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# Equal Access to Quality Education for Roma

*Volume 1*

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## Table of Contents

Acknowledgements .....	5
Preface .....	7
Bulgaria .....	11
Hungary .....	181
Romania .....	325
Serbia .....	479



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## Preface

The EU Monitoring and Advocacy Program (EUMAP) of the Open Society Institute (OSI) monitors human rights and rule of law issues throughout Europe, jointly with local NGOs and civil society organisations. EUMAP reports emphasise the importance of civil society monitoring and encourage a direct dialogue between governmental and nongovernmental actors on issues related to human rights and the rule of law. The reports are elaborated by independent experts from the countries being monitored.

This series of EUMAP reports on “Equal Access to Quality Education for Roma” builds on previous EUMAP reports on Minority Protection, which addressed the situation of Roma in Europe. It has been prepared in collaboration with OSI’s Education Support Program (ESP) and Roma Participation Program (RPP). In each country, the reporting teams also benefited from the support and experience of Roma NGOs, which were involved in gathering and processing data for the field research.

The Roma, with an estimated population of between 8 and 12 million spread across the whole continent, are one of Europe’s largest and most vulnerable minorities. Throughout Europe, Roma remain excluded from many aspects of society, denied their rights and entrenched in poverty. The particular problems faced by Roma in accessing quality educational opportunities have been widely recognised.

The “Decade of Roma Inclusion 2005–2015” is an unprecedented international effort to combat discrimination and to close the gap in welfare and living conditions between the Roma and the non-Roma, in order to break the cycle of poverty and exclusion. The initiative is supported by the OSI and the World Bank, and endorsed by nine Central and Eastern European countries. The declared objective is to accelerate progress in improving the social inclusion and economic status of Roma.

The Decade focuses on four main areas: education, housing, employment and health care. The EUMAP reports on “Equal Access to Quality Education for Roma” aim to support the goals of the Decade in the key area of education, and to establish a framework for regular monitoring throughout the Decade. The reports also aim to provide an assessment of the state of implementation of Government education policies for Roma, to promote consultation with Roma communities on education issues, and to provide data on key education indicators, as well as presenting case studies on selected communities. The case studies were intended to supplement and corroborate data gathered from other sources. They provide relevant local examples, which is particularly important given that information on the educational status of Roma can be incomplete at the national level. The case studies also provide a baseline survey for follow up monitoring, in order to document changes in educational outcomes at the local level, over the course of the Decade.

This first volume of reports covers four countries: *Bulgaria, Hungary, Romania* and *Serbia*. Further volumes in the series will be published later in 2007; these will include

reports on the other countries covered by the Decade – *Croatia, the Czech Republic, the Republic of Macedonia, Montenegro and Slovakia* – plus an overview report resuming the main findings across all the countries. All country reports will be translated to the relevant national language and published as a separate report.

The monitoring on “Equal Access to Quality Education for Roma” was based on a detailed methodology, intended to ensure a comparative approach across the countries monitored, while the case studies were conducted according to a common template (both available at [www.eumap.org](http://www.eumap.org)). Each of the country reports included in this volume was reviewed at a national roundtable meeting. These meetings were organised in order to invite comments on the draft from Government officials, civil society organisations, parents, and international organisations. The final reports reproduced in this volume underwent significant revision based on the comments and critique received during this process. EUMAP assumes full responsibility for its final content.

For each country report there are detailed recommendations aimed at improving the access to quality education for Roma. These are directed at the national level, to the national governments, ministries and national education agencies, and will form the basis for OSI advocacy activities. Recommendations at the international level, including to the European Union (EU) and to international organisations, across all the countries covered by the monitoring, will be included in the overview report.

There are seven main parts to each of the country reports. Section 1 includes the executive summary and recommendations. Section 2 looks at available data on school enrolment and retention of Roma students, in comparison with general trends. Section 3 reviews governmental policies and programmes on Roma, as well as general educational policies impacting Roma education, and looks at their state of implementation, in particular with respect to the “Decade of Roma Inclusion”. Section 4 addresses the main constraints preventing Roma from fully accessing education; it also looks at the impact of segregation – whether in schools serving exclusively Roma neighbourhoods or villages, in separate classes within mainstream schools, or in special schools for people with intellectual disabilities – on access to education. Section 5 looks at the quality of education that Roma receive.

In Annex 1, the section on administrative structures briefly details the organisation and operation of the school system in each country. This will be most relevant for international readers who are less familiar with the specific education structures of the country concerned. Finally, in Annex 2 there are additional details from the case studies. Information from the case studies are, however, also integrated throughout the body of the report.

## About EUMAP

This report on “Equal Access to Quality Education for Roma” builds on previous EUMAP reports on Minority Protection. In 2001 and 2002, EUMAP released two



series of reports looking at the situation of Roma and Russian speakers in Central and Eastern European countries. In 2002 and 2005, EUMAP published reports on the situation of Roma and Muslims in selected Western European countries. In 2007, EUMAP will be initiating a new monitoring project that will look at the situation of Muslims in eleven cities in Western Europe.

In addition to its reports on Minority Protection, EUMAP has released monitoring reports focusing on the Rights of People with Intellectual Disabilities, the Regulation and Independence of the Broadcast Media, Judicial Independence and Capacity, Corruption and Anti-corruption Policy, and Equal Opportunities for Women and Men. EUMAP is currently initiating a follow-up monitoring of the Regulation and Independence of the Broadcast Media, which will have a special focus on digitalisation; publication is expected in late 2007. All published EUMAP reports are available online, both in English and translated to the national languages ([www.eumap.org](http://www.eumap.org)).

## About ESP

The OSI's Education Support Program (ESP) and its network partners support education reform in countries in transition, combining demonstration of best practice and policy advocacy to strengthen open society values, and promote justice in education, in three interconnected areas:

- Combating social exclusion: equal access to quality education for low income families; desegregation of children from minority groups; inclusion and adequate care for children with special needs.
- Openness and accountability in education systems and education reforms: equitable and efficient state expenditures on education; anticorruption and transparency; accountable governance and management.
- Open society values in education: social justice and social action; diversity and pluralism; critical and creative thinking.

Support is focused in Central Asia, the Caucasus, Europe, the Middle East, Russia, South Asia and Southern Africa. ESP has offices in Budapest, London, and New York and previously had an office in Ljubljana, Slovenia, where it was known as Open Society Education Programs-South East Europe (OSEP-SEE). The Budapest office now oversees work in South Eastern Europe as well. Past work of OSEP-SEE can be accessed at [www.osepsee.net](http://www.osepsee.net).

## About RPP

The OSI's Roma Participation Program (RPP) is committed to further the integration of Roma in society, and empower Roma to challenge the direct and indirect racial discrimination that continues to hinder such integration. RPP views integration not as a flattening process of assimilation, but as equal opportunity, accompanied by cultural

diversity, in an atmosphere of mutual tolerance. This commitment finds expression in RPP's four core objectives:

- Providing institutional support and training to Roma NGOs capable of effective advocacy; linking these NGOs to wider regional and national activities and campaigns, and strengthening networking across borders to impact on policy processes at the national and EU levels.
- Creating training, development, internship and funding opportunities to consolidate the new generation of Roma women and men who will be the future leaders of national and international Roma movements.
- Broadening awareness of the priorities of the “Decade of Roma Inclusion” and creating opportunities for increased Roma participation in the Decade process.
- Promoting Roma women's access to public institutions and participation in decision-making processes, and to build a critical mass of Roma women leaders.

Equal access to quality education for  
Roma

Bulgaria

## Table of Contents

1. Executive Summary and Recommendations .....	18
1.1 Executive summary .....	18
1.2 Recommendations .....	21
1.2.1 Recommendations on monitoring and evaluation .....	21
1.2.1 Recommendations for improving access to education .....	21
1.2.3 Recommendations on improving quality of education .....	24
2. Basic Education Indicators .....	28
2.1 Data collection .....	28
2.2 Enrolment data and trends .....	29
2.3 Retention and completion .....	34
2.4 Types and extent of segregation .....	42
3. Government Educational Policies and Programmes .....	51
3.1 Main Government policy documents .....	51
3.2 Government education policies .....	54
3.3 Desegregation .....	58
3.4 Roma teaching assistants/school mediators .....	62
3.5 Romanes teachers .....	67
3.6 Educational materials and curriculum policy .....	67
3.7 Teacher training and support .....	71
3.8 Discrimination-monitoring mechanisms .....	79
4. Constraints on Access to Education .....	83
4.1 Structural constraints .....	83
4.2 Legal and administrative requirements .....	85
4.3 Costs .....	86
4.4 Residential segregation/Geographical isolation .....	91
4.5 School and class placement procedures .....	92
4.5.1 Class placement .....	92
4.5.2 Placement in special schools .....	93
4.5.3 Transfer between schools .....	97
4.6 Language .....	100
5. Barriers to Quality of Education .....	104
5.1 School facilities and human resources .....	104

5.1.1	School infrastructure .....	104
5.1.2	Human resources .....	108
5.2	School results .....	109
5.3	Curricular standards .....	114
5.3.1	Special schools and classes .....	114
5.3.2	Segregated schools .....	115
5.4	Classroom practice and pedagogy .....	116
5.5	School–community relations .....	118
5.6	Discriminatory attitudes .....	119
5.7	School inspections .....	123
ANNEX 1.	Administrative Structure .....	126
A1.1	Structure and organisation .....	126
A1.2	Legal roles and decision-making .....	128
A1.3	Administrative structures dealing with Roma education at the Ministry of Education and Science .....	130
A1.4	School funding .....	131
ANNEX 2.	Case Studies .....	135
A2.1	Nikolaevo .....	135
A2.1.1	Administrative Unit .....	135
A2.1.2	Roma and the Community .....	136
A2.1.3	Education .....	140
A2.2	Veliko Turnovo .....	147
A2.2.1	Administrative Unit .....	147
A2.2.2	Roma and the Community .....	148
A2.2.3	Education .....	151
A2.3	Vidin Municipality .....	159
A2.3.1	Administrative Unit .....	159
A2.3.2	Roma and the Community .....	160
A2.3.3	Education .....	162
ANNEX 3.	Legislation Cited in the Report .....	169
ANNEX 4.	Bibliography .....	172

## Index of Tables

Table 1:	Population structure for children – breakdown by age group, for Roma and national populations (March 2001) .....	30
Table 2:	Net enrolment rates – breakdown by educational level (2000–2005) .....	31
Table 3:	Net enrolment rates – breakdown by age group (2000–2005) .....	31
Table 4:	School attendance rates – breakdown by educational level (1995–2001) .....	33
Table 5:	Enrolment rates (2005) .....	34
Table 6:	Proportion of Roma students in grades 1–10 (2004) .....	36
Table 7:	Self-reported school drop-out rates – breakdown by ethnicity and religion (2003) .....	37
Table 8:	Drop-out rates of fourth-grade Roma students (May 2005) .....	39
Table 9:	Educational attainment (population aged 20 and over) – breakdown by population group (2001) .....	40
Table 10:	Educational attainment by ethnicity (2000) .....	40
Table 11:	Educational attainment of the national population (2000) .....	41
Table 12:	Pupils starting the first grade who complete the fifth grade (2005) .....	42
Table 13:	Distribution of Roma children and of schools with close to 100 per cent Roma enrolment – breakdown by region (2001) .....	46
Table 14:	Children enrolled in special schools for children with intellectual disabilities (2000–2005) .....	47
Table 15:	Enrolment trends in grades 1–8 in general and special schools (2000–2005) .....	48
Table 16:	Children enrolled in boarding schools for children with behavioural challenges (2000–2005) .....	50
Table 17:	Roma teaching assistants/school mediators – breakdown by region (2005) .....	63
Table 18(a):	Number of teachers taking part in courses related to minority children – for basic education (2005) .....	74
Table 18(b):	Number of teachers taking part in courses related to minority children – for secondary education (2005) .....	75
Table 19:	Number of teachers taking part in in-service training courses (2004–2006) .....	76

Table 20:	Minimum and maximum number of children and students permitted in classrooms and pre-school groups .....	84
Table 21:	Test results for Roma students in segregated schools and integrated classes – results for five cities .....	110
Table 22:	Test results for Roma students in segregated schools and integrated classes – result for Vidin only .....	111
Table 23:	Number of students repeating a grade (2003–2005) .....	112
Table 24:	Attitudes to social distance of Bulgarians towards Roma (1992–2005) .....	119
Table 25:	Attitudes of Bulgarians towards educational integration (1992–2005) .....	120
Table A1:	Municipal-level education funding (2001–2005) .....	132
Table A2:	Case Study: Nikolaevo Municipality – demographic distribution 2004 .....	135
Table A3:	Case Study: Nikolaevo Municipality – ethnic distribution 2004 .....	135
Table A4:	Case Study: Nikolaevo Municipality – pre-school- and school-age population (2006) .....	137
Table A5:	Case Study: Nikolaevo Municipality – infrastructure situation .....	138
Table A6:	Case Study: Nikolaevo Municipality – number of students in the schools (2006) .....	141
Table A7:	Case Study: Nikolaevo Municipality – number of Roma students by grade (2003–2005) .....	142
Table A8:	Case Study: Nikolaevo Municipality – Roma enrolment rates (2006) ..	143
Table A9:	Case Study: Nikolaevo Municipality – Total enrolment rates per cent (2006) .....	143
Table A10:	Case Study: Nikolaevo Municipality – Drop-out rates (2006) .....	144
Table A11:	Case Study: Nikolaevo Municipality – Human and financial resources (2004) .....	145
Table A12:	Case Study: Veliko Turnovo Municipality – ethnic distribution .....	148
Table A13:	Case Study: Veliko Turnovo Municipality – proportion of Roma in six schools .....	152
Table A14:	Case Study: Veliko Turnovo Municipality – special school enrolment .....	152

Table A15:	Case Study: Veliko Turnovo Municipality – drop-out rates (2004–2005) .....	154
Table A16:	Case Study: Veliko Turnovo Municipality – budget allocations (2006) .....	154
Table A17:	Case Study: Veliko Turnovo Municipality – per-pupil budget in the 5 schools with a prevailing number of Roma students (June 2006) .....	155
Table A18:	Case Study: Veliko Turnovo Municipality – available computers and library volumes (in the five schools with a majority of Roma students) .....	157
Table A19:	Case Study: Veliko Turnovo Municipality – school results of Roma pupils (2005–2006) .....	158
Table A20:	Case Study: Vidin Municipality – pre-school and school network (2006) .....	162
Table A21:	Case Study: Vidin Municipality – pre-school- and school-age population (2006) .....	163
Table A22:	Case Study: Vidin Municipality – pre-school- and school-age Roma population (2006) .....	163
Table A23:	Case Study: Vidin Municipality – net enrolment rates by educational level (2006) .....	164
Table A24:	Case Study: Vidin Municipality – enrolment rates of Roma pupils (2006) .....	165
Table A25:	Case Study: Vidin Municipality – drop-out rates (2006) .....	165
Table A26:	Case Study: Vidin Municipality – drop-out rates of Roma pupils (2006) .....	166

## List of abbreviations and acronyms

BHC	Bulgarian Helsinki Committee
BSELE	“Basic Schools with Enforced Labour Education” ( <i>Основни училища със засилено трудово обучение</i> )
CEMCC	Central Expert Medical Consultative Commission ( <i>Централна експертна лекарска консултативна комисия</i> )
ISCED	International Standard Classification of Education
MES	Ministry of Education and Science ( <i>Министерство на образованието и науката</i> )



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NCEDI	National Council on Ethnic and Demographic Issues ( <i>Национален съвет по етническите и демографските въпроси</i> )
NSI	National Statistical Institute ( <i>Национален статистически институт</i> )
REF	Roma Education Fund
REI	Roma Education Initiative
REMCC	Regional Expert Medical Consultative Commissions ( <i>Районни експертни лекарски консултативни комисии</i> )
RIE	Regional Inspectorate of Education ( <i>Регионален инспекторат по образованието</i> )
SACP	State Agency for Child Protection ( <i>Държавна агенция за защита на детето</i> )
TCPA	Team for Complex Pedagogical Assessment ( <i>Екип за комплексна педагогическа оценка</i> )

# 1. EXECUTIVE SUMMARY AND RECOMMENDATIONS

## 1.1 Executive summary

Bulgaria has one of the largest Roma populations in Europe, estimated at as much as eight per cent of the population. However, all available indicators demonstrate that Roma children are often denied equal access to quality education. The Government has adopted policies and programmes aimed at improving the situation of Roma generally, but more must be done to address aspects of educational policy most relevant to Roma. The Decade of Roma Inclusion 2005–2015 is an important platform for the realisation of essential improvements to the education system in Bulgaria, to enable all children to study in schools that meet their needs, reflect their identity, and prepare them for participation in the wider society.

While Bulgarian law permits the collection of personal data with appropriate safeguards, official statistics on education are unreliable, as they rely on schools to report data and there are incentives for schools to inflate their enrolment figures. The Government should take steps to establish other mechanisms for collecting data on education, particularly regarding education for Roma.

In particular, current statistics do not reflect the high number of pupils, especially Roma, who are formally enrolled but rarely attend classes. Local and international researchers have gathered data demonstrating that Roma also attend pre-school at significantly lower rates than the majority population. While the number of Roma who have never attended school appears to be on the decline, Roma are still far more likely to drop out of school, with the proportion of Roma students plunging in higher grades.

Segregation has a long history in Bulgaria; geographical segregation has led to the establishment of segregated “Roma schools” in neighbourhoods and villages where Roma are the majority. Roma are also overrepresented in the special school networks, both in schools for children with intellectual disabilities (“special schools”) and in boarding schools for children with behavioural challenges. With such well-documented evidence of segregation as an ongoing trend, in all levels and branches of the education system, it is clear that the Government must be more active in integrating schools and communities.

The Government of Bulgaria has adopted both programmes aimed at improving the situation of Roma that include a section on education, and programmes targeting education that contain measures aimed at minority groups including Roma, but with very little evidence of impact or implementation on the local level. The *National Programme for the Development of School Education and Pre-School Upbringing and Instruction*, adopted in June 2006, retreats from earlier commitments made towards desegregation, and does not address many of the specific problems identified in the Government’s own Action Plan for the Decade of Roma Inclusion 2005–2015 (*Decade*

*Action Plan*) in 2005. This divergence should be resolved through the adoption of a comprehensive policy for Roma education, supported by appropriate legislative and financial measures. Earlier Government programmes to eliminate segregation in education have not been implemented, even as NGO-led desegregation initiatives have been expanding at the local level and could serve as useful models for a more comprehensive Government approach. A clear vision and concrete instruments for implementation, including appropriate financial resources, is needed, along with specific monitoring instruments to assess longer-term success rates.

Despite need and confirmed benefits demonstrated at the local level, just over 100 Roma teaching assistants have been appointed to work as classroom facilitators throughout the country. Many municipalities, however, do not have the resources to hire such assistants. Likewise, there are very few teachers of Romanes working in schools at present. While Roma traditions and culture are presented in some textbooks, stereotypical or even biased material about Roma still appears in classroom materials. Measures must be enacted to right this situation. A variety of training opportunities are available for teachers in areas relevant to Roma education, but the impact of such courses is not clear. Better monitoring of these important areas would provide the Government with a better basis for ongoing policy development.

Some of the obstacles blocking access to education for Roma are straightforward: for example, there are not enough pre-school places to ensure that every child will be able to enrol, a problem that current Government policy fails to address. Pre-school costs are also a significant barrier for Roma families, many of whom cannot afford the fees set by the municipalities, and the free meals and travel subsidies offered by special schools may encourage disadvantaged families to enrol their children in such schools. Financing structures need to be reconsidered in order to counteract these constraints.

Geographical segregation is widespread in Bulgaria, both in urban and rural areas, giving rise to “Roma schools” in predominantly Roma neighbourhoods. Although parents can choose to send their children to schools outside the area, few Roma parents do so outside an organised desegregation programme. Even where desegregation programmes are running successfully, many children are left behind. The number of Roma children enrolling in special schools continues to increase, as all schools seek ways to keep enrolment numbers up. The Ministry of Education and Science has promulgated instructions aimed at improving assessment procedures, but research at the local level indicates that these directives have not successfully counteracted incentives to place children in special schools. Better overseeing of the assessment committees is clearly needed to ensure that each child’s individual potential is appropriately evaluated.

Many Roma children in Bulgaria speak another language at home, making access to pre-school even more important as a means to improve their Bulgarian language skills before entering school. However, the number of teachers proficient in Romanes is very small, placing Roma children at a disadvantage from their first days of school. More

Roma teachers and teaching assistants, as well as training in bilingual education techniques, are needed at the earliest level of education.

In every way, schools with a high level of Roma students are inferior to those with lower numbers of Roma enrolled. Many Roma schools are in poor physical condition and lack the facilities necessary to educate students adequately, such as computers and laboratories; in the special school networks, even the most basic equipment, such as desks, textbooks and teaching materials, is inadequate or altogether lacking. With such conditions, these schools cannot attract the most highly qualified and motivated teachers, although the lack of vacant teaching positions throughout Bulgaria limits staff turnover in all schools. As the school system adjusts to reflect the lower birth rate and consequent smaller numbers of students, the Government must take steps to ensure that all children attend an integrated school with adequate facilities and appropriate resources.

Recent NGO-conducted research demonstrates that Roma students in segregated schools perform worse on tests in mathematics and Bulgarian language than do their counterparts in integrated schools. Literacy rates for Roma are below those for the majority population; in particular, Roma who have attended segregated schools have much lower literacy rates, possibly because attendance at such schools is poorly monitored, the quality of education is low, and students can pass from grade to grade without meeting basic standards. Indeed, for children attending special schools for children with intellectual disabilities (remedial schools), and other types of special schools, there are no set standards at all – further ensuring that these students will be unable to go on to further education or reasonable expectations of employment.

Teaching in Bulgaria still relies heavily on older methods, and while professional development courses are available, many are offered by NGOs and are not part of recognised teacher training. The Ministry of Education and Science could offer certificates for these courses, which would encourage teachers to take part and advance professionally. Many teachers acknowledge that they have lower expectations for Roma students, despite efforts to improve inter-cultural awareness; this is a reflection of Bulgarian society in general, which still opposes integrating education. Research suggests that once the desegregation process moves ahead, communities are more receptive, further indicating that concerted Government action is needed to take integration forward. In particular, the Government could empower the network of Regional Inspectorates of Education (RIE) to do more with regard to segregation: first to recognise it, and then to work with local authorities to reverse the process and ensure equal access to quality education for all children.

## 1.2 Recommendations

### 1.2.1 Recommendations on monitoring and evaluation

#### *Data collection*

The Bulgarian Government should do the following:

1. Take steps to improve the overall collection of data related to education, disaggregated according to ethnic group, including Roma and other ethnic minorities, with adequate safeguards for protecting sensitive information and the identity and privacy of individuals.

The Ministry of Education and Science and the Regional Inspectorates of Education should do the following:

2. Develop data collection procedures and mechanisms for education, to ensure that data on education disaggregated on the basis of ethnicity and gender are made publicly available.

#### *Evaluation*

The Ministry of Education and Science, the Regional Inspectorates of Education and the Centre for Control and Assessment of Quality in Education should do the following:

3. Ensure that when the national assessment instruments in Bulgarian language and mathematics are implemented, there is an assessment of the outcomes for Roma children specifically, in comparison with national averages.

### 1.2.1 Recommendations for improving access to education

#### *Structural constraints, legal and administrative requirements, costs*

The Ministry of Education and Science should do the following:

4. Ensure that all children have access to full-day two-year pre-school, by:
  - covering any fees for disadvantaged children;
  - ensuring that adequate space is available to accommodate all children, through construction of new classrooms, revision in class scheduling, or reviewing the requirements for the number of children per class; and
  - providing free full-day educational programmes for disadvantaged children.
5. Ensure that mainstream primary schools can offer the same benefits to disadvantaged children as special schools (for example free school meals and school materials, including textbooks) do, so that these incentives do not encourage disadvantaged families to send their children to special schools.

6. Provide full-day educational programmes in primary schools for disadvantaged children, including tutoring and mentoring and catch-up classes, to ensure that these children can succeed in mainstream integrated schools.
7. Further expand the system of providing necessary educational materials (in particular textbooks and exercise books) free of charge to disadvantaged children in primary schools.
8. Provide certificates for primary school attendance (for the purposes of receiving social welfare benefits) periodically throughout the school year, rather than at the beginning of the year, to ensure the actual attendance of children.

### *Residential segregation/geographical isolation*

The Government of Bulgaria should do the following:

9. Fulfil the goals on desegregation detailed in point 1.2 of the *Decade Action Plan*<sup>1</sup> on “Desegregation of Schools and Kindergartens in the Detached Roma Quarters”.
10. Ensure that necessary financial resources are made available at the national and local levels, to ensure the full implementation of all the Government’s adopted commitments and policies on the desegregation of Roma education, and in particular the *Framework Programme for the Equal Integration of Roma in Bulgarian Society*.<sup>2</sup>
11. Ensure that respected Roma organisations and activists are fully involved in, and consulted, in the process of desegregation of Roma education, to help build Roma communities’ confidence.

The Ministry of Education and Science should do the following:

12. Elaborate and submit to Parliament a comprehensive nationwide desegregation programme, based on the best practices in desegregation elaborated by Roma NGOs in local projects. Desegregation should also focus on eliminating the placement of Roma in special schools, and on responsible transfer of misdiagnosed Roma children into the mainstream classes and schools.
13. Where possible, instruct segregated Roma schools (that is, mainstream schools where at least 50 per cent of the children are Roma) to adopt a “zero enrolment” policy, where such a policy would not prohibit Roma children from effective enrolment in school.

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<sup>1</sup> *National Action Plan for the Decade of Roma Inclusion, 2005–2015* (Национален план за действие по Децетилетие на ромското включване 2005–2015 г.).

<sup>2</sup> *Framework Programme for the Equal Integration of Roma in Bulgarian Society* (Рамкова програма за равноправно интегриране на ромите в българското общество).

14. Finance research and studies on the process of desegregation of Roma education and the training of educators willing to work in this field.

The Regional Inspectorates of Education and municipal education authorities should do the following:

15. Make desegregation of Roma education one of the focuses of their activity, and monitor and support the process, including through regular school inspections.
16. Ensure that in all integrating primary schools (that is, schools that are receiving Roma children from segregated schools or areas) the following obtain:
  - free transport of all children to the host schools is available as needed, including within city boundaries; and
  - full assistance is provided to the integrating primary schools, for the process of desegregation.

### *School and class placement procedures*

The Ministry of Education and Science and the Ministry of Health Care should do the following:

17. Cooperate to improve overseeing of the Teams for Complex Pedagogical Assessment, to help to eliminate arbitrariness and ensure that parents give their informed consent to such placement.

The Ministry of Education and Science should do the following:

18. Demonstrate commitment to, and progress in, the improvement of diagnostic and assessment tools/instruments used in the assessment of children with special educational needs.
19. In accordance with the *National Plan for the Integration of Children with Special Educational Needs and/or Chronic Diseases in the National Education System*,<sup>3</sup> develop standards, methodologies and financing mechanisms for the inclusion of children from special schools in mainstream classes, ensuring that mainstream schools offer all of the support and resources necessary for inclusive education.
20. Require special schools to offer preparatory courses and other support for students taking the exam allowing them to transfer to mainstream schools, and allocate funding to support the implementation of this requirement.

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<sup>3</sup> *National Plan for the Integration of Children with Special Educational Needs and/or Chronic Diseases in the National Education System* (Национален план за интегриране на деца със специални образователни потребности и/или с хронични заболявания в системата на народната просвета).

21. Dismantle the separate education system for children with behavioural challenges, as it serves no educational or correctional purposes in its present form.
22. Integrate special schools for children with intellectual disabilities into the mainstream education system, with resource teachers appointed in the mainstream schools.

### *Language*

The Ministry of Education and Science should do the following:

23. Fulfil the goals set out in the *Decade Action Plan* with regard to point 2, on “Preservation and Development of the Cultural Identity of the Children and Pupils from the Roma Ethnic Minority”.
24. Develop a clear and coherent national education policy and strategy to ensure that students have access to studying Romanes as a mother tongue or as a second language in practice. In particular, ensure the following:
  - suitable teaching materials are developed and provided to schools;
  - space is made for this in the national curricula; and
  - the required number of students who can form a group for the study of their mother tongue is reduced from 11 to 5.
25. Develop and improve pre-school programmes that strengthen readiness for school among Roma children, placing particular emphasis on language acquisition.

The Ministry of Education and Science and the Regional Inspectorates of Education should do the following:

26. Provide incentives and support for the education of teachers who would like to teach Romanes as a mother tongue.
27. Support and foster in-service and pre-service teacher training courses covering language acquisition and methodologies for bilingual education.
28. Ensure that teacher training institutions have the proper curriculum and courses to prepare teachers of the Romanes.

## 1.2.3 Recommendations on improving quality of education

### *School facilities and human resources*

The Ministry of Education and Science and the Regional Inspectorates of Education should do the following:



29. Fund and support teachers from special schools who qualify, to be employed as resource teachers in integrating schools, to help with the transition of children from special school environments to mainstream educational environments.
30. Redirect funds from segregated schools in Roma neighbourhoods as they become obsolete, to mainstream, integrating schools. These funds should be used as incentives for the improvement of the schools' infrastructure, and as a means to pay salaries of integrated teachers.

### *Curricular standards*

The Ministry of Education and Science should do the following:

31. Fulfil the goals that it set out in the *Decade Action Plan* with regard to point 4, "Transformation of the Cultural Diversity into a Source of and a Factor for Knowledge of Each Other and Spiritual Development of the Young People. Establishment of an Atmosphere of Mutual Respect, Tolerance and Understanding", and point 5, "Formation of Appropriate Social-Psychological Climate, Favourable for the Educational Integration of Children and Pupils from the Roma Minority".
32. Revise curricula and produce learning materials to take into account Roma history, culture and values, using materials developed by NGOs as models.
33. Further revise the criteria for textbook creation and selection, to bring them into conformity with the principles of multicultural education.
34. Allow for the provision of curriculum development at the school level that takes into account the local Roma community.

### *Classroom practice and pedagogy*

The Ministry of Education and Science should do the following:

35. Explicitly define *quality education*, in collaboration with Roma minority and education experts, using a set of recognised indicators that can be tracked and assessed.
36. Use these indicators for regular monitoring of segregated Roma educational settings, as well as for host integrating schools, at the pre-school, primary and secondary levels of education.

Regional and local pedagogical authorities, inspectorates, and pre-service and in-service training institutions should do the following:

37. Provide training for teachers and administrators in pre-service and in-service training institutions, in child-centred pedagogy, anti-bias education,

methodologies for second language learning, multicultural education, and effective ways of involving parents and communities.

38. Provide support for the in-service teacher training institutions (linked to the inspectorates), to encourage new models and practices of school-based leadership and management, student-centred instruction and parent and community involvement.
39. Support teachers' pre-service and in-service training institutions to include school improvement theory and practice in their official curriculum.

### *School–community relations*

The Ministry of Education and Science should do the following:

40. Increase the number of Roma working in schools, by recruiting and training more Roma as teachers and teaching assistants.

Local education authorities should do the following:

41. Work closely with NGOs and community groups to ensure that efforts to improve education for Roma are coordinated, and that the school is truly responsive to community needs and interests.

### *Discriminatory attitudes*

The Bulgarian Government should do the following:

42. Strengthen anti-discrimination and anti-bias measures, including both legislation and social policies, to reduce discrimination against Roma in all spheres and improve public perception.
43. Provide training to the Protection against Discrimination Commission in order to enhance its capacity to deal with discrimination in education.

The Ministry of Education and Science and the Regional Inspectorates of Education should do the following:

44. Create effective mechanisms for preventing and counteracting racism, particularly inside Bulgarian schools that integrate Roma pupils, by designing and financially supporting programmes promoting interethnic tolerance and cooperation, and combating bias and prejudice, in education.

Universities, and pre-service and in-service teacher training institutions should do the following:

45. Introduce in their teacher training courses specific training modules on inter-cultural, anti-bias and anti-racism training. These courses should take into account the specific facets of Roma discrimination in the Bulgarian education system.

*School inspections*

The Ministry of Education and Science and the Regional Inspectorates of Education should do the following:

46. Ensure that all schools, including special schools and segregated Roma schools, are inspected regularly and held to the standards defined by law.
47. Specifically include reporting on segregation as a responsibility for inspectors, and require inspectors to take action in line with adopted desegregation policy.
48. Draft standards to be used in the inspection of schools that discourage the overrepresentation of Roma children in schools (over 50 per cent).
49. Create units at the Regional Inspectorates of Education with a specific task to monitor discrimination in education, including segregation.

## 2. BASIC EDUCATION INDICATORS

*While Bulgarian law permits the collection of personal data with appropriate safeguards, official statistics on education are unreliable, as they rely on schools to report data and there are incentives for schools to inflate their enrolment figures. The Government should take steps to establish other mechanisms for collecting data on education, particularly regarding education for Roma.*

*In particular, current statistics do not reflect the high number of pupils, especially Roma, who are formally enrolled but rarely attend classes. Local and international researchers have gathered data demonstrating that Roma also attend pre-school at significantly lower rates than the majority population. While the number of Roma who have never attended school appears to be on the decline, Roma are still far more likely to drop out of school, with the proportion of Roma students plunging in higher grades.*

*Segregation has a long history in Bulgaria; geographical segregation has led to the establishment of segregated “Roma schools” in neighbourhoods and villages where Roma are the majority. Roma are also overrepresented in the special school networks, both in schools for children with intellectual disabilities (“special schools”) and in boarding schools for children with behavioural challenges. With such well-documented evidence of segregation as an ongoing trend, in all levels and branches of the education system, it is clear that the Government must be more active in integrating schools and communities.*

### 2.1 Data collection

Due to the social stigma attached to Roma identity, data on the number of Roma, and specifically on the school-age Roma population, collected by official bodies tend to be unreliable. A general demographic decrease in the population of Bulgaria over the past decades, which has led to a steady decline in the number of students and sometimes threatened even the very existence of certain schools, has made a great deal of the statistical data collected on the basis of educational authorities’ reports highly unreliable.<sup>4</sup> Children whose births are not registered (almost all of them Roma) are non-existent as far as educational statistics, and the education system for that matter, are concerned. On the other hand, children who have dropped out of school or temporarily departed from the region or the country may sometimes be present in school registers and may even pass from one grade to another. Collection of data by private research institutions follows different methodologies, a fact that often renders it inconsistent.

The Bulgarian Law for the Protection of Personal Data, from January 2002, stipulates that collection of personal data may take place only “for concrete purposes, strictly defined by law, and cannot be processed additionally in a manner that is incompatible with these goals”.<sup>5</sup> It does not prohibit collection of ethnic data but prohibits any

<sup>4</sup> For example, drop-out rates are based on official deregistration of the student from the school and do not take into account school absenteeism.

<sup>5</sup> Law for the Protection of Personal Data, *Official Gazette*, No. 1, 4 January 2002, as last amended 10 November 2006 (hereafter, *Law for the Protection of Personal Data*), Art. 2, para. 2, pt. 2.

processing of such data that “reveals racial or ethnic origin”.<sup>6</sup> This prohibition, however, is subject to numerous exemptions, among which are the consent of the person concerned, stipulations of other laws, and data collection for the specific aims of some NGO, as well as journalistic and literary activity.<sup>7</sup>

The Law on Statistics, from June 1999, stipulates that ordinary citizens are required to provide information to the statistical bodies only during the census. They cannot, however, be obliged to provide data about their “race, nationality, ethnic belonging, religion, health status, personal life, political party affiliation, committed offences, philosophical and political opinions”.<sup>8</sup> Every census in Bulgaria is regulated by a separate law. The last Law on the Census of Population, Housing and Agricultural Enterprises in the Republic of Bulgaria in 2001, from February 2000, provides for the collection of data on ethnic appartenance, religion and mother tongue of the population.<sup>9</sup> All these data were collected on the basis of free self-determination from the respondents during the census. Many private research institutions routinely collect ethnic data in the course of sociological surveys. No issue related to possible violations of the law has ever been discussed in Bulgaria with regard to these activities.

## 2.2 Enrolment data and trends

The total population of Bulgaria on 31 December 2004 was 7,761,049, and has been decreasing over the past decade.<sup>10</sup> The number of Roma, according to the last census from March 2001, was 370,908, or 4.7 per cent of the total population. As elsewhere, in Bulgaria many people who are identified as Roma by the surrounding population do not identify themselves as such for a variety of reasons, including the social stigma associated with belonging to this ethnic group. Expert opinions put the number of Roma in Bulgaria at between 600,000 and 800,000.<sup>11</sup>

In line with the general decline of the population, the number of children in Bulgaria, including children of school age, has been constantly decreasing over the past decade. However, because of the higher birth rate and lower life expectancy, the demographic structure of the Roma population differs significantly from the national average.

<sup>6</sup> Law for the Protection of Personal Data, Art. 5, para. 1, pt. 1.

<sup>7</sup> Law for the Protection of Personal Data, Art. 5, para. 2, pts. 2, 4 and 7.

<sup>8</sup> Law on Statistics, *Official Gazette*, No. 57, 25 June 1999, the last amendment from 4 November 2005, Art. 21, para. 1 and 2.

<sup>9</sup> Law on the Census of Population, Housing and Agricultural Enterprises in the Republic of Bulgaria in 2001, *Official Gazette*, No. 16, 25 February 2000, Art. 5, para. 1.

<sup>10</sup> National Statistical Institute, *Population and Demographic Processes – 2004*, Sofia: NSI, 2005, p. 8.

<sup>11</sup> Cf. E. Marushiakova and V. Popov, *Gypsies (Roma) in Bulgaria*, Frankfurt aM: Peter Lang, 1997 (hereafter, Marushiakova and Popov, *Gypsies (Roma) in Bulgaria*), pp. 43–44; Jean-Pierre Liegeois, *Roma, Gypsies, Travellers*, Strasbourg: Council of Europe Press, 1994, p. 34; Ilona Tomova, *Циганите в преходния период* (Gypsies in the Period of Transition), Sofia: ICMSIR, 1995, p. 13.

According to census data, just 5.4 per cent of the Roma population are between 60 and 100 years of age, while the national average was 22.3 per cent.<sup>12</sup>

Table 1 below shows these differences in the pre-school- and school-age population according to the groupings made up by the National Statistical Institute (NSI), for presentation of the data from the March 2001 census:

**Table 1: Population structure for children – breakdown by age group, for Roma and national populations (March 2001)**

Age group (years)	Share of overall population (per cent)	
	For total population	For Roma population
0–4	4.07	10.37
5–9	4.86	10.74
10–14	6.42	11.67
15–19	6.78	10.70

Source: NSI<sup>13</sup>

Bulgarian official education statistics calculate net enrolment rates by level of education on two bases – as group net enrolment rates by levels of the International Standard Classification of Education (ISCED – 97)<sup>14</sup> and as net enrolment rates in the education system by age groups.<sup>15</sup> The respective trends over the past five school years were as follows:

<sup>12</sup> National Statistical Institute, *Census of the Population, Buildings and Agricultural Enterprises in 2001, Vol. 1-Population, Book 1 – Demographic and Social Characteristics of the Population*, Sofia: NSI, 2004 (hereafter, NSI, *Census of the Population – Demographic and Social Characteristics of the Population*), p. 182.

<sup>13</sup> Calculations based on NSI, *Census of the Population – Demographic and Social Characteristics of the Population*, p. 182.

<sup>14</sup> Calculated as percentages of the number of enrolments by educational levels in certain age groups to the number of population in the same age groups.

<sup>15</sup> Calculated as percentages of the number of enrolments in corresponding age groups irrespective of the educational level to the number of population in the same age groups.

**Table 2: Net enrolment rates – breakdown by educational level (2000–2005)**

Educational level (ISCED – 97)	Net enrolment rate (per cent) – by school year					
	2000– 2001	2001– 2002	2002– 2003	2003– 2004	2004– 2005	2005– 2006
Pre-primary education	66.8	73.6	74.2	74.6	73.6	73.7
Primary education	96.3	98.5	99.8	100.3	99.7	99.5
Lower secondary education	82.4	83.1	83.9	84.2	84.2	84.9
Upper secondary education	64.7	68.3	74.9	77.1	77.3	78.0

Source: NSI<sup>16</sup>**Table 3: Net enrolment rates – breakdown by age group (2000–2005)**

Age group (years)	Net enrolment rate (per cent) – by school year					
	2000–2001	2001–2002	2002–2003	2003–2004	2004–2005	2005–2006
3–6	70.1	77.2	78.5	78.0	76.3	75.7
7–10	98.4	101.2	102.3	102.2	101.6	101.4
11–14	97.0	97.7	98.0	98.1	98.2	98.3
15–18	71.9	75.2	81.0	82.8	82.9	83.4

Source: NSI<sup>17</sup>

There are high quotients for participation and enrolment, with some percentage points above 100 per cent. Two types of enrolment are tracked: net by degree and by age group, where the net quotient is the ratio between the number of children enrolled and the number of children in the respective age group. Due to demographic decline, this ratio can exceed 100 per cent. Enrolment is calculated at the beginning of the school year, based on documents that schools submit in October, which account for how many children are enrolled. However, children in a particular school group or age group are actually counted at the end of the year. This also creates enrolment rates over 100 per cent.

<sup>16</sup> National Statistical Institute, *Education in the Republic of Bulgaria – 2005*, Sofia: NSI, 2005 (hereafter, NSI, *Education in Bulgaria – 2005*), p. 116, and National Statistical Institute, *Education in the Republic of Bulgaria – 2006*, Sofia: NSI, 2006 (hereafter, NSI, *Education in Bulgaria – 2006*), p. 100.

<sup>17</sup> NSI, *Education in Bulgaria – 2005*, and NSI, *Education in Bulgaria – 2006*.

According to official data sources, the net enrolment rates show that the overall tendency of enrolment over the past five school years at the pre-school level, where enrolment is influenced by a number of socio-economic factors, is somewhat uncertain, peaking in the 2002–2003 school year, only to decrease again by the 2005–2006 school year. Such an uncertain trend is also visible for primary education. The tendency towards higher enrolment over the period is more clearly expressed for lower and upper secondary school, however.

Official statistics do not collect information on net enrolment rates by ethnic groups. The bases of the calculation of the net enrolment rates are the school records. They take into account formal enrolment but are inaccurate with regard to actual attendance, as there are situations, especially in Roma communities, where children are enrolled at the beginning of the school year but rarely show up during the year.

According to a 2003 survey of the International Center for Minority Studies and Intercultural Relations (IMIR), 35 per cent of Roma children and about 16 per cent of Turkish children had not attended pre-school at all.<sup>18</sup> For comparison, just 6.8 per cent of Bulgarian children, according to the IMIR survey, had not attended pre-school. Muslim Roma girls were overrepresented compared with the Roma boys among those who had never attended pre-school (38.1 per cent versus 31 per cent). Since then this gap may have narrowed somewhat, due to Government support for one obligatory year of pre-school for all children from the 2003–2004 school year (see Annex 1). However, the trends in the overall net enrolment rates suggest that even if this narrowing took place, it is not of real significance. A small number of Roma children may enrol at an older age, especially when the families are pressured by the social security authorities to present a certificate for attendance, but no data are available on the precise number.

Data collected as part of a multi-country study on poverty and ethnicity in 2000 (the “Yale dataset”),<sup>19</sup> however, disaggregated enrolment rates by ethnicity. In Bulgaria the Yale data show a significant difference in enrolment levels for children of basic school age (6–14, from the first to the eighth grade). Roma enrolment rates were 33 per cent lower, at 60 per cent, than for the majority population, at approximately 90 per cent.

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<sup>18</sup> МЦПМКВ (IMIR), *Окончателен доклад по проект: Оценка на съществуващите образователни политики и практики за предоставяне на равен достъп до обучение на деца от малцинствата и за разработване на препоръки за устойчиво решение на образователните проблеми на малцинствата* (Final Report on the Project: Evaluation of the Existing Policies and Practices for Ensuring Equal Access to Education of Children from Minorities and for Developing Recommendations for a Sustainable Solution of the Educational Problems of the Minorities), Sofia: IMIR, 2004, p. 10, available also at <http://www.ncedi.government.bg> (accessed on 14 January 2006) (hereafter, IMIR, *Final Report on Minority Education*).

<sup>19</sup> Yale dataset; Revenga *et al.* 2002, in World Bank, *Roma in an Expanding Europe, Breaking the Poverty Cycle*, Washington, DC: World Bank, 2005, p. 42, available at [http://siteresources.worldbank.org/EXTROMA/Resources/roma\\_in\\_expanding\\_europe.pdf](http://siteresources.worldbank.org/EXTROMA/Resources/roma_in_expanding_europe.pdf) (accessed on 20 February 2007).



Representative household surveys on actual attendance at the different educational levels show a somewhat different picture of trends of attendance, and indicate clear differences in attendance by ethnic groups. Table 4 presents the results of one such survey, reported by the Ministry of Finance. School attendance is calculated as the share of children in the respective age group attending school.

**Table 4: School attendance rates – breakdown by educational level (1995–2001)**

Ethnic group	School attendance (per cent) – by educational level and year								
	Pre-school			Basic (first to eighth grade)			Secondary		
	1995	1997	2001	1995	1997	2001	1995	1997	2001
National	44	14	22	87	88	90	47	55	46
Bulgarian	44	15	26	90	93	94	55	66	56
Turks	53	10	19	88	93	90	10	30	34
Roma	25	5	16	55	58	71	3	5	6

Source: Ministry of Finance<sup>20</sup>

While the overall attendance at the school level increased over the reported period, the trends at the pre-school level were on the decline, with attendance estimated as being as low as 16 per cent in 2001. Another study reports only 12 per cent of Roma children attending pre-schools by 2002. Attendance rates among Roma at the end of 2002 were 28.3 per cent lower than the national at the pre-school level, 21.3 per cent lower than the national at the basic level and as much as 87 per cent lower than the national at the secondary level.<sup>21</sup>

The 2005 UNDP survey, *Vulnerable Groups in Central and South-Eastern Europe*, has the following data with regard to enrolments for Roma.

<sup>20</sup> Ministry of Finance, *Review of the Public Spending: Education – State, Problems and Possibilities*, 2004, p. 39, available at <http://www.minfin.government.bg/docs/EDUpercent20reportpercent2020041.pdf> (accessed on 20 February 2007).

<sup>21</sup> Попа Томова, “Проблеми на образованието на уязвимите малцинствени общности в България” (Problems with the Education of Vulnerable Minority Communities in Bulgaria) (hereafter, Томова, “Education of Vulnerable Minority Communities”), in Hristo Kyuchukov (ed.), *Десеграция или интеркултурна интеграция* (Desegregation or Inter-Cultural Integration), Veliko Turnovo: Faber, 2005 (hereafter, Kyuchukov (ed.), *Desegregation or Inter-Cultural Integration*), p. 197.

**Table 5: Enrolment rates (2005)**

Education Level	Enrolment rate (per cent)	
	Majority population in close proximity to Roma	Roma
Primary (7–15)	99	77
Secondary (16–19)	81	12

Source: UNDP<sup>22</sup>

According to the UNDP survey the enrolment data for Roma indicate a 77 per cent enrolment rate for primary education and a 12 per cent enrolment rate for secondary education, figures that are only slightly higher than the 71 and 6 per cent respectively for attendance reported by the Government in 2001 (see Table 4).

Academic research from 1999–2000 reports that as many as 15 per cent of Roma children have never been enrolled in school.<sup>23</sup> This source does not indicate its methodology, however, and its data might be somewhat inconsistent with the official statistics on net enrolment rates by age groups. This is, however, the only source reporting the percentage of Roma children never having been enrolled in school. Since the year 2000 the overall net enrolment rates have increased, and, consequently, the proportion of Roma children who have never been enrolled in school now is probably lower.

Some NGOs and individuals in Roma neighbourhoods operate “informal” pre-schools, but neither the number of these or their enrolment rates is known. This makes it even more difficult to assess the real and current situation regarding enrolment data and trends.

### 2.3 Retention and completion

There is no systematic collection of statistical data by the Government on drop-out rates by ethnicity. According to the Ministry of Education and Science, the total number of drop-outs during the 2004–2005 school year was 19,193 students, out of a total of 963,051 enrolled in the entire national education system (including secondary

<sup>22</sup> UNDP, *Vulnerable Groups in Central and South-Eastern Europe*, 2005, available at <http://vulnerability.undp.sk/> (accessed on 20 February 2007) (hereafter, UNDP, *Vulnerable Groups*).

<sup>23</sup> Petar-Emil Mitev, “Динамика на бедността” (Dynamics of Poverty) (hereafter, Mitev, “Dynamics of Poverty”), in Ivan Szelenyi (ed.), *Бедността при посткомунизма* (Poverty under Post-Communism), Sofia: Istok-Zhapad, 2002 (hereafter, Szelenyi (ed.), *Poverty under Post-Communism*), p. 42.

education), or some 0.12 per cent.<sup>24</sup> These data are provided by the Regional Inspectorates of Education and there are no indications about the methodology for their collection. Officially, students are considered to be drop-outs if they withdraw or their parents formally withdraw them from a school. In many cases, however, especially in segregated Roma schools, the student is formally enrolled and even passes from one grade to another but rarely, if ever, shows up in class.<sup>25</sup>

Experts suggest that it is common to register children as enrolled even if some attend only occasionally or not at all.<sup>26</sup> Segregated schools also reportedly allow students to continue to the next grade without meeting basic standards, thereby reducing grade repetition and dropping out.<sup>27</sup>

Material collected for this report in 2006 at the local level illustrates this phenomenon of absenteeism that is not reflected in official statistics. In Vidin Municipality, for example, there were 502 Roma children enrolled in the official records of the Roma segregated school at the beginning of the 2005–2006 school year.<sup>28</sup> At the end of the first school term of the 2005–2006 school year, 21 Roma children dropped out.<sup>29</sup> The data, however, do not correspond to the actual number of students that regularly attend the segregated school as compared to the mainstream schools. A micro-study by the NGO Organisation Drom conducted on 30 March 2006 found that a total of 126 Roma children entered the segregated school premises to attend classes on that day, representing only a quarter of all enrolled pupils. This makes the segregated school the least effective and the most expensive school in Vidin Municipality, because it receives a subsidy for 100 per cent attendance but, in fact, educates 25 per cent of the students.

An expert has noted that official records may be even more inaccurate for pre-school attendance, alleging that children may attend for a short time and then never return, which is not revealed by inspection.<sup>30</sup>

As the available data on drop-out rates and the proportion of Roma students of the total number of students by grades clearly demonstrate, the average number of years spent by Roma children in school is much lower than the national average. The available data from non-governmental sociological research indicate that the drop-out

<sup>24</sup> *National Programme for the Development of School Education and Pre-School Upbringing and Instruction*, IV.3, available at <http://www.minedu.government.bg> (accessed on 1 April 2006).

<sup>25</sup> Cf. IMIR, *Final Report on Minority Education*, p. 7.

