomaVersitas Association* based in Sofia launched the project RomaVersitas in 2015. The project objectives are to provide academic support to Roma university students as well as to create an environment for social participation of young Roma people.

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<sup>118</sup> See above, note 94, p. 12.



## STRATEGIC DIRECTIONS FOR FUTURE REF ACTIVITIES IN BULGARIA

REF policy analysis and research activities conducted in the past have resulted in the publication of numerous reports highlighting the most critical issues affecting the education of Romani children. For setting the priorities in Bulgaria REF analyses throughout the process of adjusting the best practice models to national and local contexts. Three main guiding principles have been taken into consideration and accustomed to the Bulgarian needs: **access to compulsory education and desegregation, access to tertiary education and construction of the evidence for effective policy-making that will result in better quality education**

Embedding effective models for inclusive Roma education is part of the new REF strategy requires strong partnership with national and sub-national education authorities and substantive Roma participation. REF will continue to: *(i) producing and disseminating evidence-based research on Roma education (ii) monitoring regularly the legislation and policies in Bulgaria, (iii) to increase REF programs' efficiency by adjusting them to in-country changing policy environments; (iv) providing evidence-based policy recommendations to the EU and Bulgarian authorities and sharing our experience with policy makers.*

### 1. School Desegregation

REF should scale up support for school desegregation in Bulgaria because it is the only donor which promotes this policy. Although various institutions claim that they work for school desegregation, actual enrollment of Roma children in ethnically mixed schools is taking place in very limited numbers, mostly on the initiative of Roma parents themselves. In conditions of extreme public hostility towards Roma, however, previous actions characterized by high public visibility, are not feasible. Support for school desegregation should continue with a focus on motivation of parents and technical support for the enrolment of children in ethnically mixed schools. REF can also identify progressive local authorities (like in the case of Sofia and Kyustendil) who can be supported to desegregate all-Roma schools. Some specific objectives include:

- Prevention of wrongful enrolment of Romani children in special education through awareness-raising among parents, preschool education and after-school support in the early years of primary education;
- Support for pedagogical-methodological innovative trainings for teachers taking part in inclusive education;
- Support for new forms of involvement of parents into school life, building effective parent-teacher relations.

### 2. Early Childhood Education

As it is evident from the recent data preschool enrollment of Roma children trails behind and the low levels of attendance have detrimental effect on the future schooling of Roma children. REF should continue supporting Roma NGOs working within the communities to



motivate parents and facilitate access to preschool education in an integrated environment. Some specific objectives include:

- Promoting preschool enrolment of children, increasing access to quality preschool, supporting preschool attendance from age three onwards;
- Enhancing the parenting skills, improving the practices of Roma parents, and supporting healthy childhood development and nurturing.

### **3. Access to Higher Education**

REF is the only donor which provides scholarships for Roma students in higher education. As evident from the number of applications submitted from Bulgaria, the demand for this support is high. The support with scholarships should be complemented by activities for motivation and orientation of Roma pupils in high school to continue their education at higher education institutions. Some specific objectives include:

- Increasing the number of RMUSP scholarships.
- Continuation of the RHP;
- Continuation of Higher Education Program Romaversitas;
- Beneficiary networking.
- Promoting scholar participation in other REF activities.

### **4. Advocacy**

Given the progressive decline in government commitments for Roma integration, REF should remain an active participant in the policy dialogue with Bulgarian authorities and contribute to maintaining pressure on policy-makers to pursue the goals formulated in the NRIS. REF funding can build capacity of NGOs for advocacy and complement the Open Society Foundations advocacy efforts, with a special focus on educational policies for Roma integration. Some specific objectives include:

- Cooperation and joint projects with other key donors and policy makers; closer cooperation with the NGO sector;
- Working on commenting the drafts of the Educational Act targeting policy or structural changes and providing feedbacks to the policy makers through discussions and policy papers;



## KEY EDUCATION INDICATORS PRESENTED BY REF MODELS

While no official data are available for the indicators given below, the data needed for each indicator could be generated by recording the ethnicity of all pupils/students at the time of enrolment. Individual identity could be protected by making the collected data anonymous. Additional comments for individual indicators relate to generating unofficial estimates.

### Early Childhood Education

- Reduced gap in gross/net enrolment rates of Roma children aged 3–6 in mainstream kindergartens.
- Improved ECD outcomes among the targeted young Roma children.
- Number and share of Roma children aged 6 who enroll 1<sup>st</sup> grade in primary education.
- Improved parenting practices among the targeted Roma as measured by increased frequency of parent-children interaction.

### Primary Education

- Increased gross primary enrolment rates of Roma students in selected non- segregated project schools.
- Reduced gap in primary school completion rate between Roma and non-Roma.
- Reduced repetition rate by grade in primary education.
- Reduced transition rate into special primary education of Roma children.

### Tertiary Education

- Improved graduation rate of Roma tertiary school students recipients of the scholarship support.
- Improved retention rate of Roma tertiary school students recipients of the scholarship support.