<sup>26</sup> OSI Roundtable, Sofia, June 2006. Explanatory note: the OSI held a roundtable meeting in Bulgaria in June 2006 to invite critiques of the present report in draft form. Experts present included representatives of the Government, parents and non-governmental organisations.

<sup>27</sup> OSI Roundtable Bulgaria, Sofia, 20 June 2006.

<sup>28</sup> Case study Vidin, Data provided by the Regional Inspectorate of Education. Explanatory note: three case studies were conducted for this report, in Vidin, Veliko Turnovo, and Nikolaevo. More information on each site can be found in Annexes 1–3.

<sup>29</sup> Case study Vidin, Data provided by the Regional Inspectorate of Education.

<sup>30</sup> OSI Roundtable Bulgaria, Sofia, 20 June 2006.

rates among Roma are significantly higher than the drop-out rates among the rest of the population.

As revealed by Table 6 below, the relative proportions of Roma students to the total number of students in Bulgaria decrease, especially after the eighth grade.

**Table 6: Proportion of Roma students in grades 1–10 (2004)**

Grade	Roma students as a proportion of total students (per cent)
1	20.6
2	19.1
3	17.4
4	14.5
5	12.8
6	10.1
7	8.8
8	7.2
9	2.6
10	1.7

Source: REF<sup>31</sup>

Further evidence of significant disparities between Roma, Bulgarians and Turks in drop-out rates is provided by survey data on self-reported drop-out rates by ethnicity, presented by the IMIR from 2003. According to this survey, the overall drop-out rates by ethnicity in 2003 were as shown in Table 7.

<sup>31</sup> Roma Education Fund, *Needs Assessment Study for the Roma Education Fund, Background Paper – Bulgaria*, December 2004, Annex 1, available at <http://siteresources.worldbank.org/INTROMA/Resources/NAREportBulgariaAnnex1FINAL.pdf> (accessed on 11 February 2006) (hereafter, REF, *Needs Assessment Study – Bulgaria*). This paper suggests that these figures are relevant as of February 2002, although it does not indicate a source. It appears that they have been taken from a 2001 Ministry of Education and Science Survey through the Regional Inspectorates of Education from 2001. See, for example, Yosif Nunev, *Ромите и процесът на десеграция в образованието* (Roma and the Process of Desegregation in Education), Sofia: Kuna Editorial House, 2006 (hereafter, Nunev, *Roma and the Process of Desegregation*), p. 65.

**Table 7: Self-reported school drop-out rates – breakdown by ethnicity and religion (2003)**

Ethnic group	Religious sub-group	School drop-out rates (per cent)	
		Overall	For 15–19 year age group
Bulgarian	–	2.0	3.9
Turkish	–	8.3	21
Roma	–	–	42.8
Roma	Christian	12.8	–
Roma	Muslim	8.1	–

Source: IMIR<sup>32</sup>

The same source indicates that drop-out rates are higher among rural Muslim Roma (25.6 per cent), as well as among Muslim Roma girls nationwide (21.2 per cent). By age group the drop-out rates are the highest for all ethnic groups (including Roma) in the age group 15–19 years.

The data above are consistent with the observations of the researchers who conducted the survey of the Bulgarian Helsinki Committee (BHC) of the former “Basic Schools with Enforced Labour Education” (BSELE).<sup>33</sup> At present these are among the biggest segregated Roma schools in Bulgaria, located, with few exceptions, in the cities. The survey included 28 such schools. In the course of visits to these schools, BHC researchers found a systematic discrepancy between the enrolment and the attendance. Overall in this system not more than 70 per cent of the students attend school regularly. High non-attendance usually correlated with high drop-out rates. In some schools BHC researchers were able to come up with concrete figures and estimates. Thus in the Ivan Vazov Lower Secondary School in Kyustendil, according to the school director, the drop-out rate was 5–6 per cent of the entire student body each year.

The BHC researcher estimated that it might be even higher. In the Georgi Sava Rakovski Lower Secondary School in Berkovitsa the real attendance was normally 70 per cent of the enrolled students. Sometimes (for example, around holidays), however, there were no more than two to six students in a classroom. In the Hristo Botev Lower Secondary School in Lom around 400–420 students attended regularly, out of 596 enrolled, making 70 per cent. In the same school 45 students a year dropped out on average (for the most part from the sixth to the eighth grade). In the Dobri Voinikov

<sup>32</sup> IMIR, *Final Report on Minority Education*, p. 6.

<sup>33</sup> Bulgarian Helsinki Committee, *Report on the 2004 Survey of Former Basic Schools with Enforced Labor Education (BSELE)*, not published, available in the BHC archive (hereafter, BHC, 2004 *Report on Former BSELE*).

Lower Secondary School in the village of Kamenar, Varna region, 60–70 per cent of the students attended regularly. The drop-out rate in the Dr. Petar Beron Lower Secondary School in Yambol was 10–15 per cent a year, according to the school director. There were former BSELE where the attendance was lower and the drop-out rates even higher. For example, in the SS. Cyril and Methodius Lower Secondary School in Straldzha only 40–60 per cent of the students attended. According to the director of that school, from around 40 students enrolled in the first grade, a little more than ten graduate from the eighth grade.

According to an interview with the Regional Inspectorate of Education, Veliko Turnovo, dropping out in this region is highest among children from socially disadvantaged families with unemployed parents, children of divorced parents, and Roma children. Child labour also contributes to the early drop-out rate of Roma children. The proportion of children dropping out due to travel abroad is also high, and is also common among Roma families. The percentage of social, family and foreign travel reasons is higher for primary and lower secondary education than it is for secondary education. Otherwise, the general drop-out rate is higher for secondary education in Veliko Turnovo.<sup>34</sup>

There is some evidence from research that the drop-out rates in segregated urban Roma neighbourhoods are higher than those in non-segregated urban settings. During the evaluation study of ongoing desegregation projects conducted by the Bulgarian Helsinki Committee in cooperation with the Ministry of Education and Science in six Bulgarian cities in May 2005, standardised Bulgarian language and mathematics tests were administered to Roma students in the fourth grade in segregated and integrated schools.<sup>35</sup> Attendance at the tests, as well as during the school year, was studied in addition to the test results. The results from five cities<sup>36</sup> are summarised in Table 8.

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<sup>34</sup> Case study Veliko Turnovo.

<sup>35</sup> The results of the evaluation were published in Bulgarian Helsinki Committee, *Five Years Later: Non-Governmental Projects for Desegregation of Roma Education in Bulgaria*, Sofia: BHC, 2005 (hereafter, BHC, *Five Years Later*).

<sup>36</sup> The results from Haskovo were discarded because the tests were not conducted and monitored as planned, due to manipulations of the administration of the local segregated school.

**Table 8: Drop-out rates of fourth-grade Roma students (May 2005)**

Type of school	Drop out rate – calculated as the share of Roma students absent from tests (per cent)	
	For the mathematics test	For the Bulgarian language test
Integrated	23.7	22.0
Segregated	27.4	28.4

Source: BHC<sup>37</sup>

In the cities with desegregation projects that are proceeding relatively well the proportion of student absences from integrated schools is even lower: 20 per cent in Vidin, 7.7 per cent in Montana and 8.1 per cent in Sliven. The data in Sliven are of special note, as the Roma children attending integrated schools are of a significantly lower socio-economic status than the Roma children attending the segregated school. According to the observations of the BHC researchers who attended the tests, the absences in all schools reflected long-term tendencies of non-attendance of the Roma students in the schools concerned.

There are both official and unofficial sources of data on school attainment and completion by ethnicity in Bulgaria. Governmental sources collected such data during the March 2001 population census. Ethnic data collected for the census were based on self-declaration. This may have led to some inaccuracies, as Roma who are more educated tend to designate themselves as belonging to the majority ethnic group rather than designating themselves as Roma.<sup>38</sup> Several non-governmental surveys were conducted subsequently, which change and supplement the picture.

According to the 2001 census, the comparative (national and Roma) educational attainment of the population aged 20 and over appears as follows:

<sup>37</sup> BHC, *Five Years Later*.

<sup>38</sup> Cf. Janos Ladanyi and Ivan Szelenyi, “Социалната структура на ромския етнос в България, Румъния и Унгария по време на прехода към пазарна икономика” (The Social Structure of Roma Ethnicity in Bulgaria, Romania and Hungary during the Transition to a Market Economy), in Szelenyi (ed.), *Poverty under Post-Communism*, p. 109.

**Table 9: Educational attainment (population aged 20 and over) – breakdown by population group (2001)**

Population group	Share (per cent) of the population group attaining the following educational levels:						
	Higher (including college)	Secondary overall	Basic	Primary	Incomplete Primary	Illiterate <sup>39</sup>	DK/NA
National (total)	17.01	43.74	27.28	8.7	1.19	1.76	0.31
Roma (total)	0.24	6.46	41.83	28.28	8.3	14.88	–
National (women)	18.79	40.54	26	10.59	1.46	2.29	0.32
Roma (women)	0.24	4.23	36.9	30.49	9.32	18.83	–
National (rural)	4.45	28.57	43.36	17.88	2.3	3.18	0.26
Roma (rural)	0.17	5.56	39.25	31.49	9.06	14.47	–
National (rural women)	4.96	24.63	41.18	21.8	2.87	4.26	0.29
Roma (rural women)	0.16	3.44	33.91	33.71	10.16	18.61	–

Source: NSI<sup>40</sup>

While most Roma have a basic education or lower, most non-Roma have a basic education or higher. The Yale dataset also illustrates lower educational attainment for Roma than for the majority population. According to that source, from 2000, 89 per cent of Roma had primary education or less, while only 10 per cent had some secondary education.

**Table 10: Educational attainment by ethnicity (2000)**

School level attained	Proportion (per cent)	
	Roma	Non-Roma
Primary or below	89.6	32.7
Some secondary	9.6	53.8

Sources: Yale dataset; Revenga *et al.* 2002<sup>41</sup>

<sup>39</sup> The category “illiterate” as an element of the methodology of the NSI is somewhat unclear and inconsistent with the other categories.

<sup>40</sup> Calculation based on NSI, *Census of the Population – Demographic and Social Characteristics of the Population, 2001*, pp. 204–212.



More recent NSI statistics provide the following structure of educational attainment of the national population:

**Table 11: Educational attainment of the national population (2000)**

Educational attainment level	Share of national population, aged 25–64 (per cent)
Basic and lower education	28
Secondary education	51
Higher education (including college)	22

Source: NSI<sup>42</sup>

Non-governmental surveys based on determining Roma ethnicity by interviewers report a somewhat better educational attainment of Roma. A representative survey of Gallup International/the Bulgarian Helsinki Committee from May 2005 found the following structure of Roma educational attainment for the population aged 18 and over: while 88.3 per cent of Roma reported having primary or lower educational qualifications, the percentage reporting secondary qualifications dropped to 10.6 per cent, and just 1.1 per cent have a higher education degree.<sup>43</sup>

Yet another data source, from UNDP, has differing information on retention during the first five years of schooling, as shown below in Table 12.

<sup>41</sup> Yale dataset; Revenga *et al.* 2002 in World Bank, *Roma in an Expanding Europe, Breaking the Poverty Cycle*, p. 42, 2005.

<sup>42</sup> NSI, *Education in Bulgaria – 2006*, p. 34. The NSI does not collect ethnic data for its annual surveys on education.

<sup>43</sup> Gallup International/Bulgarian Helsinki Committee, *Bulgarians and Roma: Interethnic Attitudes, Social Distances and Value Orientations*, Sofia: BHC, May 2005 (hereafter, Gallup International/BHC, *Bulgarians and Roma: Interethnic Attitudes, Social Distances and Value Orientations*). The survey was based on two nationally representative samples – Bulgarian (1,112 persons interviewed) and Roma (1,104 persons interviewed). In both cases ethnicity was determined by the interviewer. For other, older, surveys, cf. REF, *Needs Assessment Study – Bulgaria*. They all report a somewhat (although not much) better educational attainment of Roma as compared to the census data.

**Table 12: Pupils starting the first grade who complete the fifth grade (2005)**

Educational attainment level <sup>44</sup>	Share of people aged 12 and over (per cent)		
	Majority population in close proximity to Roma	Roma	National average
At least incomplete secondary education	72	10	–
Spent more than 4 years in school	92	63	93.8

Source: UNDP<sup>45</sup>

Despite various methodologies and approaches, all the available data, both official and non-governmental, reveal a large gap between the educational attainment of Roma and that of the rest of the population in Bulgaria. It is particularly low among Roma women. Roma are the only large ethnic group in Bulgaria in which women have a lower educational attainment than men.

## 2.4 Types and extent of segregation

Segregated schooling for ethnic minorities has a long history in Bulgaria,<sup>46</sup> and at present segregated neighbourhood schools are the most widespread type of educational institutions where Roma are schooled. They are typical in the cities, and most of them were intentionally built in or near the major Roma ghettos during the period of Communism to serve the educational needs of their residents. As a result of urbanisation, many village schools that were ethnically mixed became Roma-only and were influenced by the additional negative effects of rural poverty. Because of the isolation, poor infrastructure and lack of financial and human resources in rural municipalities, desegregation in these settings would be extremely difficult. In 2005 the Regional Inspectorates of Education identified 90 urban schools and pre-schools where “desegregation as a solution” can be applied. There were 30,421 children and students enrolled in them, of whom 27,957 were primary to secondary school students, while the rest were enrolled in pre-schools.<sup>47</sup>

<sup>44</sup> The first dataset shows the people who completed the fifth grade as a share of those aged 12 (of those who should have completed it). The second dataset shows the people who completed the fifth grade as a share of all those aged 12 and over. The difference between the two datasets indicates the incidence of repeaters.

<sup>45</sup> UNDP, *Vulnerable Groups*.

<sup>46</sup> Cf. Elena Sachkova, “Политики относно образованието на малцинствата в България (1878–2000)” (Minority Education Policies in Bulgaria 1878–2000), *Стратегии на образователната и научната политика* (Strategies for Policy in Science and Education), No. 3, 2000.

<sup>47</sup> Nunev, *Roma and the Process of Desegregation*, pp. 65–66.

Under Communism, most segregated schools were intended to cultivate basic manual skills in a population that was officially branded as being “of a low living standards and culture”.<sup>48</sup> Special programmes were adopted in 31 of these schools, stressing vocational training and developing labour skills from the first grade. They were officially called “basic schools with enforced labour education” (BSELE) and were assigned production plans in addition to education. In at least one case (Kliment Timiryazev 131 Secondary School in Sofia) around 50 Roma students from one of Sofia’s mostly Bulgarian neighbourhoods were separated from the Bulgarian children and were placed under the “enforced labour” curriculum.

According to the last information, before their formal transformation into mainstream schools in the 1990–1991 school year, the BSELE system included 17,880 students, and the production plan was for 317,415 levs.<sup>49</sup> The BSELE became the target of severe criticism by Roma activists at the beginning of the democratisation process in the early 1990s.<sup>50</sup> Although their transformation took place soon after the fall of Communism, they continued to operate informally as schools with enforced labour education through the mid-1990s.<sup>51</sup> Today these schools are ordinary neighbourhood “Roma” schools, although most of the staff are the same. According to Yosif Nunev, State expert at the Ministry of Education and Science, there are still cases of enforced labour education at the expense of Bulgarian language and mathematics in some of the former BSELE.<sup>52</sup>

Estimates of the extent of educational segregation of Roma education vary in different publications, from almost 70 per cent to as little as 44 per cent, depending on the different definitions of segregation, different sample methodologies, and various interpretations of how to define who is Roma. According to an official paper of the Secretariat of the National Council on Ethnic and Demographic Issues (NCEDI) from 2003, the share of Roma children attending segregated “Roma” neighbourhood schools is 70 per cent of their total number.<sup>53</sup> This is also the figure provided for Bulgaria by the European Roma Rights Center (ERRC) 2005 report on Roma education in

<sup>48</sup> Marushiakova and Popov, *Gypsies (Roma) in Bulgaria*, p. 38.

<sup>49</sup> Ministry of National Education, *Справка №1 за ОУЗТО в страната за 1990–1991 учебна година* (Information Bulletin No. 1 for the BSELE in the Country for the School Year 1990–1991), available in the BHC archive.

<sup>50</sup> Nunev, *Roma and the Process of Desegregation*, p. 42.

<sup>51</sup> BHC, *2004 Report on Former BSELE*.

<sup>52</sup> Interview with Yosif Nunev, State expert at the Ministry of Education and Science, Sofia, 28 June 2006.

<sup>53</sup> Government of Bulgaria, “Information on the Policy of the Bulgarian Government for the Improvement of the Situation of the Roma Population in Bulgaria,” report for the conference *Roma in an Expanding Europe: Challenges for the Future*, Budapest 30 June 2003–1 July 2003, available at <http://www.ncedi.government.bg/8.Doklad-Budapest-1.07.03.htm> (accessed on 7 January 2006).

Eastern Europe.<sup>54</sup> Other research gives lower figures for the share of Roma educated in such schools. The UNDP 2002 Roma report estimate is 49 per cent.<sup>55</sup> The IMIR 2003 report on minority education estimates is 54.9 per cent for Christian Roma and 44.5 per cent for Muslim Roma.<sup>56</sup> Because of the supposed large increase in residential segregation in Bulgaria, some experts do not consider the lower figure for those studying in “Roma” schools, 44 per cent, to be reliable.<sup>57</sup>

Numbers may also be skewed due to the practice of stopping integration after a certain time period. In Vidin Municipality, shockingly, a regular practice of village schools is to enrol Roma children at the beginning of the school year, to transport them for a month or so from distant neighbourhoods to the village schools, and then when the school files the appropriate documentation and receives the school subsidy, to immediately stop transport of the children, who are later reported as drop-outs. There is no State or municipality mechanism that would require the school authorities to monitor the presence of their students regularly.<sup>58</sup>

Recent data for 2005 from the Ministry of Education and Science put the figure of Roma students educated in pre-schools and schools with more than 50 per cent Roma children and students in the towns of 22 regions at 30,421.<sup>59</sup> Of these, 2,464 are in pre-schools and 27,957 are in schools. This figure, as well as all official governmental enrolment data for the schools, is based on the official enrolment records of the schools, not on the number of students actually attending.

Starting in 2001, the Open Society Foundation, Sofia (OSF-Sofia), has conducted research on segregated schools touching on different aspects – their number,

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<sup>54</sup> European Roma Rights Center, *Stigmata: Segregated Schooling of Roma in Central and Eastern Europe, a Survey of Patterns of Segregated Education of Roma in Bulgaria, the Czech Republic, Hungary, Romania, and Slovakia*, Budapest: ERRC, 2005 (hereafter, ERRC, *Stigmata*), p. 22. The ERRC report cites a 2001 publication of Yosif Nunev, “Анализ на състоянието на училищата, в които се обучават ромски деца” (Analysis of the Current Status of Schools with Roma Enrolment), *Стратегии на образователната политика* (Strategies for Policy in Science and Education), MES, special issue, 2002, p. 117 (hereafter, Nunev, “Analysis of the Current Status of Schools with Roma Enrolment”). Nunev’s estimate is based on data from the Regional Inspectorates of Education of the Ministry of Education and Science. This is probably the source for the NCEDI estimate as well.

<sup>55</sup> UNDP, *Avoiding the Dependency Trap: the Roma in Central and Eastern Europe*, Bratislava: UNDP, 2002 (hereafter, UNDP, *Avoiding the Dependency Trap*), p. 55.

<sup>56</sup> IMIR, *Final Report on Minority Education*, p. 14.

<sup>57</sup> OSI Roundtable, Sofia, June 2006.

<sup>58</sup> Case study Vidin.

<sup>59</sup> Information provided by Yosif Nunev, State expert at the Ministry of Education and Science, in February 2006, based on data from the Regional Inspectorates of Education of the Ministry of Education and Science. Roma ethnicity was determined by the inspectorates. See Nunev, *Analysis of the Roma Schools*, unpublished document, provided by Yosif Nunev to EUMAP, November 2006.

distribution by regions, relationships to the Roma ghettos, and material conditions.<sup>60</sup> In the course of this study, OSI-Bulgaria researchers interviewed school directors and teachers, municipal officials and officials at the Regional Inspectorates of Education. According to the most recent report, out of the total 2,657 schools of general education and 127 special schools in Bulgaria, the total number of schools with more than 50 per cent Roma students in 2005 was 554 (or almost 20 per cent of the total number of schools).<sup>61</sup> There were 960 schools with more than 30 per cent Roma students (35 per cent of the total number of schools).<sup>62</sup> One of the observations of the report was that a school that has more than 30 per cent Roma students tends to be quickly transformed into a “Roma school” because of “white flight”, where non-Roma parents withdraw their children from the school. Research on school desegregation in several Bulgarian cities supported this observation.<sup>63</sup> There were 960 schools (out of a total of 2,657 schools of general education and 127 special schools) with more than 30 per cent Roma students in 2005.<sup>64</sup>

An example of this phenomenon is the P. R. Slaveykov Primary School in Pavlikeni (Pavlikeni Municipality, Veliko Turnovo district), which has been gradually become segregated over the last six years. The school is situated between the Roma and the Bulgarian neighbourhoods, and six years ago children of both areas used to study in school together. At present, however, all the Bulgarian children are enrolled in a more distant school with predominantly Bulgarian pupils.<sup>65</sup> These children go on foot to the other school, which is further away than the P. R. Slaveykov Primary School, although still within walking distance.

A 2001 study by the Ministry of Education and Science provided comprehensive data on the distribution of residentially segregated Roma schools with close to 100 per cent Roma enrolment by regions, a picture that remains valid (see Table 13).

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<sup>60</sup> To date OSF-Sofia has published three reports: *Roma Schools in Bulgaria – 2001*, *Roma Schools in Bulgaria – 2002–2003* and *Roma Schools in Bulgaria – 2005*. The first of these reports exists in English; the other two are available only in Bulgarian. They are available at <http://www.osi.hu/esp/rei/romaschools.bg.osf/bg/objectives.html> (accessed on 20 February 2007).

<sup>61</sup> OSF-Sofia, *Roma Schools in Bulgaria – 2005*, p. 6. Roma ethnicity is determined by the officials interviewed.

<sup>62</sup> OSF-Sofia, *Roma Schools in Bulgaria – 2005*, p. 6.

<sup>63</sup> Krassimir Kanev, *The First Steps: An Evaluation of the Nongovernmental Desegregation Project in Six Bulgarian Cities*, Sofia, Budapest: OSI, 2003, pp. 15 and 22.

<sup>64</sup> OSF-Sofia, *Roma Schools in Bulgaria – 2005*, p. 6.

<sup>65</sup> Case study Veliko Turnovo.

**Table 13: Distribution of Roma children and of schools with close to 100 per cent Roma enrolment – breakdown by region (2001)**

Region	Total number of children in school and of pre-school age			Total number of schools and pre-schools with 100 per cent Roma enrolment
	Total population	Roma children		
		Total	As a share of total population (per cent)	
Blagoevgrad	51,604	2,344	4.5	2
Bourgas	57,581	6,246	10.8	4
Dobrich	29,968	1,131	3.7	5
Gabrovo	17,274	1,386	8.0	3
Haskovo	23,628	4,871	21.0	5
Kurdjali	25,221	1,524	6.0	4
Kyustendil	21,505	1,606	7.0	3
Lovech	21,517	1,003	4.6	0
Montana	23,185	6,231	27.0	6
Pazardjik	36,736	6,930	19.0	10
Pernik	19,006	1,524	12.5	0
Pleven	40,199	5,060	12.5	4
Plovdiv	77,129	10,315	13.4	5
Razgrad	21,776	2,068	9.5	0
Rousse	34,147	3,113	9.0	2
Shumen	29,008	4,063	14.0	5
Silistra	17,076	1,922	11.3	5
Sliven	29,492	5,645	19.0	5
Smolian	22,443	231	1.0	0
Sofia – city	146,526	2,405	1.7	6
Sofia – region	31,290	5,192	16.6	6
Stara Zagora	50,209	7,228	14.4	6
Turgovishte	19,099	3,122	16.0	6
Varna	59,691	7,259	12.0	4
Veliko Turnovo	37,620	3,238	8.6	3
Vidin	15,154	2,735	18.0	2
Vratsa	29,248	4,802	16.4	1
Yambol	20,212	2,972	15.0	4
<b>TOTAL</b>	<b>1,007,544</b>	<b>106,166</b>	<b>10.5</b>	<b>106</b>

Source: Nunev<sup>66</sup><sup>66</sup> Nunev, “Analysis of the Current Status of Schools with Roma Enrolment,” pp. 110–144.

According to a 2002 Bulgarian Helsinki Committee research project into schools for children with intellectual disabilities, Roma represented at least 51 per cent of their total student body.<sup>67</sup> A more recent evaluation of the State Agency for Child Protection (SACP) put the number of ethnic Bulgarian children in special schools<sup>68</sup> at 42.5 per cent of such schools' total student body as of 31 December 2004. The rest were minority (Roma, Turkish and other), plus 1.9 per cent undecided).<sup>69</sup> In some schools the share of Roma students reaches 90–100 per cent.

The past five years saw some reduction of the number of special schools for children with intellectual disabilities, as well as a reduction of the number of children enrolled in them, as seen in Table 14.

**Table 14: Children enrolled in special schools for children with intellectual disabilities (2000–2005)**

School year	Total no. of special schools	Total no. of children enrolled
2000–2001	76	9,581
2001–2002	76	9,489
2002–2003	75	9,193
2003–2004	73	8,655
2004–2005	72	7,996

Source: NSI<sup>70</sup>

There is good reason to believe that the decrease shown in the tables above is a result more of the recent demographic trend of general decrease of the population in Bulgaria and less of some planned governmental policy.<sup>71</sup> Over a period of 15 years after 1989 the overall population in Bulgaria decreased by 1.2 million. It was 8,987,000 in 1988,

<sup>67</sup> Bulgarian Helsinki Committee, *Помощните училища в България* (Remedial Schools in Bulgaria), Sofia: ВНС, 2002 (hereafter, ВНС, *Remedial Schools in Bulgaria*), p. 7.

<sup>68</sup> Remedial schools are one type of special schools. The other types include schools for delinquent children, hospital schools, and so on. Remedial schools are the most numerous in the special school system.

<sup>69</sup> State Agency for Child Protection, “Право на образование за децата със специални образователни потребности” (Right to Education for Children with Special Educational Needs), *Бюлетин на ДАЗД* (Newsletter of the SACP), No. 2/2005 (hereafter, SACP, “Right to Education for Children with Special Educational Needs”), p. 81.

<sup>70</sup> NSI, *Education in Bulgaria – 2005*, p. 47.

<sup>71</sup> OSI Roundtable, Sofia, June 2006.

7,929,000 around 1 March 2001 (at the time of the census), and dropped further to 7,801,000 at the end of 2003.<sup>72</sup>

As shown below in Table 15, over the last five years there has been a general trend of a reduction in the total number of children in grades one to eight, for both general schools and for special schools for children with intellectual disabilities (remedial schools).<sup>73</sup> This reduction has been similar for both general schools and special schools – as compared to 2000–2001, there was a reduction of 81.4 per cent in general schools and 83.5 per cent in special schools.

**Table 15: Enrolment trends in grades 1–8 in general and special schools (2000–2005)**

School Year	Reduction (per cent) as compared to 2000–2001	
	General schools	Special schools
2000–2001	100	100
2001–2002	95.6	99.0
2002–2003	92.0	96.0
2003–2004	87.1	90.3
2004–2005	81.4	83.5

Source: NSI<sup>74</sup>

The boarding schools for children with behavioural challenges in Bulgaria can be considered as a distinct system of segregated Roma education. Formally, according to

<sup>72</sup> Ivan Balev and Sergei Cvetarski, “Демографски процеси и бъдещи тенденции в развитието на населението на България” (Demographic Processes and Future Tendencies in the Population Development in Bulgaria), in Mihail Ivanov and Atanas Atanasov (eds.), *Демографско развитие на Република България* (Demographic Development of the Republic of Bulgaria), Sofia: NCCEDI etc., 2005 (hereafter, Ivanov and Atanasov (eds.), *Demographic Development of the Republic of Bulgaria*), p. 11.

<sup>73</sup> Calculation based on NSI, *Education in Bulgaria – 2005*, p. 47, and NSI, *Education in Bulgaria – 2006*, p. 101. Tendencies are presented as shares from the general number of students and the number of those enrolled in remedial schools by years, the 2000–2001 school year being the 100 per cent basis.

<sup>74</sup> NSI, *Education in Bulgaria – 2005*, p. 47.



the Rules and Regulations for the Application of the National Education Act, these are institutions for children with “deviant behaviour”.<sup>75</sup>

There are two types: social-pedagogical boarding schools and correctional boarding schools. The major difference between the two types is in the regime, which tends to be stricter in the latter. According to a 2001 BHC study, minority (mainly Roma) children in these boarding schools represent between 60 and 70 per cent of the entire student body and reach 95 per cent in some of them.<sup>76</sup> This research, as well as a subsequent BHC study, revealed serious flaws in placement, education and rehabilitation of children in these institutions, as well as a variety of human rights abuses, including physical violence.<sup>77</sup> In some of these, mostly village schools, local Roma children are enrolled and classified as juvenile delinquents solely because this is the only school in the locality.<sup>78</sup>

According to some, these places are, in fact, for the deprivation of liberty for the purposes of compulsory educational supervision. Some parents perceive these types of boarding schools as a way of removing Roma children from their own parents’ care.<sup>79</sup> The institutionalisation of Roma children in these “delinquent schools” has also been characterised as an illegal procedure for which school headmasters should be made liable.<sup>80</sup>

In the 2004–2005 school year there were 24 such schools in Bulgaria. While placement in these schools was subject to reform on two occasions in the last ten years, no attempts at comprehensive re-evaluation of the policy regarding the existence and the purpose of these schools have ever been made. The *National Programme for Child Protection 2006* talks about “restructuring and reforming” these institutions through individualising the work with the students placed there, training the staff and re-evaluation of the placement of children placed there for social reasons.<sup>81</sup> Their curriculum is the same as in the

<sup>75</sup> Ministry of Education and Science, Rules and Regulations for the Application of the National Education Act, *Official Gazette*, No. 68, 30 July 1999, with many amendments, the latest one from 24 February 2004 (hereafter, *Rules and Regulations for the Application of the National Education Act*), Art. 66, para. 1, section 6.

<sup>76</sup> Bulgarian Helsinki Committee, *Социално-педагогически и възпитателни училища-интернати* (Social-Pedagogical Boarding Schools and Correctional Boarding Schools), Sofia: BHC, 2001 (hereafter, BHC, *Social-Pedagogical Boarding Schools and Correctional Boarding Schools*), pp. 391–392.

<sup>77</sup> Cf. Bulgarian Helsinki Committee, *В името на институцията: поправителните училища в България* (In the Name of the Institution: Schools for Delinquent Children in Bulgaria), Sofia: BHC, 2005 (hereafter, BHC, *In the Name of the Institution*).

<sup>78</sup> BHC, *Social-Pedagogical Boarding Schools and Correctional Boarding Schools*, p. 19.

<sup>79</sup> OSI Roundtable, Sofia, June 2006.

<sup>80</sup> OSI Roundtable, Sofia, June 2006.

<sup>81</sup> State Agency for Child Protection, *Национална програма за закрила на детето за 2006 г.* (The National Programme for Child Protection for 2006), available at [http://www.stopech.sacp.government.bg/?sid=professional\\_bg&pid=0000000074](http://www.stopech.sacp.government.bg/?sid=professional_bg&pid=0000000074) (accessed on 20 February 2007).

schools of general education. The quality of teaching, however, is very poor, and, given the overall educational and social conditions in which these children are placed, their chances for meaningful integration in society are very poor.

Trends in enrolment in boarding schools for children with behavioural challenges for the past five years indicate some decrease (see Table 16).

**Table 16: Children enrolled in boarding schools for children with behavioural challenges (2000–2005)**

School year	Total no. of students
2000–2001	3,054
2001–2002	2,749
2002–2003	2,522
2003–2004	2,264
2004–2005	1,963
2005–2006	1,340

Source: NSI<sup>82</sup>

Thus the 2005–2006 school year enrolment in the schools for children with behavioural challenges was 43.9 per cent of the 2000–2001 school year enrolment. The decrease is probably due to the difficulties in complying with the reformed procedure, which better safeguards against arbitrariness.

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<sup>82</sup> Calculation based on NSI, *Education in Bulgaria – 2005*, p. 47, and NSI, *Education in Bulgaria – 2005*, p. 45.

### 3. GOVERNMENT EDUCATIONAL POLICIES AND PROGRAMMES

*The Government of Bulgaria has adopted both programmes aimed at improving the situation of Roma that include a section on education, and programmes targeting education that contain measures aimed at minority groups including Roma, with very little evidence of impact or implementation on the local level. The National Programme for the Development of School Education and Pre-School Upbringing and Instruction, adopted in June 2006, retreats from earlier commitments made towards desegregation, and does not address many of the specific problems identified in the Government's own Action Plan for the Decade of Roma Inclusion 2005–2015 (Decade Action Plan) in 2005. This divergence should be resolved through the adoption of a comprehensive policy for Roma education, supported by appropriate legislative and financial measures. Earlier Government programmes to eliminate segregation in education have not been implemented, even as NGO-led desegregation initiatives have been expanding at the local level and could serve as useful models for a more comprehensive Government approach. A clear vision and concrete instruments for implementation, including appropriate financial resources, is needed, along with specific monitoring instruments to assess longer-term success rates.*

*Despite need and confirmed benefits demonstrated at the local level, just over 100 Roma teaching assistants have been appointed to work as classroom facilitators throughout the country. Many municipalities, however, do not have the resources to hire such assistants. Likewise, there are very few teachers of Romani language working in schools at present. While Roma traditions and culture are presented in some textbooks, stereotypical or even biased material about Roma still appears in classroom materials. Measures must be enacted to right this situation. A variety of training opportunities are available for teachers in areas relevant to Roma education, but the impact of such courses is not clear. Better monitoring of these important areas would provide the Government with a better basis for ongoing policy development.*

#### 3.1 Main Government policy documents

The main document that defines Government policies towards Roma is the *Framework Programme for the Equal Integration of Roma in Bulgarian Society*<sup>83</sup> (hereafter, *Framework Programme*), which was adopted by the Council of Ministers in April 1999.<sup>84</sup> In the education section, the *Framework Programme* outlines four major problems with Roma education:

<sup>83</sup> Government of Bulgaria, *Рамкова програма за равноправно интегриране на ромите в българското общество* (Framework Programme for the Equal Integration of Roma in Bulgarian Society) (hereafter, *Framework Programme*). Although adopted as an official Government document, the *Framework Programme* has never been published in the *Official Gazette*. Only as late as 2004 was it placed on the website of the National Council of Ethnic and Demographic Issues at <http://www.ncedi.government.bg/> (accessed on 20 February 2007).

<sup>84</sup> EUMAP prepared a full-length report analysing the content and implementation of the *Framework Programme* in 2002. EUMAP, *Minority Protection in Bulgaria*, Budapest: OSI, 2002, available at [http://www.eumap.org/reports/2002/minority/international/sections/bulgaria/2002\\_m\\_bulgaria.pdf](http://www.eumap.org/reports/2002/minority/international/sections/bulgaria/2002_m_bulgaria.pdf) (accessed on 20 February 2007) (hereafter, EUMAP, *Minority Protection in Bulgaria – 2002*).

- Territorial segregation of Roma schools;
- Arbitrary placement of Roma students in special schools for children with intellectual disabilities;
- Lack of mother-tongue instruction;
- Low educational status of the adult Roma population.

The *Framework Programme* develops six strategic objectives:

- Desegregation of Roma education;
- Termination of the practice of arbitrary placement of Roma children in special schools for children with intellectual disabilities;
- Combating racism in the classroom;
- Introduction of mother-tongue education;
- Support of Roma university education;
- Adult education.

In addition to its limited implementation, the *Framework Programme* is also now regarded as outdated,<sup>85</sup> and its section on education has largely been supplanted by a specialised Government programme on education (see section 3.2). This new policy does not specifically target Roma, however.

The Government advanced its own Action Plan for the “Decade of Roma Inclusion 2005–2015”<sup>86</sup> (*Decade Action Plan*). This consists of a table of goals, targets, and activities, with a timeframe, financing and indicators for implementation.<sup>87</sup> The *Decade Action Plan* makes education its first priority, and includes the following as specific targets:

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<sup>85</sup> OSI Roundtable, Sofia, June 2006.

<sup>86</sup> The “Decade of Roma Inclusion 2005-2015”, an initiative supported by the Open Society Institute (OSI) and the World Bank, is an unprecedented international effort to combat discrimination and ensure that Roma have equal access to education, housing, employment and health care. Launched in February 2005 and endorsed by nine Central and Eastern European countries, the Decade is also supported by the European Commission, the Council of Europe, the Council of Europe Development Bank, and the United Nations Development Program. For further details, see the Decade website ([www.romadecade.org](http://www.romadecade.org)).

<sup>87</sup> Government of Bulgaria, *National Action Plan for the Decade of Roma Inclusion, 2005–2015* (hereafter, *Decade Action Plan*). Available in English alongside those of the eight other countries on the website of the Decade at <http://www.romadecade.org/action.htm> (accessed on 20 February 2007).

- Ensuring legal guarantees for equal integration and an institutional mechanism for the adequate integration of Roma children through amendments to the legal framework;
- Creating conditions for equality and adaptation of Roma children within the new educational environment;
- Desegregating schools and pre-schools in Roma settlements;
- Reducing drop-outs, and reintegrating children who have already dropped out;
- Promoting Roma culture and traditions;
- Improving attitudes towards Roma in the school community.

Since the adoption of the *Decade Action Plan*, the Government has released a number of documents that were supposed to constitute its implementation, none of which addressed the sphere of education.<sup>88</sup>

The *Needs Assessment Report*<sup>89</sup> created for the Roma Education Fund (REF) outlined several actions that the Government should take to improve the situation for Roma education. These actions fall into three groups:

- Desegregation of Roma or prevalingly Roma schools, and improving the quality of education in village schools with high numbers of Roma students;
- Improving the preparation of Roma children prior to enrolment in the first grade;
- Transferring Roma without disabilities from special schools for children with intellectual disabilities to other schools.

Though not apparent from the overarching goals of the *Decade Action Plan*, there is consistency between the actions outlined in the *Needs Assessment Report*, and the targets and actions that were subsequently developed in the *Decade Action Plan*. Those, specifically, address desegregation in many ways. In terms of “improving the

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<sup>88</sup> For example, Ministry of Health, *Здравна стратегия за лица в неравностойно положение, принадлежащи към етнически малцинства* (Health Strategy for Persons in Unequal Social Status, Belonging to Ethnic Minorities), available at <http://www.nccedi.government.bg> (accessed on 20 February 2007), and *Национална програма за подобряване жилищните условия на ромите в Република България за периода 2005–2015 г.* (National Programme for the Improvement of the Housing Conditions of Roma in the Republic of Bulgaria for the Period 2005–2015), available at <http://www.mrrb.government.bg> (accessed on 20 February 2007);

<sup>89</sup> REF, *Needs Assessment Study for the REF Background Paper, 2004*, available at [http://www-wds.worldbank.org/external/default/WDSContentServer/WDSP/IB/2006/02/28/000090341\\_20060228103723/Rendered/PDF/352030BU0NARreport.pdf](http://www-wds.worldbank.org/external/default/WDSContentServer/WDSP/IB/2006/02/28/000090341_20060228103723/Rendered/PDF/352030BU0NARreport.pdf) (accessed on 20 February 2007).

preparation of Roma children for enrolment into grade 1”, the Plan addresses the training of teaching assistants, and the desegregation of Roma pre-schools.

### 3.2 Government education policies

On 7 June 2006, Parliament adopted the *National Programme for the Development of School Education and Pre-School Upbringing and Instruction*<sup>90</sup> (hereafter, *National Programme*). This envisages the introduction of systems of internal and external evaluation in the entire education system, differential remuneration of teachers depending on their achievement, and decentralisation of management. It stipulates that all children should have an “equal start” and that there should be “special care” for “children who do not speak Bulgarian well”, as well as for “children with special educational needs”.<sup>91</sup> This programme has no binding legal force and is to be implemented by passing the necessary regulations.

The *National Programme* is much less progressive on school desegregation than the *Framework Programme* or the 2004 *Strategy for the Educational Integration of Children and Pupils from Ethnic Minorities*,<sup>92</sup> and is in general a step back from the commitments already undertaken by the Government. Although it proposes placing minority children in an “integrating environment”, it deals with transport of children only in the context of the “optimising of the school network and developing of the system of hub schools”. On the integration of children with disabilities the *National Programme* envisages the “creating of a supporting environment” and the “supplying of special textbooks and school materials”, but does not deal with the integration of children with intellectual disabilities, into mainstream schools. There is nothing in the programme on mother-tongue education and none of the other strategic objectives envisaged by the *Framework Programme* (combating racism, providing adult education, and so on) are dealt with in the *National Programme*. The goals of the *Decade Action Plan* have also not been taken into consideration by this newest programme. As for the

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<sup>90</sup> Ministry of Education and Science, *Национална програма за развитие на училищното образование и предучилищното възпитание и подготовка 2006–2015* (National Programme for the Development of School Education and Pre-School Upbringing and Instruction), adopted by Parliament on 7 June 2006, available on the MES website at [http://www.minedu.government.bg/opencms/export/sites/mon/documents/frontpage/MON\\_Programa\\_образование.pdf](http://www.minedu.government.bg/opencms/export/sites/mon/documents/frontpage/MON_Programa_образование.pdf) (accessed on 20 February 2007) (hereafter, *National Programme for the Development of School Education and Pre-School Upbringing and Instruction*).

<sup>91</sup> *National Programme for the Development of School Education and Pre-School Upbringing and Instruction*, Section I.

<sup>92</sup> Ministry of Education and Science, *Стратегия за образователна интеграция на децата и учениците от етническите малцинства, Одобрена от министъра на образованието и науката на 11 юни 2004 г.* (Strategy for Educational Integration of Children and Pupils from Ethnic Minorities), adopted by the MES on 11 June 2004, available on the MES website at [http://www.minedu.government.bg/opencms/export/sites/mon/left\\_menu/documents/strategies/s\\_trategy\\_integration.pdf](http://www.minedu.government.bg/opencms/export/sites/mon/left_menu/documents/strategies/s_trategy_integration.pdf) (accessed on 20 February 2007) (hereafter, MES, *Strategy for Educational Integration of Children and Pupils from Ethnic Minorities*).

pedagogical practices, they presumably should be an integral part of the “supporting environment”. However, the Government has passed no regulations regarding the State educational standards in that regard.

On 29 June 2006, the Council of Ministers adopted an *Action Plan for Implementing the Framework Programme*.<sup>93</sup> The section on education in this document stresses measures to prevent dropping out, qualification of pedagogical personnel, study of a mother tongue, reduction of special schools and professional education. In line with the *National Programme*, however, it again does not mention desegregation and does not envisage measures in that regard.

The Government has also introduced three types of measures to reduce dropping out of the education system for children from low-income families:

- Progressive offering of free textbooks. All students from the one-year obligatory pre-school and grades one to four are at present eligible to receive free manuals.<sup>94</sup>
- Covering transport costs and providing boarding. All children who do not have schools in their place of residence are eligible to have their costs for transport covered to the “hub” school where they are enrolled. Alternatively, they should be provided with boarding at that school.<sup>95</sup> These provisions, however, do not envisage covering the transport costs of students when they enrol in mainstream schools in the city, but only cover the costs for travel between cities and villages.
- Offering social security benefits to cover pre-school taxes, food in the schools and school supplies.<sup>96</sup>

On 25 February 2005, Parliament adopted the *National Programme for Broadening the Participation of Children of Compulsory Age in School*.<sup>97</sup> It envisages three modules:

<sup>93</sup> Government of Bulgaria, *План за действие за изпълнение на Рамковата програма за равноправно интегриране на ромите в българското общество за 2006 г.* (Action Plan for the Implementation of the Framework Programme for the Equal Integration of Roma in Bulgarian Society), adopted on 29 June 2006, available at <http://www.nccedi.government.bg> (accessed on 23 February 2007).

<sup>94</sup> The measure has been fully in effect since April 2005 with the amendments of Decree No. 104 of the Council of Ministers for the adoption of an Ordinance for the Textbooks and School Manuals, *Official Gazette*, No. 34, 19 April 2005.

<sup>95</sup> *Rules and Regulations for the Application of the National Education Act*, Art. 37, para. 7. The measure has been in effect since March 2003.

<sup>96</sup> Council of Ministers, *Rules and Regulations for the Application of the Social Assistance Act*, *Official Gazette*, No. 133, 11 November 1998, with many amendments, the last one from 23 December 2005.

<sup>97</sup> National Assembly, *Национална програма за обхващане на учениците в задължителна училищна възраст* (National Programme for Broadening the Participation of Children of Compulsory Age in School), adopted by Parliament on 25 February 2005.

ensuring free textbooks and school supplies for students from the first to the fourth grade, reducing the network of schools by closing existing schools in small villages and offering bussing for students up to 16 years of age to “hub” schools, and supplying one free meal for all the students from the first to the fourth grade. In May 2006 Parliament updated this plan. According to a report by the Ministry of Education and Science from 2 September 2005, by that date the State budget had secured 15,390,000 levs (€7,892,307) to implement that programme. This money was used to buy 219 school buses to provide transport to “hub” schools. According to the Ministry, however, there is a need for at least twice as many.<sup>98</sup> According to a later report of the Ministry, the buses served 13,140 students from 134 municipalities and 219 schools.<sup>99</sup>

Another important policy document for Bulgaria that recognises school segregation of Roma is the *Strategy for Educational Integration of Children and Pupils from Ethnic Minorities*,<sup>100</sup> adopted by the Ministry of Education and Science on 11 June 2004 (see section 3.3).

Since its inception in 2005 the Roma Education Fund has financed several projects in Bulgaria, many of which are co-funded and implemented by the Government. These projects are mentioned in the relevant sections below to which they pertain.

Bulgarian legislation on the study and the use of minority language is restrictive and discriminatory in two important aspects. It guarantees the right to study one’s mother tongue, but not the right to receive education in it. In addition, minority students (many of them Roma) in remedial schools for children with intellectual disabilities and schools for children with behavioural challenges are denied the possibility to study their own language, in a clearly unconstitutional and discriminatory way.

Council of Minister’s Decree No. 183/1994 provides for a mother tongue to be studied as a “free elective subject” within the general curriculum for the basic school (first to eighth grades).<sup>101</sup> This means that the students do not receive any grades and the subject does not contribute to the cumulative assessment for completion of the basic educational level. Another problem with this decree is that it restricts the right of secondary students to study their mother tongue, in contradiction to the National Education Act, which guarantees this right to all the students. In 1999, with the adoption of the Law for the Degree of Education, the General Education Minimum and the Education Plan, study of the mother tongue became an “obligatory elective”

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<sup>98</sup> The report is available in Bulgarian at <http://kei.parliament.bg/?page=plSt&lng=bg&SType=show&id=8> (accessed on 14 March 2006).

<sup>99</sup> Minutes of the meeting of the Parliamentary Committee on Education and Science from 10 May 2006, adopted on 11 June 2004, available at <http://www.parliament.bg>.

<sup>100</sup> MES, *Strategy for Educational Integration of Children and Pupils from Ethnic Minorities*.

<sup>101</sup> Council of Ministers, Decree No.183 on the Study of Mother Tongue in the Municipal Schools in Bulgaria from 5 September 1994, *Official Gazette*, No.73, 9 September 1994.



subject,<sup>102</sup> which is offered in addition to the compulsory curriculum on students' or parents' choices, within regular school hours, and students receive grades on it both during and at the end of the year. The grade contributes to the students' annual cumulative assessment.<sup>103</sup> Making mother-tongue study an obligatory elective subject allowed secondary school students to study it as well. The 1999 law repeals the provision of Decree 183/1994 for free elective mother-tongue study by requiring that it becomes "obligatory elective". Decree 183/1994, however, was not repealed entirely, as it has some provisions that are still in force.

Romanes has been recognised as a mother tongue, one that can be taught as such in the municipal basic schools, since the adoption of the National Education Act in 1991. At present Romanes as a mother tongue in Bulgaria can be studied as an "obligatory elective" subject in the national education system if there are 11 students to form a group for three hours per week in the first grade and between the fifth and the eighth grade, and for two hours per week between the second and the fourth grade (groups can be from one class or mixed, from different classes).<sup>104</sup> Its teaching, however, has never been organised to reach a significant share of the Roma population, and has declined in recent years.

There have been no evaluations of any governmental programmes with regard to their effect on Roma specifically. Case studies at the local level indicate that awareness of these programmes is good, but their impact has been limited. Local journalists in Vidin, for example, are aware of the *Strategy for the Educational Integration of Children and Students from Ethnic Minorities*, and the *Decade Action Plan*, but do not know of any specific governmental and local public policies for direct involvement in the desegregation of Roma education. School directors also confirmed that there are no such programmes functioning at the school level. There are a few examples of national programmes that have been introduced to schools in Vidin, but these do not have a direct linkage to the development of an integrated school environment. The opening of a new study for informatics under the programme "e-class" or courses for computer literacy were mentioned as examples by two school directors, as was the transport of Roma children to schools from one village to another village, mentioned by the deputy mayor of Vidin Municipality.<sup>105</sup>

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<sup>102</sup> Law for the Degree of Education, the General Education Minimum, and the Education Plan, *Official Gazette*, No.67, 27 July 1999, the latest amendment from 14 May 2004, Art. 15, para. 3 (hereafter, *Law for the Degree of Education, the General Education Minimum, and the Education Plan*).

<sup>103</sup> *Rules and Regulations for the Application of the National Education Act*, Art.111, para.1.

<sup>104</sup> Ministry of Education and Science, Ordinance No.7 on the Number of Students and Children in School and Kindergarten Classes, *Official Gazette*, No.4 , 12 January 2001, the latest amendment from 3 October 2003, Art.26.

<sup>105</sup> Case study Vidin.

These research findings on the local level suggest a very loose connection between national documents and policies, on the one hand, and local concrete measures taken by the school staff or local authorities under the aegis of national or international initiatives in which Bulgaria takes part, on the other. One weak point of the governmental programmes aiming to improve the education of Roma is the lack of any elaborated mechanism for monitoring and evaluation. This structural weakness of governmental educational policies raises, in turn, serious questions about the efficiency of these programmes as well as about their potential for development and replication. Delays in implementation after policy documents have been elaborated and disseminated risk further decreasing Government credibility in the field of education for Roma.

### 3.3 Desegregation

The *Framework Programme for the Equal Integration of Roma in Bulgarian Society* from April 1999 acknowledges school segregation as one of the major problems of Roma education. It treats segregation as a form of discrimination and requires that the Government adopt concrete measures for desegregation. The *Strategy for the Educational Integration of Children and Students from Ethnic Minorities* requires “full integration of the Roma children and students through desegregation of pre-schools and schools in segregated Roma neighbourhoods”.

In September 2002, the Ministry of Education and Science issued its annual instructions on the organisation and regulation of school activities, including a new annex entitled “Guidelines for the Integration of Children and Students from Minorities”.<sup>106</sup> These instructions direct municipalities to create their own programmes for the gradual integration of Roma with their peers from schools outside segregated settlements. The closure of Roma schools is not advised until local communities have been adequately prepared for integration. However, the instructions do not have a binding power on the municipal authorities, which are the only ones that can organise desegregation and close down segregated schools. Thus the instruction, just like the other documents adopted by the Ministry of Education and Science, has remained a piece of paper.

The structures dealing with the desegregation of Roma schools are the municipal governments. They are responsible for opening and closing of the schools of general education and kindergartens on the territory of their municipality. They are expected to ensure a significant share in the financing of the school and pre-school networks. The Regional Inspectorates of Education of the Ministry of Education and Science can also have a role in developing desegregation policies.

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<sup>106</sup> Ministry of Education and Science, *Organisation and Management of the Activities in the School of General Education, Professional and Special Schools during the 2002–2003 Year*, Annex 10: “Guidelines for the Integration of Children and Students from Minorities”, Sofia: MES, 2002.

There were two programmes for dismantling segregation developed by the Bulgarian Government, both not implemented. First, in September 2003, the Government developed an *Action Plan for the Implementation of the Framework Programme for the Equal Integration of Roma in Bulgarian Society for the Period 2003–2004*.<sup>107</sup> It envisaged identifying integrated schools for the purposes of school desegregation by January 2004 and developing models for enrolling Roma students in them. The municipalities were obliged to ensure transport of Roma children where needed. None of these measures was implemented.

The second programme was developed in February 2005 on the eve of the opening of the Decade of Roma Inclusion; the Government's *Decade Action Plan* has much in terms of desegregation, with many targets dealing specifically with it, from a legal and an implementation perspective. The *Decade Action Plan* targets physical desegregation of children from segregated geographical settings as well as actions for handling desegregation from special schools.<sup>108</sup> It envisaged the creation of a centre for the educational integration of children and students from ethnic minorities within the Ministry of Education and Science as a special governmental fund, supposed to finance projects for school desegregation. The plan envisaged 1,000,000 levs (€500,000) for 2005 as seed money. The plan also envisaged developing municipal programmes and plans with concrete schedules for closing segregated schools and pre-schools and ensuring the necessary transport. The plan, however, did not secure any funds for the implementation of these activities. A law for the establishment of this centre for the educational integration of children and students from ethnic minorities was rejected by Parliament in October 2004 already at the first reading. In response, the Government established it by a decree of the Council of Ministers in January 2005.<sup>109</sup> After a long delay, in May 2006 the Council of Ministers adopted the Rules and Regulations for the Structure, Activities and the Organisation of the Centre for the Educational Integration of Children and Students from Ethnic Minorities.<sup>110</sup>

Since 1999 three governments of Bulgaria have failed to deliver on their commitments to desegregate Roma education. Soon after the adoption of the *Framework Programme for the Equal Integration of Roma in Bulgarian Society*, several NGOs started

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<sup>107</sup> Government of Bulgaria, *Action Plan for the Implementation of the Framework Programme for the Equal Integration of Roma in Bulgarian Society for the Period 2003–2004*, September 2003, available at <http://ethnos.bg/index.php?TPL=2&MID=89&SID=276> (accessed on 23 February 2007).

<sup>108</sup> *Decade Action Plan*, targets 1.1.1 through 1.2. 4.

<sup>109</sup> Council of Ministers, Decree No. 4 on the Establishment of a Centre for the Educational Integration of Children and Students from Ethnic Minorities, *Official Gazette*, No. 7, 19 January 2005.

<sup>110</sup> Council of Ministers, Decree No. 108 from 8 May 2006 on the Adoption of the Rules and Regulations for the Structure, Activities and the Organisation of the Centre for Educational Integration of the Children and Students from Ethnic Minorities, *Official Gazette*, No. 40, 16 May 2006.

implementing desegregation projects funded by the OSI's Roma Participation Programme and later by the Roma Education Fund. They enrol children from the Roma neighbourhoods in mainstream schools in eight Bulgarian cities: Vidin, Pleven, Montana, Stara Zagora, Sliven, Haskovo, Sofia and Plovdiv. More than 2,000 students successfully participated in these programmes during the 2004–2005 school year. In addition to organising their transport to the mainstream schools the projects ensure additional educational support and supervision of the Roma students, as well as extracurricular activities. The May 2005 evaluation of the projects showed that Roma students from integrated classes perform better at school even when they come from families with lower socio-economic status.<sup>111</sup>

In one of these projects in the town of Vidin, as of April 2006, there were 633 Roma children (around 56 per cent of the students in Vidin Municipality). These children are transferred to the integrated mainstream schooling system with the support of the NGO Organisation Drom, which started desegregating the school in the Roma neighbourhood in 2000. Interviews with local authorities, school directors and NGO leaders indicate that the local measures for desegregation in Vidin are the sole responsibility of Organisation Drom, which involves all Vidin upper secondary schools as partners. The rest of the students in the municipality still study in segregated schools or classes.<sup>112</sup>

Close observation of several schools in Vidin Municipality showed that the school infrastructure (running water, indoor toilets and central heating) and school facilities (sport halls, equipped laboratories and libraries) are much better in the mainstream schools than those in the segregated schools, despite the fact that all schools receive subsidies according to the same criteria (see Annex 2).

In addition, a new Resource Centre for children with special educational needs was registered in the Regional Court of Vidin on 20 September 2006. Based in Vidin, it was created and is funded by the Ministry of Education and Science. The director of this new centre explained that the role of this new State agency will be to work for the integration of children with special needs and Roma pupils within the mainstream school environment in the Vidin region.<sup>113</sup> The centre claims that there are 36 children with special educational needs, of whom 27 have intellectual disabilities, who were registered by the centre as being able to study in mainstream schools for the 2006–2007 school year. None of these children, however, came from the special school.

Other localities, where there are no NGO-led desegregation efforts, have been slow to take action against segregation. The Regional Inspectorate of Education in Veliko Turnovo lists the P. R. Slaveykov Primary School in Pavlikeni as the only segregated school in the district. For several years discussions have been ongoing between the

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<sup>111</sup> BHC, *Five Years Later*.

<sup>112</sup> Case study Vidin.

<sup>113</sup> Interview with Asia Petrova, director of the Resource Centre, Vidin, 27 September 2006, Vidin.

Regional Inspectorate of Education, Pavlikeni Municipality, the segregated school and the Bulgarian-majority school in close proximity to it for merging the two schools. However, no activities have been undertaken for changing the ratio between minority and majority children in the Hristo Botev School in Veliko Turnovo, which for 2005–2006 is 75.6 per cent Roma, or for addressing several Roma-majority schools in the district's villages.<sup>114</sup>

A successful practice has been established in Gorna Oriahovitza, a neighbouring municipality. In 2003 the primary school in the Roma neighbourhood was closed after a series of discussions with the NGO, the Amalipe Centre for Interethnic Dialogue and Tolerance, and all the children integrated into a predominantly Bulgarian school near the neighbourhood. At the beginning the Roma parents were reluctant to let their children study outside the neighbourhood, all the more so as they had to travel via a railway station. To overcome this difficulty, the school director has provided daily transport for 97 students from the Roma neighbourhood.<sup>115</sup> Subsequently, the municipality assumed the responsibility for providing the transport of the children to the St. Paisij Hilendarski Primary School, which is approximately 1.5–2 kilometres from the settlement.

In addition to initiatives aimed at desegregation on an ethnic basis, in September 2003 the Council of Ministers adopted a plan for reducing the number of children in specialised institutions.<sup>116</sup> According to the *National Plan for the Integration of Children with Special Educational Needs and/or Chronic Diseases in the National Education System*,<sup>117</sup> the first goal of the plan is “inclusion of children with special educational needs without regard to the degree of disability into the educational process in all types of schools and pre-schools”.

The 2005 report of the State Agency for Child Protection (SACP) on the right to education for children with special educational needs, however, estimates that this process is slow. For the entire year 2004, only 341 children were integrated in the mainstream schools, of whom fewer than one third were integrated due to the recommendations of diagnostic teams.<sup>118</sup> The SACP has criticised the reluctance of the

<sup>114</sup> Case study Veliko Turnovo.

<sup>115</sup> Case study Veliko Turnovo.

<sup>116</sup> Council of Ministers, Decision No. 602 from 2 September 2003, published in *Newsletter of the SACP*, No. 1/2005.

<sup>117</sup> The Plan is envisaged by the National Education Act, *Национален план за интегриране на деца със специални образователни потребности и/или с хронични заболявания в системата на народната просвета* (The National Plan for the Integration of Children with Special Educational Needs and/or Chronic Diseases in the National Education System), adopted by the Council of Ministers on the recommendation of the Ministry of Education and Science. The last version is available on the MES website at [http://www.minedu.government.bg/opencms/export/sites/mon/left\\_menu/documents/strategies/plan\\_spec\\_potrebnosti.pdf](http://www.minedu.government.bg/opencms/export/sites/mon/left_menu/documents/strategies/plan_spec_potrebnosti.pdf) (accessed on 20 February 2007).

<sup>118</sup> SACP, “Right to Education for Children with Special Educational Needs,” p. 41.

diagnostic teams to direct children from special schools to mainstream schools, but does not reveal that a conflict of interest may give the teams an incentive to keep children in special schools. Teachers from the special schools are members of the diagnostic teams. However, as their jobs depend on maintaining enrolment in the special schools, they may possibly have a motive for ensuring that students continue to be placed in such schools.

Besides the desegregation projects mentioned above, the Roma Education Fund is financing several other efforts. Those projects that particularly deal with desegregation are extensive, and can be found on the Roma Education Fund website.<sup>119</sup> Many of them deal with the physical transfer of children from segregated geographical locations into integrated ones, with supports to integrating schools, while others focus on assisting municipalities to adopt concrete plans of action for implementing desegregation. These projects are seemingly in alignment with the objectives of the *Decade Action Plan*. However, most are implemented by NGOs, and their relationship to national efforts is not clear. As of October 2006, approximately 15 projects had been funded that target desegregation.

While Bulgaria has taken concrete steps towards reducing segregation, the process is slow and progress is halting. The lack of a clear vision and concrete instruments for implementation, including securing governmental financial resources, impedes it. There are no concrete monitoring instruments to assess longer-term success rates, or to ensure that a process of resegregation does not take hold.

### 3.4 Roma teaching assistants/school mediators

The need for introducing teaching assistants into the Bulgarian education system was specified in the *Framework Programme for the Equal Integration of Roma in Bulgarian Society*, Part V.I Desegregation of Roma Schools. The main objectives, duties, organisational relations and eligibility are described in the Ministerial Decree No. 5131, which specifies the job description of teaching assistants. It is also included as an activity in the *Decade Action Plan* under Goal 1, Activity 1.3.8, “Training and employment of assistant teachers in the receiving pre-schools and schools with the aim to ensure better adaptation of the children and pupils of Roma origin”.

Since the 2003–2004 school year some teaching assistants have been appointed in the municipal schools. In the 2005–2006 school year 107 Roma teaching assistants in 17 regions of the country were employed in public schools. Some are appointed by school principals, and municipalities pay their salaries; others work on different projects initiated by non-governmental organisations. The highest proportion of the teaching assistants are employed within the school desegregation projects. Table 17 below illustrates the respective shares by regions.

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<sup>119</sup> The website address for the Roma Education Fund is <http://www.romaeducationfund.org>.

**Table 17: Roma teaching assistants/school mediators  
– breakdown by region (2005)**

Region	Number of Roma Teaching Assistants/School Mediators			
	Appointed by Municipalities on a Permanent Basis	Appointed by Municipalities on a Temporary Basis	Working on Projects of NGOs	Total
1. Sofia – city	7		8	15
2. Blagoevgrad	3			3
3. Pazardzhik	2			2
4. Lom		6	4	10
5. Burgas	1			1
6. Sofia – region	1			1
7. Pleven	1		5	6
8. Sliven	2	1	22	25
9. Kyustendil	3			3
10. Stara Zagora	2		9	11
11. Shumen	1			1
12. Yambol	2			2
13. Haskovo			4	4
14. Vidin			8	8
15. Plovdiv			6	6
16. Montana	2	1	5	8
17. Rakitovo	1			1
<b>TOTAL</b>	<b>28</b>	<b>8</b>	<b>71</b>	<b>107</b>

Source: Ministry of Education<sup>120</sup>

According to the teaching assistants' model job description approved by the Ministry of Education and Science in 2003, some of the teaching assistants' responsibilities are as follows: assisting the teacher in preparing the children and the students for attaining proficiency in Bulgarian; acquiring skills for studying and for attracting children to school; facilitating the process of communication between the teacher and the students; assisting in the interaction with the parents; participating in the educational process and the out-of-school activities under the supervision of the teacher when needed;

<sup>120</sup> Information from Yosif Nunev, State expert at the Ministry of Education and Science, 20 March 2006.

assisting the teacher in choosing appropriate methods, approaches and materials for carrying out the educational process.<sup>121</sup>

The job description of the teaching assistants employed by NGOs is different. There they are usually called mediators or school coordinators/consultants, and the emphasis is more on the social than on the pedagogical functions. Monitoring segregation is not a responsibility of the teaching assistants, according to the model job description of the Ministry of Education and Science, but this is implied as a duty in the responsibilities of the teaching assistants appointed by NGOs.

Teaching assistants who are employed by the school director must comply with the requirements of the model job description. There is no such requirement for the teaching assistants employed by NGOs. Different NGOs have different criteria for appointment.

According to the legislation, the school director is the employer of teaching assistants and is responsible for the selection of any particular person chosen for such employment. All basic schools are municipal, and so the financing for teaching assistants should come from the municipal budget. The teaching assistants' labour remuneration is paid from the State budget through transfers to the municipal budgets. It is usually the minimum salary (160 levs or €80 at present), which is only a limited incentive.<sup>122</sup> Based on the model job description, the employer works out a concrete job description giving an account of the specific problems.

The major requirements, according to the model job description, are as follows: secondary education and a certificate of the professional qualification of a "teaching assistant" issued by a university. Teaching assistants employed by NGOs do not need to abide by the requirements of the model job description. Some NGO projects employ supervisors or coordinators performing tasks similar to these requirements who have lower than secondary education. The additional requirements are as follows: knowledge of the mother tongue of the children and the students; knowledge of the national culture and the ethno-culture of the children and the students; knowledge of the normative regulations in the State education system and the UN Convention for the Protection of the Rights of the Child and the Law on the Child Protection in of Bulgaria. Teaching assistants who are employed by a school director must meet these criteria.

It is entirely up to the discretion of the school director as to whether to hire a Roma teaching assistant. Every director has only a limited number of positions paid by the municipality, however, and must choose between hiring a teaching assistant and filling some other position. In Vidin, for example, there are no Roma teaching assistants

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<sup>121</sup> A full description of the job description in English is available on the Regional Inspectorate of Education website at [http://www.osi.hu/esp/rei/RTAs\\_Bulgaria.html](http://www.osi.hu/esp/rei/RTAs_Bulgaria.html) (accessed on 20 February 2007).

<sup>122</sup> A teacher at the beginning of his/her career earns approximately €150 and a teacher with 25 years of teaching experience earns about €200 a month.



appointed in the mainstream schools. It is the NGO Organisation Drom that has employed supervisors since 2000, who are Roma between 19 and 30 years old. They facilitate the transfer of Roma pupils from the Nov Pat neighbourhood to the mainstream schools in town, and they are assigned to each integrated school to act as “watchdogs” (among other tasks) to prevent any conflicts in the school environment. Recently, the NGO has decided to replace the supervisors with school psychologists, who are employed by the school and receive additional training and funding from the NGO.<sup>123</sup>

No Roma teaching assistants/mediators are employed in Veliko Turnovo Municipality or district either. At present a woman from the Roma community in the village of Vodoley is participating in a regional programme of the Employment Agency for training teaching assistants. The curriculum includes 300 classes, and at the end of the course the trained teaching assistant should be employed for two years in the Hristo Smirnenski Primary School of Vodoley as part of the programme “Teachers for Out-of-School Activities”.<sup>124</sup> The programme “Teachers for Out-of-School Activities” was initiated by the Ministry of Labour and Social Policy in 2006. One of the aims of the programme is “additional work with children from ethnic groups to support their integration in the educational process”. It provides training and work for unemployed teachers and people with secondary education who are trained as teaching assistants. The requirements for the teaching assistants are secondary education, preferably Roma origin, and registration at the local labour office. The duties of the teaching assistants are to “provide a link between the community, the parents, and the teachers, to motivate the children in school and help their preparation for the classes”. If they have secondary education they should receive payment equal to the minimum salary of 160 levs (approximately €80) and 250 levs (€125) if they have university education.<sup>125</sup>

In Nikolaevo, a municipality where close to 90 per cent of school-age children are Roma, both representatives of the Roma community and officials (municipal representatives and schoolteachers) have indicated that there is a need for teaching assistants or mediators.<sup>126</sup> These representatives reported that such a position would be necessary mainly in the first grade, because the first-grade Roma children have difficulties with the Bulgarian language. An assistant could also be effective in the fifth grade to help the children with their adjustment from primary to lower secondary education; at this point, children enter a higher educational phase, many of them in a

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<sup>123</sup> Case study Vidin.

<sup>124</sup> Case study Veliko Turnovo.

<sup>125</sup> More information available in Bulgarian at [http://www.az.government.bg/Projects/Prog/Uchiteli/Frame\\_Uchiteli.htm](http://www.az.government.bg/Projects/Prog/Uchiteli/Frame_Uchiteli.htm) (accessed on 20 February 2007).

<sup>126</sup> Interview with Biliiana Belcheva, school principal of the SS. Cyril and Methodius Primary School of Nikolaevo, October 2006; interview with Ivan Minchev, informal Roma leader, Nikolaevo, 16 October 2006.

new school, as all the village schools go only as far as primary school.<sup>127</sup> The school directors have not been very enthusiastic and active about hiring teaching assistants, and therefore they have not been very insistent in requiring funding for their employment.

In 2005 two teaching assistants were trained and worked within a programme of the local labour office in Nikolaevo. Five Roma have been included in 2006 in the programme of the Ministry of Labour and Social Policy for training teaching assistance. The second component of the programme is employing the trained young Roma for a period of two years. Although the course has finished they have not yet been employed.<sup>128</sup>

The employment of teaching assistants in the Bulgarian education system has clashed with the desegregation efforts of many Roma activists. Some educational experts, human rights activists and Roma parents have opposed their introduction, arguing that the integration of Roma children into mainstream education would not be achieved if a third person in the class were to translate the instruction from Bulgarian to Romanes. According to this perspective, such a measure puts Roma children in an inferior position in comparison to the non-Roma children.<sup>129</sup> Furthermore, many education experts and Roma activists agreed that the translation of instruction from Bulgarian to Romanes is not needed, because most Roma children have a sufficient knowledge of Bulgarian, even when they are bilingual.<sup>130</sup> Such concerns may stem from a misunderstanding of the role of a teaching assistant in the educational process. When used in a pedagogically appropriate way, teaching assistants neither translate nor interpret, but rather facilitate and bridge learning and understanding between two languages and cultures. The importance of this role in the pedagogical process and in having an impact on learning outcomes has already been established through research.<sup>131</sup> Furthermore, the controversial role of the teaching assistants in the different types of schools and environments has been studied in depth in the research carried out by the Amalipe Centre on the results from the *PHARE BG 0104.01 "Roma Integration Population"*, where one of the key elements was the teaching assistants' training.<sup>132</sup>

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<sup>127</sup> Case Study Nikolaevo.

<sup>128</sup> Information from the Nikolaevo Labour Office, October 2006.

<sup>129</sup> Roma Education Initiative website, available at [http://www.osi.hu/esp/rei/RTAs\\_Bulgaria.html#training](http://www.osi.hu/esp/rei/RTAs_Bulgaria.html#training) (accessed on 20 February 2007).

<sup>130</sup> Roma Education Initiative website.

<sup>131</sup> Roma Education Initiative (REI) and Proactive Information Services, *Transition of Students: Roma Special Schools Initiative Year 4 Evaluation Final Report*, New York: OSI, December 2004, p. 13, available at <http://www.osi.hu/esp/rei> (accessed on 20 February 2007).

<sup>132</sup> Deyan Kolev, Teodora Krumova and Boian Zahariev, *Evaluation Report on the Implementation of PHARE BG 0104.01 "Roma Population Integration"*, Sofia: Amalipe, 2006.

### 3.5 Romanes teachers

Romanes has been recognised as a mother tongue, one that can be taught as such in the municipal basic schools, since the adoption of the National Education Act in 1991. Its teaching, however, has never been organised to reach a significant share of the Roma population, and has declined in recent years.

According to some reports, around the mid-1990s, at the peak of its teaching, Romanes was taught to around 4,000 students.<sup>133</sup> This education, however, was not systematically organised: no measures were taken to ensure the necessary teaching materials and to qualify Romanes teachers, let alone better fit these classes into the curriculum.<sup>134</sup> In the late 1990s the teaching of Romanes declined and gradually disappeared. It was revived during the 2003–2004 school year, but again on a declining scale. According to official statistics, the numbers of children studying Romanes as a mother tongue in general education and professional schools in Bulgaria plummeted from 1,329 in 2003–2004 to just 80 in 2005–2006.<sup>135</sup> This dramatic drop suggests that the figures from 2003–2004 may not have been accurate in the first place.

The Bulgarian *Decade Action Plan* has goals for education that call for ensuring appropriate conditions for Roma students to learn their mother tongue, and for ensuring the appropriate education and training of teachers in Romanes.<sup>136</sup>

Currently, there are no schools in Bulgaria where the curriculum is bilingual, and nor are there any schools where the entire curriculum is taught in Romanes.

According to the school directors interviewed in Vidin, there are no teachers who are qualified to teach in Romanes, and the number of teachers who work with bilingual techniques is very limited in the entire school system of Vidin Municipality.<sup>137</sup>

### 3.6 Educational materials and curriculum policy

The *Decade Action Plan* has goals for education that address issues related to the curriculum and other materials in goals two, four, and five; these points focus on the development of cultural identity among Roma and an awareness of diversity in the

<sup>133</sup> Yosif Nunev, *Ромското дете и неговата семейни среда* (The Roma Child and His/Her Family Environment), Sofia: IMIR, 1998, p. 40. This figure was contested as being too high by several observers subsequently.

<sup>134</sup> EUMAP, *Minority Protection in Bulgaria – 2002*, pp. 106–107.

<sup>135</sup> NSI, *Education in Bulgaria – 2005*, pp. 53 and 65; Letter of the Ministry of Education and Science to the Bulgarian Helsinki Committee, 13 February 2006. Despite these figures given by the MES in their letter, the official statistical publication, which appeared in August 2006, indicates 134 Roma students who studied their mother tongue in the 2005–2006 school year (NSI, *Education in Bulgaria – 2006*, p. 50).

<sup>136</sup> *Decade Action Plan*, point 2.2.

<sup>137</sup> Case study Vidin.

general school population. Only goals two and five, however, have a specific activity mentioned with regard to textbooks and curriculum, with goal five mentioning the creation of new ones in which Roma culture is presented. All other activities for goal five are rather with regard to activities outside the classroom, and sometimes target Roma only, rather than targeting all youth for integrated, mutual learning.

Until the 2004–2005 school year only the textbooks for the first grade were offered for free and could be retained by the students after the school year. Since 2005–2006 all textbooks for the primary grades (first to fourth) have been offered for free. Each year the Ministry of Education and Science publishes a list of “approved” textbooks, and it is up to teachers to choose which one they will use during the year. Ordinance No. 5 from 15 May 2003 regulates the procedure for evaluation and approval of textbooks and teaching materials. The regulation allows for the approval of no more than three textbooks for each subject in each grade.<sup>138</sup> Any publisher or author may suggest a proposal for a textbook. The evaluation procedure envisages both an evaluation by experts from the Ministry and input from teachers who will use them. The Council of Ministers’ Ordinance on the Textbooks and Teaching Materials from 10 May 2003 sets requirements with regard to their content. It refers to the State educational requirements as provided for by Article 16 of the National Education Act and, by implication, to the other acts that are supposed to regulate the curriculum.<sup>139</sup>

Since 2001 a change in the curriculum has been under way in the Bulgarian education system, starting from the first grade and moving gradually onwards. The change was introduced with Regulation No. 2 of the Ministry of Education and Science from 18 May 2000.<sup>140</sup> It involved the inclusion of ethnic and religious diversity, conveying the values of tolerance, after the Ministry of Education and Science required the inclusion of these issues in the curriculum for certain subjects. Consequently there is a significant presence of these topics in the textbooks published in or after 2001 as compared to previous years. As the change in the curriculum moves from elementary to secondary education, minority issues are predominantly covered at present by primary school textbooks, although they appear also in some secondary education textbooks. In addition to history and literature textbooks, minority issues appear also in some music textbooks.

There are references to some national minorities, including Roma, in some textbooks approved for use in the Bulgarian schools by the Ministry of Education and Science.

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<sup>138</sup> MES, Ordinance No. 5 from 15 May 2003 on the evaluation and approval of textbooks and teaching materials, *Official Gazette*, No. 49, 27 May 2003, with many amendments, the latest one from 16 June 2006, Art. 3, para. 1.

<sup>139</sup> Council of Ministers, Ordinance on the Textbooks and Teaching Materials, Adopted by Decree No. 104 from 10 May 2003, *Official Gazette*, No. 46 from 20 May 2003, the latest amendment from 3 November 2006, Art. 4, para. 2. Cf below A2.2.

<sup>140</sup> Ministry of Education and Science, Regulation No. 2 from 18 May 2000 on the Curriculum, *Official Gazette*, No. 48 from 13 June 2000, latest amendment from 18 July 2006.

For the purposes of the present research, around one hundred textbooks, teachers' books and student books were reviewed. These were literature and history textbooks<sup>141</sup> from the first to the twelfth grade of public schools. All of them were taken from the list of approved textbooks of the Ministry of Education and Science.<sup>142</sup> Most of the textbooks were published after 1999. There are a few that were published in the early 1990s and are still in use.

In the literature textbooks, Turkish, Roma, and Armenian stories are included in the chapter "Stories of Other Peoples", and are treated in the same way as African, Japanese and Scottish stories. Even the illustrations to the stories do not show the traditional Roma, Turkish or Armenian costumes. This gives the children the impression that representatives of the minorities in Bulgaria do not belong to the Bulgarian nation and Bulgarian national culture, and indeed rather increases distance and separation of ethnic minorities.<sup>143</sup> Only one textbook for the second grade<sup>144</sup> and one for the third grade<sup>145</sup> incorporate the theme of minority culture throughout the entire textbooks. Furthermore, additional information on Roma culture is provided in the teacher's book for the second grade to help in the lesson development: information about the author of the story, information on Roma customs, examples of a Roma song and Roma sayings that might be used to better reveal the values of Roma culture. The smooth integration of the idea that all ethnic groups in Bulgaria contribute to the richness of the Bulgarian culture and are composed of Bulgarian citizens is best illustrated in the lesson about the Bulgarian National Anthem. The picture accompanying the text of the song shows children dressed in the different traditional costumes: Bulgarian, Turkish, Roma, Armenian and Jewish.

At the same time, the fourth-grade textbooks already show a tradition in including minority issues in the school curriculum. Both approved reading books include Turkish and Roma folk tales with additional information and questions for discussion. Customs such as St. George's Day are presented as common customs of Bulgarians,

<sup>141</sup> For primary education the literature textbooks are called "Chitanka" (*Reading Book*). History books are called "Roden kray" (*Homeland*, first grade), "Okolen sviat" (*Environment*, second grade), and "Chovekat i obstestvoto" (*The Man and Society*, third and fourth grade). There is no history subject for the twelfth grade. Instead the subject named "Sviat i lichnost" (*World and Personality*) is taught. It is designed to provide knowledge about society, national and international institutions, the EU and EU-related issues, ethnic minorities, and so on. Textbooks for this subject were also reviewed.

<sup>142</sup> The list is available, in Bulgarian, on the MES website at [http://www.minedu.government.bg/opencms/export/sites/mon/left\\_menu/textbooks/uchebnici\\_2005-2006.pdf](http://www.minedu.government.bg/opencms/export/sites/mon/left_menu/textbooks/uchebnici_2005-2006.pdf) (accessed on 20 February 2007)

<sup>143</sup> This is a persistent tendency in the reading books for the different grades by Tatyana Borissova, for example (Bulvest publisher).

<sup>144</sup> G. Georgiev and V. Popov, *Читанка за 2 клас* (Reading Book for the Second Grade), Sofia: Prosveta, 2003.

<sup>145</sup> R. Tankova *et al.*, *Читанка за 2 клас* (Reading Book for the Second Grade), Sofia: Prosveta, 2004.

Turks and Roma, with additional information on how Roma celebrate *Ederlezi* (St. George's Day). A Roma song is also included in the lesson.

Unlike literature textbooks for primary schools, it is hard to find any presence of minorities in the secondary education literature textbooks. Regarding history textbooks, the new curricula for the third and fourth grades contain special lessons devoted to the ethnic and religious communities in the Ottoman Empire. While quite precise for the other communities, these lessons present Roma in a biased and stereotypical way. The only accurate presentation of the ethnic communities in the Ottoman Empire appears in the *History and Civilisation* textbook for the eleventh grade by V. Gyuzelev *et al.*<sup>146</sup> Ethnic communities and especially Roma are realistically presented with a number of references to documents and historical sources.

According to local research, schools usually do not offer Roma literature, history and culture books in their libraries and the pupils usually pay for their own textbooks, while free textbooks are provided to students from the first to the fourth grade, according to the national standards. Some schools have also funds for provision of textbooks to pupils that come from socially disadvantaged families, whereas the NGO Organisation Drom supplies all socially disadvantaged Roma pupils (from the fifth to the twelfth grade) in the Vidin desegregation programme with free textbooks. There is limited access to textbooks of Roma history and culture, and the Roma pupils' access to bilingual curriculum is non-existent in the Vidin Municipality mainstream school system.<sup>147</sup>

A Roma-led NGO, Amalipe, has developed textbooks on Roma culture and history books for use in the classroom. These books may be used to teach Roma folklore, which is an optional subject. Two textbooks on Roma folklore were published: *Stories by the Fireplace* for students from the second to the fourth grade<sup>148</sup> and *Roads Retold* for students from the fifth to the eighth grade,<sup>149</sup> accompanied by relevant methodical materials. The two textbooks discuss Roma folklore, culture and history within and with relation to Bulgarian national culture and the culture of the other ethnic groups living in Bulgaria. At present, more than 5,600 students from 200 schools in 26 regions of Bulgaria use these textbooks. In Veliko Turnovo district a course on Roma culture and history is offered in 20 schools and studied by more than 400 pupils. Five schools in the municipality, in Vodoley, Balvan, Ledenik, Resen, and the P. R.

<sup>146</sup> V. Gyuzelev *et al.*, *История и цивилизация: учебник за 11 клас* (History and Civilisation: Textbook for the Eleventh Grade), Sofia: Prosveta, 2001.

<sup>147</sup> Case study Vidin.

<sup>148</sup> A. Krasteva, D. Kolev and T. Krumova, *Истории край огнището: учебно пособие за учениците от 2 до 4 клас* (Stories by the Fireplace: Textbook for the Students from the Second to the Fourth Grade), Veliko Turnovo: Astarta, 2003.

<sup>149</sup> D. Kolev, T. Krumova and A. Krasteva, *Разказани пътища: учебно помагало за учениците от 5 до 8 клас* (Roads Retold: Textbook for the Students from the Fifth to the Eighth Grade), Veliko Turnovo: Astarta, 2003.

Slaveykov Primary School in Veliko Turnovo, study Roma history and culture as a free elective within the programme “Roma Folklore in Bulgarian Schools” organised by the Amalipe Centre for Interethnic Dialogue and Tolerance.<sup>150</sup> For the 2006–2007 school year these books will be printed by the Ministry of Education and Science under a Phare 2003 project, together with textbooks in Turkish. The Ministry of Education and Science has been supporting the process from the very beginning, although generally only in logistical aspects.

To meet the goals set forth in the *Decade Action Plan*, the Ministry of Education and Science should look to the curricular materials developed by Amalipe and other NGOs, and take steps to ensure that Roma traditions and culture are presented to all schoolchildren in Bulgaria as an integral dimension of the country’s diverse heritage and character.

### 3.7 Teacher training and support

Pedagogical training in Bulgaria takes place in the “pedagogical colleges”, which used to be independent. Over the past decade, however, all of them have become parts of larger universities, which offer pedagogical degrees both as part of the mainstream fields and in specific pedagogical fields, including “education science”. Teacher training lasts from four to five years, depending on the degree and speciality. Of the 41,500 university graduates (both bachelors and masters) in 2005, 8 per cent were graduates in “teacher training and education sciences”.<sup>151</sup>

In recent years almost all pedagogical universities preparing teachers have included courses dealing with tolerance and multicultural education. In the SS. Cyril and Methodius University of Veliko Turnovo a course about inter-cultural interaction is taught to pre-school and elementary school future educators. The aim of this course is to acquaint future teachers with the ways in which different ethnic groups interact and communicate among each other and the ways in which this could be used in the educational process. A special module of lectures is devoted to the role of the mother-tongue classes for the integration of minority children. A similar course of lectures entitled “Ethnopedagogy” is taught to all “Primary pedagogy and foreign language” specialists. Thus, students studying in the faculty of pedagogy at this particular university have the opportunity to gain access to a variety of courses that expose them to different aspects of multicultural education.<sup>152</sup>

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<sup>150</sup> Case study Veliko Turnovo.

<sup>151</sup> NSI, *Education in Bulgaria – 2006*, p. 30.

<sup>152</sup> The course description of the disciplines of all specialities can be found at the website of the Faculty of Pedagogics at the University of Veliko Turnovo, available at <http://www.uni-vt.bg/1/ndefault.asp?p=zinfo&pzid=5&zid=5&cat=struct&lid=1> (accessed on 1 April 2006).

St. Kliment Ohridski University in Sofia offers similar courses to its students in Pedagogics. They deal with bilingual education, general knowledge about the role of mother-tongue education in the school curriculum and the difference between integration and assimilation.<sup>153</sup> Close to it is the curriculum of the other big pedagogical universities: the University of Shumen and the South-West University of Blagoevgrad. In addition, the University of Shumen offers also an MA programme in civic and inter-cultural education.<sup>154</sup>

Article 128 of the Rules and Regulations for the Application of the National Education Act stipulates that teachers are obliged to improve their skills.<sup>155</sup> Other provisions of the same act oblige the schools and kindergartens to “create conditions” for raising the qualification of the teachers “through organised forms and through self-education”. The Government is only obliged to provide financial assistance for this if new educational requirements are to be implemented or if there are changes in the existing ones.<sup>156</sup>

There are several pedagogical institutes for further qualification of the teachers. They are attached to the larger universities, such as the University of Sofia<sup>157</sup> and the University of Shumen. They have developed several courses based on the principles of multiculturalism, the incorporation of bilingual teaching and minority folklore and culture in the school curriculum in pre-schools, pre-school and basic school education. Occasionally such courses are taught also to secondary school teachers. Furthermore, several of the courses at the University of Shumen are organised around a specific programme for inter-cultural education called “RAMO”.<sup>158</sup> None of these courses is organised as in-service training. Instead the courses are organised rather as lecture courses in the university centre. The teachers select and pay for these courses themselves, and there are no obligations for taking these courses, although they are reflected in the qualification profile of the teacher, which in turn has an effect on the salary. The change in the salary is not sufficiently large to be a stimulating factor for taking such a course.

Three types of programmes are organised for teachers from schools with a high percentage of Roma students. It is up to the director to determine whether the school can receive training in these areas. The first type is the programmes of the National

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<sup>153</sup> Programme available at <http://www.uni-sofia.bg/faculties+bg/edu+bg/curriculum+bg.html> (accessed on 1 April 2006).

<sup>154</sup> Programme available at <http://www.shu-bg.net/Fakulteti/FP/fakultetpercent20-percent20PEDAGOGIKA.htm> (accessed on 1 April 2006)

<sup>155</sup> *Rules and Regulations for the Application of the National Education Act*, Art. 128, pt. 5.

<sup>156</sup> *Rules and Regulations for the Application of the National Education Act*, Art. 130 and 131.

<sup>157</sup> Programme available at <http://www.diuu.bg/> (accessed on 1 April 2006).

<sup>158</sup> The description of the courses can be found at <http://www.ittd.acad.bg/plan/1xxTXT.html#10209p> (accessed on 1 April 2006).



Pedagogical Centre (NPC).<sup>159</sup> NPC is a State institution, which organises and coordinates the policy of the Ministry of Education and Science directed towards pedagogical support and consultation of students, teachers and parents. The National Pedagogical Centre has 28 regional branches, which are responsible for carrying out the training sessions. The courses are regulated by the *Plan for Qualification of the Pedagogical Staff in Secondary Education for 2005*.<sup>160</sup> The courses organised within this plan are free of charge for the teachers.

Several of these courses are designed to address multiculturalism in pre-schools and schools. These include the following: “Work in a multi-ethnic environment” (for pre-schools and all levels of school education); “Creating positive attitudes towards school system of the parents of children of minority background” (for pre-schools); “Keeping children at school and prevention of dropping out” (for primary and secondary education). The director of each school decides which courses are relevant for the teachers under his/her responsibility from the list of 14 (pre-schools), 27 (primary education) or 22 (secondary education) courses. There is no clear evidence with regard to the efficiency of these training courses and on the impact on teaching methods used in the classroom.

Table 18 below provides a picture of how many teachers have taken part in the four courses<sup>161</sup> perceived by the school directors as related to children of minority background, for basic education (Table 18a) and secondary education (Table 18b).

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<sup>159</sup> Website of the National Pedagogical Centre (NPC): [http://npc-bg.com/index\\_2.htm](http://npc-bg.com/index_2.htm) (accessed on 1 April 2006).

<sup>160</sup> Ministry of Education, *Plan for Qualification of the Pedagogical Staff in Secondary Education for 2005*, available at <http://npc-bg.com/Kuasar/plan.htm> (accessed on 1 April 2006).

<sup>161</sup> The four courses in the table were selected after several conversations with directors of the Regional Pedagogical Centres in Veliko Turnovo and Razgrad. They include courses that were not necessarily intended to relate to minority children but are perceived by the teachers as such.

**Table 18(a): Number of teachers taking part in courses related to minority children – for basic education (2005)**

Region	Courses:			
	Work in multicultural environment	Inter-cultural competency	Keeping children at school	Special educational needs
Blagoevgrad				
Burgas	70			40
Varna			104	
Veliko Turnovo				
Vidin			20	
Vratsa				
Gabrovo			25	
Dobrich	40		30	
Kardzhali	60			
Kyustendil				100
Lovech				17
Montana				
Pazardzhik	20			
Pernik	20		40	
Pleven	30		20	
Plovdiv	80		220	30
Razgrad			60	
Ruse	12		45	13
Silistra				
Sliven	15		30	
Smolyan			50	
Sofia city	600	130	189	100
Sofia district	45		40	20
Stara Zagora			45	
Targoviste	50			
Haskovo			20	30
Shumen			40	30
Yambol	40			
<b>Total</b>	<b>1,082</b>	<b>130</b>	<b>978</b>	<b>380</b>

Source: Regional Pedagogical Centres<sup>162</sup>

<sup>162</sup> The data were provided by the information submitted by the Regional Pedagogical Centres. Independent research, however, showed that not all regional centres have been punctual about submitting the information, and omissions are possible. Data from Regional Pedagogical Centres, available on the website of the National Pedagogical Centre at <http://npc-bg.com> (accessed on 20 February 2007) (hereafter, Regional Pedagogical Centres data).

**Table 18(b): Number of teachers taking part in courses related to minority children – for secondary education (2005)**

Region	Course:			
	Work in a multicultural environment	Inter-cultural competency	Keeping children at school	Special educational needs
Blagoevgrad				
Burgas	70			40
Varna			104	
Veliko Turnovo				
Vidin			20	
Vratsa				
Gabrovo			25	
Dobrich	40		30	
Kardzhali	60			
Kyustendil				100
Lovech				17
Montana				
Pazardzhik	20			
Pernik	20		40	
Pleven	30		20	
Plovdiv	80		220	30
Razgrad			60	
Ruse	12		45	13
Silistra				
Sliven	15		30	
Smolyan			50	
Sofia city	600	130	189	100
Sofia district	45		40	20
Stara Zagora			45	
Targoviste	50			
Haskovo			20	30
Shumen			40	30
Yambol	40			
<b>Total</b>	<b>1,082</b>	<b>130</b>	<b>978</b>	<b>380</b>

Source: Regional Pedagogical Centres<sup>163</sup><sup>163</sup> Regional Pedagogical Centres data.

The most popular courses included “Special educational needs”, “Keeping children at school” and “Work in a multicultural environment”. The total number of teachers who took part in any of these in-service training courses in 2005 is 5,358, just over 6 per cent of primary and secondary school teachers for the 2005–2006 school year. Table 19 shows the corresponding number of teachers in the 2004–2005 and 2005–2006 school years.

**Table 19: Number of teachers taking part in in-service training courses (2004–2006)**

Grade level (According to the International Standard Classification of Educational Degrees, ISCED-97)	Number of teachers	
	2004–2005	2005–2006
Pre-school education (ISCED-0)	18,893	19,254
Primary education (I-IV class, ISCED-1) <sup>1</sup>	18,182	17,668
Lower secondary education (V-VIII class, ISCED-2A) <sup>1</sup>	27,601	26,844
Upper secondary education (IX-XIII class, ISCED-3A, 3C)	34,475	34,372

Source: NSI<sup>164</sup>

The second type of course is organised by the local authorities in coordination with the Regional Inspectorates of Education.<sup>165</sup> These courses are financed by the municipalities themselves. Due to the decentralised system of governance, it is difficult to collect the information about all the courses conducted.

The third type of programmes is organised in the framework of different projects. One such training course was realised in 2004 with *Phare BG 0104.01 “Roma Population Integration”*.<sup>166</sup> Within this project 320 teachers were trained in the University of Veliko Turnovo. Originally (according to the Terms of Reference of the project) five in-service training sessions were supposed to take place instead of training all the

<sup>164</sup> National Statistical Institute website: <http://www.nsi.bg/SocialActivities/Education.htm> (accessed on 20 May 2006).

<sup>165</sup> Information about the educational activities of Varna Municipality is available at [http://www.varna.bg/adm/prog/kvalifikacia\\_06.htm](http://www.varna.bg/adm/prog/kvalifikacia_06.htm) (accessed on 1 April 2006). According to the *Municipal Plan for the Qualification of the Pedagogical Staff*, 20,000 levs from the municipal budget have been provided for organising such courses.

<sup>166</sup> Assessment of the project has been carried out with the project “Roma in South-Eastern Europe: Towards EU Integration” by the Amalipe Centre (Veliko Turnovo), Bulgarian Helsinki Committee (Sofia) and ERIO (Brussels). The data provided above are derived from the field research carried out and a number of interviews carried out with the different stakeholders involved. For additional information, see Deyan Kolev, Teodora Krumova and Boian Zahariev, *Evaluation Report on the Implementation of PHARE BG 0104.01 “Roma Population Integration”*, Sofia: Amalipe, 2006.

teachers together. The training of the teachers was implemented during the period 13 March–2 May 2004. Six two-day seminars were held with 150–160 teachers. From a methodological point of view the training of 300 teachers in one place makes the achievement of real, lasting results impossible.<sup>167</sup> As a result, more than 65 per cent of the 118 interviewed teachers assessed the lectures as inefficient and only 14 per cent held the contrary opinion.

In 2003 a new bachelor's degree programme was founded in the University of Veliko Turnovo: Primary School Pedagogy with Romanes.<sup>168</sup> The aim of the course is to prepare pre-school teachers and primary school teachers in Romanes. At present around 50 students, all of whom but one are Roma themselves, are being educated in the three courses of the programme. Within it, in addition to the general pedagogical courses, they attend courses in Romanes, Introduction to Roma Studies, Roma Dialects in Bulgaria, Ethnopedagogics, Culture of the Interaction between Ethnic Groups, Linguistic Specifics in Romanes Learning in Childhood, Roma Literature for Children, Roma Folklore for Children, Methods of Teaching Romanes, Practice in Multicultural Interaction, Psycholinguistics and Bilingualism, Sociolinguistics and Bilingualism, Hindi and several others.<sup>169</sup>

There were no in-service training programmes in bilingual education organised for teachers from majority Roma schools.

A number of interviews with teachers from Vidin Municipality schools confirm that training programmes for Vidin teachers (also in bilingual education training) are rare and they are mostly organised by the NGO Organisation Drom.<sup>170</sup> School directors in Vidin confirm that only Organisation Drom has offered courses for teachers to improve their pedagogical qualification in the past couple of years. Some teachers from Vidin were also involved in a Master's programme for Inter-Cultural Learning at St.

<sup>167</sup> The 320 teachers are formally divided into four sub-groups. The seminars are being conducted with two of the sub-groups (i.e. with about 150–160 teachers). Thus, instead of the 15 seminars required by the Terms of Reference, only six were conducted in practice.

<sup>168</sup> Approved by the Academic Council, Record No. 11 from 22/12/2003. Information available at <http://www.uni-vt.bg/2/ndefault.asp?p=specinfo&nspec=000063&path=plan&plannumb=0&namesp=Primarypercent20Schoolpercent20Pedagogypercent20andpercent20Romapercent20Language> (accessed on 1 April 2006).

<sup>169</sup> Full information about curriculum and courses is available at <http://www.uni-vt.bg/2/ndefault.asp?plannumb=2004358&p=specinfo&path=plandisc&nspec=000063&namesp=Primary+School+Pedagogy+and+Roma+Language> (accessed on 1 April 2006).

<sup>170</sup> Interviews with the following: Petar Petrov, teacher in the Otec Paisii Lower Secondary School, 16 March 2006; Irina Puncheva, the Sofronii Vrachanski Upper Secondary School, 6 March 2006; two anonymous interviews with teachers from the Sofronii Vrachanski Lower Secondary School, 6 March 2006; Georgi Mladenov from the Hristo Botev Upper Secondary School, 16 March 2006; Sashka Radukanova from the P. R. Slaveykov Upper Secondary School, 17 March 2006; Marinka Boyanova from the SS. Cyril and Methodius Upper Secondary School, 20 March 2006.

Kliment Ohridski, Sofia, with the financial support of Organisation Drom from October 2005.<sup>171</sup>

No teachers from Veliko Turnovo Municipality have taken part in teacher training led by the National Pedagogical Centre and its regional branches. Regular pedagogical meetings and teacher training sessions in Roma folklore, history and culture are organised by the Amalipe Centre with the support of the Regional Inspectorate of Education. The workshops and training sessions are organised within the programme “Roma Folklore and Bulgarian Schools”. At present ten teachers from the municipality and 15 teachers from the other municipalities in the district have passed through these courses.<sup>172</sup> The programme has been under development as an elective subject by the Amalipe Centre with the cooperation of the Ministry since 2002. The classes are included in the school curriculum, and results from previous years show that the number of drop-out students has decreased since the programme’s introduction. The programme has been included in a number of Ministry documents, such as the *Action Plan for the Implementation of the Framework Programme for the Equal Integration of Roma in Bulgarian Society*. In addition, the Ministry included publication of textbooks for the programme of Phare projects for 2004.

None of the goals of the *Decade Action Plan* has any subsequent targets and actions focused on teacher training specifically, with the exception of action number 4.1.4, which mentions organising seminars for training teams who will provide training in inter-cultural education and human rights. There is mention of the development of programmes for teaching Romanes. However, there seems to be little attention to training teachers in techniques to improve their overall pedagogy, which have been proven to have an impact on students’ learning outcomes, especially for minority children, such as child-centred learning pedagogy, and interactive and critical thinking techniques.

There appears to have been a movement to bring in elements of multicultural education and training to pre-service teacher education as well as into in-service teacher education in Bulgaria in recent years. Universities have autonomy in developing their curricula, however, and in the absence of regulations on the national level requiring teachers to update their skills in areas that would be beneficial for Roma and minority students, and requirements or incentives for their updating their skills regularly, substantial and systematic improvements in the practice of pedagogy to benefit Roma children, rather than the dispersed efforts that appear to be happening currently, are unlikely. As evidence from the data gathered in the case studies reveals, few teachers knew about or had access to regular, high-quality teacher education other than that offered by a local NGO, which is a serious obstacle when considering improving access to quality education for Roma.

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<sup>171</sup> Case study Vidin.

<sup>172</sup> Case study Veliko Turnovo.

### 3.8 Discrimination-monitoring mechanisms

There are two ways to complain against unequal treatment in the Bulgarian education system: under the general and under a special procedure. The general procedure is administrative and judicial and is based on the anti-discrimination provisions of the Constitution, the international law, which is directly applicable, and the laws in force. Article 6, para. 2, of the Constitution and Article 4, para. 2, of the National Education Act provide for equality of treatment and protection against different forms of discrimination. They were occasionally used before the establishment of the special procedure through the Protection against Discrimination Act. The latter was passed in 2003,<sup>173</sup> in compliance with the EU Directives 43/2000 and 78/2000.<sup>174</sup>

For its part, the Protection against Discrimination Act envisages two mechanisms at the national level, both provided as alternatives for a complainant to choose between. The first is recourse to the Protection against Discrimination Commission, an independent specialised quasi-judicial collegiate equality body established under the Protection against Discrimination Act.<sup>175</sup> The Commission's authority is to make legally binding findings of discrimination, to issue mandatory instructions to prevent impending acts of discrimination, or to abolish the consequences of acts already committed.<sup>176</sup> The Commission further has the authority to impose financial sanctions on liable parties, as well as to make recommendations to public bodies to alter their practices, or to adopt or amend legislation. The Commission has no authority to award victims compensation. Its fact-finding powers include a mandate to question witnesses, to take possession of documents and to carry out on-site inspections.<sup>177</sup> Its proceedings are designed to be expeditious, relatively simple and accessible for complainants. Statutory time limits for procedural steps are brief. Under the law, no fees or expenses are due by complainants.<sup>178</sup> The Commission's decisions are subject to judicial review by the Supreme Administrative Court.

Complaints to the Commission must be written and signed.<sup>179</sup> They must contain a statement of the facts and of the petition to the Commission.<sup>180</sup> No proceedings will be initiated if three years have elapsed since the breach was committed. As of 6 April 2006

<sup>173</sup> Protection against Discrimination Act, *Official Gazette*, No. 86, 30 September 2003. In force since 1 January 2003 (hereafter, *Protection against Discrimination Act*).

<sup>174</sup> EU Council Directive 2000/43/EC of 29 June 2000 implementing the principle of equal treatment between persons irrespective of racial or ethnic origin (Race Equality Directive); EU Council Directive 2000/78/EC of 27 November 2000, establishing a general framework for equal treatment in employment and occupation.

<sup>175</sup> *Protection against Discrimination Act*, Art. 40.

<sup>176</sup> *Protection against Discrimination Act*, Art. 47.

<sup>177</sup> *Protection against Discrimination Act*, Art. 56.

<sup>178</sup> *Protection against Discrimination Act*, Art. 53.

<sup>179</sup> *Protection against Discrimination Act*, Art. 51.

<sup>180</sup> *Protection against Discrimination Act*, Art. 51.

the Commission has received no education discrimination complaints by Roma complainants.<sup>181</sup> It has only been operational since 1 November 2005, which could in part account for this fact. Another reason for this may be that the equality law is not visible enough within Roma communities, who are not sufficiently aware of the possibilities for legal protection that it provides, including the fact that proceedings are tax-free. Rights groups' lawyers, on the other hand, while better informed about the law, may not have yet approached the Commission with Roma educational inequality complaints or signals because they feel that it still lacks the necessary professionalism and resolve to deal with this critically important issue. They may consider, for the time being, that the courts are the better-equipped authority to meet this challenge.

The second mechanism is a judicial remedy. Victims of discrimination are entitled to a special anti-discrimination claim to have a civil court find discrimination, order the respondent to terminate it, and to abolish its consequences, as well as to abstain from repeating it in the future, and award the claimant compensation for any pecuniary or non-pecuniary damage sustained.<sup>182</sup> No fees or expenses are due.<sup>183</sup> The procedure is the general civil procedure, with the exception that the burden of proof shifts onto the respondent once the claimant has established facts from which the court may presume that discrimination is at hand.<sup>184</sup> Apart from victims, trade unions and public interest non-profit organisations also have the standing to join proceedings, both as representatives of victims, and in their own right where the equal rights of many parties are infringed.<sup>185</sup> In addition, the law provides for the standing for additional victims or public interest groups and trade unions to join pending proceedings initiated by another party.<sup>186</sup> Discriminatory acts by public authorities are subject to judicial review under general administrative procedure rules.<sup>187</sup>

As far as information is available, unofficially and non-exhaustively (as no official record is being kept of discrimination lawsuits), there have been at least 11 cases brought on behalf of Roma complainants before the courts, with at least five rulings being delivered to date, two of which are favourable to the complainants. Some of these allege racial segregation in schools. In 2005 alone three district courts – two in Sofia and one in Ihtiman – ruled on cases alleging that segregation of Roma students in residential schools amounted to discrimination. In one case the court found for the plaintiffs and in two against them. All three were appealed and there is no final decision on any of them at present.

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<sup>181</sup> Interview with Ms. Zora Guencheva, member of the Commission, 6 April 2006.

<sup>182</sup> *Protection against Discrimination Act*, Art. 71

<sup>183</sup> *Protection against Discrimination Act*, Art. 75.

<sup>184</sup> *Protection against Discrimination Act*, Art. 9.

<sup>185</sup> *Protection against Discrimination Act*, Art. 71.

<sup>186</sup> *Protection against Discrimination Act*, Art. 72.

<sup>187</sup> *Protection against Discrimination Act*, Art. 73.



In addition, at the institutional level, the law provides for an internal complaint mechanism to be established within each educational body.<sup>188</sup> However, this is only applicable to harassment complaints. Educational institutions' directors are under a duty to immediately investigate such complaints, and to take action to terminate the harassment, and to impose disciplinary liability. There is no information as to any complaints brought under this mechanism.

In cases where educators fail to take action when addressed with harassment complaints, there is no express remedy under the law against such failure, although educators would be liable under general tort law for compensation. Alternatively, or in addition, a harassment victim may complain to the Ministry of Education and Science, asking for administrative pressure to be put on the educator to take due action, including sanctions administered by the Ministry on the educator. However, the law does not provide for such a complaint to the Ministry, nor for any express powers of the Minister of Education to act in such a situation, and, accordingly, the Minister's response would be entirely at his or her discretion. Having no direct authorisation under the law, the Minister would not be likely to impose any sanction. At best, he or she could be expected to make an inquiry, and/or a recommendation to the educator.

As mentioned above, the competent bodies for protection against discrimination are the Protection against Discrimination Commission, the civil courts, the administrative bodies and, as far as complaints of harassment are concerned, directors of schools and universities.

Both the Protection against Discrimination Commission and the civil courts are fairly accessible in terms of cost of the proceedings, with no fees, or expenses due. However, there is not sufficient information publicly available on the existence of these anti-discrimination remedies. The legislation is still relatively new, and the Government has launched no public awareness campaigns to make it known by the general public. The Protection against Discrimination Commission is in the initial stages of preparing such a campaign, national in scope. The impact of this is yet to be gauged. The Commission is still insufficiently accessible in terms of its contact details' availability to the general public. For a certain period, it lacked offices, and, accordingly, had no postal or email address or telephone numbers.

NGOs have conducted training sessions on the new anti-discrimination legislation, primarily for NGO activists. These have had a limited impact on the general public awareness of the legal remedies for redress. On a more positive note, the media have shown interest in the anti-discrimination practices of both the courts and the Commission, and have been covering these adequately, with some particularly good pieces of information having been published or broadcast. This media coverage has not focused so much on the procedural aspects of using these authorities for obtaining redress, but rather on the substantive aspects of their decisions. The general public, and

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<sup>188</sup> *Protection against Discrimination Act*, Art. 31.

especially vulnerable communities, particularly the most isolated Roma communities, are still in want of information as to the means to obtain redress for discrimination from the competent institutions.

In terms of damage awards, the courts have not awarded any to date in cases of educational discrimination. In the two cases with positive outcomes, none was sought, since the claims were brought by NGOs in their own right. In only one of these cases did the proceedings result in a remedy other than a declaration of law, namely disbanding a segregated class as a part of a court-approved agreement between the parties.<sup>189</sup>

As for assistance offered to complainants of discrimination in education, all lawsuits to date have been sponsored by NGOs, including the provision of legal counsel. No governmental assistance has been provided for complainants to the courts, other than the statutory waiver of fees and expenses.

The *Decade Action Plan* sets out in action 1.1.7 an additional mechanism for ensuring non-discrimination in education for Roma at the pre-school and school level. These mechanisms were scheduled to take place in 2005–2006, but as no indicators were outlined in the *Decade Action Plan*, and no official reports have been published, progress is difficult to track.

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<sup>189</sup> Sofia District Court, Decision No. 666/2005 from 7 November 2005.

## 4. CONSTRAINTS ON ACCESS TO EDUCATION

*Some of the obstacles blocking access to education for Roma are straightforward: for example, there are not enough pre-school places to ensure that every child will be able to enrol, a problem that current Government policy fails to address. Pre-school costs are also a significant barrier for Roma families, many of whom cannot afford the fees set by the municipalities, and the free meals and travel subsidies offered by special schools may encourage disadvantaged families to enrol their children in such schools. Financing structures need to be reconsidered in order to counteract these constraints.*

*Geographical segregation is widespread in Bulgaria, both in urban and rural areas, giving rise to “Roma schools” in predominantly Roma neighbourhoods. Although parents can choose to send their children to schools outside the area, few Roma parents do so outside an organised desegregation programme. Even where desegregation programmes are running successfully, many children are left behind. The number of Roma children enrolling in special schools continues to increase, as all schools seek ways to keep enrolment numbers up. The Ministry of Education and Science has promulgated instructions aimed at improving assessment procedures, but research at the local level indicates that these directives have not successfully counteracted incentives to place children in special schools. Better overseeing of the assessment committees is clearly needed to ensure that each child’s individual potential is appropriately evaluated.*

*Many Roma children in Bulgaria speak another language at home, making access to pre-school even more important as a means to improve their Bulgarian language skills before entering school. However, the number of teachers proficient in Romani languages is very small, placing Roma children at a disadvantage from their first days of school. More Roma teachers and teaching assistants, as well as training in bilingual education techniques, are needed at the earliest level of education.*

### 4.1 Structural constraints

According to the most recent NSI statistics, in the 2005–2006 school year there were 3,331 pre-schools in Bulgaria. Of these, 2,421 were all-day, 866 half-day and seasonal, 12 for children with intellectual disabilities and 6 convalescent for children suffering specific health conditions, such as heart conditions. More than half, 1,740 of them, were in villages. Since 2001 the number of pre-schools has increased by 2.7 per cent.<sup>190</sup>

Ordinance No. 7 of the Ministry of Education and Science<sup>191</sup> determines in detail the minimum and the maximum number of children that can be enrolled in one classroom and in one group in a pre-school, depending on the type of school and pre-school. Table 20 below represents some of these numbers:

<sup>190</sup> NSI, *Education in Bulgaria – 2006*, p. 35.

<sup>191</sup> MES, Ordinance No. 7 on the Number of Students and Children in School and Pre-School Classes from 29 December 2000, *Official Gazette*, No. 4, 12 January 2001, the latest amendment from 22 August 2003 (hereafter, *Ordinance No 7/2000*).

**Table 20: Minimum and maximum number of children and students permitted in classrooms and pre-school groups**

	Number of children/students	
	Minimum	Maximum
Group in all-day and weekly pre-school	12	22
Group in special pre-school	8	11
Preparatory class	12	16
Classroom 1–4 grade in general education schools	16	22
Classroom 5–8 grade in general education schools	18	26
Classroom in a special school	8	12

Source: MES<sup>192</sup>

According to rough statistical estimates, at present there are around 260,000 children in the age group 3–6 years nationwide.<sup>193</sup> According to NSI data, the capacity of the existing pre-schools in the 2005–2006 school year was 228,146 children.<sup>194</sup> Pre-schools in Bulgaria vary in size, but the average number of children per pre-school was 68.5. In the 2005–2006 school year there were 9,496 groups, with a total of 206,243 children. Almost half, 48.4 per cent, of the children enrolled were girls.<sup>195</sup>

According to these estimates, around 32,000 children cannot be served by the present number of pre-schools. Calculated at the rate of 68.5 children per pre-school, 467 pre-schools could accommodate the current number of pre-school-age children. According to some estimates, in Sofia alone 1,500 children cannot attend pre-schools, due to a lack of places. To cover these needs another 24 pre-schools are needed.<sup>196</sup> Due to the higher birth rate among Roma, there is a higher proportion of pre-school-age Roma children, who are therefore disproportionately affected by the insufficient number of pre-school places.

To a certain extent, the obligatory year of pre-school takes in some of those children who otherwise would in any case be in pre-schools, especially when these pre-school classes are organised at schools.

<sup>192</sup> MES, Regulation No 7/2000.

<sup>193</sup> National Statistical Institute, *Population and Demographic Processes – 2004*, Sofia: NSI, 2005, p. 8.

<sup>194</sup> NSI, *Education in Bulgaria – 2006*, p. 106.

<sup>195</sup> NSI, *Education in Bulgaria – 2006*, pp. 36–37 and 106.

<sup>196</sup> Veliko Dimitrov, “За идеята да се разшири повинност ‘детска градина’” (On the Idea to Expand the ‘Pre-School’ Service), *IME Review*, No. 247, 28 October 2005, available at [http://www.ime.bg/pr\\_bg/247-4.htm](http://www.ime.bg/pr_bg/247-4.htm) (accessed on 10 March 2006).

The underdeveloped system of public pre-school institutions is currently inadequate for all children to receive this type of early formal education, which is an important prerequisite for their adaptation to and success in school. The *Decade Action Plan* has not identified this as a problem, and has therefore not made provisions to address this, either.

## 4.2 Legal and administrative requirements

The procedure for enrolling children in pre-schools in Bulgaria is regulated by the Rules and Regulations for the Application of the National Education Act. According to the relevant provisions, parents or legal guardians apply to all-day, half-day and weekly pre-schools (where children stay overnight) with a written request, a copy of the birth certificate of the child and medical certificates issued by the territorial health authority.<sup>197</sup> As these requirements are relatively simple, only Roma children whose births are not registered would not be able to comply with them, and this is a rare occurrence in Bulgaria.

Material collected for this report at the local level illustrates this. In Vidin Municipality no administrative barriers for enrolling Roma children in pre-schools and mainstream schools have been reported. This was confirmed in a number of interviews with school directors, teachers, Roma parents and NGO leaders. Roma parents can freely select their child's school or pre-school and there is no school enrolment regulation that is constrained by the residence of the child. The formation of the classes in the school is based on parents' preferences, which are generally based on the perceived quality of the teacher. This is especially true in the case of primary education.<sup>198</sup> The parents in Vidin Municipality are inclined to send their children to specialist schools (languages, mathematics, art, or sports).

However, while Roma parents in Veliko Turnovo are also free to choose ethnically mixed (non-segregated) schools regardless of their place of residence, this rarely happens in practice among families not living in mixed neighbourhoods. Often the reason for this is the fact that some of the "Roma" schools are the only schools in the settlement, as is the case of the village schools in Vodoley, Ledenic and Tzerova Korja. In other cases, such as the segregated school Hristo Botev in Veliko Turnovo, this is the only school within a 3–4 kilometre distance from the Roma neighbourhood, although the school itself is situated on the border between the Roma neighbourhood and the Bulgarian neighbourhood.<sup>199</sup> Parents are aware that they could send the children to other schools, and transport is not a real constraint. A factor for the parents keeping children in the neighbourhood school in this case is the fact that the local mosque unofficially supervises the school.

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<sup>197</sup> *Rules and Regulations for the Application of the National Education Act*, Art. 28, para. 1.

<sup>198</sup> Case study Vidin.

<sup>199</sup> Case study Veliko Turnovo.

According to the Rules and Regulations for the Application of the National Education Act, the municipal authorities prepare a list of children who should be admitted to pre-schools and the first grade by 30 April of each year. The authorities send this list to the schools and pre-schools in their area by 15 May.<sup>200</sup> Children are enrolled in the mainstream schools on the basis of a request from their parents, who may freely choose the school. There are no entry exams for general education schools, although some art and sports schools may organise such exams.<sup>201</sup> These are simple procedures and most Roma parents can comply with them.

The National Education Act stipulates that every citizen may realise his/her right to education in a school of his/her choice. Parents choose the school for their minor children.<sup>202</sup> Before 2003, in clear violation of this provision, Article 36 of the Rules and Regulations for the Application of the National Education Act stipulated that local mayors could draw up school districts for the municipal schools. In 2003 this provision was attacked before the Supreme Administrative Court by the Bulgarian Helsinki Committee and the Romani Baht Foundation. Shortly before the decision the Ministry of Education and Science changed the provision in the Rules and Regulations in line with the law. Thus at present the school enrolment is not conditioned on residence in the school district. Parents can choose any school from the system regardless of their domicile. However, this leads to serious pressure on the schools with good reputations, and parents try all available formal and informal means to enrol their children.

### 4.3 Costs

The National Education Act stipulates that the parents should pay fees for the pre-schools that are set by the municipal councils. In addition, they are required to pay for extracurricular activities.<sup>203</sup> According to the Rules and Regulations for the Application of the National Education Act, parents and legal guardians of children enrolled in the one-year obligatory pre-school do not pay fees, when it takes place in kindergartens.<sup>204</sup>

Different municipal governments have adopted different approaches to determine the basis and the amount of fees. The overwhelming majority grouped citizens into three different categories: those who are to pay the fees in their full amount, those who are exempted in part and those who are exempted in full. The bases for the exemptions, however, are different. Thus parents who are on social welfare pay 50 per cent of the fee

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<sup>200</sup> *Rules and Regulations for the Application of the National Education Act*, Art. 35, para. 2.

<sup>201</sup> *Rules and Regulations for the Application of the National Education Act*, Art. 36, para. 1.

<sup>202</sup> National Education Act, *Official Gazette*, No. 86, 18 October 1991, with many amendments, the latest one from 1 January 2006 (hereafter, *National Education Act*), Art. 9.

<sup>203</sup> *National Education Act*, Art. 19, para. 2 and 3.

<sup>204</sup> *Rules and Regulations for the Application of the National Education Act*, Art. 30, para. 2.

in Pazardzhik Municipality,<sup>205</sup> but pay the full fee in Vratza Municipality.<sup>206</sup> Usually the parents or guardians who are exempted in full are required to prove that they are students, that one of them is a soldier, that they have disabilities or that their wards are orphans. In many cases the second and the following children in a family are also exempted when all children attend pre-schools, without regard to the social status of the parents. In Vidin the fee determined by the Municipal Council, which every Roma family has to pay on a monthly basis for one child in pre-school, is 30 leva (€15), or 10 per cent of the average salary in Bulgaria. However, if the family does not have an official marriage, then the fee is 15 leva (5 per cent of the average salary, payable by the mother, who is considered single in such a case). Just as elsewhere in Bulgaria, unofficial marriages are frequent practice among Roma families in Vidin Municipality. Furthermore, if the child is the third or fourth in the family, then no fee is due.<sup>207</sup>

Most municipalities set separate fees for all-day and for weekly pre-schools. The latter are usually higher. Thus the fee for the all-day pre-school in Shumen Municipality is 30 leva (€15) and the fee for the weekly pre-school is 40 leva (€20) per month.<sup>208</sup> Some municipalities set a flat monthly fee per child and an additional fee on the basis of the days that the child actually attends the pre-school during the month. Thus Veliko Turnovo Municipality sets a flat fee of five leva per month (€2.5) for all-day pre-schools plus 0.8 leva per day (€0.40) for each day of attendance.<sup>209</sup> Vidin Municipality

<sup>205</sup> Municipality of Pazardzhik, *Наредба за определянето и администрирането на местните такси и цени на услуги на територията на Община Пазарджик от 21 февруари 2006 г.* (Ordinance for the Determination and Administration of Local Taxes and Prices of Services on the Territory of the Municipality of Pazardzhik from 21 February 2003), available at <http://www.pazardjik.bg/framesywet.html> (accessed on 11 March 2006).

<sup>206</sup> Municipality of Vratza, *Наредба за определянето и администрирането на местните такси и цени на услуги и права на територията на община Враца от 6 март 2003 г.* (Ordinance for the Determination and Administration of Local Taxes and Prices of Services on the Territory of the Municipality of Vratza from 6 March 2003), available at <http://www.vratza.bg/docs/naredba4.html> (accessed on 11 March 2006).

<sup>207</sup> Case study Vidin.

<sup>208</sup> Municipality of Shumen, *Наредба за определянето и администрирането на местните такси и цени на услуги на територията на Община Шумен от 6 март 2003 г.* (Ordinance for the Determination and Administration of Local Taxes and Prices of Services on the Territory of the Municipality of Shumen from 6 March 2003), available at <http://www.shumen.bg/doc/03401.htm> (accessed on 11 March 2006).

<sup>209</sup> Municipality of Veliko Turnovo, *Наредба за определянето и администрирането на местните такси и цени на услуги на територията на Община Велико Търново от 6 март 2003 г.* (Ordinance for the Determination and Administration of Local Taxes and Prices of Services on the Territory of the Municipality of Veliko Turnovo from 6 March 2003), available at [http://www.veliko-turnovo.com/obs/obs1999/Reshenia/naredba\\_taksi.htm](http://www.veliko-turnovo.com/obs/obs1999/Reshenia/naredba_taksi.htm) (accessed on 11 March 2006).

sets the basic fee as a share (20 per cent) of the minimal salary, which in Bulgaria is determined by law.<sup>210</sup>

In addition to the fee, different pre-schools determine different additional contributions that the parents should pay for extracurricular activities. They depend on the nature and the scope of these activities and vary on average between 5 and 20 leva per month (€2.5–10).

The municipalities cover the rest of the costs. According to the deputy mayor of Sofia Municipality, Mr. Minko Gerdzhikov, the average cost (excluding extracurricular activities) per child in a pre-school is 120 leva (€60). Of this, the fee (40 leva in Sofia, €20) covers one third; the rest is covered by the municipal budget.<sup>211</sup>

A segregated weekly pre-school, Mir, was run by the municipality in the Roma neighbourhood in Nikolaevo until 2005. When it was established the enrolment in the pre-school was free of charge and all the children from the ghetto attended. Roma leaders report that this was good for the children and most of all for improving their command of Bulgarian, which further influenced their success in school.<sup>212</sup> In 2005 a fee was introduced – 20 leva (€10) per month. The fee covered the whole stay of the children for the month: accommodation, food, and any other costs. Nevertheless, when the fee was imposed, parents withdrew their children and from the 2006–2007 school year the pre-school was closed. At present some children attend the pre-school in the centre of Nikolaevo; there is transport provided by the municipality for the children from the Roma neighbourhood.<sup>213</sup> While the Mir pre-school was operating, there were parents who preferred to send their children to the mixed pre-school in the centre even though they had to pay a monthly fee there.<sup>214</sup>

The fee plus additional payments for extracurricular activities varies in different regions of Bulgaria in the range of 25–70 leva (€13–36) per child per month (when and where children are not exempted from paying the fee). The average household income in Bulgaria in December 2005, according to the NSI, was 580.02 leva per month (€297),

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<sup>210</sup> Municipality of Vidin, *Наредба за определянето и администрирането на местните такси и цени на услуги на територията на Община Видин от 2 февруари 2005 г.* (Municipality of Vidin. Ordinance for the Determination and Administration of Local Taxes and Prices of Services on the Territory of the Municipality of Vidin from 2 February 2005).

<sup>211</sup> Nova TV, “Десният дебат за София” (The Right-Wing Debate on Sofia), from 20 October 2005, transcript available at <http://www.sds-sofia.org/otrazeno.aspx?id=71> (accessed on 11 March 2006).

<sup>212</sup> Interview with Ivan Minchev, local informal leader in Nikolaevo, 29 July 2006; interview with Ivan Jorov, former teaching assistant in Edrevo, 16 October 2006.

<sup>213</sup> Information from Nikolaevo Municipality, Administrative Services Department, October 2006.

<sup>214</sup> Interview with Ivan Minchev, local informal leader in Nikolaevo, 29 July 2006.



or 229.71 leva per household member (€118).<sup>215</sup> The average monthly salary in Bulgaria in December 2005 was 340 leva (€174).<sup>216</sup> Thus the estimated costs incurred for placing a child in public pre-school (excluding the costs for transport), would amount to 4.3–12.1 per cent of the average family income or 7.4–20.6 per cent of the average monthly salary. The costs would, however, be higher in the case of a Roma working family, as the average income and the average salaries in that case are lower. A Roma family living on social welfare would also pay a higher share of its family income where it is not exempted from paying fees and additional contributions.

According to an estimate by a school director in Vidin, the estimated costs incurred by a family for the school participation of one child for one month are 25 leva for the primary level (€13.5), 35 leva for the lower secondary level (€18) and 45 leva for the secondary level (€23).<sup>217</sup> Calculated on the basis of the average salary around the date of the interview (340 leva), this would mean 7.4 per cent, 10.3 per cent and 13.2 per cent of that salary respectively. As the average salary in the Roma family is lower, pre-school participation places a higher financial burden on Roma families.

An expert has questioned the impact of providing snacks and other benefits to disadvantaged children, charging that the programme affects children's sense of pride and dignity. According to this expert, such programmes have also come under criticism for failing to keep Roma in school.<sup>218</sup>

The NSI reports periodically on household spending by selected categories. Education in this statistics is integrated with leisure and cultural consumption. This integrated spending for December 2005 was 21.41 leva (€11) on average per household and 8.48 leva (€4.3) per household member. Calculated as a share of the average monthly monetary spending per household, the above amounts would make 4.5 per cent of the total household and household member spending.<sup>219</sup> There are no statistics disaggregated by ethnicity, but the respective share in a Roma household that has all its children in school would probably be higher, because of the much higher number of children.

The number of private pre-schools in Bulgaria is relatively low. In the 2005–2006 school year there were only 34 such pre-schools, with 952 children.<sup>220</sup> Their fees vary

<sup>215</sup> National Statistical Institute, *Income, Spending and Consumption of the Households*, available at <http://www.nsi.bg/BudgetHome/BudgetHome.htm> (accessed on 11 March 2006) (hereafter, NSI, *Income, Spending and Consumption of the Households*).

<sup>216</sup> Source: Stat.bg, at <http://www.stat.bg/indicator.html?lang=1&cid=401> (accessed on 11 March 2006).

<sup>217</sup> Interview with Mr. Ventsislav Stanev, director of the Tsar Simeon Veliki School, Vidin, 5 January 2006.

<sup>218</sup> OSI Roundtable, Sofia, June 2006.

<sup>219</sup> NSI, *Income, Spending and Consumption of the Households*.

<sup>220</sup> NSI, *Education in Bulgaria – 2006*, pp. 35–36.

from €80 to €200 per month on average,<sup>221</sup> which is 47 per cent to 117 per cent of the average monthly salary. Private pre-schools are prohibitively expensive for many Roma households, as their income is much lower than that of an average household. The media have reported some cases of corruption with regard to the enrolment of children in well-regarded pre-schools. According to a February 2006 Radio Free Europe report, because around 1,000 children are on waiting lists for pre-schools in Sofia alone, enrolment in some of them requires “connections”.<sup>222</sup>

Sending a child to a special boarding school relieves the family from all the expenses that they usually incur if the child attends a local school. These costs include food, textbooks after the fourth grade, school supplies and medicine. Some boarding schools offer also clothing and shoes if they are able to solicit donations from local and international donors. The special school in Veliko Turnovo is a semi-boarding type, and, according to the school director, it does not receive meal subsidies. The managing body of the school has secured additional money from different sponsors to provide free meals and travel to the school for the students. The amount varies from month to month, ranging between 300 levs and 400 levs (€15–20).<sup>223</sup> The school director reported that the free meals and travel are often the reasons for Roma parents to send their children to the special school although they do not have disabilities; at the same time, the parents of Roma children enrolled in the special school note that they have to give one or two levs per week for food. There is no special transport provided for the school, but the principal has negotiated with private bus companies so that the children from the special school would travel for free.<sup>224</sup>

The constraints raised by school costs, however minor they might seem for a middle-class Bulgarian family, coupled with other factors, such as racism, lower educational status in the Roma communities in general, and the need to involve children in supporting the family from a very early age, apparently discourage many Roma families from sending their children to educational institutions and especially to pre-schools. There are no provisions in the *Decade Action Plan* that deal specifically with addressing costs at the pre-school level, nor provisions for changing the incentives in free provision of services and goods in special schools that encourage socio-economically deprived Roma families to send their children to those institutions.

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<sup>221</sup> Source: The websites of the private pre-schools “Detski Klub” ([www.detskiklub.net](http://www.detskiklub.net)) and “ESPA” ([www.espa-bg.com](http://www.espa-bg.com)).

<sup>222</sup> RFE, “Детските градини” (Kindergartens), broadcast on 28 February 2006, transcript available at [http://www.rfi.bg/prog/euaccent/show.shtml?type=show&program=euaccent&news\\_NUM=664&indexa=no](http://www.rfi.bg/prog/euaccent/show.shtml?type=show&program=euaccent&news_NUM=664&indexa=no). (accessed on 11 March 2006). Similar practices, due to the insufficient number of places in the pre-schools in Sofia, are reported in the newspaper *Dnevnik* from 25 August 2005 (“Pre-Schools also in the Cafes”).

<sup>223</sup> Source: the St. Teodosii Turnovski Special School, Veliko Turnovo, school documentation and interview with Mrs. Katinka Obretenova, school director.

<sup>224</sup> Case study Veliko Turnovo.

#### 4.4 Residential segregation/Geographical isolation

Roma in Bulgaria live in the most segregated residential settings as compared to the Roma communities in the other Eastern European countries. Residential segregation grew together with urbanisation in the Roma communities during the period from the 1950s to the 1970s. According to one estimate, 57 per cent of Bulgarian Roma live in “Roma neighbourhoods”, while another 21 per cent live in “neighbourhoods with a predominantly Roma population”.<sup>225</sup> Another estimate from November 2001 puts the share of Roma living in “principally Roma” neighbourhoods in Bulgaria at 66.4 per cent and those living in “mixed” neighbourhoods at 31.4 per cent.<sup>226</sup> In some cases segregated neighbourhoods are separated by walls from the rest of the town or village.<sup>227</sup>

Most of the houses in the segregated Roma neighbourhoods are “illegal”, either outside the town/village boundaries or without appropriate authorisation papers. The extent of “illegal” construction, according to one survey from 2000, is approximately 70 per cent of all the real estate in Roma neighbourhoods nationwide. In some cities this share is higher, reaching 90–100 per cent.<sup>228</sup> This situation became a source of tensions in recent years, with some municipal governments targeting Roma neighbourhoods and parts of neighbourhoods for demolition.<sup>229</sup> The living conditions in segregated neighbourhoods are much worse than they are for the rest of the population. The Government recognised that they “are among the main factors for the relatively worse state of health of the Roma population”.<sup>230</sup> The fact that many Roma settlements are “illegal” leads to a lower quality or to a total lack of municipal services.<sup>231</sup> Poor living conditions in Roma settlements also negatively affect the school results of Roma children, who in many cases lack adequate conditions for doing homework or other school assignments. While the State pays for transport between two towns or villages, transport within a city or town is not covered.

<sup>225</sup> Mitev, *Dynamics of Poverty*, p. 41.

<sup>226</sup> UNDP, *Avoiding the Dependency Trap*, pp. 101–102.

<sup>227</sup> EUMAP, *Minority Protection in Bulgaria – 2002*, p. 94.

<sup>228</sup> EUMAP, *Minority Protection in Bulgaria – 2002*, p. 93. The figure of 70 per cent Roma “illegally built housing” in the Roma neighbourhoods was cited also in the European Commission’s 2001 *Regular Report on Bulgaria*. European Commission, *2001 Regular Report on Bulgaria’s Progress Towards Accession*, Brussels, 13 November 2001, p. 23.

<sup>229</sup> Cf. International Helsinki Federation for Human Rights, “Bulgaria Should Stop Demolition of Roma Houses,” Statement of 31 August 2005, available at [http://www.ihf-hr.org/documents/doc\\_summary.php?sec\\_id=3&d\\_id=4122](http://www.ihf-hr.org/documents/doc_summary.php?sec_id=3&d_id=4122) (accessed on 20 February 2007).

<sup>230</sup> Replies of the Government of Bulgaria to the List of Issues of CESCR, Art. 4.1, 9 July 1999.

<sup>231</sup> Ina Zoon, *On the Margins: Roma and Public Services in Romania, Bulgaria, and Macedonia*, New York: Open Society Institute, 2001, pp. 141–142.

Negative effects of residential segregation and segregated education have been discussed on numerous occasions by Bulgarian sociologists, anthropologists and educational specialists in Bulgaria. These include deficits in basic social skills, language barriers, limited social horizons and lack of experience with multi-ethnic environments.<sup>232</sup>

## 4.5 School and class placement procedures

### 4.5.1 Class placement

According to the Rules and Regulations for the Application of the National Education Act, the school director distributes the students into classes on the basis of the class and group size requirements.<sup>233</sup> However, there are no rules on how exactly this should happen, and class placement procedure in Bulgarian schools is informal and often arbitrary. Placement is sometimes negotiated with parents. Opinions of the students and of the teachers are also sometimes, although by no means always, taken into account.

The possibility of placing children with intellectual disabilities in mainstream schools is envisaged by the National Education Act.<sup>234</sup> Although the purpose of this placement, according to the law, is “integrated education”, the law does not prohibit forming separate classes for children with intellectual disabilities. While such classes do exist,<sup>235</sup> they are rare in the Bulgarian education system, where the typical form of remedial educational is the special school for children with intellectual disabilities. The assessment procedures for assigning children to remedial classes are the same as the procedures for assigning them to special schools.<sup>236</sup>

There are cases where Roma children are proportionately allocated to integrated school environments, such as, for example, in Vidin by the NGO Organisation Drom, which has organised the desegregation initiative there.<sup>237</sup> The criteria for allocating Roma children in mainstream schools are solely based on the choice of their parents, who take account of the specialisation and reputation of the schools.<sup>238</sup>

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<sup>232</sup> Nunev, *Roma and the Process of Desegregation*, pp. 40–41.

<sup>233</sup> *Rules and Regulations for the Application of the National Education Act*, Art. 90, para. 3.

<sup>234</sup> *National Education Act*, Art. 27, para. 1.

<sup>235</sup> In the town of Montana there are two such classes: in one of the mainstream schools and in the segregated Roma school. Both are predominantly filled with Roma students (cf. BHC, *Remedial Schools in Bulgaria*, pp. 256–263). According to the SACP, the total number of children in such classes on 31 December 2004 was 135 (SACP, “Right to Education for Children with Special Educational Needs,” p. 80).

<sup>236</sup> See below.

<sup>237</sup> This is confirmed in an interview with Donka Panayotova, chair of the NGO Organisation Drom, 8 April 2006, Vidin.

<sup>238</sup> Case study Vidin.

### 4.5.2 Placement in special schools

The overrepresentation of Roma children in special schools for children with intellectual disabilities is a serious problem in Bulgaria. These are schools that enrol children from the first to the eighth grade, but do not offer a formal diploma on graduation. According to the Rules and Regulations for the Application of the National Education Act, students who graduate from the eighth grade of these schools receive a certificate but not a diploma for the educational level completed unless they pass exams.<sup>239</sup>

The overrepresentation of Roma in special schools came to the attention of the European Commission as early as 1999, with the 1999 Regular Report on Bulgaria's progress towards accession.<sup>240</sup>

The Bulgarian Helsinki Committee's research, as well as subsequent studies, revealed serious flaws in the procedure for diagnosing intellectual disabilities, which result in arbitrary placement in special schools for purely social reasons.<sup>241</sup> These include imprecise, formalistic and culturally insensitive testing by a team of experts, many of whom have conflicts of interest, sometimes in clear violation of the procedure prescribed by law. In some cases school directors actively seek their students in Roma neighbourhoods and drive them through the procedure.<sup>242</sup> The SACP observed with concern the fact that eight special schools are located in places where there are no other schools, which both creates an obstacle to integration and places pressure on local parents to enrol their children in the special schools.<sup>243</sup> The Government of Bulgaria pledged before the EU to deal with this situation by establishing a diagnostic procedure that prevents arbitrariness, by integrating remedial education with the mainstream

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<sup>239</sup> *Rules and Regulations for the Application of the National Education Act*, Art. 46, para. 2 and 3.

<sup>240</sup> In 1999, the European Commission noted that "A disproportionate number of Roma children are sent to special schools for the mentally handicapped". Since then the EC has continued to express concerns over this issue. European Commission, *1999 Regular Report from the Commission on Bulgaria's Progress Towards Accession*, Brussels, 10 October 1999, p. 15, available at [http://ec.europa.eu/enlargement/archives/pdf/key\\_documents/1999/bulgaria\\_en.pdf](http://ec.europa.eu/enlargement/archives/pdf/key_documents/1999/bulgaria_en.pdf) (accessed on 20 February 2007).

<sup>241</sup> See EUMAP/MHI, *Rights of People with Intellectual Disabilities: Access to Education and Employment – Bulgaria*, Sofia: OSI, 2005 (hereafter, EUMAP, *Rights of People with Intellectual Disabilities – Bulgaria*), pp. 40–45, available at [http://www.eumap.org/group1/silva2/reports/2005/inteldis\\_country/bulgaria/](http://www.eumap.org/group1/silva2/reports/2005/inteldis_country/bulgaria/) (accessed on 20 February 2007); The State Agency of Child Protection too observed that "[Roma] parents prefer to place their children in a remedial school for a number of reasons – the ensuring of boarding services, free textbooks, and free or cheap food. Because of the difficulties in communication and the short time in which the child is assessed, these children most often get a diagnosis of intellectual disability, despite the fact that they do not have impaired intellect." SACP, "Right to Education for Children with Special Educational Needs," p. 54.

<sup>242</sup> ERRC, *Stigmata*, pp. 41–42.

<sup>243</sup> SACP, "Right to Education for Children with Special Educational Needs," p. 38.

education and by reducing the number of children in the special schools.<sup>244</sup> Recent data, however, do not substantiate these commitments (see Chart 2 in section 2.4).

Although since 2002 parents of children with intellectual disabilities have been able to enrol their children in mainstream schools, the Government has so far failed to secure the necessary regulations and resources to make this policy effective,<sup>245</sup> such as hiring “resource teachers” in the mainstream schools, ensuring appropriate teaching materials, training teachers for integrated, multi-ability classrooms, and the like.

The procedure for placement of children in special schools for persons with disabilities is regulated by the Rules and Regulations for the Application of the National Education Act and by Ordinance No. 6 of the Ministry of Education and Science from 19 August 2002.<sup>246</sup> These regulations allow for the placement in special schools of children from the first grade, as well as placement in special pre-schools. Three bodies have a role in the placement: the Central Expert Medical Consultative Commission (CEMCC),<sup>247</sup> the Central Diagnostic Commission at the Ministry of Education and Science and the Team for Complex Pedagogical Assessment (TCPA) at the Regional Inspectorates of Education.

Before they were dismantled in 2005, the Regional Expert Medical Consultative Commissions (REMCC) had a role in diagnosing disabilities for the purposes of special education. Today, the TCPA has a decisive role in the placement of children in special schools. For the specific purposes of placement at the beginning of each school year the TCPA is appointed by the Regional Inspectorates of Education and consists of different specialists – educators, medical professionals and psychologists from the special schools and from other institutions in the locality.<sup>248</sup> The expert on special schools at the inspectorate chairs the team in this case. For the rest of the year another diagnostic team, chaired by the school/pre-school director, has a specific duty to ensure individualised education for students placed in special schools and pre-schools, including the education and reassessment of the students. REMCC and after 2005

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<sup>244</sup> The amendments to the National Education Act and passing of Ordinance No. 6, both from 2002, were largely in response to that pledge. Three subsequent documents followed: *The National Strategy for Child Protection 2004–2006 from 2004*; *The National Programme for Child Protection for 2005*; *The National Programme for Child Protection for 2006*. These documents were developed by the State Agency for Child Protection and are available, in Bulgarian, at its website at [http://www.stopech.sacp.government.bg/?sid=professional\\_bg&pid=0000000074](http://www.stopech.sacp.government.bg/?sid=professional_bg&pid=0000000074) (accessed on 20 February 2007).

<sup>245</sup> OSI, *Rights of People with Intellectual Disabilities – Bulgaria*, p. 49.

<sup>246</sup> *Rules and Regulations for the Application of the National Education Act*, Art. 50, para. 4; Ministry of Education and Science, Ordinance No. 6 for Education of Children with Special Educational Needs and/or Chronic Diseases from 19 August 2002, *Official Gazette*, No. 83, 30 August 2002 (hereafter, *Ordinance No. 6 for Education of Children with Disabilities*).

<sup>247</sup> Established with Ordinance No. 19 of the Ministry of Health on the Expertise of Disability of Children under 16 Years of Age, *Official Gazette*, No. 84, 13 October 2000.

<sup>248</sup> *Ordinance No. 6 for Education of Children with Disabilities*, Art. 18, para. 1 and 2.

CEMCC assigned medical diagnoses of different degrees of intellectual disability, which were usually accepted by the TCPA.

Before 2002 the procedure was arbitrary in both law and practice and did not even envisage the obligatory use of tests. With the adoption of Ordinance No. 6 for Education of Children with Disabilities in 2002, the procedure became more elaborate in law, with obligatory testing and other guarantees for objective assessment of disabilities. Placement in special schools became a measure of the last resort,<sup>249</sup> which by law cannot take place without the consent of the parents. The latter are members of the TCPA and can nominate experts who also participate as members.<sup>250</sup>

However, in practice the assessment procedure is often arbitrary and simplistic.<sup>251</sup> Tests are offered in Bulgarian, and the involvement of the parent is formal. A 2004 evaluation of the legality of the placement in the special schools, conducted by the SACP, revealed that in the files of 533 children placed in the special schools there were no TCPA records for placement. In the files of 1,912 children there were no protocols of the diagnostic teams for the assessment of their individual educational needs. In 623 cases there were no applications by family members.<sup>252</sup> The system's failure to reduce the relative share of the children in special schools, as a proportion of the school-age children in Bulgaria, generally clearly demonstrates that the system remains arbitrary and imprecise.<sup>253</sup>

Material collected at the local level for this report illustrates this. While two thirds of the Roma living in the ghetto on Aleko Konstantinov St. in Veliko Turnovo acknowledge that a higher education would provide them with better opportunities for finding a job, half of the school-age children attend a special school for people with intellectual disabilities. Parents unanimously report that the social benefits available at this school are the main reason that they choose to enrol their children there, although they are aware that the children cannot continue their education after finishing this school. Nevertheless, they accept this as something immutable, not as something dependent on them themselves.<sup>254</sup>

Desegregation in Vidin Municipality has reduced the number of children studying in segregated Roma schools (see section 3.3); however, the proportion of Roma students at the special school in the municipality increased from 70 per cent in 2005–2006 to

<sup>249</sup> *Ordinance No. 6 for Education of Children with Disabilities*, Art. 2, para. 3.

<sup>250</sup> *Ordinance No. 6 for Education of Children with Disabilities*, Art. 18, para. 3 and 4.

<sup>251</sup> Cf. OSI, *Rights of People with Intellectual Disabilities – Bulgaria*, p. 40.

<sup>252</sup> SACP, "Right to Education for Children with Special Educational Needs," pp. 40 and 49.

<sup>253</sup> See above Table.

<sup>254</sup> *Amalipe Newsletter*, January 2005, p. 3, available at <http://geocities.com/amalipe2002> (accessed on 27 May 2006).

85 per cent in 2006–2007; the overall enrolment in the school also increased, from 83 to 105 students.<sup>255</sup>

The practice in Vidin is for children to be placed in special schools after the parent has filed a request and the child has taken the “Hamburg-Wechsler” IQ test. The child completes an IQ test while a speech therapist conducts a preparatory evaluation, and after that the committee asks several questions to confirm the results from the tests and makes a decision, which is approved by the Regional Inspectorate of Education, Vidin.<sup>256</sup> The reassessment of the children is performed after a request from the parent submitted to the head of the Regional Inspectorate of Education, Vidin. The last Regional Inspectorate of Education report does not note how many reassessments have been conducted in the past years. The Regional Inspectorate of Education’s files contained no complaints by Roma parents.<sup>257</sup>

According to interviews in Vidin, there is one specific element that must be changed, related to the entry regulation for special schools. The children must be carefully medically examined, because the committee accepts children without disabilities in some cases. There are, however, still cases of children entering special schools only because parents insist that the child receives all the benefits provided by State social services and the Bulgarian Red Cross. A member of the committee confirmed that many Roma children do not manage to pass the test because of their inability to speak Bulgarian.<sup>258</sup>

There are four qualified teachers in Vidin Municipality for work with children who have special needs but study in mainstream schools. The special school registers a high number of illiterate Roma children, but the school programme does not track school results, and there is thus a significant difference between the programme of the special school and that of the mainstream schools in town. A decision of the committee can be revoked in the case that the child completes a second test successfully and before that there is a request submitted to the head of the Regional Inspectorate of Education. Interviews confirmed that no such requests were submitted, and nor were any complaints filed. The Vidin region was the only one in the country that has not submitted a programme for children in the special schools to integrate in the mainstream schools in 2006. Neither the special school authority nor the Regional Inspectorate of Education, Vidin, which are the driving engines for this programme, had a clear explanation of the reasons.<sup>259</sup>

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<sup>255</sup> Territorial Statistical Bureau, Vidin, February 2006.

<sup>256</sup> Interview with Georgi Mladenov, member of the Committee for Evaluation of Children to the Remedial School in Vidin, 12 April 2006, Vidin.

<sup>257</sup> Case study Vidin.

<sup>258</sup> Case study Vidin.

<sup>259</sup> Case study Vidin.



### 4.5.3 Transfer between schools

Transfer from one school to another is relatively easy in Bulgaria. The Rules and Regulations for the Application of the National Education Act provide for separate procedures for transfer for the students between the first to the fourth grade, for the students between the fifth to the eighth grade and for the students from special schools to the schools of general education. Students between the first to the fourth grade in the schools of general education may be transferred from one school to another throughout the year. Parents direct a request for transfer to the director of their child's school, who is obliged to respond by issuing a certificate for transfer. The director is also obliged to inform the municipal authorities. The director of the accepting school is obliged to inform the municipal authorities within a seven-day period after the enrolment.<sup>260</sup> Students between the fifth and the eighth grade are transferred through the same procedure, with the only limitation that the transfer cannot take place later than 30 days before the end of the school term.<sup>261</sup> The NSI does not publish data on transfers in the Bulgarian education system.

According to Ordinance No. 6 for Education of Children with Disabilities, students from the special schools can be transferred to the mainstream schools if they successfully pass the exams for the respective grade, stage or educational level. The accepting school organises these exams.<sup>262</sup> There are no support mechanisms and no preparation whatsoever for this procedure in the special schools. The latter have an interest in not "losing" children to the mainstream schools and therefore transfer takes place very rarely, if ever. The reduction of the number of children in special schools that took place over the past several years is a result of the general demographic decline, not of transfers.

Ordinance No. 6 for Education of Children with Disabilities does not envisage obligatory reassessment of children with special needs by an independent body. The diagnostic commissions of the Regional Inspectorates of Education may conduct additional assessments in order to correct the results of the assessment of the diagnostic teams, as well as for other purposes, which are, however, not specified in the ordinance.<sup>263</sup> This type of reassessment is incidental and not periodic.

Although the right is not specifically provided for in Ordinance No. 6, based on the general clause of the administrative law parents can appeal against the results of the assessment. The Central Diagnostic Commission at the Ministry of Education and Science is empowered to decide on the disputed cases of the commissions at the regional level.<sup>264</sup> As the parents are made members of the diagnostic teams and as

<sup>260</sup> *Rules and Regulations for the Application of the National Education Act*, Art. 40.

<sup>261</sup> *Rules and Regulations for the Application of the National Education Act*, Art. 44.

<sup>262</sup> *Ordinance No. 6 for Education of Children with Disabilities*, Art. 35, para. 4.

<sup>263</sup> *Ordinance No. 6 for Education of Children with Disabilities*, Art. 23, pt. 13.

<sup>264</sup> *Ordinance No. 6 for Education of Children with Disabilities*, Art. 27, pt. 3.

placement in special schools is only possible on the basis of an explicit request by parents in the first place, appeal cases are only hypothetical.

Two of the special schools in Veliko Turnovo Municipality (in Mindia and Gabrovtsi) were closed in June 2006 as part of the Ministry's efforts to meet EU accession criteria regarding special schools. From the school in the village of Mindia with a majority Roma enrolment, only 12 of the 86 children were redirected to the special schools in Novo Selo or Teodosij Turnovski. The other children have been assessed as eligible for integrated education.<sup>265</sup> Research carried out by the Amalipe Centre, however, has shown that the Regional Inspectorate of Education has not followed whether these children have been appropriately integrated in the mainstream schools or whether they have been enrolled in a mainstream school at all. The study showed that the children were just formally directed to certain schools in their place of residence, without any consultations with the parents.<sup>266</sup>

Another problem appeared for the integrated children after the start of the new school year. Resource centres were established in district cities by Ordinance No. RD 14-180/13.09.2006 of the Ministry of Education and Science.<sup>267</sup> At the beginning of October 2006, however, these centres were still not operating and not able to provide pedagogical and psychological help to the integrated children formerly enrolled in special schools. Since the first two to three weeks are the most important weeks for the children's psychological and pedagogical adaptation, this created a high risk that these children would drop out.

From the end of the 2005–2006 school year and the beginning of 2006–2007, the Amalipe Centre started a campaign for integrating children without intellectual disabilities from the special school in Veliko Turnovo into mainstream schools in the town. This, however, met with strong resistance from the teachers at the St. Teodosij Turnovski Special School. They made several visits to the Roma ghetto, where the teachers at the special school warned parents not to take their children from the special school.<sup>268</sup>

On 19 September 2006, the Commission for Complex Pedagogical Assessment met in the special school. A representative of the Amalipe Centre was present at the meeting and charged that the work of the Commission constituted a serious violation of children's rights for access to quality education. Although the goal of the Commission is to assess and stimulate the children who could be integrated to continue their education in a mainstream school, the Amalipe Centre found a number of serious irregularities with the process. First, discussion with the parents revealed that only a few of them were present at

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<sup>265</sup> Interview with Mr. Lyubomir Minchev, expert in integrated education in the Regional Inspectorate of Education, Veliko Turnovo, 27 May 2006.

<sup>266</sup> Case study Veliko Turnovo.

<sup>267</sup> *Official Gazette*, issue 77 of 19 September 2006.

<sup>268</sup> Case study Veliko Turnovo.

the Commission hearings. One of the girls reported that she had attended the Commission only once, although she is in the sixth grade. The members of the Commission made an unsuccessful attempt to deny the Amalipe Centre access to the meeting, although observers are permitted by law, and the parents gave their authorisation. Furthermore, the observer noted that members of the Commission tried to convince the children that they would benefit and succeed only in the special school and that they would fail if they attended the mainstream school. This was repeated two or three times to the children. At the same time, they were given tasks from textbooks for higher grades. This practice continued even after the representatives of the Amalipe Centre objected.<sup>269</sup> The Regional Inspectorate of Education did not intervene, despite requests to do so. The Amalipe Centre is considering further steps to lodge an appeal to higher instances. Unfortunately, the parents themselves did not dare to make a complaint, since the teachers from the special school warned them not to do so.<sup>270</sup> As a result, three of the children returned to the special school. No information has been provided so far by the Regional Inspectorate of Education as to how many of the children from the closed schools in Mindia and Gabrovtsi have not been enrolled in schools at all or have already dropped out.<sup>271</sup>

There are no registered cases of transfer of Roma children from the special school to the mainstream schooling system in Vidin, in part because the problem has a social dimension: Roma parents send their children to the special school, even if they qualify for mainstream schools, because of the financial benefits that they receive, without understanding that this path greatly diminishes their children's chances of employment on finishing school. In the 2006–2007 school year the Vidin special school enrolled 105 children, 85 per cent of whom were of Roma ethnic origin. This was an increase from the 83 children enrolled during the previous school year. The average age of children entering the school is between 8 and 12 years.<sup>272</sup> During both the 2005–2006 and the 2006–2007 school year there were children who enrolled in that school from the first grade.<sup>273</sup>

Parents must submit a request for entry of their child to the special school, which is examined and approved by a committee, attached to the Regional Inspectorate of Education and consisting of a representative of the Regional Inspectorate of Education, a psychologist, a speech therapist, a resource teacher and a primary teacher. The committee's decision is based on a "complex psychological and pedagogical examination

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<sup>269</sup> Case study Veliko Turnovo.

<sup>270</sup> Interviews with parents who prefer to remain anonymous.

<sup>271</sup> Case study Veliko Turnovo.

<sup>272</sup> Several attempts to interview the principal of the remedial school failed. That is why an anonymous interviewee, a teacher at the school, was approached on 30 March 2006 to answer the questions that were directed to the principal.

<sup>273</sup> Case study Vidin.

of the child”.<sup>274</sup> After completing the eighth grade the child receives a certificate and not a diploma. The children in the special school are assessed at the beginning of each school year, and there is, at least in theory, an individual programme for the development of each child, which is reassessed at the end of the first school term. In practice, however, this is rarely the case.

The Juvenile Delinquency Act regulates placement of children in special schools for children with behavioural challenges.<sup>275</sup> Established during the period of Communism, the placement procedure for these schools was completely arbitrary for years and was a matter of serious concern for local and international human rights monitors.<sup>276</sup> This procedure was reformed in July 2004 – placement became possible only through a court decision with some, although not all, due process guarantees. The new procedure did contribute to the reduction of the number of children in this type of special schools.<sup>277</sup> However, it is still entrapped by the deficiencies of both the Bulgarian criminal justice system and the education system, with selective targeting of Roma juveniles as delinquents, and children from poor families being used as material to maintain the capacity of institutions serving their own institutional logic, just as in the case of the special schools.

#### 4.6 Language

The number of Romanes-speakers in Bulgaria is relatively high, at 327,882 according to 2001 census data. At 88.4 per cent of the self-identified Roma in the census, this is probably proportionately the highest in Europe. The real number of Romanes-speakers is almost certainly higher, as is the number of Roma identified as such by others. The share of Romanes-speakers from the latter, however, is most probably lower, although how much lower than the respective shares from the census data is not clear.

There is no precise information on how many children using a Romani language (including different dialects of Romanes) and/or Turkish are also proficient in Bulgarian at the age of three years (the general age of enrolment in pre-school) and at the age of seven years (the age of enrolment in the first grade of primary school). There is, however, no doubt that a significant portion of them cannot speak Bulgarian even by an older age. This problem has been recognised on several occasions by different governmental institutions, most recently with the *National Programme for the*

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<sup>274</sup> Interview with Georgi Mladenov, member of the Committee for evaluation of children to the remedial school in Vidin, 12 April 2006, Vidin.

<sup>275</sup> Juvenile Delinquency Act, *Izvestia*, No. 13, 14 February 1958, with many amendments, the latest one from 25 December 2005.

<sup>276</sup> Cf. Human Rights Watch, *Children in Bulgaria: Police Violence and Arbitrary Confinement*, New York: HRW, September 1996.

<sup>277</sup> See Table 16.

*Development of School Education and Pre-School Upbringing and Instruction.*<sup>278</sup> According to the IMIR 2003 survey, around 74 per cent of Christian Roma children and around 90 per cent of Muslim Roma children in Bulgaria speak a minority language (Romanes or Turkish) at home. Also, around 70 per cent of Christian Roma children and 87 per cent of Muslim Roma children speak a minority language with friends.<sup>279</sup> There is clear evidence from this survey that speaking Bulgarian at home correlates positively with higher grades at school in both the Turkish community and the Roma community. However, Turkish children (a separate object of study of the IMIR survey) report higher grades at school, despite the fact that they speak a minority language at home and with friends much more often than Christian Roma and as often as Muslim Roma. Yet 60.7 per cent of the Muslim Roma children and 50.3 per cent of the Christian Roma children report that they need additional education in Bulgarian language.<sup>280</sup> Another study reports that more than two thirds of the children in the Roma and in the Turkish communities start the school with no knowledge of the Bulgarian language.<sup>281</sup>

There is no precise information on how many educators working in pre-schools or in schools with a high percentage of Roma speak Romanes or Turkish and are prepared to teach or conduct some instruction in these languages using bilingual techniques. The overwhelming majority of the teachers in these schools are Bulgarians who do not speak any Romanes or Turkish. They are unable to use bilingual techniques and do not understand the specific educational needs of Roma children. This is also true for the teachers in integrated schools.<sup>282</sup> Yet clearly there are some teachers who speak Romanes or Turkish, as all the teachers who taught Romanes at the height of its popularity in the mid-1990s were themselves Roma. According to information from the Regional Inspectorates of Education for the 2004–2005 school year, 11 teachers identified themselves as Roma and as Romanes-speakers.<sup>283</sup> Their number, however, is probably higher in fact.

Research in Vidin suggests that the level of Bulgarian language proficiency of Roma children in pre-school and before entering the first grade at school is very limited, because they live in segregated Roma settlements, where Romanes is dominant, and

<sup>278</sup> *National Programme for the Development of School Education and Pre-School Upbringing and Instruction*, IV.3.

<sup>279</sup> IMIR, *Final Report on Minority Education*, pp. 17–18. See also the entry on the Roma neighbourhood of Stolipinovo, in Plovdiv, indicating the gravity of the problem and the tendency to have fewer Roma Bulgarian-speakers among the younger generation.

<sup>280</sup> IMIR, *Final Report on Minority Education*, p. 18.

<sup>281</sup> Tomova, “Education of Vulnerable Minority Communities,” p. 197.

<sup>282</sup> Hristo Kyuchukov and A. Ivanova, “Отношението на учителите към образованието на ромските деца” (The Attitude of Teachers to the Education of Roma Children), in Kyuchukov (ed.), *Desegregation or Inter-Cultural Integration*, p. 187.

<sup>283</sup> Interview with Yosif Nunev, State expert at the Ministry of Education and Science, 23 March 2006.

they communicate at home solely in this language.<sup>284</sup> The practice of Organisation Drom shows that once Roma children enter integrated schools they quickly adapt to the language environment if they are tutored after the regular classes. The Vidin desegregation model has shown that this is a much better practice instead of channelling resources for assistant teachers to enter integrated classes and translate for the Roma children. According to a member of the committee that decides for the placement of children in special schools, there are misdiagnoses of Roma in special schools because they do not speak Bulgarian well, but the Roma parents, usually of a poor social background, insist that their children go to this type of school because of the substantial benefits offered by the State.<sup>285</sup>

In Veliko Turnovo Municipality, however, poor command of Bulgarian is only rarely the reason for misdiagnosis of Roma in the special schools. Most of the Roma children in the municipality are Turkish-speakers. There is a serious problem for the children from the Sveta Gora neighbourhood in Veliko Turnovo, since many of them do not attend pre-school prior to first-grade school enrolment. A pre-school group has been established in the Hristo Botev School in Veliko Turnovo for children with low proficiency in Bulgarian and/or Turkish as their mother tongue. At the same time, the school has eight groups for studying Turkish as a mother tongue as a free elective subject. Some of the teachers speak Turkish. Observations of teachers teaching in the secondary schools in the town show that children coming from the Hristo Botev School drop behind in the school material due to their low command of Bulgarian.<sup>286</sup>

There are no schools in Veliko Turnovo where Romanes is taught as a mother tongue. In the neighbouring Gorna Oriahovitza Municipality, students specialising in primary school pedagogy with Romanes language have their practice in teaching Romanes within the Roma folklore classes. The primary teacher teaching Roma folklore in the school of Vodoley has reported that she uses the mother tongue of the children (which is a mixture of Romanes and Turkish) to facilitate her everyday work with the children.<sup>287</sup>

Likewise, both Roma community representatives and schoolteachers and principals report that Roma children in Nikolaevo face serious language difficulties, especially those who have not attended pre-school.<sup>288</sup> The problems are greatest in the first school grade, and sometimes the communication necessitates interpretation by a person who speaks the mother tongue of the children. None of the teachers speaks Turkish, which appears to be the mother tongue of most of the Roma children.<sup>289</sup>

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<sup>284</sup> Case study Vidin.

<sup>285</sup> Anonymous interview with a committee member, 23 April 2006, Vidin.

<sup>286</sup> Case study Veliko Turnovo.

<sup>287</sup> Case study Veliko Turnovo.

<sup>288</sup> Interviews with Biliana Belcheva, school principal, Ivan Minchev, informal Roma leader, Ivan Jorov, teaching assistant, and Tania Kostadinova (Nikolaevo Municipality), October 2006.

<sup>289</sup> Case study Nikolaevo.

A number of experts have noted the importance of studying Romanes as a mother tongue, in terms of building children's self-esteem and personal identity. The lack of an overarching Government policy on the study of second languages has been cited as a problem in establishing a comprehensive system to enable children to study their mother tongue in school.<sup>290</sup>

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<sup>290</sup> OSI Roundtable, Sofia, June 2006.

## 5. BARRIERS TO QUALITY OF EDUCATION

*In every way, schools with a high level of Roma students are inferior to those with lower numbers of Roma enrolled. Many Roma schools are in poor physical condition and lack the facilities necessary to educate students adequately, such as computers and laboratories; in the special school networks, even the most basic equipment, such as desks, textbooks and teaching materials, is inadequate or altogether lacking. With such conditions, these schools cannot attract the most highly qualified and motivated teachers, although the lack of vacant teaching positions throughout Bulgaria limits staff turnover in all schools. As the school system adjusts to reflect the lower birth rate and consequent smaller numbers of students, the Government must take steps to ensure that all children attend an integrated school with adequate facilities and appropriate resources.*

*Recent NGO-conducted research demonstrates that Roma students in segregated schools perform worse on tests in mathematics and language than their counterparts in integrated schools do. Literacy rates for Roma are below those for the majority population; in particular, Roma who have attended segregated schools have much lower literacy rates, possibly because attendance at such schools is poorly monitored, the quality of education is low, and students can pass from grade to grade without meeting basic standards. Indeed, for children attending special schools for children with intellectual disabilities (remedial schools), and other types of special schools, there are no set standards at all – further ensuring that these students will be unable to go on to further education or reasonable expectations of employment.*

*Teaching in Bulgaria still relies heavily on older methods, and while professional development courses are available, many are offered by NGOs and not part of recognised teacher training. The Ministry of Education and Science could offer certificates for these courses, which would encourage teachers to take part and advance professionally. Many teachers acknowledge that they have lower expectations for Roma students, despite efforts to improve inter-cultural awareness; this is a reflection of Bulgarian society in general, which still opposes integrating education. Research suggests that once the desegregation process moves ahead, communities are more receptive, further indicating that concerted Government action is needed to take integration forward. In particular, the Government could empower the network of regional inspectorates of education to do more with regard to segregation: first to recognise it, and then to work with local authorities to reverse the process and ensure equal access to quality education for all children.*

### 5.1 School facilities and human resources

#### 5.1.1 School infrastructure

There are no statistical data nationwide that would allow a systematic assessment of the state of infrastructure in schools with a high percentage of Roma students. The latter is affected by a number of factors, among which are not only the ethnicity of the students but also the location (urban versus rural, suburb versus centre), the socio-economic status of the parents, the relationship of the school management with the political institutions and personalities at the local and at the national level, its ability to solicit donations from private sources and the like. There have been several credible reports on the deplorable material conditions of the segregated Roma schools, of some special schools and of some boarding schools for children with behavioural challenges.



The 2001 OSF-Bulgaria report on Roma schools painted a grim picture of the material conditions in many segregated Roma schools. According to this report, they were by and large substandard – some of them lacked basic facilities such as blackboards and chalk; in more than 50 per cent of them windows were screened with plywood, rather than glass.<sup>291</sup> Since then the infrastructure and equipment in all the schools in Bulgaria have probably improved slightly, but reports have continued to reveal serious problems in that regard in all types of Roma schools. The 2003 IMIR report states that, according to information obtained from students in the schools where ethnic Turks and Roma are educated, there were only half as many specialised laboratories and study areas as there were in the schools of the Bulgarians. While 64 per cent of the schools of the Bulgarians had specialised laboratories in chemistry, the respective shares were 32 per cent for the Roma schools and 45 per cent for the Turks.<sup>292</sup> The same survey reported that 60 per cent of Bulgarian children had access to a computer against only 14 per cent of the Roma and 30 per cent of the Turkish students.<sup>293</sup>

The field research conducted in Veliko Turnovo in 2006 for this report indicates that only two out of the five schools with a prevailing number of Roma students have their own libraries, and that the number of volumes in these libraries is below the average for the municipality.<sup>294</sup>

The 2002 BHC survey on special schools reported harsh material conditions in a number of these institutions. According to its findings, in 40 per cent of them there were problems with the buildings that required urgent repairs, such as leaks from the roofs, and the heating, electricity and water supply systems. In several schools heating was provided through wood and coal stoves. The report revealed problems with the hygiene, lighting and the state of the walls and furniture in the residential facilities. In 80 per cent of the schools classrooms were equipped only with desks, blackboards and shelves. BHC researchers found a drastic shortage of teaching materials, including textbooks. Some subjects, such as music, were taught without textbooks at all, as there none had been published for this type of educational institution.<sup>295</sup> Subsequent research by the State Agency of Child Protection (SACP) also found that the lack of textbooks and of teaching materials, as well as the old and non-existent textbooks, “is one of the major problems” of the special schools.<sup>296</sup>

The Roma segregated school in Vidin’s Nov Pat neighbourhood, for example, is located on a secondary street, surrounded by a large fence with three entrances – one is

<sup>291</sup> OSF-Sofia, *Roma Schools in Bulgaria – 2001*, pp. 10–11.

<sup>292</sup> IMIR, *Final Report on Minority Education*, p. 7.

<sup>293</sup> IMIR, *Final Report on Minority Education*, p. 10. According to the survey, while most children from all ethnic backgrounds use computers outside the school, 80 per cent of the minority students want to have a computer education at school.

<sup>294</sup> Case study Veliko Turnovo.

<sup>295</sup> BHC, *Remedial Schools in Bulgaria*, pp. 15–16 and 18.

<sup>296</sup> SACP, “Right to Education for Children with Special Educational Needs,” p. 53.

connected to the Health Centre, the Mayor's Office and the Police Department, while the other two are provided for the pupils and local residents, who often use the school yard to go directly to their houses. The three-storey segregated school resembles a prison-like building with gratings put in 20 years ago. No major repairs of the school have been done in recent years, although all mainstream schools in Vidin have had such renovation. There is no green grass, and nor are there any trees or bushes in the school yard. Desks are in poor condition, tables and chairs are broken, and the classrooms are dirty. There is central heating but no drinking water.<sup>297</sup>

There are no functioning laboratories or libraries. There are two computer rooms in the school as confirmed by the school director,<sup>298</sup> one of which has 11 computers, donated by the Ministry of Education and Science in 2005, while the other computer room is in a process of installation. It is expected to have a total of eight computers, donated by Vidin Municipality, at the beginning of the 2005–2006 school year. There is also a computer in the art classroom. An internet hall with five computers is located in the school yard, created by the NGO “Free Youth Centre”, which is a project funded by the EU.<sup>299</sup>

The infrastructure of the Vidin mainstream schools is much better than that of the two segregated schools in the municipality. They have running water, indoor toilets, central heating and equipped laboratories and libraries. There are 40–50 computers on average in the schools, which makes one computer per every 10–15 children. The overall physical quality of the buildings and the furniture in the mainstream schools, on average, is also much better than that in the segregated schools.<sup>300</sup>

In contrast, the special school in Veliko Turnovo was completely renovated in August and September 2006. The school has been equipped with a modern computer laboratory, toilets and bathrooms, with 227,972 leva (€113,986) from the “Beautiful Bulgaria” Programme (a project of the Ministry of Labour and Social Policy) and 56,993 leva (€28,497) from the Ministry of Education and Science.<sup>301</sup>

The 2004 BHC research on former basic schools with enforced labour education (BSELE) focused specifically on the school infrastructure, technical and human resources in these typically Roma schools. Because most of them were established in the cities, access to infrastructure, technical and human resources were probably not as bad as was the case with the Roma schools in rural areas. Yet the BHC researchers found

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<sup>297</sup> Case study Vidin.

<sup>298</sup> Interview with Nina Ivanova, principal of the Sofronii Vrachanski School, 26 September 2006, case study Vidin.

<sup>299</sup> Case study Vidin.

<sup>300</sup> Case study Vidin.

<sup>301</sup> Further details, in Bulgarian, available on the MES website at [http://www.minedu.government.bg/opencms/opencms/top\\_menu/news/archiv2006-1/06-01-20\\_pu\\_vt.html](http://www.minedu.government.bg/opencms/opencms/top_menu/news/archiv2006-1/06-01-20_pu_vt.html) (accessed on 20 February 2007).

striking situations of desolation and neglect, even in otherwise large and affluent urban communities. One such case was the situation with the Hristo Botev former BSELE in the Roma neighbourhood of Pobeda in Burgas. The BHC researcher who visited that school in May 2004 wrote the following:

The state of the school building was miserable from both outside and inside [...] The look from outside was wintry and in the middle of the school yard there was a dangerously crumbling building to which the municipal authorities did not want to pay any attention. The yard was additionally narrowed by a 3–4 metre-tall metal wall, built to prevent football players breaking the windows [...] From inside the plaster of all the walls and ceilings was peeling and there were huge sections where it was absent altogether; the linoleum cover of the floors was torn into pieces; the doors were distorted and did not close well and in some there were huge holes; here and there one can see broken windows and even the rooms for the staff were in a miserable condition [...] There were faeces throughout the floor in the lavatory and a stinking smell spread throughout the corridors and the nearby classrooms. One of the cleaning ladies said that the students relieve themselves even in the wash-basins placed in the corridors on each floor of the building.<sup>302</sup>

The BHC researchers found similar conditions in several other former BSELE.<sup>303</sup> In some former BSELE, including the Dr. Peter Beron Lower Secondary School in Yambol and the SS. Cyril and Methodius Lower Secondary School in the village of Bluskovo, Varna region, material conditions were relatively good.

The BHC survey of the former BSELE also found that while some of these schools were equipped with computers (for the most part donations from charitable organisations), there were no schools where the computers were sufficient in number to be used meaningfully as educational tools. Thus among the best-equipped schools were the Naiden Gerov former BSELE in the large Roma neighbourhood of Stolipinovo in Plovdiv, which had 12 computers for 1,280 students, the Otec Paisii Lower Secondary School in Varna, which had five computers for 421 students, and the Hristo Botev Lower Secondary School in Lom, which had 13 computers for 596 students. Most former BSELE did not have any computers at all. In some the computers that they possessed were used only by the school administration.

Access to infrastructure and technical resources is also a serious problem in the boarding schools for children with behavioural challenges. The 2005 BHC survey revealed that “the state of repair of most buildings is very bad and they need

<sup>302</sup> BHC, *2004 Report on Former BSELE*.

<sup>303</sup> These included the Georgi Sava Rakovski Lower Secondary School in Berkovitsa, the Dobri Voinikov Lower Secondary School in the village of Kamenar, near Varna, the Anton Strashimirov Lower Secondary School in Kazanluk, the Hristo Smirnenski Lower Secondary School in Nova Zagora and the Hristo Smirnenski Lower Secondary School in the village of Georgi Dobrev, Haskovo region.

renovation”. The problems reported were ramshackle buildings, peeling plaster from the facades, dampness, broken joinery, leaking roofs and not working heating systems. In at least eight of these institutions the need for renovation, according to the BHC, was urgent.<sup>304</sup> The researchers found the following in the social-pedagogical boarding school (SPBS) in the village of Pchelarovo:

SPBS-Pchelarovo is threatened with closure as it cannot comply with the requirements of the State Hygiene Inspectorate with regard to the buildings of the school and the hostel, which are in need of urgent repair. The material basis of the school is in very bad condition. There are no desks, chairs or even doors in the classrooms. In the dormitories the windows are broken. A project proposal was directed to the Ministry of Education and Science, but it was rejected.<sup>305</sup>

According to the BHC report, the teaching facilities in many of the schools for children with behavioural challenges were very basic: “the classrooms were most often furnished with very old blackboards, where the writing cannot be read, desks and chairs covered with scratches and without backs”.<sup>306</sup> Many schools lacked textbooks and teaching materials, and the available ones were in a deplorable condition.

In conclusion, there appears to be a correlation between schools with a high proportion of Roma students, whether geographically segregated schools, special schools (with exceptions) or BSELE schools, and their material quality. Whether this is the result of neglect, low tax-based funding, or lack of lobbying on behalf of citizens, the impact on the quality of the learning experience cannot be denied.

### 5.1.2 Human resources

Due to the population decline in Bulgaria over the past decades and the constant reduction in the number of students in the school system, there have been strong employment pressures on the teachers in the Bulgarian schools, and in fact their number has declined as well. Thus the mass presence in the Roma schools of “irregular teachers”, teachers who did not have the necessary training, is less the case now than it was in the mid-1980s. The 2004 survey of the former BSELE found very few “irregular teachers” employed there: only six in the entire system. There was no former BSELE that employed more than one such teacher. The disciplines where these teachers were employed were diverse, including English language, music, sports and others. BHC research on the special schools and on the boarding schools for children with behavioural challenges did not find a serious problem with “irregular teachers” there either.

This is, however, just part of the problem with the shortage of qualified teachers in the Roma schools. Because of the difficult and unrewarding working conditions in these

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<sup>304</sup> BHC, *In the Name of the Institution*, p. 34–36.

<sup>305</sup> BHC, *In the Name of the Institution*, pp. 34–35.

<sup>306</sup> BHC, *In the Name of the Institution*, p. 57.

schools, poor material conditions and the lack of opportunities for private lessons, these schools attract teachers who are unable to find work in more competitive environments and who are not motivated for serious work.

However, the available research does not suggest that the staff turnover in the separate schools with a majority of Roma students is higher than in mainstream schools. Even for the most difficult of them, the special schools for children with behavioural challenges, the 2005 BHC report found very low staff turnover, despite the almost unanimous lack of satisfaction with the salaries and the working conditions.<sup>307</sup> Again, this is due to the employment pressure on the teaching profession over the recent years, shrinking the job pool. The result is that teachers who are employed in special schools, and perhaps in BSELE, want to keep their jobs due to the difficulty of finding employment in other schools or other sectors. The reality is that many will resist structural changes in the education system as schools begin to close, and will lobby to keep schools open and to keep their jobs.

## 5.2 School results

There is no information nationwide that would allow a comparison of the examination results for exit/entry into critical points in the system between the national average and the average for Roma students, because there is no collection of disaggregated data. Furthermore, an expert has noted that since a national system for examination is absent, standards vary wildly. Many children may receive a certificate even where they have not attained basic literacy. Under such circumstances, any kind of evaluation of quality education between schools is extremely difficult.<sup>308</sup>

In May 2005 the Bulgarian Helsinki Committee, in collaboration with the Ministry of Education and Science, administered tests of Bulgarian language and mathematics on three groups of fourth-grade students: Roma students educated in segregated schools for four consecutive years, Roma students educated in integrated schools for four consecutive years and Bulgarian students educated in integrated schools. The tests had to also take into account the problem of non-attendance, mostly in the segregated Roma schools. All students educated in different settings who did not attend got a technical poor mark. The comparison between the results of the Roma students from segregated schools and Roma students from integrated classes in five cities is presented in Table 21.

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<sup>307</sup> BHC, *In the Name of the Institution*, p. 80.

<sup>308</sup> OSI Roundtable, Sofia, June 2006.

**Table 21: Test results for Roma students in segregated schools and integrated classes – results for five cities**

			Average test results <sup>309</sup>			
			Mathematics		Bulgarian language	
			Of those who took the test	After inclusion of technical poor marks	Of those who took the test	After inclusion of technical poor marks
Roma children only	In segregated schools	All	3.36	2.99	3.22	2.87
		Girls	3.39	–	3.37	–
		Boys	3.32	–	3.03	–
	In integrated classes	All	3.72	3.44	3.85	3.57
		Girls	3.84	–	4.13	–
		Boys	3.61	–	3.57	–
Difference 1 (between results for Roma children in integrated classes and those in segregated schools)			+ 0.36	+ 0.45	+ 0.63	+ 0.70
Ethnic Bulgarian children	In integrated classes	4.92	4.65	5.56	5.23	
Difference 2 (between Bulgarian and Roma students in integrated classes)			+ 1.20	+ 1.21	+ 1.71	+ 1.66

Source: BHC<sup>310</sup>

The Roma students in segregated schools got the lowest average results. The difference between the Bulgarian and the Roma students in integrated schools, however, is even greater. The size of the samples did not allow for any application of a control over the results for socio-economic status, education of the parents and other factors affecting educational achievement beyond segregation. However, in Sliven, where the local desegregation project targets the poorest segments of the Roma ghetto, the Roma students in integrated schools scored better than Roma students in segregated schools. The results in Vidin were as shown below in Table 22.

<sup>309</sup> The highest possible grade was six.

<sup>310</sup> BHC, *Five Years Later*, pp. 28 and 33.

**Table 22: Test results for Roma students in segregated schools and integrated classes – result for Vidin only**

		Average test results			
		Mathematics		Bulgarian language	
		Of those who took the test	After inclusion of technical poor marks	Of those who took the test	After inclusion of technical poor marks
Roma children only	In segregated schools	2.83	2.45	2.65	2.30
	In integrated classes	3.94	3.55	4.56	4.05
Difference 1 (between results for Roma children in integrated classes and those in segregated schools)		+ 1.11	+ 1.10	+ 1.91	+ 1.75
Ethnic Bulgarian children in integrated classes	In integrated classes	5.02	4.78	5.70	5.40
Difference 2 (between Bulgarian and Roma students in integrated classes)		+ 1.08	+ 1.23	+ 1.14	+ 1.35

Source: BHC<sup>311</sup>

Here too, the results of the Roma students from integrated schools were significantly better than those of the Roma students from the segregated school. They were much better in Bulgarian language than in mathematics. Grade repetition for Roma pupils who take part in the desegregation programme, according to the NGO Organisation Drom, is extremely limited (ten Roma pupils).<sup>312</sup>

Grade repetition in the Bulgarian education system is uncommon. The system does not encourage holding children back, because it reflects negatively on the overall evaluation of the teachers' performance, on the attractiveness of the school and on the drop-out rates. According to data from the National Statistical Institute, around 1.5 per cent of the students repeat a grade. The trends in grade repetition have been stable over the past five years.<sup>313</sup>

Research conducted for this report in Nikolaevo revealed that grade repetition in this municipality was more common than nationwide statistics would suggest. According to data from the Education Department in Nikolaevo Municipality, around 100 Roma

<sup>311</sup> BHC, *Five Years Later*, pp. 29–32.

<sup>312</sup> Case study Vidin.

<sup>313</sup> NSI, *Education in Bulgaria – 2006*, p. 47.

pupils repeated the school year (around 17 per cent). No information has been provided for the 2006–2007 school year. The results for repeating students from the previous years are shown below in Table 23.

**Table 23: Number of students repeating a grade (2003–2005)**

Grade	Number of students	
	2003–2004	2004–2005
1	–	–
2	23	22
3	11	14
4	17	18
5	9	9
6	3	2
7	10	3
8	–	–
9	7	8
10	3	2
11	2	–
12	–	–

**Source:** Nikolaevo Municipality, Education Department, June 2006

According to the OSF-Sofia 2001 Roma Schools survey, around 0.3 per cent of Roma students took part in the national exam for admission to language and other specialised schools after the seventh and eighth grades.<sup>314</sup> There are, however, no statistics on their results. Research in Vidin indicates that no Roma pupils have taken part in national competitions in literature, mathematics and chemistry, but a small number of Roma pupils (28 altogether) have entered elite schools in Vidin, supported by the NGO Organisation Drom through extracurricular tutoring.<sup>315</sup>

According to official data, the share of Roma population that is “illiterate” or has an incomplete elementary education aged 20 and over is 23.18 per cent.<sup>316</sup> Census data trends show that between 1992 and 2001 the share of “illiterate” Roma aged seven and

<sup>314</sup> OSF-Sofia, *Roma Schools in Bulgaria – 2001*, p. 10.

<sup>315</sup> Case study Vidin.

<sup>316</sup> See above Table 6.



over increased from 11.2 per cent to 14.9 per cent.<sup>317</sup> Some scholars suggest that functional illiteracy among Roma includes half of the community.<sup>318</sup> These figures apparently include also Roma who went to school but were unable to learn how to read and write or forgot how to do so later. Data on functional illiteracy in the fourth and in the eighth grade are not systematically collected in the Bulgarian education system. However, there are credible reports of functionally illiterate Roma students at all levels of the Bulgarian education system. The OSF-Sofia 2001 report on Roma Schools observes that “it is not uncommon for a fourth-grader [in a Roma school] to be illiterate.”<sup>319</sup>

Data from the UNDP survey indicates that of people over 15 years of age, Roma lag behind the majority population in terms of literacy, with 88 per cent of Roma between the ages of 35 and 44 being literate as compared to 100 per cent of their majority peers. The figure drops dramatically for those over 45 years of age, with the data at 71 per cent for Roma and 91 per cent for the majority population.<sup>320</sup>

In segregated settings, there is evidence that literacy is far lower than it is in integrated settings. This is illustrated by material gathered at the local level for this report. The functional literacy of Roma children from Vidin Municipality, for example, who are outside the desegregation programme is below 30 per cent,<sup>321</sup> at least in part due to irregular attendance in segregated schools where their presence is not monitored appropriately. Another reason for the low literacy rate is the fact that about 50 per cent of school-age Roma children outside the desegregation programme (about 500 Roma children) are transferred to village schools: Makresh, Bukovetz, Novo Selo, Vrav or Boinica. These village schools educate the Roma and non-Roma children from several grades in one classroom, which disturbs the education process and inhibits skill development, since the teachers are not properly trained to handle such situations.

In the course of the 2004 BHC research on former BSELE the organisation came across a complaint from 2001 of Roma parents from the town of Lom, who claimed that their children had graduated from the Hristo Botev Lower Secondary School, which is 96 per cent Roma, and were still illiterate. In October 2001 the Regional Inspectorate of Education in Montana tested 77 fifth-grade students in the school and

<sup>317</sup> EUMAP, *Monitoring the EU Accession Process: Minority Protection, Bulgaria*, Budapest: OSI, 2001. Available at [http://www.eumap.org/reports/2001/minority/sections/bulgaria/minority\\_bulgaria.pdf](http://www.eumap.org/reports/2001/minority/sections/bulgaria/minority_bulgaria.pdf) (accessed on 20 February 2007) (hereafter, EUMAP, *Minority Protection Bulgaria – 2001*), p. 90.

<sup>318</sup> Илона Томова, “Демографски процеси в големите етноконфесионални общности в България” (Demographic Processes in the Big Ethno-Religious Communities in Bulgaria), in Ivanov and Atanasov (eds.), *Demographic Development of the Republic of Bulgaria*, p. 162.

<sup>319</sup> OSF-Sofia, *Roma Schools in Bulgaria – 2001*, p. 10.

<sup>320</sup> UNDP, *Vulnerable Groups*.

<sup>321</sup> The estimate is reported by Donka Panayotova, chair of the NGO Organisation Drom, 8 April 2006, Vidin.

found that 23 of them (30 per cent) were “completely illiterate”.<sup>322</sup> During the May 2004 visit to SS. Cyril and Methodius in Pazardzhik, a former BSELE, now a lower secondary school, the school director Tsvetana Vracheva told the BHC researcher that many Roma students come from the primary school illiterate and remain so to the eighth grade but get basic school diplomas nevertheless.<sup>323</sup>

According to directors of mainstream schools in Vidin, illiteracy among Roma children in the fourth and eighth grades is almost eliminated. The NGO Organisation Drom reported that only five eighth-grade Roma pupils from mainstream schools had to retake an exam after the end of the 2005–2006 school year. In fact, only two of them did not manage to pass the final exam and had to repeat the school year.<sup>324</sup>

The two types of special schools where Roma are overrepresented also contribute to the functional illiteracy in the Roma community. The 2005 BHC report on boarding schools for children with behavioural challenges revealed that the proportion of illiterate children there is higher than the national average.<sup>325</sup> Many students in the special schools for children with intellectual disabilities also remain illiterate even on graduation.

There is no information available on Roma pupils’ achievement in the PISA and other tests administered in the Bulgarian education system.

## 5.3 Curricular standards

### 5.3.1 Special schools and classes

The national educational standards are regulated by Ordinance No. 2 of the Ministry of Education and Science on the Curriculum from 18 May 2000.<sup>326</sup> According to these standards, the students at the end of the fourth grade are supposed to be able to do the following:

- Read fluently aloud and be able to show that they understand the basic meaning of the text;
- Read for themselves and show that they have understood the text;
- Write in Bulgarian with a knowledge of basic punctuation;
- Write a text on the basis of their own experience, describe an object and respond to a question on a theme relevant to their age;
- Plan and edit their own and other people’s texts.

<sup>322</sup> BHC, *2004 Report on Former BSELE*.

<sup>323</sup> BHC, *2004 Report on Former BSELE*.

<sup>324</sup> Case study Vidin.

<sup>325</sup> BHC, *In the Name of the Institution*, p. 55.

<sup>326</sup> MES, Ordinance No. 2 on the Curriculum from 18 May 2000, *Official Gazette*, No. 48, 13 June 2000, latest amendment from 18 July 2006.

No such requirements exist for the students in the remedial classes or special schools; the above standards can in principle apply to students in special schools, in which case they will be able to pass the respective level. Students who pass the exam may go on to the secondary school of their choice.

Curricula for the remedial classes and for the special schools in Bulgaria are the same. They differ from mainstream classes/schools in the possibility to obtain the respective educational degree, as well as in the length of the classes. However, they do not differ in the number of classes in the respective educational fields.<sup>327</sup> The length of the classes in the special schools/remedial classes is five minutes less for the students in the third grade and above. Students enrolled in remedial classes are not able to obtain a certificate for completion of basic educational level (eighth grade) unless they pass an exam. Without a basic degree they are not able to enrol in high school and are highly unlikely to pass the entrance exam.

According to the Ministry of Education and Science standards, students in the first grade are required to take seven hours a week in Bulgarian language and literature, four hours a week in mathematics, and several hours a week in other subjects (such as music, painting and physical exercise), in total 806 hours per year. The number of hours for the students in the first grade in special schools/special classes is the same. The difference is that they are not allowed to take “obligatory elective subjects” but only “obligatory” and “free electives”. In effect, this results in special schools taking one hour a week more Bulgarian language and literature as an “obligatory” class (eight versus seven in the mainstream schools/classes). Many students in the mainstream classes compensate for this, however, by taking additional classes in Bulgarian language and literature as “obligatory electives”.

### 5.3.2 Segregated schools

There is abundant evidence that the teachers’ expectations with regard to pupils from segregated Roma schools are lower. The very fact that many of these students can pass from grade to grade and even graduate without being able to read and write is a clear indication of this leniency. Some school directors and chiefs at the Regional Inspectorates of Education openly recognised this problem. Thus in the course of the BHC visit to the SS. Cyril and Methodius former BSELE in the village of Ignatievo, Varna district, in May 2004, the director of the school recognised that the criteria for evaluation of the Roma students there are lower than normal, without regard to the quality of the teaching. In April 2004 officials at the Regional Inspectorate of Education in Stara Zagora admitted that the criteria for evaluation of the Roma children in one of the segregated schools of the city are lower than in the other schools.

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<sup>327</sup> Cf. MES Regulation, *Organisation and Management of the Activities in the School of General Education, Professional and Special Schools during the 2002–2003 Year*, Sofia: MES, 2002.

They justified this by the need to “make compromises” in order to keep the children in the school and to allow them to graduate.<sup>328</sup>

#### 5.4 Classroom practice and pedagogy

The importance of the quality of the teaching and the learning process in education and school success cannot be denied; in efforts of equal access to quality education, including desegregation, this component must also be taken into consideration.<sup>329</sup>

The 2006 *National Programme for the Development of School Education and Pre-School Upbringing and Instruction*, although seemingly a step back from some commitments already undertaken by the Government, may be seen as a positive step forward towards raising the overall level of pedagogy and the teaching and learning process in Bulgaria. As one expert said, “The positive thing is that finally there is a strategy and an idea of how to do it.”<sup>330</sup> To support the process, two new institutions were formed: the National Institute for the Training of School Managers, which offers professional development training, and the Centre for Control and Assessment of the Quality in Education, which develops assessment instruments in Bulgarian language and mathematics.

The timing for a move towards improving the overall quality of pedagogy in the system is probably overdue, as the majority of teachers in Bulgaria are still working in the old paradigm, that of frontal teaching with a passive learning style. Although some critics argue that such a style of teaching produces results, and that “real” learning takes place, others argue that the result is inequality in school achievement, which is obvious from the available statistics and data, and that those who hold on to old methodologies do not understand the new techniques, their benefits to all children, or how to practise them. “It is easier to work in the old way. If you want to use interactive methods, you have to think before the lesson – what to do, how to do it, should I use brainstorming, or separate them into small groups – it means making a lot of effort before the lesson, which is why they prefer to use those old methods.”<sup>331</sup>

According to the same expert, even Bulgaria’s national institutes,<sup>332</sup> where teachers go to improve their qualifications, do not offer subjects such as how to use interactive methods in the classroom, or even what the term “interactive methods” means, and the like. Although there has been an improvement with pre-service and in-service institutions in Bulgaria in terms of providing teachers with exposure to courses dealing with tolerance, multicultural education, inter-cultural education, bilingual education,

<sup>328</sup> BHC, *2004 Report on Former BSELE*. See also below at school inspections.

<sup>329</sup> Education For All Global Monitoring Report 2005

<sup>330</sup> Interview with Emil Buzov, pedagogical expert and director of the “Step-by-Step” Foundation, Bulgaria, on 30 January 2007.

<sup>331</sup> Interview with Emil Buzov, pedagogical expert and director of the “Step-by-Step” Foundation, Bulgaria, on 30 January 2007.

<sup>332</sup> In Sofia, Stara Zagora and Varna.

and so on, one of the drawbacks of this offer is the fact that their focus is on a lecture delivery, and based on theoretical knowledge, with little or no opportunity for teachers to implement in a practicum what they have been taught. Although it may seem as though institutions are opening up in a direction that embraces diversity and allows teachers exposure to such concepts, there is at the same time a gap between knowledge and practice, much as there is often a gap between policy documents and implementation of those policies. This remains a problem even with the new *National Programme*. As for the pedagogical practices, they presumably should be an integral part of the “supporting environment”. However, the Government has passed no regulations regarding the State educational standards in that regard. This is a weakness with regard to the whole education system: although official policy may require certain practice, it does not have a system or means to monitor or support its implementation. Therefore, the *status quo* remains in practice in schools, and few teachers actively implement new techniques.

The responsibility for training teachers in new techniques and, almost more importantly, in supporting them in the process of using and implementing those techniques, has remained primarily in the third sector. Although theoretically this could or should be the role of school inspectorates, in fact, they do not have the capacity to carry out this function. Most training that is covered by project funding, such as Phare, is targeted at teachers and schools, which leaves little room for other professionals in the education sector, such as inspectors, to update and improve their skills. Furthermore, bylaws inhibit the Government’s supporting the NGO sector to integrate it into its overall system for professional development. In the existing system, if a teacher receives a certificate for having participated in any NGO training, the certificate does not work towards achieving points to increase the teacher’s salary. Furthermore, the Government cannot financially support the third sector as a service provider in professional development. Opening up the professional development market in Bulgaria, which would allow for certificates obtained by NGO training to count towards salary increase, and for financial support of the third sector in the Government’s professional development framework, are important changes that the Government could implement to improve the quality of classroom teaching.

Opening up the market may help to reach more teachers to improve their skills. The total number of teachers who took part in in-service training courses in 2005 was 5,358, just over 6 per cent of primary and secondary school teachers for the 2005–2006 school year (see Tables 18 and 19). This is too few. Currently, according to a pedagogical expert, what could be considered good, high-quality practice in schools is uneven, at best. Good practice does exist, but only in those schools where teachers and directors are very highly motivated, where they have done their best to implement what they have learned in training, despite the lack of any infrastructure for ongoing and sustained mentoring and support. The Vela Blagoeva School in Veliko Turnovo has been mentioned as such a school, and another is in Kardjali, the P. R. Slaveykov School, an ethnically mixed school – Turkish, Roma and Bulgarian – which was “a well working, ‘effectiveness school’ in a multi-ethnic environment, with well-prepared

teachers, highly motivated teachers, and working as a real team with mixed classes, although this region is complicated.”<sup>333</sup> The practices that these examples put in place should be analysed to give other schools a framework in which to make their own improvements.

## 5.5 School–community relations

The education system, centralised as it is, allows only a very limited role for the parents’ boards. The law does not oblige the schools and the pre-schools to establish parents’ boards. Municipal schools can form parents’ boards as non-governmental organisations. However, they do not have governing functions. The parents’ boards do not have any role in the human resources and the curriculum policy. Their functions, according to the law, are limited to the following:

- Ensuring additional funding and logistical support for curricular and extracurricular activities and school/pre-school infrastructure;
- Offering help in the realisation of school/pre-school policies, such as ensuring the attendance of the students or involvement of the parents in the extracurricular activities;
- Addressing the competent bodies in cases of irregularities.<sup>334</sup>

Roma parents take part in some parents’ boards, predominantly in the segregated schools. Roma parents are involved in the parents’ boards also in some integrated schools. The practice of the Bulgarian education system at all levels allows for a very limited involvement, if any, of the parents in the pedagogical practice of a school. The participation of Roma parents in the school boards is token at best.

Case study research conducted for this report in 2006 identifies some good practices in this regard; these examples could be models for more active Government policy in supporting a cooperative relationship between Roma parents and the school. In Vidin, Roma parents are involved in parents’ meetings.<sup>335</sup> School celebrations and competitions among children also attract both Roma and non-Roma parents. The integrated mainstream schools and the segregated school in Vidin included Roma parents in their school boards.<sup>336</sup>

In Veliko Turnovo, the schools that have introduced Roma folklore classes have achieved a comparatively high level of Roma parental involvement. A very positive example in this direction is the school of Vodoley, where the Roma parents are

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<sup>333</sup> Interview with Emil Buzov, pedagogical expert and director of the “Step-by-Step” Foundation, Bulgaria, on 30 January 2007.

<sup>334</sup> *National Education Act*, Art. 46.

<sup>335</sup> Case study Vidin.

<sup>336</sup> Case study Vidin.

involved also in the organisation of the educational process and classes. Several joint children-parents lessons have been organised by the primary teacher, Mrs. Diana Dimitrova. Furthermore, the parents actively participate and financially support all out-of-school activities. Parents of Roma pupils in the first grade participated also in the third edition of the Children Roma Festival “Open Heart” organised in late May by the Amalipe Centre and Veliko Turnovo Municipality in Veliko Turnovo. Furthermore, in the 2004–2005 school year several out-of-class activities were organised where parents taught the children different skills, such as cooking, playing musical instruments and the like.<sup>337</sup>

## 5.6 Discriminatory attitudes

Government programmes for dismantling segregation fail because of insufficient political will, which is itself a consequence of the widespread negative prejudices and social distances towards Roma in Bulgarian society. Table 24 below presents the results of four surveys, conducted between 1992 and 2005, on the attitudes of the ethnic Bulgarians towards Roma.<sup>338</sup> These surveys reveal that over a period of 13 years social distances have remained very high and do not show any positive dynamics, unlike the case of the Bulgarian Turks, where there have been some positive changes.

**Table 24: Attitudes to social distance of Bulgarians towards Roma (1992–2005)**

The Statement “Would you agree to:”	Proportion of respondents disagreeing with the statement (per cent)			
	1992	1994	1997	2005
Maintain friendship with Roma	64	70	72	67
Be in the same neighbourhood with Roma	63	60	69	63
Work in the same workplace with Roma	39	49	36	52
Be in one country with Roma	34	28	38	27

Source: Gallup International/BHC<sup>339</sup>

The Gallup International/BHC survey from May 2005, just like the previous surveys, focused among other things also on the attitudes of the Bulgarians towards the integrated schooling of their children, together with Roma children. Table 25 below

<sup>337</sup> Case study Vidin.

<sup>338</sup> For more on the dynamics in the perception of ethnic minorities in Bulgaria and in some other Balkan countries, see Krassimir Kanev, “Changing Attitudes towards the Ethnic Minorities in Bulgaria and the Balkans 1992–97,” in Thanasis Sfikas and Christopher Williams (eds.), *Ethnicity and Nationalism in East Central Europe and the Balkans*, Aldershot: Ashgate, 1999.

<sup>339</sup> Gallup International/BHC, *Bulgarians and Roma: Interethnic Attitudes, Social Distances and Value Orientations*.

shows some of the results, as well as the dynamics since 1992 in response to one of the questions.

**Table 25: Attitudes of Bulgarians towards educational integration (1992–2005)**

The Statement “Would you let your child/grandchild study in a class where:”	Proportion of respondents disagreeing with the statement (per cent)			
	1992	1994	1997	2005
There are several Roma	42	38	36	27
Half the class are Roma	86	74	82	77
More than half are Roma	90	82	88	86

Source: Gallup International/BHC<sup>340</sup>

The above data reveal a rather low level of acceptance of Roma children in an integrated educational environment, but at the same time indicate some positive dynamics, especially since 1997. They also partly explain the Government failures to implement school desegregation programmes, despite commitments. An expert has noted that children participating in integration programmes may experience a high level of stress, which can lead to a decline in performance, or even to dropping out.<sup>341</sup>

The attitudes of Roma towards integrated schooling are much more positive. The May 2005 Gallup International/BHC survey showed that 84 per cent of Roma accept the idea of integrated education, 12 per cent were uncertain and only 4 per cent objected. Only 2.3 per cent of the Roma surveyed believed that the [segregated] “neighbourhood schools” are better than the mainstream schools. 30 per cent believed that they are worse and 50 per cent found them as good as the mainstream schools.<sup>342</sup>

Local-level research in Vidin indicates that school directors generally have a positive attitude about Roma children when asked whether they should study with non-Roma children. Some are very supportive, stating “The children are all equal. Diversity is also more effective and necessary for development”<sup>343</sup> and “All are Bulgarians and they should all go through one and the same programme”,<sup>344</sup> while others are more reserved, suggesting that “Roma children should study with non-Roma, but in limited numbers,

<sup>340</sup> Gallup International/BHC, *Bulgarians and Roma: Interethnic Attitudes, Social Distances and Value Orientations*.

<sup>341</sup> OSI Roundtable, Sofia, June 2006.

<sup>342</sup> BHC, *Five Years Later*, pp. 53–54.

<sup>343</sup> Interview with Ventsislav Stanev, principal of the Tsar Simeon Veliki Upper Secondary School, 10 March 2006, Vidin.

<sup>344</sup> Interview with Silvia Pradoeva, deputy principal of the Mathematical Upper Secondary School, 9 March 2006, Vidin.



in order to be more effective in the integration process”.<sup>345</sup> However, they all acknowledge the positive impact of the desegregation initiative on mainstream society and the Roma Community and recognise that there is no other local initiative that drives forward the desegregation process of Roma education in Vidin Municipality except that of the NGO Organisation Drom.

Organisation Drom has acted as a partner to all upper secondary schools in Vidin since 2000. The leader of the desegregation process, Mrs. Donka Panayotova, the chair of Organisation Drom, confirmed that there is public support for desegregation in Vidin, which is strong and irreversible, despite the appearance of the nationalistic party “ATAKA” during the last parliamentary elections from June 2005.<sup>346</sup> The public support for desegregation is explicit insofar as there are no internal conflicts initiated by parents or citizens. However, public support is undermined by governmental institutions that continue to support the existence of segregated schools (see section 5.7)

Interviews with local journalists emphasised the point that they do not support segregation of the Roma children in education, because of the low quality of education of segregated schools and the separation of the children, which does not offer an opportunity for Roma children to compare their knowledge with their non-Roma peers.<sup>347</sup> Furthermore, the journalists agreed that there is a high number of Roma children in the special school in Vidin because of the need for the school to fill up their classes and receive the necessary State subsidies. According to these local residents, it is most important that the Roma children in integrated schools are treated equally, as that would guarantee the success of their adaptation. The journalists support the desegregation efforts in Vidin, and they confirm that the NGO Organisation Drom is the leader of that process that has made such an important contribution.<sup>348</sup>

Roma parents of children that are enrolled in the desegregation programme in Vidin are highly satisfied with their children’s performance at school. Some of them say the following:

I am very happy about the mainstream school and the teachers, because the segregated school in the Roma neighbourhood is not that good. I am satisfied because of several things, like the light meals that are offered and all the rest [...] the attitude towards my child. I cannot say anything negative about the new school in town, and I am sure that my child will continue

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<sup>345</sup> Interview with A. Gerasimov, principal of the Otec Paisii Lower Secondary School, 7 March 2006, Vidin.

<sup>346</sup> This political party, which entered Parliament in June 2005, openly instigates hatred against Roma and other ethnic and religious minorities.

<sup>347</sup> Interview with Valeri Borisov, Bulgarian Telegraph Agency reporter in Vidin, 14 March, Vidin, and Anna Lozanova, editor-in-chief of TV “Vidin” and reporter of the national channel bTV.

<sup>348</sup> Case study Vidin.

education because of the special attitude, and I have also noted that the non-Roma children are friends and they play with my child.<sup>349</sup>

Some non-Roma parents find it natural that their children study together with Roma children:

I am highly satisfied with the education of my child. I have selected the school and the choreography class because my child loves to dance. I am very positive about the Roma children and I do not think that there should be a different attitude towards them. I know that the class teacher of my child is a psychologist and she does not treat the Roma children differently. I have noticed that the relationship between Roma and non-Roma children at school is in good shape. I do not think that there are any problems, and for instance my daughter has Roma girlfriends from school.<sup>350</sup>

Interviews with Roma children also show the positive attitude towards the integrated school environment and the successful integration. Tsvetan, who studies at the Tsar Simeon Veliki Upper Secondary School, emphasises the following points:

I study in an elite school where the teachers are very attentive and respect us. I do not like the obsolete equipment in the school so much. I have been praised several times in physical training classes and I do not like to study only with Roma children because I cannot learn anything new from them. I have non-Roma friends and if I were a school director I would change the interior of the school.<sup>351</sup>

Other Roma pupils, such as the eighth-grader Emil, confirms also that the teachers are very good and he could not find any reasons to dislike the school.<sup>352</sup> He noted that he was praised at school for his excellent grades and he does not want to study only with Roma children in the segregated school. Margarita, who is in the seventh grade in an integrated school, responded thus:

I like the school because of the quality education, but I do not like some children in my class who are not disciplined enough. I have been praised by my teacher because I was good in the final test. I have never been insulted. If I were a school principal I would introduce discipline, computers and more foreign language studying.<sup>353</sup>

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<sup>349</sup> Interview with Milka Nikolova, a Roma parent of a first-grader at the Otec Paisii Lower Secondary School, 10 March 2006, Vidin.

<sup>350</sup> Interview with Ivanka Kirilova Stoyanova, parent of a non-Roma child at the SS. Cyril and Methodius Upper Secondary School.

<sup>351</sup> Interview with Tsvetan Russinov (Roma pupil), eighth-grader at the Tsar Simeon Veliki Upper Secondary School, 15 March 2006, Vidin.

<sup>352</sup> Interview with Emil Petrov Stefanov (Roma pupil), eighth-grader at the Tsar Simeon Veliki Upper Secondary School, 15 March 2006, Vidin.

<sup>353</sup> Interview with Margarita Anguelova, seventh-grader from the Tsar Simeon Veliki Upper Secondary School, 16 March 2006, Vidin.

At the same time, non-Roma children are also positive about their Roma classmates, as Maria shared in an interview:

I have good teachers and I like my classmates. I like the Roma children at school and I would like to study with them – but not only with them but also with children from other ethnic groups. I have two Roma classmates with whom I talk and we respect each other. We play together. There are Roma children from my school who are my friends too. If I had a golden fish [a figure in Russian and Bulgarian folk tales, who grants wishes to those who catch him] my three wishes would be that the children always play and never quarrel, that the children respect each other and they do not steal. In addition to that, I would always like to stay with my schoolteacher, my class and to stay in this school.<sup>354</sup>

## 5.7 School inspections

Regional Inspectorates of Education (RIE) are territorial administrative bodies under the competence of the Ministry of Education and Science.<sup>355</sup> Their structure and functions are regulated by a special regulation, issued by the Ministry.<sup>356</sup> They are based in each of the 28 regions of the country and in 2005 had a total staff of 740.<sup>357</sup> Their main function is to coordinate the fulfilment of the State educational standards in the pre-schools, schools and educational support institutions on the territory of the region.<sup>358</sup> Each Regional Inspectorate of Education has two divisions: administrative and inspection. Inspections to the schools are carried out by the inspection division.

Regional Inspectorates of Education carry out two types of inspections: planned and not planned.<sup>359</sup> Planned inspections are based on a yearly schedule developed by the Ministry of Education and Science. The plan envisages comprehensive, thematic and current inspections. All the schools, including the segregated Roma schools, may become targets of each one of these inspections. There is no public information on the frequency of the inspections and the schools visited during the year that would allow a comparison between segregated Roma schools and mainstream schools.

Inspectors are empowered to evaluate all the problems related to the fulfilment of the State educational standards by the school. They concentrate their inspections on the issues that are more or less clearly spelled out in the law. The inspections can result in

<sup>354</sup> Interview with Maria Ilieva Boyanova (non-Roma), fourth-grader in the Otec Paisii Lower Secondary School, 13 March 2006.

<sup>355</sup> *National Education Act*, Art. 35, para. 2.

<sup>356</sup> MES, Regulation on the Structure and Activities of the Regional Inspectorates of Education, *Official Gazette*, No. 61, 8 July 2003, latest amendment from 31 May 2005 (hereafter, *Regulation on the Structure and Activities of the Regional Inspectorates of Education*).

<sup>357</sup> *Regulation on the Structure and Activities of the Regional Inspectorates of Education*, Art. 6, para. 1.

<sup>358</sup> *Regulation on the Structure and Activities of the Regional Inspectorates of Education*, Art. 11.

<sup>359</sup> *Regulation on the Structure and Activities of the Regional Inspectorates of Education*, Art. 12 and 19.

obligatory prescriptions.<sup>360</sup> They are issued by the head of the Regional Inspectorate of Education through an order. The order prescribes deadlines for the measures that are to be taken. The results of the inspection, as well as the non-fulfilment of the prescribed measures, can become a basis for disciplinary sanctions envisaged by the Labour Code, including dismissals.

As there are no provisions that outlaw geographical segregation, the existence of the special schools and disproportional placement of Roma children in them, this would normally fall outside the scope of the scrutiny of the inspections. The inspectors tend to take a permissive view of the situation of the Roma schools in any case,<sup>361</sup> so the chances that they might deal with structural segregation, or the existence of *de facto* segregated Roma schools, are close to zero. In fact, the research of the BHC on former BSELE revealed a striking leniency on the part of the Regional Inspectorates of Education towards the Roma schools. By and large BHC researchers found that despite serious problems the evaluations from the inspections were positive.<sup>362</sup>

Research in Vidin confirms discrepancies in the regularity of visits to Roma schools; according to an expert, “There is a difference in the number of visits of the Roma segregated school as compared to the mainstream schools in town, because it is often the case that the Roma segregated school is not visited at all.”<sup>363</sup>

During the 2005–2006 school year, the Roma segregated school in Vidin was inspected by the Regional Inspectorate of Education in February 2006, and that body reached certain conclusions for the education process, discussed in an interview with Donka Panayotova, the chair of Organisation Drom:

On 23 February 2006 I was present for the so-called “Day of open doors”, organised by the RIE at the Roma segregated school. The RIE confirmed that they have prepared a healthy plan for the school and the RIE experts organised two lessons (one in Bulgarian literature and one in mathematics), after which we were all invited to a roundtable. Schoolteachers from the Vidin mainstream schools were also present. An expert from the Ministry of Education and Science, responsible for the Vidin region, took part in the meetings too. The representative of the Ministry emphasised the fact that according to the plan for the new school year the Ministry of Education and Science has decided to open a new specialised class for woodworking in the fifth grade, and that this is great for the children. I find this quite disturbing,

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<sup>360</sup> *Regulation on the Structure and Activities of the Regional Inspectorates of Education*, Art. 18.

<sup>361</sup> BHC, *2004 Report on Former BSELE*.

<sup>362</sup> BHC, *2004 Report on Former BSELE*.

<sup>363</sup> Expert at the Education Department, Vidin Municipality, who wishes to remain anonymous, 29 January 2006, Vidin.

especially when considering that a desegregation process for Roma children to study together with their non-Roma peers started six years ago.<sup>364</sup>

This additional class suggests that RIE-Vidin continues to support segregated schooling for Roma children. The last complex examination of the segregated school in Vidin dates back to 2003 and neither the RIE nor the segregated school principal has allowed access to the protocol of this examination, although it is a public document.<sup>365</sup>

OSI research on the right of people with intellectual disabilities to education and employment in Bulgaria also revealed that despite the serious problems in the special schools they were not paid sufficient attention by the Regional Inspectorates of Education. Inspectors visit them seldom and they do not have the relevant qualification to carry out meaningful inspections.<sup>366</sup>

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<sup>364</sup> Expert at the Education Department, Vidin Municipality, who wishes to remain anonymous, 29 January 2006, Vidin.

<sup>365</sup> Case study Vidin.

<sup>366</sup> EUMAP, *Rights of People with Intellectual Disabilities – Bulgaria*, p. 57.

## ANNEX 1. ADMINISTRATIVE STRUCTURE

### A1.1 Structure and organisation

Traditionally, the education system in Bulgaria played an important role in nation-building and is rather centralised and ethnocentric in content. Before 1944, minority children (with the exception of Roma) had their own private minority schools. The major area of Government educational policy is “national education” or “school education”, which includes basic and secondary education. It is generally regulated by the National Education Act 1991; it does not include tertiary education, which is regulated by the Law on Higher Education.<sup>367</sup> In terms of educational degrees, school education is basic and secondary; in terms of the content, it is general and professional.<sup>368</sup> This structure is further elaborated upon in the Law for the Degree of Education, the General Education Minimum, and the Education Plan (hereafter, the Law for the Degree of Education). According to this law, the basic degree comprises two phases: the primary, including the period from the first to the fourth grade, and the lower secondary, including the period from the fifth to the eighth grade. Secondary education includes only one phase from the ninth to the twelfth grade.<sup>369</sup> The Ministry of Education and Science may change the number of years spent in the different phases by ordinance.<sup>370</sup>

The National Education Act provides for compulsory education up to 16 years of age<sup>371</sup> and does not provide for a compulsory degree of education, meaning that it is not obligatory to receive a diploma. Under the Constitution, basic and secondary education in State and municipal schools is free of charge.<sup>372</sup> However, the Ministry of Education and Science may set fees for any activities outside the State educational requirements, for professional education after the secondary degree and for competitive exams.<sup>373</sup> The State pays for transport to school for students up to 16 years of age who are educated in all schools with the exception of special, sports and art schools outside their places of residence.<sup>374</sup>

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<sup>367</sup> Tertiary education is also an area of governmental policy, although to a much lesser degree.

<sup>368</sup> *National Education Act*, Art. 22, para. 2.

<sup>369</sup> *Law for the Degree of Education, the General Education Minimum, and the Education Plan*, Art. 3, para. 3 and 4.

<sup>370</sup> In professional, sports and special education, as well as in all the forms of education that are different from the day form. *Law for the Degree of Education, the General Education Minimum, and the Education Plan*, Art. 4.

<sup>371</sup> *National Education Act*, Art. 7, para. 1.

<sup>372</sup> *Constitution*, Art. 53, para. 3.

<sup>373</sup> *Rules and Regulations for the Application of the National Education Act*, Art. 5.

<sup>374</sup> *Rules and Regulations for the Application of the National Education Act*, Art. 34, para. 7.

According to the National Education Act, children may start their school education by enrolling in the first grade if they will turn seven years old during the school year. If parents or guardians consider that their children are mature enough physically and psychologically, they may enrol them in the first grade at six.<sup>375</sup> Starting in the 2003–2004 school year, with the amendments of the National Education Act, the Government began to cover the cost of one “preparatory” year, often referred to as “zero year”, before the first grade. To complete this requirement the children may be enrolled in pre-schools or schools,<sup>376</sup> according to the parents’ choice. Completion of the “preparatory” year is compulsory,<sup>377</sup> and parents are exempted from paying fees to the pre-schools or the schools.

There are three types of schools in Bulgaria: State, municipal and private. All municipal and State schools and pre-schools are juridical persons.<sup>378</sup> All State schools and pre-schools are opened, transformed and closed by a decree of the Ministry of Education and Science. The Ministry also opens, transforms and closes municipal schools, but on the proposal of the respective municipal council.<sup>379</sup>

All municipal pre-schools are opened, transformed and closed by the municipal mayors following a decision of the municipal councils.<sup>380</sup>

The largest network is that of the municipal schools. State schools are governed by a director, who is appointed by the Minister of Education and Science. Municipal schools are governed by a director, who is appointed by the Chief of the Regional Inspectorate of Education of the Ministry of Education and Science.<sup>381</sup> Private schools are governed by boards, which appoint their directors. There is no fixed term for their appointment.

The bulk of the Bulgarian education system is composed of the “schools of general education”, which are for the most part the municipal public schools, including those offering secondary degrees. In addition, several options for vocational education are available for the students from the lower secondary and secondary education. These include professional, art and sports schools. The decision whether a child will attend a technical school or a general education school is in general made between the seventh and the eighth grade, although some schools offer technical curricula from the fifth or

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<sup>375</sup> *National Education Act*, Art. 7, para. 2.

<sup>376</sup> *National Education Act*, Art. 20.

<sup>377</sup> *National Education Act*, Art. 20a, para. 1; *Rules and Regulations for the Application of the National Education Act*, Art. 6, para. 4. All children of a certain age must be enrolled. There are administrative sanctions, fines imposed by the mayor, but they are not enforced for poor parents who do not enrol their children.

<sup>378</sup> *National Education Act*, Art. 10, para. 4.

<sup>379</sup> *National Education Act*, Art. 10, para. 5.

<sup>380</sup> *National Education Act*, Art. 10, para. 6.

<sup>381</sup> *National Education Act*, Art. 37.

sixth grade. A separate category, although in theory mostly part of the schools of general education, are those schools that are popularly considered to be “elite” and regulate entry through competitive examinations.<sup>382</sup> Since the mid-1990s a system of private “elite” schools has begun to develop in Bulgaria; at present these enrol a very limited number of students (less than 0.7 per cent of the entire student body in the 2004–2005 school year). “Special schools” (a total of 127 in the 2004–2005 school year), all of which enrol students from the first grade, are administratively separate. They include schools for children with intellectual disabilities, schools for children with behavioural challenges and schools for children with some physical disabilities.

## A1.2 Legal roles and decision-making

The major role of the Ministry of Education and Science is to oversee the fulfilment of the State educational requirements by all the schools, whether State, municipal or private, that offer educational degrees. State educational requirements are set on the basis of numerous laws, Government decrees and ordinances of the Ministry of Education and Science and other ministries. Article 16 of the National Education Act determines their scope. The latter includes a variety of standards related to the following:

- The educational degrees;
- The curriculum in all types of schools that offer educational degrees;
- The curriculum in the special schools;
- The evaluation system;
- The school textbooks and educational materials;
- Extracurricular activities;
- The documentation that is to be maintained in the entire system;
- Teacher qualification;
- Work conditions and salaries of the teachers;
- School infrastructure;
- Costs per pupil in the State and municipal schools and pre-schools;
- Health care in the system;
- Scientific, informational and library support;
- School inspections.<sup>383</sup>

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<sup>382</sup> At present the procedure for entry exams to such schools is regulated by Ordinance No. 11 of the Ministry of Education and Science for the Enrolment of Students in the State and in the Municipal Schools from 28 March 2005, *Official Gazette*, No. 29, 5 April 2005, amended from 8 November 2005.

<sup>383</sup> *National Education Act*, Art. 16.



The State educational requirements serve as the basis of the work of the Regional Inspectorates of Education – the local administrations of the Ministry that are supposed to exercise management and control over the system of the national education on the territory of each of the 28 regions of Bulgaria. There is one inspectorate per region, but with different staff depending on population and the number of schools. They oversee the special schools as well.

Much of the finances of the education system at the municipal level come from the State. The municipal governments are supposed to ensure and to oversee the maintenance of school buildings and pre-schools, including their periodic renovation, as well as to contribute and to control the costs per pupil and some of the teacher and other staff salaries in the municipal schools and pre-schools.<sup>384</sup>

The schools in Bulgaria have a rather limited autonomy in determining the curriculum. Much of the latter constitutes State educational requirements, determined, according to the law, by ordinances of the Ministry of Education and Science.<sup>385</sup> State educational requirements form the obligatory part of every school curriculum. Outside the scope of the obligatory part of the curriculum, schools may decide to include additional elements within their curriculum, according to the needs of the students and the available resources; these elective subjects must also be approved by the municipal education authorities.

The human resources policy in the education system, including that implemented at the municipal level, is regulated by the National Education Act and the Rules and Regulations for its Application. It is implemented by the Regional Inspectorates of Education, the municipal mayors and the school directors.<sup>386</sup> The structure of accountability follows the management structure. The Ministry of Education and Science appoints the directors of all State schools and pre-schools.<sup>387</sup> The chiefs of the Regional Inspectorates of Education of the Ministry of Education and Science appoint the directors of municipal schools.<sup>388</sup> The municipal mayors appoint the directors of the municipal pre-schools.<sup>389</sup> The school and pre-school directors appoint the staff in schools and pre-schools.<sup>390</sup> They have some flexibility in that regard, depending on the available school budget. One part of the latter is the budget for activities delegated by the State that comes as a subsidy from the State budget, to pay teachers' salaries, for example. However, the positions for which the State pays are strictly determined by laws and sub-legal acts. The municipality raises the second part of the school budget

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<sup>384</sup> *National Education Act*, Art. 36, para. 1, pt. 3 and 4.

<sup>385</sup> *National Education Act*, Art. 17, pt. 4. At present there are several dozen such ordinances in force.

<sup>386</sup> See more on this mechanism in section A1.4.

<sup>387</sup> *National Education Act*, Art. 37, para. 3.

<sup>388</sup> *National Education Act*, Art. 37, para. 4.

<sup>389</sup> *National Education Act*, Art. 37, para. 5.

<sup>390</sup> *National Education Act*, Art. 40, para. 2.

and it allows the director the authority to create or appoint positions (such as after-class educator, school mediator, or school guard), according to the budget that the director negotiates with the municipal government. All salaries of pedagogical staff are determined by ordinances of the Ministry of Education and Science, even when the positions are paid through the municipal budget. This rigid system has recently been widely criticised by local and international observers.<sup>391</sup>

### A1.3 Administrative structures dealing with Roma education at the Ministry of Education and Science

The last Structural Regulation of the Ministry of Education and Science<sup>392</sup> establishes 15 Directorates within the specialised administration of the Ministry. Of these, two have direct and specific responsibilities related to Roma education: “Educational Environment and Educational Integration” and “Policies in General Education”. According to the regulation, the “Educational Environment and Educational Integration” directorate has a number of responsibilities, which include, *inter alia*, the following:

- Organisation and support of the educational integration of children and students with special educational needs;
- Support of educational integration of children and students from ethnic minorities;
- Support of educational integration of migrant children and students.<sup>393</sup>

Within this directorate there is a department “Integration through Inter-Cultural Education and Upbringing”, which focuses its work directly on the educational integration of children and students from ethnic minorities, predominantly on Roma. This department has an official staff of five experts, but only two are working there at present. One of the experts is Roma.

The “Policies in General Education” directorate is involved in the creation of educational programmes, plans and forms of education, as well of the testing methodologies. It is tasked with developing a national programme for prevention of school drop-out.<sup>394</sup> This

<sup>391</sup> World Bank, *Bulgaria – Education and Skills for the Knowledge Economy*, 2005, p. 9, available at [http://siteresources.worldbank.org/INTBULGARIA/Resources/EducationPolicyNote\\_EN.pdf](http://siteresources.worldbank.org/INTBULGARIA/Resources/EducationPolicyNote_EN.pdf) (accessed on 20 February 2007); Ministry of Finance, *Review of the Public Spending: Education – State, Problems and Possibilities*, discussion paper available at <http://www.minfin.government.bg/docs/EDU%20report%2020041.pdf> (accessed on 20 February 2007) (hereafter, Ministry of Finance, *Review of the Public Spending: Education – State, Problems and Possibilities*), p. 68.

<sup>392</sup> Council of Ministers, Decree No. 148 from 19 June 2006 on the adoption of Structural Regulation of the Ministry of Education and Science, *Official Gazette*, No. 52, 27 June 2006 (hereafter, *Structural Regulation of MES*).

<sup>393</sup> Structural Regulation of MES, Art. 42.

<sup>394</sup> Structural Regulation of MES, Art. 39.

directorates employ one expert with the specific responsibilities of developing education in Romanes as a mother tongue.

The Ministry of Education and Science is responsible for administering also the Centre for Educational Integration of the Children and Students from Ethnic Minorities.<sup>395</sup> At present the Centre has six employees, and operates with a rather modest budget of 500,000 leva (€250,000), envisaged as matching funds that it is supposed to solicit from international and local donors. However, as no donations have yet been secured, the Centre has not started activities in earnest.

#### A1.4 School funding

The share of education from the GDP in Bulgaria over the last five years was 4 per cent in 2001, rose to 4.2 per cent in 2002, rose again to 4.4 per cent in 2003, was 4.3 per cent in 2004 and was 4.3 per cent in the projected 2005 budget.<sup>396</sup> This share is less than the average share for the OECD countries (5.6 per cent for 2004).<sup>397</sup>

Municipal schools are financed through the municipal budgets, which include some funding from the State budget for “delegated activities”. These activities include salaries for school and pre-school teachers and “material maintenance”.<sup>398</sup> State schools in Bulgaria are financed from the State budget directly as parts of the budgets of the ministries that operate State schools.<sup>399</sup> Each municipal government has a department responsible for education. It has some role in overseeing the distribution of money, but the major role is played by the financial department.

Municipalities are obliged by law to ensure finances for school and pre-school infrastructure maintenance, as well as to contribute to some of the salaries of the teachers in the schools and pre-schools. These are ensured through the local tax-based financing, which contributes to the financing from the State budget. As the municipalities in Bulgaria differ in their abilities to solicit local funds, because of

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<sup>395</sup> See section 3.3.

<sup>396</sup> Sources: Ministry of Finance, *Review of the Public Spending: Education – State, Problems and Possibilities*, p. 84, and Letter of the Ministry of Finance to the BHC, May 2006 (website accessed on 16 January 2006).

<sup>397</sup> Ministry of Finance, *Review of the Public Spending: Education – State, Problems and Possibilities*, p. 85.

<sup>398</sup> See below. The concept of “material maintenance” as applied to the State and municipal educational institutions is clarified by the Council of Ministers’ Ordinance for the State Educational Requirement for the One-Year Maintenance of Children and Students in the State and Municipal Pre-Schools, Schools and Service Units from 19 August 2004, *Official Gazette*, No. 76, 31 August 2004. According to this ordinance, “the standard for maintenance of one student in the State and municipal schools of general education ensures the means for the creation of conditions for education of the student and for self-preparation” (Art. 4. pt. 2).

<sup>399</sup> These include the Ministry of Education and Science, the Ministry of Culture, the Ministry of Agriculture and the Ministry of Youth and Sports.

regional disparities in economic development, the shares of the local tax-based financing for municipal education are different in the different municipalities. At the national level the share of the local resources in the total financing per school over the past five years was as follows:

**Table A1: Municipal-level education funding (2001–2005)**

Year	Local level education funding as a share of total funding per school, average across all municipalities (per cent)
2001	54.7
2002	57.8
2003	56.6
2004	58
2005 (planned)	51.8

Source: Ministry of Finance<sup>400</sup>

The local finances go predominantly towards maintaining the infrastructure of the schools and pre-schools and for financing the pre-schools. Except for State budget funding for one obligatory pre-school year (where it takes place in kindergartens), all other expenses of the pre-schools are covered by the municipality.

The State budget finances, through the municipal budgets, all the expenses of the State schools, including teachers' salaries, school maintenance and utilities, texts, supplementary materials and supplies, as well as the meals and other expenses of boarding schools. The State budget also finances part of the expenses of the municipal schools. Every year this share is determined by a decision of the Council of Ministers for the standards of financing of activities in the municipalities delegated by the State. This financial contribution is based on standards for the number of personnel and standards for "material maintenance". According to Decision No. 21 from 19 January 2006, which sets the standards for 2006, the standard for the number of personnel for students between the first and the eighth grade in the municipal schools at 15 students per classroom was 0.152, with an increase of 0.0074 for each student above that number. The standard for "material maintenance" was 146.50 levs per pupil (€73.25) with an additional 14 levs (€7) if the school is heated with liquid fuel, and a yearly lump sum of 1,820 levs (€910) for schools with fewer than 100 students. The standard for the number of personnel for pre-schools was 0.26 per pupil with an additional 0.065 for the one-year obligatory municipal pre-school. The standard for the "material maintenance" on a per-pupil basis for the one-year obligatory municipal pre-school was

<sup>400</sup> Letter of the Ministry of Finance to the BHC, May 2006.

169.40 levs (€86.90).<sup>401</sup> Similar standards are set for the different types of special schools, orphanages, social care institutions and other activities “delegated” by the State to the municipalities.

On this basis each year the Law for the State Budget allocates funds for delegated State activities to the municipalities on the basis of certain “natural indicators”. In the Law for the State Budget of the Republic of Bulgaria for 2006 these indicators as a basis for the subsidy for education were as follows:

- The number of personnel;
- The number of students in the schools;
- The number of students in the service units;
- The number of children in pre-schools.<sup>402</sup>

In the light of these indicators, and on the basis of the standards, each municipality gets a subsidy from the State budget.

The State subsidy finances the salaries of the teachers and any other personnel, but only on the basis of the per-pupil standards determined by the Government decision. If school directors wish to appoint more personnel, such as a Roma school mediator or an after-class educator, they are expected to fund these positions through municipal sources. Textbooks for the one-year obligatory pre-school and for the first four grades are free of charge. The funds for their purchase are included in the State subsidy for the pre-school as part of the “material maintenance”. From the first to the fourth grade the Ministry of Education and Science buys the textbooks and delivers them to the schools through its Regional Inspectorates of Education.<sup>403</sup> All the other textbooks, educational materials and schools supplies are paid for by the parents.

Part of the State subsidy for municipal schools in the form of “material maintenance” pays school maintenance and utilities. The rest, as well as the investment into school infrastructure, is paid by the municipal tax-based budget. In February 2005 the Ministry of Labour and Social Policy started the programme “a cup of warm milk”, under which it pays for one meal plus a drink for each student of obligatory school age from the first to the fourth grade.

The Regional Inspectorates of Education, municipal governments and school directors, supported by the school educational councils, all have roles in governing the schools in

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<sup>401</sup> Council of Ministers, Decision No. 21 from 19 January 2006, Annex 2 and 3.

<sup>402</sup> Law for the State Budget of the Republic of Bulgaria for 2006, *Official Gazette*, No. 105, 29 December 2005.

<sup>403</sup> Council of Ministers, Decree No. 104 from 10 May 2003, *Official Gazette*, No. 76, 31 August 2003.

Bulgaria.<sup>404</sup> The Regional Inspectorates of Education are responsible for the fulfilment of the State educational standards. They inspect the system, give recommendations, organise re-educational and supportive activities, and coordinate the activities of the different institutions. Municipal governments ensure the school funding and offer social support to parents and students. The school directors, together with the school educational councils, ensure the fulfilment of the State educational standards in their schools, develop the educational plan and decide on the enrolment, the school educational plan, forms of education, extracurricular activities, school uniforms and other matters.

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<sup>404</sup> School educational councils consist of all pedagogues in the school. Members of the parents' boards and medical personnel too can take part in the educational councils as consulting members (*Rules and Regulations for the Application of the National Education Act*, Art. 151).

## ANNEX 2. CASE STUDIES

### A2.1 Nikolaevo

#### A2.1.1 Administrative Unit

Nikolaevo Municipality has 5,025 inhabitants, who live in the town of Nikolaevo and three villages: Edrevo, Elhovo and Nova Mahala.<sup>405</sup> It is one of the poorest municipalities of Bulgaria.

**Table A2: Case Study: Nikolaevo Municipality – demographic distribution 2004**

Permanent address	Total	Men	Women
Edrevo village	565	302	263
Elhovo village	584	276	308
Nikolaevo	3,082	1,489	1,593
Nova Mahala village	794	381	413
<b>Total</b>	<b>5,025</b>	<b>2,448</b>	<b>2,477</b>

Source: Territorial Statistical Bureau<sup>406</sup>

The ethnic distribution of the population is as follows (on the basis of self-identification):

**Table A3: Case Study: Nikolaevo Municipality – ethnic distribution 2004**

Ethnic Group	Percentage	Number
Bulgarians	68	3,346
Roma/Gypsies	25	1,252
Turks	3	179
Non-identified	4	143
Other	0	9

Source: Territorial Statistical Bureau<sup>407</sup>

<sup>405</sup> Municipality of Nikolaevo: Civic Registration and Administrative Services Department, October 2006.

<sup>406</sup> Territorial Statistical Bureau, *Statistics Collection of Stara Zagora District 2004*, available in Bulgarian at <http://www.chambersz.com/statistic/2005/> (accessed on 20 February 2007).

<sup>407</sup> Territorial Statistical Bureau, *Statistics Collection of Stara Zagora District 2004*.

The Bulgarian population in the villages is mainly elderly. In the town of Nikolaevo, the Roma community comprises around 1,000 persons, who live in a segregated neighbourhood called Vazrazhdane. Since the conditions in the Roma ghetto in Nikolaevo are very poor, those Roma who are above the economic average or have a better education tend to move to the villages and buy houses there. In the villages the Roma population is also mostly segregated, but there the social distinction between Roma and non-Roma population is limited.

The local authorities have devoted attention to the problems of the Roma community. According to the *Municipal Development Plan (2007–2013)*, the fourth priority of the Plan is Roma population integration.<sup>408</sup>

There are two Roma among the 13 municipal councillors after the last local elections. Both of them represent the Movement for Rights and Freedom. Both of them have a low level of literacy and officials in the municipality report that the work with them is not very successful. At the same time, the municipality has established regular working relations on an everyday basis with the informal leader of the Roma community in Nikolaevo, Ivan Minchev (known as “Bangoolu”).<sup>409</sup>

### A2.1.2 Roma and the Community

According to 2001 census data, 1,252 inhabitants of the municipality declare themselves as Roma/Gypsies, 179 as Turks and 9 as others. From these same data, 1,194 state that they speak Romanes, 287 speak Turkish and 5 speak another language (Romanian).<sup>410</sup> At the same time, interviews with people from the Roma community, informal Roma leaders and officials from the municipality show that most of the people speak Turkish as their mother tongue. They belong to the *Millet* group. Only the people living in the village of Edrevo are defined as “Roma” and speak Romanes. Five Romanian-speaking Roma from the *Rudari* group live in Elhovo.<sup>411</sup>

During the last ten years there has been a trend towards declining educational levels and literacy among the Roma population. It is not rare that the parents are more educated than the children in Roma families, which was not the case 20 years ago.<sup>412</sup> The number of Roma children enrolled in school has been decreasing in recent years,

<sup>408</sup> Nikolaevo Municipality, *Municipal Development Plan 2007–2013*.

<sup>409</sup> Interviews with Eng. Kolio Chergelanov, mayor of Nikolaevo Municipality, 25 September 2006, and Tania Kostadinova, director of the Administrative, Information and Financial Services Department, 25 September 2006.

<sup>410</sup> Territorial Statistical Bureau, *Statistics Collection of Stara Zagora District 2004*, available at <http://www.chambersz.com/statistic/2005/>.

<sup>411</sup> Interview with Ivan Minchev, local informal Roma leader, 29 July 2006; informal discussions with people from the Vazrazhdane neighbourhood, Nikolaevo, July 2006 and 16 October 2006.

<sup>412</sup> Nikolaevo Municipality, *Municipal Development Plan 2007–2013*; interview with Ivan Minchev, local informal Roma leader, 29 July 2006.



while at the same time the number of Roma children as compared to Bulgarian students is increasing, due to the low birth rate among Bulgarians and the ageing of the population.<sup>413</sup>

**Table A4: Case Study: Nikolaevo Municipality – pre-school- and school-age population (2006)**

Age group	No. of children
Under 7 years	556
7–13 years	449
14–17 years	321

Source: Territorial Statistical Bureau<sup>414</sup>

Around 60 per cent of the Roma population live in the municipal centre. In all the four settlements of the municipality the Roma live predominantly in segregated neighbourhoods. Only exceptionally are there families who live among the Bulgarian population. All of the neighbourhoods are out of the regulation plans, with the exception of two streets in the Vazrazhdane neighbourhood in Nikolaevo. Significant numbers of the houses are illegally built, and are too close to each other and do not fit into the space requirements. Therefore, in order to build road infrastructure, the houses would need to be demolished and reconstructed in line with the relevant regulations. This raises serious problems for any improvements.<sup>415</sup> In 2005 a meeting was organised between the mayor and the people from the Roma ghetto in Nikolaevo. It was decided after the meeting that some of the streets would be partly covered with gravel. This was included in the set of activities within the programme “From Social Benefits to Employment”.<sup>416</sup> The programme “From Social Benefits to Employment” is a national programme of the Ministry of Labour and Social Policy.<sup>417</sup>

The ghetto in Nikolaevo is divided into two parts, and two social categories within the Roma community living there can be defined. The first group inhabits the area around the two streets that are in line with regulations. The houses are stable and have a visibly better outside appearance. These people consider themselves to be the original

<sup>413</sup> Information provided by the Education Department, Nikolaevo Municipality, June 2006.

<sup>414</sup> Territorial Statistical Bureau – Stara Zagora, August 2006.

<sup>415</sup> Information from the Territorial and Settlement Planning Department, Nikolaevo Municipality, October 2006.

<sup>416</sup> Interviews with Eng. Kolio Chergelanov, mayor of Nikolaevo Municipality, 25 September 2006. “From Social Benefits to Employment” is a national programme aiming at replacing monthly social benefits with permanent employment of the beneficiaries in public works.

<sup>417</sup> Ministry of Labour and Social Policy, *Programme “From Social Benefits to Employment”*, available in Bulgarian at [http://www.az.government.bg/Projects/Prog/NPSPZ/Frame\\_SPomZaet.htm](http://www.az.government.bg/Projects/Prog/NPSPZ/Frame_SPomZaet.htm) (accessed on 20 February 2007).

inhabitants of Nikolaevo.<sup>418</sup> The other group is composed of more recent arrivals, who have settled within the last one or two decades. They live in slums. Some of them do not have even roofs but use nylon fabric instead. No hygienic conditions exist in this part of the neighbourhood.

The whole municipality has no sewage system except for two kilometres in the municipal centre. Another serious problem is the garbage collection. The official garbage dumps do not meet current needs. At the same time, unofficial garbage dumps have been created near some of the Roma settlements. All areas have electricity and running water. The Roma community in Nikolevo uses free water from a reservoir near the village, which is not included in the water-providing system. No telephone system exists in the neighbourhood.

**Table A5: Case Study: Nikolaevo Municipality – infrastructure situation**

	Settlement:				
	Edrevo	Elhovo	Nikolaevo	Nova Mahala	Total
Area (hectares)	58.4	103.9	119.5	51.7	333.5
Streets (km)	4	17.7	11.4	5.6	38.7
Streets with public utilities (per cent)	10	10	30	10	–
Streets with electric lights (per cent)	70	70	70	70	–
Streets with a water supply (per cent)	90	90	90	90	–
Sewage systems	–	–	2	–	–
Green areas	1	2	25	5	–
Garbage collection	Central and illegal garbage dumps				

Source: Nikolaevo Municipality<sup>419</sup>

There is no public transport within the town, but children from the Roma ghetto are bussed to the pre-school in the centre of the town. The transport is organised by the Municipality. Although estimates show that the distance from the Roma ghetto to the town school is not greater than the distance from one of the Bulgarian neighbourhoods, no transport is provided for school-age children. For all children living in villages, transport is provided to the school in Nikolaevo.

The unemployment rate among Roma in the municipality is twice as high as the unemployment rate among Bulgarians: it is between 50 and 60 per cent among people of working age. Some 85 per cent of the 491 people registered in the local labour office (this is a local structure of the Ministry of Labour and Social Policy) are Roma. The

<sup>418</sup> Informal discussions with people from the Vazrazhdane neighbourhood, Nikolaevo, July 2006.

<sup>419</sup> Nikolaevo Municipality, *Municipal Development Plan 2007–2013*.

reasons for this are the shrunken labour markets in Nikolaevo and the extremely low educational and qualification level of the Roma community. Most of the people who work are occupied with seasonal (usually construction) work or within the programmes of the Ministry of Labour and Social Policy; 176 working places were provided for 2005 and most of them were occupied by Roma unemployed people.<sup>420</sup>

Most of the Roma families live off the social benefits provided. Around 10 per cent of the municipal budget is spent on social benefits.<sup>421</sup> The majority of mothers are registered as single mothers; they do not work, and they receive help for every newborn child and monthly social benefits, according to the number of the children. The average number of family members in the Roma families in Nikolaevo is between seven and eight, so a family with five children, one of whom is under one year old, and where the parents do not work, receives monthly around 250 leva (€125) or 30–35 leva per member (€15–17). If the father works he usually receives the minimum wage, which increases the family income by another 160 leva (€80), which would mean 55–60 leva (€27–30) in total per person in the family. This money, however, is inadequate to meet daily needs.<sup>422</sup>

The Roma communities in Nikolaevo Municipality differ in the various settlements of the locality. As mentioned above, two social groups make up the community in the town of Nikolaevo. Most of the residents have only elementary or primary education. This is reflected in the general educational structure of the whole municipality, where the people who are illiterate, or have only elementary or primary education, make up 68.10 per cent of the total.<sup>423</sup> For the Roma community this contributes to a high unemployment rate. There are no Roma NGOs in the community, but there is an informal leader, who is also the local money-lender. He is the main political figure in the community. In previous election he participated in the campaigns of different Roma parties, United Romani Union, Free Bulgaria Party and Evroroma, as well as in the campaigns of the different mainstream parties.<sup>424</sup>

At the same time, there is a very strong presence of the Movement for Rights and Freedoms. Two representatives from this party were elected in the local city council at the last local elections.

In recent years the number of Roma who have emigrated to Western Europe has increased. They go to work mainly in Greece and Spain. There is a visible tendency

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<sup>420</sup> Information from the Administrative Department, Nikolaevo Municipality, and from the local labour office. September 2006.

<sup>421</sup> Nikolaevo Municipality, *Municipal Development Plan 2007–2013*.

<sup>422</sup> Interview with Ali Asanov, Roma man from Nikolaevo, 16 October 2006; interview with Galia Asenova, mother of five children, living in Nikolaevo, 16 October 2006; interview with Ivan Minchev, informal local leader, Nikolaevo, 16 October 2006.

<sup>423</sup> Nikolaevo Municipality, *Municipal Development Plan 2007–2013*.

<sup>424</sup> Interview with Ivan Minchev, informal local leader, Nikolaevo, 16 October 2006; informal discussions with people from the Vazrazhdane neighbourhood, Nikolaevo, July 2006.

towards raising the living standards of the families who have one member or more abroad. The work abroad leads also to a change in the educational attitudes. The children of such parents go more regularly to school and show higher results.<sup>425</sup>

The Roma community in the village of Nova Mahala differs from the rest of the Roma population in the municipality. The educational level of the community there is higher; parents actively participate in school activities and in activities organised by the local cultural house. They have the best infrastructure as compared to the other Roma communities in the municipality. Only one sixth of them receive social benefits; many people work in Greece. One person works for the municipality, and they have also one municipal councillor.<sup>426</sup>

The Roma community in the municipality is socially rather than culturally isolated (with the exception of the inhabitants of Nova Mahala). The major conflicts with the majority population appear because of the marginalised situation in the Roma ghettos, especially in Nikolaevo. One of the factors is the high amount of unpaid electricity bills and the high share of social benefits.

Representatives of the municipality confide that they hardly work with the Roma city councillors, but they work quite well with the informal leader, with whom they organise weekly meetings, and several other representatives who have higher education, with whom they discuss everyday problems.

### A2.1.3 Education

#### *School and education network*

The three village schools have a majority of Roma students. The total share of Roma students in the municipality is 88.41 per cent; Roma comprise 100 per cent of the students in Nova Mahala, 97.62 per cent in Edrevo, 100 per cent in Elhovo and 60 per cent in the school in Nikolaevo.<sup>427</sup>

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<sup>425</sup> Interview with Svetlana Stoyanova, school principal of SS. Cyril and Methodius Primary School in Nova Mahala, 26 September 2006.

<sup>426</sup> Interview with Svetlana Stoyanova, school principal of SS. Cyril and Methodius Primary School in Nova Mahala, 26 September 2006.

<sup>427</sup> Information from the Education Department, Nikolaevo Municipality, on the basis of school reports, June 2006.

**Table A6: Case Study: Nikolaevo Municipality – number of students in the schools (2006)**

School	Pre-school	Primary	Lower secondary	Secondary
Nikolaevo	19	199	184	–
Edrevo	–	43	–	–
Elhovo	–	26	–	–
Nova Mahala	–	48	–	–
Atanas Damyanov Vocational School in Nikolaevo	–	–	–	71

Source: Nikolaevo Municipality<sup>428</sup>

There are no special schools in the municipality. There are four children with physical disabilities and special educational needs. All of them are Roma, and two of the children are from one family. The school in Nikolaevo has designed a special individual programme for them and provides home visits for the children. The teachers from the schools indicate that the children show good results and success in their studies.

### *Enrolment and completion*

Formally, Roma parents are free to choose ethnically mixed (non-segregated) schools regardless of their place of residence. This, however, rarely happens in practice if the families do not live dispersed among Bulgarians. Often the reason for this is the fact that some of the “Roma” schools are the only schools in the settlement. Furthermore, Roma children in Nikolaevo Municipality make up over 88 per cent of the total number of children.<sup>429</sup>

There is only one lower secondary school where Roma and non-Roma children study together. Since enrolment in pre-school is not obligatory, and there is a monthly fee, most of the Roma parents are reluctant to send their children to pre-school.

<sup>428</sup> Nikolaevo Municipality, Education Department, October 2006.

<sup>429</sup> Information provided from the Education Department, Nikolaevo Municipality, and submitted to Stara Zagora Regional Inspectorate of Education, October 2006.

**Table A7: Case Study: Nikolaevo Municipality – number of Roma students by grade (2003–2005)**

Grade	Number of students		
	2003–2004	2004–2005	2005–2006
1	64	80	45
2	90	87	97
3	75	73	78
4	84	83	70
5	78	60	54
6	45	66	50
7	40	45	66
8	26	20	40
9	11	8	5
10	5	4	8
11	3	2	2
12	2	2	–
13	–	–	–
14	–	–	–

Source: Nikolaevo Municipality<sup>430</sup>

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<sup>430</sup> Nikolaevo Municipality, *Municipal Development Plan 2007–2013*.

**Table A8: Case Study: Nikolaevo Municipality – Roma enrolment rates (2006)**

	Enrolment rate (per cent)					
	Pre-school <sup>431</sup>	Basic Education		Secondary education		
		Primary education	Lower secondary	Secondary overall (general, professional, vocational)	Secondary general	Secondary professional and vocational
Boys	18	98	58	10.9	–	10.9
Girls	16	98	64	2.5	–	2.5
<b>Total</b>	<b>17</b>	<b>98</b>	<b>61</b>	<b>6.7</b>	<b>–</b>	<b>6.7</b>

Source: Nikolaevo Municipality<sup>432</sup>

**Table A9: Case Study: Nikolaevo Municipality – Total enrolment rates per cent (2006)**

	Enrolment rate (per cent)					
	Pre-school	Basic Education		Secondary education		
		Primary education	Lower secondary	Secondary overall (general, professional, vocational)	Secondary general	Secondary professional and vocational
Boys	21	98	61	35.50	–	35.50
Girls	19	98	67	12	–	12
<b>Total</b>	<b>20</b>	<b>98</b>	<b>64</b>	<b>23.75</b>	<b>–</b>	<b>23.75</b>

Source: Territorial Statistical Bureau<sup>433</sup>

Almost all Roma children enter school in the first grade, but sharp differences can be observed between the enrolment rate in primary and lower secondary education. The differences between the enrolment of girls and that of boys are also significant. The only school with lower secondary classes is in the town of Nikolaevo. Since all the children who live in the villages have to travel to Nikolaevo after they finish the fourth

<sup>431</sup> Estimation of Tania Kostadinova, director of the Administrative, Information and Financial Services Department, Nikolaevo Municipality, and Ivan Minchev, informal Roma leader in Nikolaevo.

<sup>432</sup> Nikolaevo Municipality, Education Department, October 2006.

<sup>433</sup> Territorial Statistical Bureau, Stara Zagora, August 2006.

grade, many of them never get as far as the fifth grade. However, this is not reflected in the drop-out statistics. Usually each school keeps statistics about drop-outs within its own system. All the schools in the municipality (except one) are primary schools. Children must enroll in the town school to continue to the lower secondary level; the primary school is responsible for them until they finish the fourth grade, while the lower secondary school is responsible only after they are enrolled in it. Since these children move from one school to another, even if they do not show up in the lower secondary school they are not considered to be drop-outs. Hypothetically, they might have enrolled in another school outside the municipal area.

Usually Roma children in Nikolaevo spend one year in pre-school, four years in primary school, around three years in lower secondary, and 2.25 years in secondary vocational school. The average age of enrolment of Roma children in pre-school is six, and in the first grade it is seven.

**Table A10: Case Study: Nikolaevo Municipality – Drop-out rates (2006)**

	Drop-out rates (per cent)		
	Primary education	Lower secondary	Secondary overall (general, professional, vocational)
Total	5.22	4.89	NA
Roma students	6.19	15.38	81.82

Source: Regional Inspectorate of Education and Nikolaevo Municipality.<sup>434</sup>

The drop-out rate is measured on the basis of data from three school years (2003–2004, 2004–2005 and 2005–2006). The drop-out rate for the Roma students in lower secondary education is rather high, in part due to the need to travel into Nikolaevo, as mentioned above. The average distance between the villages and the town of Nikolaevo is 10 kilometres. The drop-out rate is extremely high for vocational school: out of 11 Roma students who are enrolled in the ninth grade, only two finished the eleventh grade.

The net enrolment rates in the municipality are far below the country's average, especially at the levels above primary. The only secondary school in the municipality is the Atanas Damyanov Vocational School of Electronics. Many of the children (mainly the non-Roma children) at that age, however, prefer to study in different cities, a fact that is not reflected by the statistics at the municipal level. Before the beginning of each school year, the municipality prepares a list with the addresses of all the children who should enter the first grade, and the teachers visit them prior to the beginning of the

<sup>434</sup> Regional Inspectorate of Education, Stara Zagora, October 2006, and Nikolaevo Municipality, Education Department, October 2006.



school year. The procedure is facilitated by the fact that there is only one school in each settlement.<sup>435</sup>

### *Financing*

The municipality has four municipal schools and one State school. Education consumes around 40 per cent of the municipal budget and is the largest single budgetary item.<sup>436</sup> Each school and pre-school receives funds according to the school and municipal regulations: salaries and travel expenses for teachers who have another place of residence are covered by the State budget, while expenses for renovations and supplies for the school are provided from the municipal resources. They are distributed on a needs basis.

**Table A11: Case Study: Nikolaevo Municipality – Human and financial resources (2004)**

Schools	No. of Students	No. of Teachers	Budget (2004)	Per pupil (levs)
Nikolaevo	386	25	237,846	616.18
N.Mahala	50	5	38,175	763.50
Edrevo	54	7	52,133	965.43
Elhovo	29	2	20,316	700.55
Professional school	79	8	76,130	963.67

Source: Nikolaevo Municipality<sup>437</sup>

The municipality sets pre-schools fees, currently 20 levs per month. Nevertheless, the parents need to provide clothes and different materials for the children, and these costs are estimated at around 40 levs per month for both pre-school and primary schools. An NGO in the municipality, the Centre for the Development of Nikolaevo Municipality, manages every year to provide clothes and school materials (notebooks, stationery and textbooks) and thus reduce the costs for the parents.<sup>438</sup>

<sup>435</sup> Interview with Biliana Belcheva, school principal of the SS. Cyril and Methodius Primary School of Nikolaevo, October 2006.

<sup>436</sup> Nikolaevo Municipality, *Municipal Development Plan 2007–2013*.

<sup>437</sup> Nikolaevo Municipality, *Municipal Development Plan 2007–2013*.

<sup>438</sup> Interview with the deputy chair of the Board of the Centre for the Development of Nikolaevo Municipality, 16 October 2006.

*School conditions*

All the schools have running water, although buildings are not in very good condition; nevertheless, modest renovation works are carried out every year. The worst is the situation of the school in Nikolaevo. New furniture and coal-burning stoves were provided for this school in 2005, and recently a large sports hall was completely renovated next to the school. Only the schools in Nikolaevo and Elhovo have libraries. In 2005 all schools received computers and equipped computer labs. The schools in Niklaevo and Nova Mahala have a connection to the internet, but for technical reasons this is not possible for the school in Edrevo. Only two of the schools (in Nikolaevo and Elhovo) have indoor toilets.<sup>439</sup>

All the teachers have the appropriate qualifications. But more than half of the teachers are not local: they travel from Kazanlak and Stara Zagora. This influences the quality of the educational process.<sup>440</sup>

More than 10 per cent of students (especially those after the fourth grade) travel, with the municipality providing transport. Most of the students from the villages travel to the municipal centre. Some of the Roma students from the village of Edrevo prefer to travel to a village that is in another municipality but is closer than Nikolaevo. The students themselves say that they prefer to study in the school in Panicherevo (Gurkovo Municipality), because it is a smaller school and the teachers are more sensitive to their needs.<sup>441</sup>

*Education quality*

No national tests have been carried out in the schools in Nikolaevo Municipality. No students, Roma or non-Roma, participate in national literature or mathematics competitions. Most of the students do participate in sport events and in folk dance groups.

While no independent assessment of literacy levels among Roma pupils has been carried out, teachers estimate that the level of literacy is not high. According to interviews, this is due to shortcomings in literature classes, and insufficiently motivated teachers.<sup>442</sup>

There is no difference in the curriculum of the schools. Teachers and the municipal administration organise regular campaigns at the beginning of every school year for providing additional textbooks and school materials. There are no textbooks on Roma history and culture. A bilingual curriculum is not provided; mother-tongue classes are

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<sup>439</sup> Interview with Biliana Belcheva, school principal of the SS. Cyril and Methodius Primary School of Nikolaevo, October 2006.

<sup>440</sup> Nikolaevo Municipality, *Municipal Development Plan 2007–2013*; interview with Tania Kostadinova, director of the Administrative, Information and Financial Services Department, Nikolaevo Municipality, and former teacher, 16 October 2006.

<sup>441</sup> Nikolaevo Municipality, *Municipal Development Plan 2007–2013*.

<sup>442</sup> Interview with Tania Kostadinova, former teacher of German.

also not included in the curriculum. None of the schools has any teachers trained to work in a multicultural environment, in a bilingual environment or to teach a mother tongue (Turkish or Romanes).

A common perspective is that the quality of the educational process depends on the attitudes of the teachers and their willingness to work. Interviews suggest that the local teachers are seen as working better with the children than those who live outside the municipality. The opinion of people from the local community and of the officials from the municipality is that the quality of education is much better in the village schools (especially in the school in Nova Mahala) than the quality of the school in Nikolaevo.

Only the schools in Nikolaevo and Edrevo have a school board, but it practically does not function. No Roma parents participate in it. At the same time, good cooperation has been established between the school managing body and the parent community in Nova Mahala without having a school board. They are involved also in everyday activities.<sup>443</sup>

Several inspections have been carried out during the last three years – in Nova Mahala (2006), in Edrevo and in the school of Nikolaevo (2004 and 2005). No significant recommendations have been made for improving the educational process.

## A2.2 Veliko Turnovo

### A2.2.1 Administrative Unit

Veliko Turnovo Municipality has a territory of 885 square metres and a population of 90,432. The municipality includes the town of Veliko Turnovo, two other towns (Debeletz and Kilifarevo) and 34 villages and *mahalas*.<sup>444</sup> The population density is 102.1 persons per square metre. The ethnic distribution of the population in the municipality, according to the official census, is shown in Table A12. Nevertheless, according to the estimations and survey carried out by the Amalipe Centre,<sup>445</sup> the actual proportion of the Roma population is higher, at around six per cent. This discrepancy is due to the fact that certain Roma groups on the territory of the municipality (such as *Rudari*, *Millet* and some *Dassikane* Roma) prefer to identify themselves as Turks, Bulgarians or Romanians (other).<sup>446</sup>

<sup>443</sup> Interview with Svetlana Stoyanova, school principal of the SS. Cyril and Methodius primary school in Nova Mahala, September 26, 2006.

<sup>444</sup> Here *mahala* does not refer to a Roma neighbourhood but to a small scattered settlement (usually in mountain areas) with a very small number of inhabitants (very often one or two).

<sup>445</sup> A Roma organisation based in Veliko Turnovo.

<sup>446</sup> D. Kolev and T. Krumova, *Mejdu Scila I Haribda: za identichnostta na milleta* (Between Scylla and Charybdis: about the Identity of the *Millet* Roma), Veliko Turnovo: Astarta, 2005.

**Table A12: Case Study: Veliko Turnovo Municipality – ethnic distribution**

Ethnic group	Proportion of total population (per cent)	Number of inhabitants
Bulgarians	92.15	83,285
Turks	5.42	4,919
Roma	0.88	786
Other	0.44	390
Not identified/other	1	1,052

Source: Veliko Turnovo Municipality<sup>447</sup>

Some Roma families (around 20 per cent of the total Roma population in the municipality) live dispersed among Bulgarian families in some neighbourhoods of the town of Veliko Turnovo as well as in Debeletz and several villages. Most often Roma live in Roma neighbourhoods (called *mahala*) that are part of the broader administrative units (villages or towns) and do not form a distinct administrative unit. There are two Roma neighbourhoods in Veliko Turnovo as well as a Roma neighbourhood in Kilifarevo and some of the villages.

There is no special budget allocated for the Roma community. The municipality finances some activities in the field of education and culture (for example, Roma folklore classes, and celebration of *Vassilitza*, the Day of Roma Culture) as well as some activities of the local Roma NGO Amalipe within its mainstream budget. In August 2005 the City Council passed Decision No. 639.04.08.2005, after a proposal from the mayor and the Amalipe Centre, to exchange municipal land for new flats where Roma from the ghetto of Aleko Konstantinov St. will be resettled. The flats will be built by the company that buys the land.

There is no Roma representative in the local council or in the municipal administration.

### A2.2.2 Roma and the Community

Over the past five years the number of school-age Roma children has gradually decreased, due to the lower birth rate in 1997 and 1998 as compared to previous years. After the two critical years the birth rate has increased again, and this is reflected now in the pre-school enrolment.

Turkish is the mother tongue of 74.64 per cent of the Roma in Veliko Turnovo; 14.67 per cent of the Roma population speak Romanes, 6.96 speak Bulgarian as their first language, and 3.73 per cent are Romanian-speaking.

<sup>447</sup> *Municipal Development Plan 2007–2013*, available at <http://veliko-turnovo.bg> (accessed on 3 June 2006).

Community infrastructure differs from place to place. It is relatively good in the largest Roma neighbourhood, Sveta Gora, in Veliko Turnovo, where all streets are paved, there is electricity, running water, a sewage network, and so on. The infrastructure is the worst in the Roma ghetto located at Aleko Konstantinov St. in Veliko Turnovo, where Roma live in slums, some of them without electricity and running water. As a whole, the Roma *mahalas* in the villages have bad roads and lack a sewage system, but the houses comply with regulations. However, this is a general problem for the villages in the municipality.<sup>448</sup> At the same time, most of the houses have electricity and running water. The only *mahala* outside the municipal planning is one of the Roma neighbourhoods in the village of Resen. It is situated in a region often flooded by the Negovanka and Rositza rivers. As a result, the municipality has not so far considered any actions to improve conditions. A solution would be to provide new houses for the inhabitants of the neighbourhood in another part of the village.

The percentage of Roma formally employed at the community level in the villages is extremely low – less than ten per cent. Generally, Roma lost their jobs immediately after 1991–1992, when the agricultural cooperatives from the Communist period were abolished. In the town of Veliko Turnovo the percentage of formally employed Roma is higher, but still less than 30 per cent.

The municipal communal company and work employ most of the Roma working in Veliko Turnovo, as street cleaners. Roma also work as bakers and non-qualified workers. Many Roma were employed within the Government programme “From Social Benefits to Employment” (especially in 2004 when the programme reached its peak). At present the number of people employed by this programme has decreased, due to limits on the programme itself. In 2006 the number of Roma included in the programmes provided by the local labour office may be broken down as follows:

- Programme for educating and qualifying illiterate Roma – 31 persons;
- A course for professional qualification – 36 persons;
- Motivation training – 18 persons;
- Tailoring course – 12 persons;
- Professional orientation – 133 persons;
- Subsidised employment programmes – 147 persons (128 out of them being employed with the programme “From Social Benefits to Employment”);
- Assistants of disabled people – 5 persons;
- “Beautiful Bulgaria” Programme – 2 persons;
- Other – 9 persons.<sup>449</sup>

<sup>448</sup> Veliko Turnovo Municipality, *Municipal Development Plan 2007–2013*, available in Bulgarian at <http://veliko-turnovo.bg> (accessed on 3 June 2006).

<sup>449</sup> Information provided by the local labour office, 3 October 2006.

During the summer many Roma in Veliko Turnovo are employed in construction or other seasonal work in the construction industry. In the villages some Roma work as agricultural workers, especially in the summer. The percentage of Roma who have their own agricultural business is low, since they do not own land. In 2004 and 2005 some Roma families in the village of Vodoley were provided with land, but this is still an exception.

Different types of social benefits, together with income from seasonal work, continue to be the main source of income for many Roma families. For example, the household of Efrail EfreMOV, who lives in Veliko Turnovo, is composed of six people: his wife, two daughters, a son-in-law, a grandson and himself. His wife is long-term unemployed and does not have any income. The younger daughter is a student and the family receives an additional child allowance for her: around 20 leva (€10). The girl receives another 20 leva (€10) as a scholarship for excellent success in school.<sup>450</sup> Efrail and his son-in-law work as builders during the summer months and they receive around 400 leva (€200) per month altogether. In the winter they do not have any income. The only significant constant income is the social benefit that the elder daughter receives for her son.

The extended family is the basis of the social structure of the Roma communities in Veliko Turnovo region. There are no preserved potestarian social institutions (such as *meshere*, *longja* and others) except among the few *Kaldarashi* Roma from the village of Samovodene.<sup>451</sup>

Although there are no ethnic conflicts, Roma communities in the municipality are socially and culturally isolated. This is especially true for the Roma from the biggest neighbourhood, that of Sveta Gora in Veliko Turnovo. They are Turkish-speaking and most of them are unemployed; they watch mainly Turkish TV, identify themselves as Turks and do not have ongoing contacts with the majority population. Officials recognise that the level of isolation is “too high and even dangerous”. Due to the work of the Roma culture classes programme developed by the Amalipe Centre, in recent years the level of isolation has been reduced, especially in the villages of Vodoley, Resen, Balvan and Ledenik, where the school brings together Roma and Bulgarian parents in public events.

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<sup>450</sup> The scholarship is a programme of the Ministry of Education and Science. There are two types of scholarships: if a student has school marks above 5.5 (6 is the maximum) then he or she receives a scholarship for high school success, while if the marks are above 4.5 and the family members receive an income below the minimum salary per person (160 leva or €80) then the student receives a social scholarship. The scholarship programme, however, is for secondary schools only. Since the girl is still a student her mother receives 20 leva per month child allowance

<sup>451</sup> The *potestarian* forms are informal authority mechanisms in traditional communities. Such a form is the *meshere* (or Romani Kris – the Roma internal court) or the *longja* (a traditional form of economic mutual support among community members). These forms are preserved only among the most traditional Roma groups: the *Kaldarashi*, the *Burgudjii*, and so on.

### A2.2.3 Education

#### *School and education network*

The total population of school-age children is 13,630, of whom 4,668 (34 per cent) are under the age of seven, 4,756 (35 per cent) are between the ages of 7 and 13, and 4,206 (31 per cent) are between 14 and 17 years old.<sup>452</sup> The Regional Inspectorate of Education registered a drop-out rate of 0.45 per cent among primary school pupils, and 0.57 per cent among lower secondary students in the 2004–2005 school year.<sup>453</sup> According to specialists working in the education field, however, these figures are underestimated, since very often the dropping out of children is not officially reported, in order to maintain higher school budgets. The figures can be estimated at 2.3 per cent for the primary education and 3.1 per cent for the lower secondary education.<sup>454</sup> Enrolment rates for the 2004–2005 school year are as follows: primary education – 110.64 per cent; lower secondary – 107.89 per cent; secondary overall (general, professional, vocational) – 127.37 per cent. Rates are over 100 per cent, as many parents from neighbouring municipalities enrol their children in the Veliko Turnovo schools.

There is one segregated school in Veliko Turnovo, the Hristo Botev Lower Secondary School. It is situated at the beginning of the *mabala* in close proximity to a “Bulgarian” school. At the same time, there is a school with a majority of Roma students (71.6 per cent in primary education) in Kilifarevo, which is the only school in a town where the number of school-age Bulgarian children is low. There are also schools with more than 80 per cent Roma students in the villages of Vodoley, Balvan, Ledenik and Tzerova Kuria.

There is no school in the municipality that is defined only as primary (which has only the first four grades). There are 13 schools that cover teaching from the first to the eighth grade, which are grouped under lower secondary and 15 schools where children can study up to the thirteenth grade. There are 123 pupils in primary grades that are enrolled in the segregated school, and 148 students at the lower secondary level.<sup>455</sup>

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<sup>452</sup> Table of the population according to permanent address, age and gender – Veliko Turnovo Municipality. Source: Veliko Turnovo Municipality, 13 February 2004.

<sup>453</sup> Regional Inspectorate of Education, February 2006.

<sup>454</sup> Informal conversation with municipal officials, March 2006.

<sup>455</sup> Regional Inspectorate of Education.

**Table A13: Case Study: Veliko Turnovo Municipality – proportion of Roma in six schools**

School	Number of children – by grade					Proportion of minority (Roma) children (per cent) – by grade				
	Pre-school	I	II	III	IV	Pre-school	I	II	III	IV
“Hristo Botev” – Veliko Turnovo	15	17	33	34	30	100	100	100	100	100
“Neofit Riski” – Kilifarevo	12	23	22	19	20	83	87	91	42	55
“Hristo Smirnenki” – Vodoley	11	11	12	14	14	100	100	100	100	100
“Ivan Rilski” – Balvan	5	12	6	13	12	100	90	100	80	90
“Vasil Levski” – Ledenik	7	5	8	7	5	95	95	95	95	95
“P.R.Slaveykov” –Tzerova Kuria	10	8	12	7	9	70	75	83	57	66

Source: Veliko Turnovo Municipality

**Table A14: Case Study: Veliko Turnovo Municipality – special school enrolment**

	Special schools for children with intellectual disabilities		
	Primary education (7–10 years)	Lower secondary (11–14 years)	Secondary overall (Grades 9 and 10)
Total number of special schools	–	4	–
Total enrolment in special schools (2004–2005)	127	144	40
Roma pupils enrolled in special schools as a share of the total of pupils enrolled in special schools	Around 80%	Around 75%	–

Source: Estimates of the Amalipe Centre

By an order of the Ministry of Education and Science from June 2006,<sup>456</sup> and as a result of the policy of the Ministry to respond to the requirements in the process of the EU accession regarding the special schools, two of the special schools were closed

<sup>456</sup> *Official Gazette*, issue 44 of 30 May 2006.



down: the Vasil Levsky special boarding school in the village of Mindia, and the special boarding school in the village of Gabrovtsi. As a result of a joint campaign of the Amalipe Centre and the P. R. Slaveykov Primary School in Veliko Turnovo, 12 out of 22 Roma children from the ghetto at Aleko Konstantinov St. in Veliko Turnovo have been integrated from the St. Teodosij Turnovski special school in Veliko Turnovo to the mainstream school.

The special schools in Mindia and Novo Selo are boarding schools, and their budget is 795 leva per pupil (€398), while the budget of the Teodosij Turnovski School in Veliko Turnovo is 211.60 leva per pupil (€106).<sup>457</sup> At the same time, the schools rely to a great extent on sponsors and external donations. For example, the St. Teodosij Turnovski School in Veliko Turnovo receives around 400 leva per month (€200) in cash and additional materials in kind.<sup>458</sup>

The sum allocated for a student in a general mainstream school is 146.50 leva plus 14 leva per pupil for heating (€73 plus €7).

### *Enrolment and completion*

According to the official data submitted by the municipality to the Regional Inspectorate of Education, there are no children who have never been enrolled in school. At the same time, informal conversations with officials indicate that there are such children. Estimates given by local formal and informal leaders show, however, that their percentage is low – around one per cent of all Roma children. Dropping out is a more serious problem: 190 children are recorded as dropping out of primary school, 271 from the lower secondary level, and 300 from secondary schools in Veliko Turnovo district for 2004–2005.<sup>459</sup> These percentages are higher in the more marginalised communities.

For the 2004–2005 school year the total number of drop-outs for the district is 767 or 2.25 per cent, higher than the 1.99 per cent average for the country, while only in Veliko Turnovo Municipality is the percentage as low as 0.57 (or 71 students).

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<sup>457</sup> Decision No. 21/19.01.2006 of the Council of Ministers.

<sup>458</sup> Interview with Katinka Obretenova, school director of the St. Teodosij Turnovski Special School in Veliko Turnovo.

<sup>459</sup> Table for the movement of students in Veliko Turnovo district during the 2004–2005 school year, provided by the Regional Inspectorate of Education, Veliko Turnovo.

**Table A15: Case Study: Veliko Turnovo Municipality  
– drop-out rates (2004–2005)**

Reason for dropping out	Proportion of total drop-outs (per cent)
Family	35
Absences	23
Social	19
Travel abroad	18
Low school marks	3
Health	2

Source: Regional Inspectorate of Education, Veliko Turnovo

### *Financing and costs*

In addition to funds allocated by the State, the Education Department in the municipality allocates money to each school on the basis of its needs for renovations, equipment supply and so on. Table A16 below provides information on the budget allocated to each school by the municipality for 2006.

**Table A16: Case Study: Veliko Turnovo Municipality – budget allocations (2006)**

Type of school	School name	Number of pupils	Total budget (levs)	Per-pupil budget (levs)
Segregated town school	Hristo Botev School, Veliko Turnovo	252	239,157	949.04
Mainstream town school	Vela Blagoeva Secondary School, Veliko Turnovo	644	536,677	833.35
Elite school	Prof. Asen Zlatarov Language School, Veliko Turnovo	789	566,885	718.49
Village school with a prevailing number of Roma students	Hristo Smirnenski School, Vodoley	97	96,077	990.48
Village school with a low number of Roma students	Hristo Smirnenski School, Samovodene	108	107,746	997.65
Average for Veliko Turnovo municipality		8,274	6,511,630	787.00

Source: Veliko Turnovo Municipality<sup>460</sup>

<sup>460</sup> Veliko Turnovo Municipality, Education Department, May 2006.

**Table A17: Case Study: Veliko Turnovo Municipality – per-pupil budget in the 5 schools with a prevailing number of Roma students (June 2006)**

School	Per-pupil budget (levs)
Hristo Botev, Veliko Turnovo	949.04
Tzerova Kuria	1,591.24
Ledenik	1,224.04
Vodoley	990.48
Neofit Rilski, Kilifarevo	935.50
Average	781.30

Source: Regional Inspectorate of Education; school directors <sup>461</sup>

The budget of each municipality is nationally defined by the Ministry of Finance, while the investments are the result of the economic policy of the municipality. In 2003, 34.2 per cent of the municipal budget was allocated for education, which was the single largest budget item; the proportion rose to 37 per cent in 2006. Investments allocated for education for 2003 were 13.88 per cent of the total.

A significant amount of the educational budget is allocated for renovating the buildings and providing a good school environment. Recently, a new local heating system has been built in the Vodoley village pre-school (which shares one building with the school). Roof repairs, heating systems overhaul and toilet renovation were done at a cost of 1,154 lev (€577). One of the buildings with the worst conditions is the Prof. Asen Zlatarov Language School in Veliko Turnovo. Nevertheless, within the municipality's gas connection programme, many of the town schools already have been equipped with gas. <sup>462</sup>

According to the National Education Act, the obligatory one year of pre-school is free of charge. <sup>463</sup> Nevertheless, the parents need to provide clothes and other supplies for the children, and the cost of all this is estimated at around 40 lev per month. Until the 2004–2005 school year only the textbooks for the first grade were offered for free and

<sup>461</sup> Source: Regional Inspectorate of Education; school directors – June 2006. Three of the schools have classes for basic professional skills in the ninth and the tenth grade, but they are optional. They have specialities in baking and flower cultivation. The schools are generally lower secondary schools.

<sup>462</sup> "The Problems in the Education Field Are Due to the Lack of Rules," interview with Rumiana Yordanova, head of the Education Department, Veliko Turnovo Municipality, available at [http://www.forum-bg.net/bg/index.php?option=com\\_content&task=view&id=132&Itemid=32&lang=bg](http://www.forum-bg.net/bg/index.php?option=com_content&task=view&id=132&Itemid=32&lang=bg) (accessed on 16 May 2006).

<sup>463</sup> *Rules and Regulations for the Application of the National Education Act*, Art. 30, para. 2.

could be retained by the students after the school year. Since 2005–2006 all textbooks for the primary grades (first to fourth) have been offered for free. Therefore, all children (including Roma) in the primary grades have access to school textbooks. Access is more difficult in the higher grades, where the families themselves must buy textbooks.

### *Access*

The procedure for enrolling children in pre-schools is regulated by the Rules and Regulations for the Application of the National Education Act. Parents choose the pre-school that they wish and submit a written request together with a copy of the birth certificate of the child and a recent medical certificate.<sup>464</sup> Fees are regulated by a municipal ordinance.<sup>465</sup> The procedure for enrolling children in the first grade of general schools is similar. Parents submit a written application.

Roma children are not generally placed in segregated classes in the municipality. Such a practice appeared in 2003 in a school in Gorna Oriahovica, but after an intervention by the local Roma organisation, the Amalipe Centre, and discussions with the school director the practice was immediately abandoned and the children were integrated. At present all the Roma children (who make up around 50 per cent of the pupils in the school) are allocated to mixed classes, and ethnically mixed groups are created for studying Roma folklore as a free elective.

According to regulations, the Regional Inspectorate of Education director issues an order on a yearly basis to establish a Commission for complex pedagogical assessment for pupils who should be directed to special schools or classes or integrated in the mainstream schools.<sup>466</sup> The team includes the expert in integrated education in the Regional Inspectorate of Education, a psychologist, a primary teacher, and so on, but after the changes in the National Educational Act it no longer includes a medical specialist who could estimate the level of disability of the child. Thus the functions of the Commission have been shifted from diagnostic to just pedagogical assessment. This allows developmentally average children to be directed to the special school after a request from their parents (for various reasons, usually social). The frequency of the meetings of the Pedagogical Assessment Commission depends on the Regional Inspectorate of Education; there are four planned for the 2005–2006 school year. The commission examined 237 children for the 2005–2006 school year: 69 children only from Veliko Turnovo Municipality. Of these, 122 were directed towards integrated education in the mainstream schools.

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<sup>464</sup> *Rules and Regulations for the Application of the National Education Act*, Art. 28, para. 1.

<sup>465</sup> Source: City Council of Veliko Turnovo Municipality. Information available at <http://www.veliko-turnovo.bg/obs/naredbi.htm> (accessed on 26 May 2006).

<sup>466</sup> Rules and Regulations for the Application of the National Education Act, Art. 6A and Ordinance No. 6 for Education of Children with Special Educational Needs and/or Chronic Diseases from 19 August 2002.

### *School infrastructure and human resources*

The conditions of the school infrastructure differ significantly between the urban and the village schools. Some of the village schools (although not many) still have outdoor toilets and use wood and charcoal as their major heating source during the winter. In the 2004–2005 school year, all Bulgarian schools were equipped with computer configurations within the Ministry’s National Programme for Broader Inclusion of Students in Compulsory School Age. The schools in Veliko Turnovo Municipality received 363 computers for 30 computer labs in ten schools.

The average number of pupils per computers for the municipality is 33.5 pupils per computer. There is, however, a serious problem with the technical support of the computer equipment, especially in the village schools, and there is a lack of equipment and resources to ensure that the computers are working consistently.

The libraries in the schools, however, are still far from satisfactory. Some schools, especially in villages, do not even have libraries.

**Table A18: Case Study: Veliko Turnovo Municipality – available computers and library volumes (in the five schools with a majority of Roma students)**

School	No. of computers	No. of computer laboratories	No. of library volumes
Hristo Botev, Veliko Turnovo (using the library of the School of Humanitarian Studies)	11	1	11,669
Hristo Smirnenki School of Vodoley	9	1	-
Vasil Levski School of Ledenik	8	1	1,800
Neofit Rilski School of Kilifarevo	10	1	2,310
P. R. Slaveykov School of Tzerova Kuria	15	1	-
Average for Veliko Turnovo Municipality	18.15	1.5	6,696.75

Source: Veliko Turnovo Municipality

The autonomy of the schools with regard to the curriculum is rather limited. It is connected only with “free elective subjects”, which can form at most 10 per cent of the classes. These courses may be made available after children submit a written request signed by their parents, which is finally approved by the municipal authorities responsible for education. Since 2002 Veliko Turnovo Municipality has annually approved “Roma folklore and culture” classes as a free elective subject in several municipal schools: Vodoley, Resen and Ledenik.

Schools have greater autonomy with regard to human resources policy. The Regional Inspectorate of Education appoints all school principals. The selection is made by a

commission that includes representatives of the Regional Inspectorate of Education and at least one representative of the Ministry of Education and Science. The school director appoints teachers and other staff depending on the possibilities of the school budget.

All the teachers in the municipality have the appropriate educational level, largely due to the presence of the University of Veliko Turnovo. The total number of teachers in Veliko Turnovo District is 3,341, of whom 85 per cent have a university degree and 14 per cent have a college education.<sup>467</sup> The teachers visit qualification courses at three levels: national, regional and local. During the 2005–2006 school year none of the teachers in Veliko Turnovo Municipality participated in a qualification course directed to working in a multi-ethnic environment.<sup>468</sup>

Veliko Turnovo Municipality has the lowest percentage in the district of classes with the minimum number of students (0.63 per cent with an average for the district of 3.07 per cent for the 2003–2004 school year) and the lowest percentage of mixed classes (where children of different grades study together) – 1.59 per cent with an average for the district of 6.15 per cent.<sup>469</sup>

The table below shows the school results of Roma pupils in three of the schools in Veliko Turnovo district for 2005–2006. In the last two schools (in Ledenik and Vodoley) the proportion of Roma children is around 100 per cent.<sup>470</sup>

**Table A19: Case Study: Veliko Turnovo Municipality – school results of Roma pupils (2005–2006)**

Village	School results	
	Grades 1–4	Grade 7–9
Resen	3.8	3.68
Ledenik	3.37	3.41
Volodey	4.48	3.89

Source: Regional Inspectorate of Education<sup>471</sup>

There are no data about the participation of Roma children in national competitions for mathematics, literature, or chemistry. One fifth-grade Roma student from the school in

<sup>467</sup> Strategy for the development of Veliko Turnovo District (2005–2015).

<sup>468</sup> Information from the Regional Pedagogical Centre.

<sup>469</sup> Report for the activities of the Regional Inspectorate of Education, Veliko Turnovo, for the 2003–2004 school year, submitted to the MES in August 2004.

<sup>470</sup> The director of Hristo Botev School in Veliko Turnovo has so far refused to provide us with this information.

<sup>471</sup> Information from the schools, submitted to the Regional Inspectorate of Education (June 2006).

Vodoley prepared for a national mathematics competition but could not attend due to health reasons. Nevertheless, the children actively participate in the social and public events organised. Children from all the municipal schools where Roma folklore classes are taught regularly participate in the municipal celebrations of the major Roma feasts and Bulgarian holidays. A 14-year-old student from the Hristo Botev School in Veliko Turnovo, Sevginar Topalova, is a European weightlifting champion.

There is no difference in the school curriculum except for the Hristo Botev School in Veliko Turnovo, where an intensive Turkish-language course is available as a free elective in all grades, and the schools in Vodoley, Balvan, Ledenik and Resen, where Roma folklore is studied as a free elective subject within the Programme of the Amalipe Centre and the Ministry of Education and Science's "Roma Folklore in Bulgarian Schools". From the beginning of the 2006–2007 school year Roma culture has also been offered in one of the mainstream town schools, P. R. Slaveykov.

Most of the schools with Roma pupils do not have school boards of trustees where parents participate. A type of school–community relation has been established between the Hristo Botev School and the Sveta Gora neighbourhood in Veliko Turnovo. It is religiously and politically based. A very influential factor is the local imam and the local mosque's board of trustees, who actively participate in the overall school life. This is interrelated with the strong position and role of the local representatives of the Movement for Rights and Freedoms, a political party oriented towards the Turkish minority.

The Regional Inspectorate of Education usually makes four or five school inspections per year. The most recent one in a school with Roma children from the municipality was in 2003–2004 in the Neofit Rilski School in Kilifarevo. The school inspectors' report points out that there are still administrative weaknesses in the managing of the school, which are not considered significant. One of the recommendations is for more intensive cooperation with NGOs in the different fields. The limited number of school boards of trustees is also a general recommendation after all the inspections.

No cases of ethnic discrimination have been brought so far to the competent bodies on the territory of the municipality.

## **A2.3 Vidin Municipality**

### **A2.3.1 Administrative Unit**

Vidin Municipality is located in the north-western part of Bulgaria, about 250 kilometres from the capital, Sofia. According to official data, the total population of the municipality is 80,050, of which the Roma community represents about 10 per cent (2005).<sup>472</sup> However, a high-ranking municipal official has stated that the number of

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<sup>472</sup> Vidin Municipality Plan, 2005.

Roma in Vidin Municipality is around 12,000,<sup>473</sup> while unofficial data report 13,000 and 14,000 Roma living only in Vidin itself, the largest town of the administrative unit (which would represent 30 per cent of the town's population), as of 2005.<sup>474</sup>

There are 9,000 officially registered Roma households in the Vidin region, which consists of eight municipalities. Many other Roma households are not included, as their members are not officially registered on the territory of the municipality.<sup>475</sup> As far as Vidin Municipality is concerned, there are large communities of Roma in the neighbourhood of Nov Pat in the town of Vidin and in the town of Dunavtzi.

Only the Nov Pat neighbourhood has its own mayor, who is appointed by Vidin Municipality's mayor. There is no quota principle for selection of Roma representatives to the local government, and neither there are institutional mechanisms that ensure participation of Roma in the local governance. In spite of this, seven Roma were elected to the local parliament from the "Roma" Political Party and one was elected from the Bulgarian Socialist Party during the last municipal elections, held in 2003. Roma therefore hold 22 per cent of the seats in the Vidin Municipal Council.

### A2.3.2 Roma and the Community

Close to 100 per cent of the Romanes-speakers in Vidin speak the Yerliiski dialect. A majority of the Roma in the municipality do not wear typical Roma clothes. Roma women who belong to the congregation of the Evangelist Church do wear headscarves.

Vidin Municipality registered one of the highest levels of unemployment in the country. According to the National Statistical Institute in Sofia (2005), unemployment varies between 30 per cent and 32 per cent, while the average for the country is between 14 per cent and 18 per cent. Interviews with Roma leaders and local NGOs suggest that the unemployment rate among adult Roma is about 80 per cent. Between 20 per cent and 40 per cent of all Roma in the municipality subsist on social payments. This means that a substantial number of Roma there live in extreme poverty, on approximately €1 per day.<sup>476</sup>

The major sources of income for the Roma families in Vidin are unemployment benefits and participation in programmes for temporary employment at the minimum wage. According to the Bureau of Labour, Vidin, there are 3,302 active Roma adults on the labour market, of whom 56 per cent have no qualification or degree. The average budget for one Roma household, consisting of five people, is 242 leva, which makes less than €1 person per day. The social stratification of the Roma in Vidin

<sup>473</sup> Interview with Ivan Perchinski, deputy mayor of Vidin Municipality, 10 April 2006, Vidin.

<sup>474</sup> Interview with Donka Panayotova, chair of the NGO Organisation Drom, 8 April 2006, Vidin.

<sup>475</sup> Interview, Ivan Perchinski, deputy mayor of Vidin Municipality, 10 April 2006, Vidin.

<sup>476</sup> The data are taken from a micro-study of the NGO Organisation Drom, conducted between April and May 2005 with a database of 200 Roma families that reside in the municipality.



Municipality is the following: wealthy (4 per cent), mid-level (26 per cent, usually due to the fact that a member of the family lives abroad and remits money to the family at home) and poor (70 per cent).<sup>477</sup> Only about 50–70 Roma households in Vidin Municipality live and coexist peacefully with their non-Roma neighbours. These Roma families pay their utility bills regularly. The Roma from the territorially segregated Roma settlements in the Municipality are not welcome in the local institutions.<sup>478</sup> They are frequently not served or treated well by public agencies.<sup>479</sup>

Around 1 per cent of the municipal budget is distributed specifically for the needs of the Roma community. It is mainly used for improving infrastructure in the Roma settlements, which is poor and deteriorating in both villages (such as Bukovets) and towns (including Dunavtzi and Vidin).

### *Nov Pat neighbourhood*

Nov Pat is the main Roma neighbourhood in Vidin, where the largest number of Roma in the municipality live (between 90 and 95 per cent of the total). Nov Pat is situated three kilometres from the centre of Vidin, and there is no regular public transport that connects the neighbourhood with other neighbourhoods of the town. There is a sewer line only in one main street in the neighbourhood, which is also the only street that is asphalt-paved in that neighbourhood.

About 60 per cent of the Roma houses in the neighbourhood are built of bricks and cement, while the rest are frame houses. The Roma settlements were not planned developments, and are completely lacking in grass, trees and bushes.

Around 90 per cent of the Roma in the neighbourhood are heated with solid fuel, and when that is depleted, families burn their clothes and shoes during the winter season. Every winter there is severe tension between the Roma Community and the electricity public company in Vidin. The Roma in Vidin have problems with electricity bills. Because a large number of poor Roma families do not pay, the whole neighbourhood's electricity supply is limited and irregular.

At present there are 50 home telephone lines registered in Nov Pat, which is extremely low. The institutions, public and private facilities that function in Nov Pat include one Evangelist Church, eight small shops, fourteen cafes, one private restaurant, a police station and mayor's office, and a health centre with a dentistry clinic, one gynaecologist and one doctor. The health centre works only during the day.

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<sup>477</sup> The social stratification of the Roma Community is an estimate provided by the NGO Organisation Drom, which conducted research in April 2005 among 200 Roma families. The deputy mayor of Vidin Municipality confirmed in an interview that there is no other research on Roma family revenues.

<sup>478</sup> Interview with Donka Panayotova, 8 April 2006, Vidin.

<sup>479</sup> Interview with Donka Panayotova, 8 April 2006, Vidin.

The distance of the Roma community to the nearest segregated school is 100 metres, while the nearest segregated pre-school is 500 metres away, and the nearest lower secondary school is two kilometres away, as are the nearest upper secondary school and the nearest integrated pre-school.

Thus the Roma community in Vidin Municipality is to a large extent territorially and socially isolated from the mainstream society. The only opportunity for Roma children to communicate with non-Roma peers is for those who are integrated in the mainstream schooling system, whereas the Roma parents of these children communicate with non-Roma parents through the parents' meetings and in cases of gatherings for a variety of school celebrations.

### A2.3.3 Education

#### *School and education network*

The school network in Vidin Municipality is as shown below in Table A20.

**Table A20: Case Study: Vidin Municipality – pre-school and school network (2006)**

Local/district school network	Pre-school	Primary education	Basic education	Secondary overall (general, professional, vocational)	Total
Total number of schools	0	0	16	9	25
Number of pupils enrolled	576	2,538	2,831	4,038	9,983
Total number of segregated schools	0	0	2	0	2*
Number of pupils enrolled in segregated schools	46	215	220	0	607

\*Segregated schools located in the towns of Vidin and Dunavtzi  
 Source: Territorial Statistical Bureau<sup>480</sup>

#### *Enrolment and completion*

The number of Roma in the age group between 3 and 18 is decreasing, as more and more young families are deciding to raise only two children.<sup>481</sup> According to pre-school

<sup>480</sup> Territorial Statistical Bureau, Vidin, February 2006.

<sup>481</sup> Interview with Donka Panayotova, chair of the NGO Organisation Drom, 8 April 2006, Vidin.

directors and Roma leaders, in Vidin Municipality there are no Roma children attending “informal” pre-schools operated by NGOs, which are not recognised by the State as formal education. It has been identified also that due to the desegregation of Roma Education in the town of Vidin, 56 per cent of Roma children have access to better-quality education in an integrated school environment as of April 2006.

**Table A21: Case Study: Vidin Municipality – pre-school- and school-age population (2006)**

Age group (years)	Number of children
3–6	2,507
7–10	2,436
11–14	3,095
15–18	3,774
Total	11,812

Source: Territorial Statistical Bureau<sup>482</sup>

There are no Roma children who cannot comply with the local procedures for enrolment in pre-school due to a lack of documents or other barriers. Roma parents do not report facing any administrative barriers. The same is true for Roma children who are enrolled in the first grade of school.

**Table A22: Case Study: Vidin Municipality – pre-school- and school-age Roma population (2006)**

Age Group (years)	Number of schoolchildren	Number of school-age children who are not in the education system	Total
3–6	89	–	–
7–10	1,061	58	1,119
11–14	1,094	52	1,146
15–18	725	20	845
Total:	2,969	–	–

Source: Territorial Statistical Bureau<sup>483</sup>

<sup>482</sup> Territorial Statistical Bureau, Vidin, February 2006.

<sup>483</sup> Territorial Statistical Bureau, Vidin, February 2006

Roma pupils in Vidin Municipality represented 30 per cent of all pupils in the 2005–2006 school year. There are no aggregated data on the exact number of pre-school-age Roma children who do not attend pre-schools. Few Roma families have the chance to send their children to local pre-schools, because they cannot cover the monthly fees.

**Table A23: Case Study: Vidin Municipality – net enrolment rates by educational level (2006)**

	Net enrolment rate (per cent)					
	Pre-school	Basic education		Secondary education		
		Primary education	Lower secondary	Secondary overall (general, professional, vocational)	Secondary general (general)	Secondary professional and vocational
Boys	25	96	88	95	36	59
Girls	21	96	96	93	54	39
Average:	23	96	92	94	45	49

Source: Territorial Statistical Bureau<sup>484</sup>

The net enrolment rates in Vidin are lower than the national average net enrolment rates at the pre-school and primary education levels, but they are significantly higher at the lower and upper secondary education level. There is even a two per cent increase in enrolment from lower secondary to secondary education. This is due to the fact that there are both Roma and non-Roma children from neighbouring municipalities (Dimovo, Kula and Bregovo) who prefer to continue their education in Vidin, where the high schools have a better reputation.

<sup>484</sup> Territorial Statistical Bureau, Vidin, February 2006.

**Table A24: Case Study: Vidin Municipality – enrolment rates of Roma pupils (2006)**

	Enrolment rates (per cent)					
	Pre-school	Basic education		Secondary education		
		Primary education	Lower secondary	Secondary overall (general, professional, vocational)	Secondary (general)	Secondary professional and vocational
Boys	–	95	94	86	50	36
Girls	–	95	96	86	60	26
Total:	–	95	95	86	55	31

Source: Territorial Statistical Bureau<sup>485</sup>

The Roma pupils of Vidin Municipality are primarily concentrated in basic education: 73 per cent of Roma boys and girls are found in this segment. Another specific indicator shows that most of the secondary school-age Roma are found in general education schools and not in professional and vocational training schools.

There is one special school for children with intellectual disabilities (remedial school) in Vidin Municipality.

**Table A25: Case Study: Vidin Municipality – drop-out rates (2006)**

	Enrolment rates (per cent)	
	Primary education	Lower secondary
Boys	4	7
Girls	4	5
Average:	4	6

Source: Territorial Statistical Bureau, Vidin, February 2006

According to recent statistical data, a total of 95 (Roma and non-Roma) children have dropped out of primary education, while 184 have dropped out of lower secondary education.

According to official data, about two per cent of all Roma pupils in Vidin Municipality are registered in the only special school found in the municipality. The average number

<sup>485</sup> Territorial Statistical Bureau, Vidin, February 2006.

of years that Roma children spend in pre-school is three years, while the average number of years spent in school for Roma children is five or six years. The official data confirm that 230 Roma children dropped out of school at the end of the first school term of the 2005–2006 school year in Vidin Municipality. The majority of these children (120) dropped out of upper secondary education, while a minority dropped out of lower secondary education (52) and primary education (58).

Organisation Drom operates the only system for monitoring the enrolment and drop-out of Roma pupils. There are oral but no written complaints of discrimination in integrated schools, and there are no sanctions imposed for discriminatory actions against Roma.<sup>486</sup> According to the deputy mayor of Vidin Municipality, representatives of the Roma Community have not deposited any written complaints for discrimination with the local institutions. Nor are there any lodged with the Commission against Discrimination or the courts.

**Table A26: Case Study: Vidin Municipality – drop-out rates of Roma pupils (2006)**

	Enrolment rates (per cent)		
	Primary education	Lower secondary	Secondary overall (general, professional, vocational)
Boys	5	6	14
Girls	5	4	14
<b>Total:</b>	5	5	14

Source: Regional Inspectorate of Education<sup>487</sup>

### *Financing*

Pre-schools are entirely financed by Vidin Municipality, whereas the schools are financed by the State and the municipal budget.<sup>488</sup> The distribution of education funds is based on national standards. A Council of Ministers' Decision defines the standards for the number of personnel in schools and pre-schools, as well as standards for annual subsidy per pupil and school.<sup>489</sup> The annual financial contribution of the State and the municipal budget is 55 per cent and 45 per cent, respectively,<sup>490</sup> which was fulfilled

<sup>486</sup> Interview with Donka Panayotova, 8 April 2006, Vidin.

<sup>487</sup> Regional Inspectorate of Education, Vidin, April 2006

<sup>488</sup> Interview with Malinka Russinova from the Education Department, Vidin Municipality, 5 January 2006, Vidin, and the deputy mayor of Vidin Municipality, Mr. Ivan Perchinski, 10 April 2006, Vidin.

<sup>489</sup> Decision No. 21 of the Council of Ministers from 19 January 2006 and its Annexes.

<sup>490</sup> Interview with Ventsislav Stanev, director of the Tsar Simeon Veliki School, 8 January 2006, Vidin.

during 2005.<sup>491</sup> The local government votes the budget for each school on the basis of the number of pupils and teachers, and this is directly transferred to the school's bank account. Vidin Municipality covers, on a monthly basis, the financial resources for the school's utilities (electricity, water, telephone and building repairs). The contribution for education is estimated at 44.62 per cent of the municipality budget.<sup>492</sup> The municipality subsidy allocated per pupil in a segregated pre-school or school is the same as the sum allocated per pupil in a predominantly non-Roma pre-school or school.<sup>493</sup> The percentage of the total pre-school financing represents 44.62 per cent of the municipality budget, made up from local, tax-based, resources.

### *School curriculum and programme*

In interviews with school directors it was confirmed that the mainstream schools in Vidin have some autonomy with regard to the curriculum and human resources policy, but only in the framework of the laws and regulations governing these issues.<sup>494</sup> The school director is responsible for hiring and dismissing the school staff. The members of the school board are proposed by the class teachers, while the candidates are selected by the Pedagogical Council. The school boards make decisions related to supply of means for school building repairs and extracurricular activities, supplied by private firms, and take part in the activities of the monthly and annual pedagogical councils.

There is no curricular difference between the municipality-based schools except in the case of the special school, which does not take account of the education results of its pupils; hence, it does not issue a diploma for the completion of classes but just a certificate.

The school governance body is composed of the school principal, schoolteachers and parents. The types of decisions are related to the financing of building repairs, extracurricular activities and implementation of curricular standards. Parents usually take part in regular meetings or when they need to speak with the teacher on some issue related to their child's activities.

The access of Roma pupils to school textbooks is either gained through the NGO Organisation Drom or freely supplied by the State for primary school pupils.

### *Inspections*

There are 20 employees at the Regional Inspectorate of Education, Vidin. The functions of the Regional Inspectorate of Education include the following:

<sup>491</sup> Interview with Valya Nikolova, chief accountant of Vidin Municipality, 10 May, Vidin.

<sup>492</sup> Interview with Valya Nikolova, chief accountant of Vidin Municipality, 10 May, Vidin.

<sup>493</sup> The equal treatment is stipulated in the Council of Ministers' Decision No. 21 from 19/01/2006.

<sup>494</sup> Interview with Ventsislav Stanev, principal of the Tsar Simeon Veliki Upper Secondary School, 10 March 2006, Vidin; interview with Silvia Pradoeva, deputy principal of the Mathematical Upper Secondary School, 9 March 2006, Vidin; interview with A. Gerasimov, principal of the Otec Paisii Lower Secondary School, 7 March 2006, Vidin.

- Conduct of State policy in the field of education;
- Control for implementation of State education standards in the schools;
- Methodical support for education;
- Teacher qualification activity;
- Organisation and control of the education process.

According to regulations, the Regional Inspectorate of Education is bound to conduct two inspections of the schools (complex and specific in Bulgarian literature, mathematics or another subject) on an annual basis.



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Equal access to quality education for  
Roma

Hungary

## Table of Contents

1. Introduction and Recommendations .....	187
1.1 Executive Summary .....	187
1.2 Recommendations .....	190
1.2.1 Recommendations on monitoring and evaluation .....	190
1.2.2 Recommendations for improving access to education .....	191
1.2.3 Recommendations on improving quality of education .....	193
2. Basic Education Indicators .....	196
2.1 Data collection .....	196
2.2 Enrolment data and trends .....	200
2.3 Retention and completion .....	203
2.2.1 Pre-school .....	203
2.2.2 Primary education .....	205
2.2.3 Secondary education .....	208
2.4 Types and extent of segregation .....	211
2.4.1 Overall patterns of segregation .....	211
2.4.2 Separate classes in mainstream schools .....	214
2.4.3 Other forms of segregation in mainstream schools .....	218
2.4.4 Special schools .....	219
3. Government Educational Policies and Programmes .....	221
3.1 Government policy documents .....	221
3.2 Government education programmes .....	226
3.2.1 Programmes to reduce drop-outs and segregation .....	226
3.2.2 Reintegration programmes .....	228
3.2.3 Minority education policy .....	229
3.3 Desegregation .....	230
3.4 Roma teaching assistants/school mediators .....	236
3.5 Romanes Teachers .....	237
3.6 Educational materials and curriculum policy .....	237
3.7 Teacher training and support .....	240

3.8	Discrimination monitoring mechanisms .....	241
3.8.1	Judicial procedures .....	241
3.8.2	Administrative procedures .....	244
3.8.3	Conciliation procedures .....	245
3.8.4	Other forums to be approached in cases of discrimination .....	246
4.	Constraints on Access to Education .....	248
4.1	Structural constraints .....	248
4.2	Legal and administrative requirements .....	251
4.3	Costs .....	252
4.4	Residential segregation/Geographical isolation .....	256
4.5	School and class placement procedures .....	259
4.6	Language .....	266
5.	Barriers to Quality Education .....	270
5.1	The school financing system .....	270
5.2	School facilities and human resources .....	277
5.3	School results .....	279
5.4	Curricular standards .....	280
5.5	Classroom practice and pedagogy .....	281
5.6	School–community relations .....	284
5.7	Discriminatory attitudes .....	286
5.8	School inspections .....	290
ANNEX 1.	Administrative Structure .....	293
A1.1	Structure and organisation .....	293
A1.2	Legal roles and decision-making .....	295
ANNEX 2:	Case Studies .....	300
A2.1	Case Study: Csököly .....	300
A2.1.1	Administrative Unit .....	300
A2.1.2	Roma and the Community .....	301
A2.1.3	Education .....	303
A2.2	Case Study: Ónod .....	309
A2.2.1	Administrative Unit .....	309
A2.2.2	Roma and the Community .....	310
A2.2.3	Education .....	311
A3.3	Case Study: Tiszabura .....	314
A3.3.1	Administrative Unit .....	314
A3.3.2	Roma and the Community .....	314

A3.3.3 Education .....	315
ANNEX 3. Legislation cited in the report .....	320
ANNEX 4. Bibliography .....	321



## Index of Tables

Table 1:	Roma school-age population (1993 and 2003) .....	201
Table 2:	Pre-school- and school-age populations – national and Roma populations (1990, 1991 and 2004) .....	202
Table 3:	Age distribution of children attending pre-schools – national and Roma populations (2002) .....	204
Table 4:	Age of primary school completion – for majority and Roma children (2003) .....	206
Table 5:	Correlation between “excused absences” for Roma attending primary schools and “group” and “individual” segregation (2004) .....	207
Table 6:	Access to secondary education of the Roma population (1994 and 1998) .....	208
Table 7:	Correlation between secondary school admission rates and degree of segregation in primary schools (2003) .....	210
Table 8:	Drop-out rates in secondary education (1990–1998) .....	211
Table 9:	Frequency of primary school classes with various proportions of Roma students (2000 and 2004) .....	215
Table 10:	Number of Roma students in predominantly Roma primary school classes (2000 and 2004) .....	216
Table 11:	Correlation between Roma class density and class types in primary schools (2004) .....	217
Table 12:	Proportion of Roma children according to class type (2000 and 2004) .....	218
Table 13:	The average use of pre-school capacity – breakdown by pre-school size and the proportion of Roma children in the pre-school .....	249
Table 14:	Levels of family allowance (2005) .....	254
Table 15:	<i>Per capita</i> expenditure on education, culture, recreation and entertainment .....	255
Table 16:	Degree of residential segregation (2003) .....	257
Table 17:	Location of Roma households (2003) .....	257
Table 18:	Infrastructure in settlements densely populated by Roma (2004) .....	259
Table 19:	Educational expenditure – as a share of GDP and of the State budget (2000–2004) .....	272

Table 20:	School directors' attitudes towards Roma students and school advancement (2003) .....	287
Table A1:	Public expenditure on students in primary, lower and upper secondary education (1998–2001) .....	298

## List of acronyms and abbreviations

ECRI	European Commission against Racism and Intolerance
ETA	Act No. 125 of 2003 on Equal Treatment and the Promotion of Equal Opportunities (Equal Treatment Act)
IPR	Integrative Pedagogical System ( <i>Integrált Pedagógiai Rendszer</i> )
KSH	Central Statistical Office ( <i>Központi Statisztikai Hivatal</i> )
MA	Act No. 77 of 1993 on the Rights of National and Ethnic Minorities (Minorities Act)
NCC	National Core Curriculum ( <i>Nemzeti Alaptanterv</i> )
NEKI	Legal Defence Bureau for National and Ethnic Minorities ( <i>Nemzeti és Etnikai Kisebbségi Jogvédő Iroda</i> )
NEKH	Parliamentary Commissioner for National and Ethnic Minority Rights ( <i>Nemzeti és Etnikai Kisebbségi Jogok Biztosága</i> )
OCÖ	Hungary's Gypsy Self-Government ( <i>Országos Cigány Önkormányzat</i> )
OECD	Organisation for Economic Co-operation and Development
OOIH	National Network of Educational Integration ( <i>Országos Oktatási Integrációs Hálózat</i> )
OKI	National Institute on Public Education, NIPE ( <i>Országos Közoktatási Intézet</i> )
OKÉV	National Public Education Evaluation and Examination Centre ( <i>Országos Közoktatási Értékelési és Vizsgaközpont</i> )
PEA	Act No. 79 of 1993 on Public Education (Public Education Act)
REI	Roma Education Initiative
RTA	Roma teaching assistant

# 1. INTRODUCTION AND RECOMMENDATIONS

## 1.1 Executive Summary

Hungary has one of the most advanced systems for minority protection in the region. A number of mechanisms have been developed to ensure that minority groups enjoy cultural and political rights, but Hungary's largest minority, the Roma, still face obstacles to equality in many spheres. Education in particular has been an area where Roma have been shown to fare worse than their non-Roma peers, despite governmental policies aimed at reducing barriers based on both ethnicity and socio-economic status. As one of the Governments leading the "Decade of Roma Inclusion", Hungary has achieved a high profile for its efforts to improve education for Roma, but much remains to be done before real change takes place for the majority of Roma children.

Substantial research has been conducted regarding Roma children and their access to education in Hungary. However, each study has been conducted according to different criteria and along different methodologies, making comparison of data difficult in some cases. Official data are among the least reliable of these sources, and many believe that sociological studies may be more reliable data sources than State-sponsored censuses. Data disaggregated by ethnicity have not been collected by the Government since 1993, when it passed a law protecting citizens' rights. However, groups exerting pressure from the European Union (EU) affirm that data can and must be collected by ethnicity, if this is done responsibly. The Government needs to do more to collect and maintain comprehensive information on Roma education.

Measures were enacted in 2002 that should support better enrolment of Roma children in pre-school, but the impact of these reforms does not yet appear to be significant. Roma generally start school later and are more likely to drop out than the national average. The proportion of Roma among school-age children has been rising over the last 15 years and research indicates that it will continue to increase. Non-enrolment in primary schools has not been reported as a systemic or visible problem.

Segregation is officially illegal in Hungary; however, research indicates that the separation of Roma children into segregated schools and classes has been on the rise over the past 15 years. Roma are overrepresented in schools and classes for children with intellectual disabilities, and evidence suggests that this is largely due to flaws in assessment procedures; Roma children are also frequently placed in segregated classes at otherwise mixed schools, where they are likely to study a remedial or "catch-up" curriculum. Regulations to more equally apportion children from disadvantaged backgrounds and those with special needs in each catchment area, and among classes in individual schools, could counteract these trends.

A number of different programmes and policies have been adopted to address issues relevant to Roma children. Most of these Government initiatives aim to support the education of children from "socially disadvantaged" families, rather than Roma as such, although it is clear that Roma are intended to benefit from such programmes. The

Government has so far not adequately addressed the needs of Roma and socially disadvantaged children in schools located in segregated residential areas (including town districts, villages and micro-regions), where there is no non-Roma population with which to integrate.

The Government has implemented a funding scheme intended to integrate schools, offering a subsidy and other support through the National Network of Educational Integration (OOIH). While the number of schools using these subsidies has been steadily increasing, research suggests that true integration remains a slow and uneven process. The Government has suggested that NGOs join the process and bring cases of segregation to the attention of the authorities, rather than improving the internal means of identifying problems. But without funds opening up for such activities, NGOs and activists will not be able to contribute to the fight against segregation as envisaged. Civil society has been active in the educational sphere, but the central Government itself should assert a more active role in moving desegregation forward, rather than relying on local authorities for implementation without providing support or external monitoring of progress. The lack of a mechanism to monitor and oversee the implementation of integration programmes has been identified as a problem, but no solution has been put forward.

The absence of a centralised system to track or administer programmes dealing with Roma teaching assistants and Romanes teachers also leads to a lack of data in these areas. While teaching assistants have received training on both Government and non-governmental courses, there are no centralised regulations for employing Roma mediators/teaching assistants, nor information about the total number of such assistants working in schools. Likewise, the number of teachers proficient in Romanes is unknown, but is almost certainly very small. Little attention has been given to these issues in the Hungarian Government's *National Action Plan for the Decade of Roma Inclusion* (hereafter, *Decade Action Plan*), despite their importance in creating an educational environment that is receptive to Roma children. Indeed, biased and insulting material about Roma remains in some Hungarian textbooks, and there are no courses for teachers focusing on tolerance or multicultural education available as part of standard teacher training. A number of different avenues for addressing complaints about discrimination in education exist; while only a limited number of cases have been brought forward, activists have successfully pursued charges of segregation in the courts.

Due to a lack of pre-schools in small villages, almost 20 per cent of Roma children live in areas with no pre-school nearby, and the transportation to villages where there is a pre-school may not be provided. Overcrowding is also a problem in areas where there are pre-schools. Generally, administrative requirements for enrolment in school are not an obstacle for Roma families; however, cases have been reported where Roma children were turned away from pre-schools due to their parents' social disadvantage or unemployment. Private schools are increasingly popular in Hungary; however, as most of these are too expensive for Roma families to afford, many function as segregated institutions. Although there are no conclusive data in this regard, education in public

schools does not seem to impose a serious financial burden on low-income families, as the State and municipal support for socially disadvantaged children alleviate most costs.

The physical separation of Roma communities is increasing, with a growing number of Roma children living in homogenous settlements. Schools draw their pupils from a legally defined catchment area, although parents can choose to send their children to another school outside the area. In practice, however, few Roma parents elect to send their children to other schools, while non-Roma parents are more likely to withdraw their children from schools with a high proportion of Roma. While the parents' wishes must be taken into account, the Ministry of Education and Culture should take steps to mitigate "white flight" and ensure that integration by law is not undone through segregation by choice. It is very common to assign children to classes based on their intellectual abilities. Assessments for placing children in special schools or classes for students with intellectual disabilities are sometimes conducted under inappropriate conditions and without appropriate attention to language or cultural issues. Although mechanisms exist for re-transfer of children into mainstream schools and classes, there are no statistics maintained on the actual number that take place.

Roma children are not consistently able to gain access to education in their mother tongue, although minority language education is provided for by law. Minority education, which does not necessarily mean minority language education, has been a longstanding problem in Hungary: in several cases Roma children have been given remedial "catch-up" classes rather than authentic minority education. Roma alone among the country's ethnic and national minorities have no accredited teaching material in their mother tongue at all, nor accredited teacher training courses where minority language-speaking teachers can study.

Reforms aimed at improving the quality of education in Hungary have not reached Roma children to the extent needed. School funding is a particularly contentious issue; various subsidies and forms of support are available to schools that meet specific criteria, but this approach can create incentives for schools to skew data in order to qualify for as many grants as possible. Schools without the necessary experience in applying for these funds may also lose out in this competitive process.

The Government cannot track school results for Roma, as records on achievement, disaggregated by ethnicity, are not maintained. A set of indicators, and the collection of data needed to monitor progress in key areas of school performance, should be established to determine in which areas Roma children need more support to succeed academically. Roma children are frequently relegated to classes or schools where teachers acknowledge that they have lower expectations for their students' performance, and curricula with lower standards are used. Teachers may receive training in current student-centred techniques, but in practice often rely on lectures and more traditional methods. The Ministry of Education and Culture should support greater access to in-service training and classroom support so that teachers can continue to develop their skills, particularly when working with Roma students.

In smaller villages school–community relations are often informal, but where such day-to-day contacts do not take place, there is little evidence that more structured mechanisms engage Roma parents as needed. Research on discriminatory attitudes indicates that many teachers and school directors harbour negative perceptions of Roma students, but that such attitudes are not overtly expressed, and rather come across in the form of low expectations. In addressing the more direct consequences of such prejudice, such as segregation in special classes or the inclusion of biased material in textbooks, the Ministry of Education and Culture should also focus on these indirect forms of discrimination and take steps to eliminate them in the classroom.

School inspections are performed by independent experts commissioned by the local authorities. As these same authorities are ultimately responsible for the school, they may be motivated to select experts predisposed to give the school a good report. The National Public Education Evaluation and Examination Centre (OKÉV) has the authority to sanction schools for discrimination, but the maximum penalty that it can impose is low, and there are examples where its inspectors have failed to note physical segregation in schools under review. Better central overseeing of the inspection system should be a priority in the desegregation process.

## 1.2 Recommendations

### 1.2.1 Recommendations on monitoring and evaluation

#### *Data collection*

The Hungarian Government should do the following:

1. Review regulations to ensure that, to the full extent permitted by relevant EU legislation, data collected is made available disaggregated by ethnicity, colour, religion, language, gender, age, location and nationality.

The Ministry of Education and Culture should do the following:

2. Gather and make public statistical data on the situation of Roma in the field of education, with due respect to the principles of data protection and privacy.
3. Regularly monitor disaggregated data on school enrolment, performance and progression, with the aim of ensuring a correct assessment of Roma access to education.
4. Establish and maintain a central database on public school results, including student achievement, failure and grade repetition rates, among other major indicators.
5. Establish and maintain a monitoring system at the national level, based on data from schools ensuring the enrolment of disadvantaged children, and the actual maintenance of integrated classes.

## 1.2.2 Recommendations for improving access to education

### *Structural Constraints, Legal and Administrative Requirements, Costs*

The Government should do the following:

6. Ensure coordination of educational regulation, financing, and control, delegating one central State body, preferably the Ministry of Education and Culture, with authority to oversee the process.
7. Provide additional direct social benefits to enable the poorest families to meet all the costs of education, including incidentals such as clothes, shoes, a daily meal and schoolbooks, class money, and fees for cultural events.

The Ministry of Education and Culture should do the following:

8. Fulfil its goal on education set out in the *National Action Plan of the Decade of Roma Inclusion* (hereafter *Decade Action Plan*) with regard to target 4, “Increasing the number of pre-school spaces, compulsory admission of children of vulnerable families, and providing free meals for those in need”.
9. Require compulsory pre-school attendance from as early an age as possible, and establish monitoring to ensure that children are in fact attending pre-school.
10. Ensure that there is an adequate number of pre-school spaces – whether through new investment or in micro-regional cooperation – to accommodate all multiply disadvantaged children and children with special needs.
11. Revise the rules and regulations of public education so as to provide a principled, unified and simplified legal context, with particular attention to the level of legislation at which issues are regulated, and the need for overall coherence.

### *Residential Segregation/Geographical Isolation*

The Government of Hungary should do the following:

12. Fulfil its goal on education set out in the *Decade Action Plan* with regard to desegregation, in target 1. “Increasing the number of schools utilising special financial incentives for integrated education”.

The Ministry of Education and Culture should do the following:

13. Take steps to centralise its control of aspects of the education process related to the National Network of Educational Integration (OOIH), in particular to improve quality control and the review and selection process of individual pedagogical experts within the programme.

14. Provide free room and board to disadvantaged children in cases where the nearest integrated school is more than a 60-minute bus ride away.
15. Follow ENAR/ERIO recommendations<sup>1</sup> with regard to “undertaking initiatives to combat intolerance of non-Roma parents and pupils; guaranteeing free and informed choice for Roma parents; introducing independent mechanisms to monitor and evaluate desegregation policies”.

### *School and class placement procedures*

The Ministry of Education and Culture should do the following:

16. Fulfil its targets set out in the *Decade Action Plan* with regard to the integration of children in targets 2, 3 and 5:
  - “fight against the practice of false diagnosis (as having intellectual disabilities) and stigmatisation of Roma children in the education system”;
  - “questioning of children previously diagnosed with intellectual disabilities and reintegration into mainstream classes”;
  - “improving overseeing of the process to qualify as a ‘private pupil’”.
17. Take steps to immediately end the misplacement of Roma into special and/or remedial classes.
18. Ensure that children with intellectual disabilities are correctly identified, by:
  - Promptly finalising the development and adaptation of diagnostic tools and tests to correctly identify children with intellectual disabilities;
  - Ensuring that these tests are subsequently constantly updated;
  - Ensuring that the diagnostic tools and test are not culturally biased;
  - Ensuring that when a Roma pupil is being tested, a Roma representative is also included in the Expert Panels for Assessing Learning Abilities.
19. Establish a firm commitment to a reintegration policy for misdiagnosed children, many of whom are Roma, from special schools and classes, adopting the necessary measures and ensuring the necessary financial resources at the national and local levels to make it effective.
20. Ensure that children previously misdiagnosed as having intellectual disabilities can be reintegrated into mainstream schools, via continuation of the “Out of

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<sup>1</sup> Recommendations from the proceedings of the conference “From Segregation to Integrated Schooling: the Way Forward. Roma and Equal Access to Education”, co-organised by the European Network against Racism (ENAR) and the European Roma Information Office (ERIO), 28–29 April 2006, Brussels, available at [http://www.enar-eu.org/en/events/roma/conference\\_proceedings.pdf](http://www.enar-eu.org/en/events/roma/conference_proceedings.pdf) (accessed on 1 March 2007).



the Back Row” programme and by offering free catch-up programmes for misdiagnosed students under the age of 18.

### *Language*

The Ministry of Education and Culture should do the following:

21. Fulfil its obligations under the Act on the Rights of National and Ethnic Minorities (Minorities Act) pertaining to multicultural and minority education, in particular with regard to its obligation to provide education materials and teachers able to instruct in Romanes and Beash; special attention should be paid to this at the pre-school level.

## 1.2.3 Recommendations on improving quality of education

### *School Financing*

The Government should do the following:

22. Establish sectoral neutrality, so that denominational and private schools receive State funds only as long as they comply with the same equal treatment obligations as do public local government and State-run schools.
23. Take steps to ensure that the financing of public education is also effectively based on the principle of sectoral neutrality.
24. Establish and monitor equal treatment criteria ensuring enrolment to disadvantaged children and maintaining integrated classes, and allocate funds from the central budgetary and EU funds only to schools and authorities that meet these criteria.
25. Reinforce the Ministry of Education and Culture’s powers to provide effective sanctions and remedies against all types of violations of equal treatment in education.

The Ministry of Education and Culture should do the following:

26. Calculate the allocation of all types of central budgetary support so as to cover the actual costs of public education; the level of central budgetary contribution should be maintained despite decreasing student numbers, so as to ensure quality education for all.
27. Propose the imposition of criminal liability on school maintainers if all types of State funds are not spent as earmarked.
28. Comprehensively revise Article 66 of the Public Education Act to reintroduce compulsory catchment areas and impose the costs of education on families contracting out of this system.

29. Distribute education-related EU funds in a speedy and effective manner. Establish a central emergency fund to cover expenses incurred by NGOs and other entities applying for these funds, until they receive the actual grant.

### *School facilities and human resources*

The Ministry of Education and Culture should do the following:

30. Ensure the integrated education of children with special needs, guaranteeing assistance from special teachers at all levels of education during and after class.
31. Offer training and retraining in integrative teaching techniques to teachers at all levels.
32. Increase the number of teachers trained to work with children with special needs.
33. Establish minimum criteria in schools and pre-schools concerning infrastructure, staff, physical conditions, and educational results. Schools or classes not meeting the minimum criteria should receive assistance from an emergency manager and shut down if underperformance continues for three years.
34. Open additional Study Halls (*tanoda*) with the explicit aim of improving in a measurable way the school performance of Roma pupils and their progression to higher levels of education.
35. Further develop the network of mentoring and tutoring teachers to implement the new pedagogies in which they are being trained, in support of truly integrative classrooms.

### *Curricular standards*

The Ministry of Education and Culture should do the following:

36. Ensure that extracurricular activities, such as additional language, art and subject specialisation, are genuinely extracurricular and available to all students; funding for disadvantaged pupils should be made available for them to attend.

### *Discriminatory Attitudes*

The Ministry of Education and Culture should do the following:

37. Include anti-bias education and/or education for social justice as a requisite pre-service and in- training course for teachers.
38. Include training on tolerance and diversity for local authorities, school maintainers and representatives of the local media, in order to prevent or counteract stereotypes and prejudices against Roma ethnic groups.

*School Inspections*

The Ministry of Education and Culture should do the following:

39. Bring greater cohesion to the existing review and control mechanisms for schools and pre-schools, through the publication of a decree unifying and regulating the criteria for all types of reviews of schools.
40. Ensure that the existence of all Roma special classes or catch-up classes in schools be a criteria for school reporting and the basis for penalties.
41. Retrain public education experts and other types of reviewers with a view to attaining expertise in the field of equal treatment.
42. Centralise the appointment of expert reviewers and unify the records of local reviewers to ensure that the process is objective and fair.
43. Authorise central review and overseeing mechanisms to review decisions on home schooling.
44. Develop mechanisms to monitor the rates at which children are assessed as having intellectual disabilities, to ensure that special schools do not recruit students through improper diagnosis to compensate for declining enrolment numbers.

## 2. BASIC EDUCATION INDICATORS

*Substantial research has been conducted regarding Roma children and their access to education in Hungary. However, each study has been conducted according to different criteria and along different methodologies, making comparison of data difficult in some cases. Official data are among the least reliable of these sources, and many believe that sociological studies may be more reliable data sources than State-sponsored censuses. Data disaggregated by ethnicity have not been collected by the Government since 1993, when it passed a law protecting citizens' rights. However, groups exerting pressure from the European Union (EU) affirm that data can and must be collected by ethnicity, if this is done responsibly. The Government needs to do more to collect and maintain comprehensive information on Roma education.*

*Measures were enacted in 2002 that should support better enrolment of Roma children in pre-school, but the impact of these reforms does not yet appear to be significant. Roma generally start school later and are more likely to drop out than the national average. The proportion of Roma among school-age children has been rising over the last 15 years and research indicates that it will continue to increase. Non-enrolment in primary schools has not been reported as a systemic or visible problem.*

*Segregation is officially illegal in Hungary; however, research indicates that the separation of Roma children into segregated schools and classes has been on the rise over the past 15 years. Roma are overrepresented in schools and classes for children with intellectual disabilities, and evidence suggests that this is largely due to flaws in assessment procedures; Roma children are also frequently placed in segregated classes at otherwise mixed schools, where they are likely to study a remedial or "catch-up" curriculum. Regulations to more equally apportion children from disadvantaged backgrounds and those with special needs in each catchment area, and among classes in individual schools, could counteract these trends.*

### 2.1 Data collection

Since 1993, Hungarian law has not allowed the handling of data on racial and ethnic origin except with the written consent of the person concerned.<sup>2</sup> As researchers in Hungary have argued for over a decade, however, what makes a person Roma is not self-identification, but perception,<sup>3</sup> and the use of data relating to people's perceived ethnic origin is not explicitly prohibited.

The European Commission against Racism and Intolerance (ECRI) advocates the collection of data disaggregated on the basis of ethnicity in its recent report on Hungary:

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<sup>2</sup> Articles 2 (2) and 3 (2) of Act No. 63 of 1992 on the Protection of Personal Data and the Publicity of Public Data.

<sup>3</sup> There are two major camps at loggerheads over this issue in the social sciences: those in favour of self-identity, such as János Ladányi and Iván Szelényi, and those in favour of perception, such as Gábor Havas, István Kemény and Gábor Kertesi.

ECRI is convinced that the collection and publication of data broken down according to ethnic origin can be done in full respect of human rights, provided that certain requirements are met. ECRI emphasises that such data are very useful in identifying and combating problems of discrimination.<sup>4</sup>

Official data on Roma in Hungary, as in many other countries, are far from complete; in the sphere of education, in particular, only limited information is collected by the State, and other sources of data must be consulted. One of the most severe criticisms raised by the former Ministerial Commissioner in charge of the Integration of Roma and Socially Disadvantaged Children (*a roma és hátrányos helyzetű gyerekek integrációjáért felelős miniszteri biztos*, hereafter, Integration Commissioner<sup>5</sup>) relates to the lack of reliable, relevant and cross-referable educational data. The root causes of these concerns are the following:

- Not all data relating to education are collected or monitored by the Ministry of Education and Culture;
- Relevant data are provided by the schools themselves and may not be consistent;
- Data-gathering systems are not compatible across Ministries, let alone with international data collection systems.<sup>6</sup>

The present report quotes extensively from various research reports that used entirely different samples and have quite different levels in terms of representation. The following (in chronological order) are the most widely referenced sources in this report; however, the selection of research data presented is inevitably limited by the length and scope of the present report.

School research conducted by Havas, Kemény and Liskó in 1999 and 2000 was reported in 2002 (hereafter, Havas, Kemény and Liskó, 2002<sup>7</sup>). This research reports on those schools with over 20 per cent Roma, and/or in which the overall number of

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<sup>4</sup> European Commission against Racism and Intolerance (ECRI), *Third Report on Hungary*, adopted on 5 December 2003, Strasbourg 8 June 2004, p. 24, available at [http://www.coe.int/t/e/human\\_rights/ecri/1-ecri/2-country-by-country\\_approach/hungary/third\\_report\\_Hungary.pdf](http://www.coe.int/t/e/human_rights/ecri/1-ecri/2-country-by-country_approach/hungary/third_report_Hungary.pdf) (accessed on 24 February 2007) (hereafter, ECRI, *Third Report on Hungary*).

<sup>5</sup> For further details on the Integration Commissioner's duties, see Annex 1.1.

<sup>6</sup> Interview with Gábor Daróczy, former Ministerial Commissioner for Roma and Disadvantaged Children, 8 March 2006, Budapest.

<sup>7</sup> Gábor Havas, István Kemény and Ilona Liskó, *Cigány gyerekek az általános iskolában* (Roma Children in Primary Education), Budapest: Oktatókutató Intézet (Education Research Institute), Új Mandátum Könyvkiadó (New Mandate Publishing House), 2002 (hereafter, Havas, Kemény and Liskó, 2002).

Roma students in the school was over 80. The research was conducted in 192 schools that were selected on the basis of the officially reported school statistics in 1992–1993.<sup>8</sup>

Further research conducted in 2004 by Havas and Liskó (hereafter, Havas and Liskó, 2004<sup>9</sup>) included not only schools where the proportion of Roma students exceeded 20 per cent and the overall number of Roma students was over 80, but also those schools that applied for additional *per capita* support to provide Roma minority education, as well as schools maintaining special classes (*eltérő tantervű tagozat*) that displayed “suspect” proportions of Roma students. According to the research methodology, the number of schools surveyed grew to 613, yielding relevant data from 553 schools. Havas and Liskó concluded that the number of segregated schools not reached by their research in 2004 does not exceed five per cent (eight or nine schools) of all segregated primary schools.<sup>10</sup> Therefore, in Hungary there are 178 schools in which the share of Roma students exceeds 50 per cent, most of which were included in their survey.

Babusik’s research (hereafter, Babusik, 2000, 2002, 2003) looks at enrolment in pre-schools, primary school attitudes towards Roma and chances for secondary education, and works on the basis of questionnaires sent out to pre-schools and schools as opposed to field visits. Research results quoted in this report from 2000 onward have a focus on education, but the samples are uneven – underrepresenting schools in Budapest, Fejér and Veszprém Counties – and extrapolated from the 1992 school statistics, and so this does not cover schools that at that time had a proportion of less than 8.5 per cent of Roma students. Similarly, his data on pre-schools were generated on the basis of questionnaires, underrepresenting small villages and small pre-schools. Although Babusik does not base his data on field research, his research is important, because he covers certain issues in enrolment and other areas that are not examined by other research.

Kemény (hereafter, Kemény, 1971<sup>11</sup>) first conducted national level research based on a representative sample in 1971, which covered the social status, linguistic and ethnic

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<sup>8</sup> School Statistics 1992/1993, cited in “Járási és városi cigány tanuló adatok, 1970–1992” (Regional and Town-Based Student Data 1970–1992), Chapter 7.5 in Gábor Kertesi and Gábor Kézdí, *A cigány népesség Magyarországon, Dokumentáció és adatbázis* (The Gypsy Population in Hungary, Documentation and Database), socio-typo, Budapest, 1998 (hereafter, *School Statistics 1992/1993*), pp. 313–431.

<sup>9</sup> Gábor Havas and Ilona Liskó, *Szegregáció a roma tanulók általános iskolai oktatásában, Kutatási zárótanulmány 2004. szeptember, Felsőoktatási Kutatóintézet, kézirat* (Segregation in the Education of Roma Students in Primary Schools, Final Research Report September 2004, Research Institute of Higher Education, unpublished) (hereafter, Havas and Liskó, 2004).

<sup>10</sup> Segregation is taken to occur at the school level if a majority of pupils are Roma, and at the class level if the share of Roma children in one class in the school is 50 per cent higher than that of Roma children in another class in the same school – see also section 2.4.

<sup>11</sup> István Kemény (ed.), *Beszámoló a magyarországi cigányok helyzetével foglalkozó, 1971-ben végzett kutatásról* (Report about Research Carried out in 1971 Relating to the Situation of Hungarian Roma), Budapest: MTA Szociológiai Intézet, 1976 (hereafter, Kemény, 1971).

proportions of Roma, the types of villages and towns that they inhabited, their housing conditions, family sizes, the number of children and live births, education, employment, and the impact of industrialisation in the 1950s and 1960s, as well as their income. At that time he estimated the number of Roma living in the country at around 320,000, and took a representative sample of two per cent. This research was as comprehensive as possible.

In 1993 Kemény and his two colleagues Havas and Kertesi (hereafter, Kemény and Havas, 1993<sup>12</sup>) conducted research that aimed at mapping changes that had taken place since the first research in 1971. This research estimated the number of Roma at around 468,000 and again took a representative sample, in terms of language and place of residence, of two per cent. For this research they used school statistics from 1992, which at the time still contained information about Roma provided by teachers and therefore allowed quite a precise estimate of proportions

In 2003 Kemény and Janky's research (hereafter, Kemény and Janky, 2003<sup>13</sup>) looked for the impact of the Government's economic and labour policies, as well as the relative situation of different social classes. They estimated the number of Roma to be around 540,800 and took a representative sample of one per cent only. They covered 1,165 homes and counted 5,408 people. Kemény and Janky found that 4.6 per cent (26,220 people) of the overall Roma population spoke Beash and 7.7 per cent (44,000) spoke Romanes alongside Hungarian.

Some researchers believe that sociological studies may be more reliable for data than State-sponsored censuses. One researcher summarised the methodological issues as follows:

The theoretical and legal debates notwithstanding, and given the huge distortion of the number of Roma in Hungarian census data today, empirical sociology may come to rely on statistics based on the judgement of the environment about the ethnic status of the individuals. There has been a need to work out procedures that would simultaneously comply with both legal and statistical reliability requirements. Hungarian sociologists Gábor Kertesi and Gábor Kézdi first elaborated a method by which it became possible to estimate the actual Roma population in Hungarian settlements.

<sup>12</sup> Gábor Havas and István Kemény, "A magyarországi romákról" (About Roma in Hungary), *Szociológiai Szemle* (Social Sciences Review), 1995/3 (hereafter, Kemény and Havas, 1993), pp. 3–20.

<sup>13</sup> István Kemény, Béla Janky and Gabriella Lengyel, *A magyarországi cigányság 1971–2003* (Hungarian Roma 1971–2003), Budapest: Gondolat Kiadó, MTA Etnikai-Nemzeti Kisebbségkutató Intézet (Hungarian Academy of Sciences Ethnic-National Minority Research Institute), 2004 (hereafter, Kemény and Janky, 2003).

In my own experience, this method of population estimation by settlement is the most valid one.<sup>14</sup>

In 1998 Kertesi and Kézdi provided estimates pursuant to their own research based on school statistics.<sup>15</sup> In 2005 they found that the most realistic estimate for the total number of Roma was 455,000.<sup>16</sup> Their research also critiqued the research methodologies employed by the Central Statistical Office (CSO). Direct and indirect estimates (400,000 vs. 600,000) based on the results of this collection of national minority data in 1993 were shown to differ so far as to render the CSO research unreliable. Kemény and Janky estimate the number of people living in Roma households to be between 520,000 and 650,000, out of which approximately 20,000 people are not Roma by ethnicity.<sup>17</sup>

## 2.2 Enrolment data and trends

On 1 January 2005 the total population of Hungary was 10,097,549, which had declined to 10,077,000 by 1 January 2006.<sup>18</sup>

In Hungary, national and ethnic minorities are specifically protected under Act No. 77 of 1993 on the Rights of National and Ethnic Minorities (MA), which recognises the 13 largest minority groups, including Roma.<sup>19</sup> It does not, however, define the term ethnic or national minority, or indeed who is Roma. As a result of political negotiations, for example, Jews are not included among national and ethnic minorities for the purposes of the MA.

<sup>14</sup> Ferenc Babusik, "Legitimacy, Statistics and Research Methodology – Who Is Romani in Hungary Today and What Are We (Not) Allowed to Know About Roma," *Roma Rights Quarterly* 2003/1, available at <http://www.errc.org/cikk.php?cikk=1937&archiv=1> (accessed on 24 February 2007).

<sup>15</sup> Gábor Kertesi and Gábor Kézdi, *A cigány népesség Magyarországon* (The Gypsy Population in Hungary), Budapest: socio-typo, 1998 (hereafter, Kertesi 1). The authors describe the details of how they constructed the data from fragments, and adjusted estimates where necessary, on p. 313.

<sup>16</sup> Gábor Kertesi, *A társadalom peremén, Romák a munkaerőpiacon és az iskolában* (Social Outcasts: Roma in the Labour Market and in Education), Budapest: Osiris Kiadó, 2005 (hereafter, Kertesi 2); the relevant chapter was co-authored by Gábor Kézdi, p. 454.

<sup>17</sup> István Kemény and Béla Janky, *A 2003. évi cigány felmérésről: Népesedési, nyelvhasználati és nemzetiségi adatok* (About Gypsy Research in 2003: Data on Population, Ethnicity and the Use of Minority Languages), available at <http://beszelo.c3.hu/archivum/index.htm> (accessed on 24 February 2007).

<sup>18</sup> See the website of the Hungarian Central Statistical Office (*Központi Statisztikai Hivatal*, KSH) at <http://www.ksh.hu>.

<sup>19</sup> Art. 61 of Act No. 77 of 1993 on the Rights of National and Ethnic Minorities (hereafter, MA).



Estimates for the number of Roma have ranged from 400,000 to 600,000. In the 2001 census 190,046 people identified themselves as Roma.<sup>20</sup> In addition, 129,259 said that they had cultural ties with this ethnic group.<sup>21</sup> Figures for Hungary's second most sizeable minority, Germans, were 62,233 and 88,416, respectively. In the 1990 census 164,406 people had identified themselves as Roma, of whom 29.2 per cent spoke Romanes or Beash<sup>22</sup> as their mother tongue.

Table 1 below indicates the proportion of school-age children in the Roma population, in 1993 and 2003.

**Table 1: Roma school-age population (1993 and 2003)**

Year	Roma school-age population (per cent) (as a share of the total Roma population)	
	0–14	15–19
1993	35.4	11.8
2003	36.8	10.3

Source: Kemény–Janky, 2003, and Babusik, 2003 (1)

Estimates for Roma participation in primary education have changed throughout the years. According to Kertesi, the proportion of Roma children in primary schools rose from 5.35 per cent in 1970 to 6.23 per cent in 1989,<sup>23</sup> whereas Kemény and Janky's research indicated that in 1971 the proportion of Roma among the school-age population was 6 per cent, which rose to 11 per cent in 1999.<sup>24</sup>

The last school statistics that recorded Roma ethnic minority data as perceived by teachers date from 1992. In this year, 74,241 Roma were found to attend primary school grades 1–8,<sup>25</sup> corresponding to 7.12 per cent of the overall primary school population<sup>26</sup> (however, Kertesi reviewed these data and corrected the figure to 88,182<sup>27</sup>). Table 2 below shows the corresponding figures for 1990 (73,825) and

<sup>20</sup> Hungarian Central Statistical Office (*Központi Statisztikai Hivatal*), 2001 population census results, available at <http://www.nepszamlalas.hu/hun/kotetek/04/tabhun/tabl05/load05.html> (accessed on 27 February 2007) (hereafter, 2001 Census), Table 2.1.

<sup>21</sup> 2001 Census, Table 2.2, available at <http://www.nepszamlalas.hu/hun/kotetek/04/tabhun/tabl06/load06.html> (accessed on 22 February 2007).

<sup>22</sup> Beash (also spelled Beás or Boyash) is an archaic form of Romanian.

<sup>23</sup> Kertesi 1, p. 320.

<sup>24</sup> Kemény and Janky, 2003.

<sup>25</sup> *School Statistics 1992/1993*.

<sup>26</sup> Kertesi 1, p. 320.

<sup>27</sup> Kertesi 1, p. 430.

1991–1992 (72,717). The estimated number of Roma in primary school grades in 2004–2005 is 110,000–140,000 (Table 2), corresponding to 12.4 to 15.7 per cent of the overall primary school population.

**Table 2: Pre-school- and school-age populations – national and Roma populations (1990, 1991 and 2004)**

Year		Total number of students						
		Pre-school		Primary education		Secondary overall (general, professional, vocational)		
		National	Roma	National	Roma	National	Roma	
1990	Base year	391,950	–	1,177,612	73,825	585,390	4,873	(536)*
1991–1992	Highest enrolment year (national)	394,937	–	1,124,098	72,717	605,148	3,953	(535)*
2004–2005	Lowest enrolment year (national)	326,999	–	890,551	110,000–140,000 <sup>28</sup>	664,266	–	–

\*Out of which, total number in non-vocational secondary schools<sup>29</sup>

Source: School statistics 1992 and 2005; 1992 data based on Kertesi 1998; data from 2005 from the Ministry of Education and Culture

Based on research conducted in 2003,<sup>30</sup> Kemény and Janky forecast that by 2008 the proportion of Roma among the school-age population will rise to 15 per cent and continue to rise thereafter. However, other researchers have expressed caution that Kemény and Janky’s estimates may be distorted, as less well-assimilated families who live in generally worse conditions and raise more children than the average are overrepresented in the research sample. Kertesi has estimated that a bit less than 3 per cent per year is a more realistic rate for the growth in the number of Roma primary school students.<sup>31</sup> More recently, citing the Integration Commissioner, Reuters reported that there were 138,000 Roma primary school pupils enrolled in May 2006.<sup>32</sup>

Official data are not available, but in general, non-enrolment in primary schools has not been reported as a systemic or visible problem for decades in Hungary, even in

<sup>28</sup> Estimated according to the ratio provided by Kemény and Janky in 2003.

<sup>29</sup> Kemény, Havas and Kertesi, 1993, pp. 490–491.

<sup>30</sup> Kemény and Janky, 2003.

<sup>31</sup> Kertesi 2, pp. 354–355 at footnote 71.

<sup>32</sup> Reuters, “Hungary Vows to End Roma School Segregation by 2008,” 10 May 2006, Reuters, Budapest, May 10 (hereafter, Reuters Interview).

segregated settings.<sup>33</sup> In pre-school settings, however, Babusik suggests that non-enrolment might affect 20 per cent of the Roma population in the given age groups, especially at ages 3–5.<sup>34</sup> In 2002, Babusik found that 6.5 per cent of Roma children then in sixth grade had never attended pre-school.<sup>35</sup> Havas, Kemény and Liskó also found that 36.8 per cent of Roma children educated in special schools had never attended pre-school, as compared to 4.9 per cent among those enrolled in mainstream primary schools,<sup>36</sup> demonstrating the importance of access to high-quality pre-school in ongoing desegregation efforts.

In 2002 Havas, Kemény and Liskó did not report significant differences between the enrolment rates of Roma girls and boys.

## 2.3 Retention and completion

### 2.2.1 Pre-school

Since 1 September 1993 (the adoption of the Act on Public Education), pre-school has been available for children aged from three until the age when they start primary school. Following amendments effective as of 1 September 2003, pre-schools “must not refuse the admittance” of disadvantaged children, and from 2005 must not refuse the admittance of “multiply disadvantaged” children – many of whom are Roma – (see section 3.1) from the age of three;<sup>37</sup> otherwise, pre-school is compulsory for a minimum of four hours a day from the age of five.<sup>38</sup>

Table 3, below, shows the age distribution of children attending pre-school. However, research indicates that some 20 per cent of Roma live in areas without a local pre-school, which may affect enrolment (see section 4.1).<sup>39</sup>

<sup>33</sup> Havas and Liskó, 2004, p. 70. This issue is not elevated as a cause for concern.

<sup>34</sup> Ferenc Babusik, “Késői kezdés, lemorzsolódás – cigány fiatalok az általános iskolában” (Late Start and Drop-Out – Gypsy Youth in Primary Schools), *Új Pedagógiai Szemle* (New Pedagogical Review), October 2003 (hereafter, Babusik, 2003 (1)), available at <http://www.oki.hu/oldal.php?tipus=cikk&kod=2003-10-ta-babusik-kesoi> (accessed on 22 February 2007).

<sup>35</sup> Babusik, 2003 (1).

<sup>36</sup> Havas, Kemény and Liskó, 2002, pp. 50–51.

<sup>37</sup> Art. 65 (2) PEA.

<sup>38</sup> Art. 24 (3) PEA.

<sup>39</sup> Ferenc Babusik, *A roma óvodáskorúak óvodáztatási helyzete* (The Situation of Roma Children in Kindergartens), Budapest: Delphoi Consulting, 2002 (hereafter, Babusik, 2002 (2)), p. 8, available at <http://www.delphoi.hu> (accessed on 22 February 2007).

**Table 3: Age distribution of children attending pre-schools – national and Roma populations (2002)**

Age Group (years)	Distribution by age group (per cent)	
	All children in pre-school	Roma
Not yet 3	2.0	1.6
3–4	24.1	20.7
4–5	26.1	25.9
5–6	28.2	29.6
6–7	17.3	19.7
Older than 7	1.4	2.4
<b>Total</b>	<b>99.1</b>	<b>99.9</b>

Source: Babusik, 2002 (2)

Babusik has suggested that this “age structure in [pre-schools] demonstrates more vividly the age at which children start, continue and finish attending pre-schools”.<sup>40</sup> Given that in 2002 pre-school education was compulsory only for 5–6-year-olds, this age group represented the highest proportion among all children attending pre-school (Table 3). Research carried out in 2000 found that only every second Roma child attended pre-school from the age of three, and that the majority of Roma children did not regularly attend pre-school.<sup>41</sup> Since legal provisions have been amended since 2002 to start pre-school earlier for the “multiply socially disadvantaged”, however, the impact of these amendments is not yet known. Anecdotal evidence suggests, though, that these provisions are often violated.

Neither the size of the pre-school nor the proportion of Roma children enrolled appears to have any significant impact on the age when attendance starts.<sup>42</sup> On the other hand, pre-schools operating at capacity delay the age at which they admit Roma children,<sup>43</sup> and enrol majority children before Roma children, a form of discrimination. Many pre-schools that are less than fully enrolled admit disadvantaged children before they turn three.

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<sup>40</sup> Babusik, 2002 (2).

<sup>41</sup> Havas, Kemény and Liskó, 2002, p. 51.

<sup>42</sup> Babusik, 2002 (2).

<sup>43</sup> Babusik, 2002 (2).

Research clearly demonstrates that on average, Roma children spend fewer years in pre-school than majority children, that some never make it to pre-school, and that the services provided are – in certain instances – inferior.

In 1999 a study in Borsod-Abaúj-Zemplén County found that while half of all the children in the sample spent 2–4 years in pre-school, half of the Roma children in the sample spent one year or less in pre-school.<sup>44</sup> The study found that, beyond irregular attendance, the Roma children were often away due to illness, and in some villages pre-school education was provided only twice a week for two hours.<sup>45</sup> Instances of non-admittance for reasons of capacity or “sanitary reasons” were also reported.<sup>46</sup>

### 2.2.2 Primary education

In general, Roma children commence and finish their primary school education later than majority children. Although pursuant to recent amendments education is compulsory up until 18 years of age,<sup>47</sup> an alarmingly high proportion of Roma children do not even finish primary school within this age limit.<sup>48</sup> Thus, those Roma children who complete their primary school education seem to spend an average of eight or nine years in school, indicating that grade repetition is common among Roma students.

Research carried out by Babusik in 2003 found that while approximately 70 per cent of majority children start primary school at the age of six or seven, only 50 per cent of Roma children do, with ten per cent starting at the age of eight or even later.<sup>49</sup> Havas, Kemény and Liskó in 2002, on the other hand, found that the majority of Roma children were enrolled in primary school at six or seven years of age, the usual age of enrolment. Their research states that 41 per cent of children started primary school at the age of six, 56 per cent at the age of seven, and 3 per cent at the age of eight or nine.<sup>50</sup> This research found delayed enrolment to be typical for larger towns.

In Babusik’s study, independently of the proportion of Roma children in the area, where a school has a minority education programme (see section 4.6), fewer Roma children enrol at the age of six or seven and instead enrol later. The research found that while the age of enrolment does not appear to have any impact on the proportion of those who complete education in a given primary school, the size of the village or town in which the school is situated appears relevant. In the smallest villages and the largest towns, a far lower proportion of children enrol at the age of six or seven than the

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<sup>44</sup> Sándor Loss, “Egy csapásra,” (At Once), *Beszélő*, January 2001 (hereafter, Loss, 2001).

<sup>45</sup> Loss, 2001.

<sup>46</sup> Loss, 2001.

<sup>47</sup> Art. 6 (3) PEA as amended by Act No. 61 of 2003.

<sup>48</sup> Babusik, 2003 (1).

<sup>49</sup> Babusik, 2003 (1).

<sup>50</sup> Havas, Kemény and Liskó, 2002, p. 53.

national average. In this research sample, the smallest villages show the greatest proportion of both majority and Roma children who start the first grade older than eight, 40 per cent in the case of Roma.<sup>51</sup> A lack of pre-schools for both Roma and majority children may explain this later enrolment in rural settings.

Babusik found significant differences between majority and Roma children in relation to the age of completion of primary school, and indeed completion itself (see Table 4). Data in this regard have remained virtually unchanged for five years.

**Table 4: Age of primary school completion – for majority and Roma children (2003)**

Age at Completion	Age distribution (per cent)	
	Non-Roma	Roma
14	70	40–45
15	27	30
16	3	15
Above 16	0	0
Never completed	0	10
<b>Total</b>	<b>100</b>	<b>100</b>

Source: Babusik, 2003 (1)

Babusik found that in 70.2 per cent of the primary schools included in the sample, all Roma children complete their studies without dropping out.<sup>52</sup> The reasons for differences in Roma drop-out rates across the schools have not been identified, although the size and regional location of the village or town, the size of the school, the proportion of Roma children, the proportion of disadvantaged children in the first grade, the existence of a Roma minority education programme and special education were all taken into account. Significantly, the research did not establish a correlation between the age of enrolment and the extent of dropping out. While changes in enrolment trends could not be factored out, the quality of education and teaching, as well as intangible factors such as school atmosphere, may play a role.<sup>53</sup>

<sup>51</sup> Babusik, 2003 (1).

<sup>52</sup> The remaining 29.8 per cent comprises the following: schools in which fewer than 17 per cent of the children drop out (10.8 per cent), 17–33.3 per cent of the children drop out (9.8 per cent) and over 33.3 per cent of the children drop out (9.2 per cent). Babusik, 2003 (1).

<sup>53</sup> Babusik, 2003 (1).

In 2004 research found that despite compulsory education being mandatory until the age of 16 during the 1990s, and more recently until the age of 18, the number of children not completing primary school has not decreased, but in fact has slightly increased. In recent years the rate has stabilised at around 5 per cent, which amounts to 5,000–6,000 children per year.<sup>54</sup>

Based on a sample in which segregated schools are overrepresented, in 2004 Havas and Liskó established that “it is probably not far-fetched to say that both the proportion of excused attendance and the number of students concerned are almost twice as many in the case of Roma as for non-Roma”.<sup>55</sup> They go on to find the following: “The reasons for excused absence differ too. While non-Roma are usually excused pursuant to parental request, Roma are excused because of their ‘mature age’ and the excuse is initiated by the school. Other common reasons include an early start of family life, such as pregnancy and cohabitation.”<sup>56</sup> Looking at trends of excused absence, Havas and Liskó observe that while over eight years the average number of non-Roma excused rose by 0.2 per cent, it all but doubled in the case of Roma. Finally, as shown below in Table 5, Havas and Liskó conclude that in 73 per cent of the schools that segregate Roma students in groups, excused absence – something that they label “individual segregation” – also occurs.<sup>57</sup>

**Table 5: Correlation between “excused absences” for Roma attending primary schools and “group” and “individual” segregation (2004)**

Is there a Roma student excused?	Is there a majority Roma class in the school?		For majority Roma schools (per cent)	Total – for all schools (per cent)
	Yes	No		
No (per cent)	26.7	40.8	33.3	35.3
Yes (per cent)	73.3	59.2	66.7	64.7
Number of schools	187	314	66	567

Source: Havas and Liskó, 2004, p. 72.

<sup>54</sup> Organisation for Economic Co-operation and Development (OECD), *Méltányosság az oktatásban: dimenziók, okok és oktatáspolitikai válaszok, OECD analitikus ország jelentés – Magyarország* (Equity in Public Education: Dimensions, Causes and Policy Responses, OECD Analytical Country Report – Hungary), prepared by Péter Radó in collaboration with Dániel Horn, Georgina Kasza, Judit Keller and Judit Lannert, sulíNova Kht., Oktatáspolitikai Elemzések Központja (Centre for Public Education Policy Analysis), 2005 (hereafter, OECD, *Equity in Public Education 2005*), p. 17.

<sup>55</sup> Havas and Liskó, 2004, p. 70.

<sup>56</sup> Havas and Liskó, 2004, p. 71.

<sup>57</sup> Havas and Liskó, 2004, p. 72.

### 2.2.3 Secondary education

Research on the percentage of Roma students who go on to attend secondary schools and the types of schools that they attend is varied. Research estimates indicate that between 15.6 and 22.1 per cent of surveyed Roma students continue their studies in secondary schools that provide labour market opportunities, as compared with 34.7 to 53.2 per cent of the majority students leaving the same primary school.<sup>58</sup> In 2004 Havas and Liskó found that 5–6 per cent of surveyed Roma lower secondary school graduates went on to study in special professional schools that offer virtually no prospect of further education, that over 66 per cent went on to professional schools and that only 20 per cent went on to secondary schools providing a baccalaureate.

Significantly, no Roma students were admitted to grammar or vocational secondary schools at all from 40 per cent of surveyed primary schools.<sup>59</sup> In 2004 Havas and Liskó found that 10 per cent of Roma did not continue their studies at the secondary level. They do observe, however, a positive trend in keeping Roma students in meaningful secondary-level education (an increase from 30 to 64 per cent over ten years) and in reducing the proportion of those not taking up further studies in secondary schools (a drop from 50 to 8 per cent). Furthermore, they indicate that Roma in Budapest closely follow the characteristic trends of majority children in secondary education.<sup>60</sup>

Although there has been evidence of increasing numbers of Roma participating in secondary school, those numbers seem to be confined to technical programmes, as evidenced in Table 6. Rates for the more academic tracks do not show the same increase.

**Table 6: Access to secondary education of the Roma population (1994 and 1998)**

Type of secondary education	Share of Roma students entering secondary education (per cent)	
	1994	1998–1999
No further education after completing general school	48.8	14.9
Vocational training school	9.4	9.4
Apprenticeship training school	31.2	56.5
Vocational secondary school	10.0	15.4
General Secondary school	0.6	3.6
<b>Total</b>	<b>100.0</b>	<b>99.8</b>

Source: CSO data 1994; Havas, Kemény and Liskó, 2002

<sup>58</sup> Babusik 2003 (1).

<sup>59</sup> Babusik, 2003 (1).

<sup>60</sup> Havas and Liskó, 2004, pp. 77–79.



In 2003 the National Institute of Public Education (*Országos Közoktatási Intézet*, OKI) reported the following:

The number of Roma students in secondary schools which prepare students for the school-leaving examination has increased in comparison to earlier years. However, due to the expansion of secondary education, the differences between Roma and non-Roma students have remained virtually unchanged. The increase in student numbers may be explained almost exclusively by the increase of Roma students in vocational education and related training programmes, while the proportion of Roma students in general secondary schools has remained insignificant. According to [the findings of Havas, Kemény and Liskó] in 2000, the performance levels of Roma students show a nearly 10 per cent decrease on average by the end of the sixth year in comparison to the levels of the first grade. The teachers questioned listed some of the following reasons for weakening performance: lack of appropriate school equipment, inadequate home environments suitable for learning, restricted study time at home due to the division of labour in the family, a higher rate of absence and lack of parental support. The school results of Roma children living in larger cities, in the outlying parts of the country, in Roma settlements, and of those students whose parents have failed to complete general school education show a greater degree of deterioration than the average.<sup>61</sup>

In 1998–1999, more than 15 per cent of Roma going on to secondary schools were admitted to vocational secondary schools, which represented 33.4 per cent of the total student body carrying on in this type of education. Just 6.5 per cent of Roma students went on to study in comprehensive grammar schools, which represented a seventh of the total student population going on to grammar school. However, given that these data were provided by primary schools, it is unknown what percentage actually started their studies in secondary schools. In 2002, the vast majority (77.8 per cent) of Roma primary school students continued their studies in a vocational school, where Roma were 1.5 times more likely to enrol than majority students.<sup>62</sup>

Research from 2003 concluded that the size of the village or town is essential in defining secondary school careers. The smaller the village in which a student attends primary school, the lower the level of secondary education chosen.<sup>63</sup> Over-age children from larger towns are overrepresented among students not admitted even to vocational

<sup>61</sup> Országos Közoktatási Intézet, OKI (National Institute on Public Education, NIPE), *Education in 2003*, (hereafter, OKI, *Education in 2003*), Chapter 9 on Inequalities and Special Needs in Education, available in English on the OKI (NIPE) website at <http://www.oki.hu/oldal.php?tipus=cikk&kod=Education2003-Special> (accessed on 24 February 2007).

<sup>62</sup> Babusik, 2003 (1).

<sup>63</sup> OKI, *Education in 2003*, Chapter 4 on “The Educational System and Student Advancement,” available in English on the OKI (NIPE) website at <http://www.oki.hu/oldal.php?tipus=cikk&kod=Education2003-Progression> (accessed on 24 February 2007).

school in the first tier. The study also noted a growing tendency among secondary schools to screen out “unwanted” children during the admittance procedure.<sup>64</sup>

Babusik found that in primary schools with a higher proportion of Roma, 89–97 per cent of all students are admitted to secondary school (see Table 7).<sup>65</sup> Furthermore, the higher the proportion of Roma children within the school, the greater the proportion of them gaining *admittance* to secondary school. However, on average only 60–68 per cent of Roma students actually *carry on studying* in secondary schools. Somewhat contradictory are Havas and Liskó’s findings. They report that “the higher the density of Roma children in a primary school, [and] thus the stronger is segregation between schools, the higher the proportion of Roma children not studying further in secondary schools”.<sup>66</sup> Babusik also notes that the qualification level of the primary or secondary school director correlates with the proportion of Roma children enrolling in professional secondary schools,<sup>67</sup> and that “segregation within schools, teachers’ negative attitudes and decreasing levels of requirements inevitably diminish the chances of Roma students for further education and, consequently, for social mobility”.<sup>68</sup>

**Table 7: Correlation between secondary school admission rates and degree of segregation in primary schools (2003)**

Share of Roma students in primary school (per cent)	Secondary school admission rates (per cent)	
	All students	Roma students
10–25.00	96.8	59.6
25.10–38.50	88.7	67.7
38.51–62.50	89.1	63.3
Over 62.51	91.3	63.9

Source: Babusik, 2003 (1)

Drop-out rates for Roma at the secondary level are mixed, depending on the type of institution that they attend. Table 8 shows the drop-out rates in the various types of schools providing secondary education, from 1990 to 1998. Drop-out rates for secondary schools and secondary vocational schools fell steadily over this period. However, given that Roma are overrepresented in vocational schools, which do not

<sup>64</sup> OECD, *Equity in Public Education 2005*, p. 26.

<sup>65</sup> Babusik, 2003 (1).

<sup>66</sup> Babusik, 2003 (1), p. 79.

<sup>67</sup> Babusik, 2003 (1), p. 80.

<sup>68</sup> Babusik, 2003 (1), p. 82.

give a baccalaureate, it is alarming that drop-out rates in this type of education, by contrast, rose significantly.<sup>69</sup>

**Table 8: Drop-out rates in secondary education (1990–1998)**

Year of completion	Drop-out rate (based on enrolment figures) (per cent)			
	Secondary school	Secondary vocational school	Vocational school	Total
1990–1991	11.9	16.7	23.0	17.2
1991–1992	11.2	17.2	22.8	17.1
1992–1993	11.5	15.8	22.9	16.7
1993–1994	10.4	15.2	21.1	15.6
1994–1995	9.3	15.3	20.9	15.2
1995–1996	10.1	11.1	20.4	13.9
1996–1997	9.3	8.7	23.0	13.7
1997–1998	9.1	4.0	24.7	11.6
1998–1999	8.5	3.0	31.6	14.4

Source: Vocational education in Hungary (calculated data) Liskó, *Beszélő* 2003

## 2.4 Types and extent of segregation

### 2.4.1 Overall patterns of segregation

Act No.127 of 2003 on Equal Treatment and the Promotion of Equal Opportunities (Equal Treatment Act, ETA) states that any conduct, measure, condition, omission, order or practice that, based on a protected characteristic (race and ethnicity included) stipulated in an act of Parliament, and without permission, separates persons or groups of persons from other persons or groups of persons in a comparable situation amounts to segregation.<sup>70</sup> The ETA provides for one single exception to the ban on segregation in education, namely ethnic minority education organised pursuant to parental consent.<sup>71</sup>

However, research by Havas and Liskó in 2002 and 2004 established that the educational segregation of Roma pupils has increased in primary education since

<sup>69</sup> Ilona Liskó, *Kudarok a középfokú iskolákban* (Failures in secondary education), *Beszélő*, July–August 2003, available at <http://beszelo.c3.hu/archivum/index.htm> (accessed on 24 February 2007).

<sup>70</sup> Act No.127 of 2003 on Equal Treatment and the Promotion of Equal Opportunities (Equal Treatment Act, ETA) Articles 7 (2), 8 and 10 (2) ETA.

<sup>71</sup> Article 28 (2) ETA and Article 43 (4) MA.

1990.<sup>72</sup> Havas, Kemény and Liskó (2001) identified 126 Roma-dominated segregated primary schools in Hungary that 40 per cent of all Roma students attend. Havas and Liskó (2004) stated that between the 1999–2000 and the 2003–2004 school year, the number of Roma-dominated primary schools increased from 126 to 178 while an additional 67 schools had over 40 per cent Roma students and rising. Havas and Liskó find segregation at the class level as well, if the difference between the share of Roma children in one class is 50 per cent higher than that of Roma children in another class in the school.

According to the same 2004 research, while in 1992 7.1 per cent of Roma children studied in a school attended mainly by Roma, by 2000 this had risen to 18.1 per cent. In 2004, 20–25 per cent of Roma children attended a primary school in which the proportion of Roma was over 40 per cent, and every sixth Roma child attended a school in which more than half of the student population was Roma.<sup>73</sup> Based on data coming in from 86 per cent of the schools examined and on representative data in 2004, Havas and Liskó concluded that twice as many socially disadvantaged and jeopardised children attended primary schools in which Roma students represented more than 20 per cent of the student population than was the case in “average” primary schools. This reinforces their previous findings that ethnicity-based segregation also includes social class-based segregation.

According to the research by Havas and Liskó, in their sample in 2000 there were 111 schools in which the proportion of Roma was at least 50 per cent, suggesting further tendencies towards segregation. The highest growth rate was discernable in larger villages (8.2 per cent) and in Budapest (6.6 per cent), which suggests that a selection among schools, closely linked to students’ and parents’ free choice among institutions, plays a significant role in growing levels of segregation.

Havas and Liskó in their 2004 study found the following:

The higher the percentage of Roma students in the local school, the higher the extent of white flight. From schools where Roma represent a proportion over 80 per cent, as many as 31 per cent of school-age children attend school in other towns or villages. This proportion drops to 11 per cent for schools teaching 50–80 per cent Roma, and on average stays below 10 per cent in schools where the proportion of Roma does not exceed 50 per cent.<sup>74</sup>

Based on data for 2004, Havas and Liskó indicate that the higher the proportion of Roma in a town, the smaller the size of primary schools and a higher proportion of majority children attending school in neighbouring villages or towns. In 15.9 per cent of primary schools, over 20 per cent of the primary school-age population attended school in other villages or towns, and in more than half of these schools this proportion

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<sup>72</sup> Havas, Kemény and Liskó, 2002, p. 81.

<sup>73</sup> Havas and Liskó, 2004, p. 6.

<sup>74</sup> Havas and Liskó, 2004, p. 12.

was over 30 per cent. Havas and Liskó suggest that in the latter situations majority citizens become active in shaping segregation, and local governments appear willing to pay more to maintain segregation, as research from Kemény, Havas and Liskó in 2002 maintains, segregated education is expensive to maintain. (See section 2.4.)

Local-level research carried out in the framework of this report illustrates the current situation in this regard.<sup>75</sup> Research in the first case study site, Csököly, revealed that the phenomenon of “white flight” is less of a concern at present than it was some years earlier, when a so-called “circle of friends”, non-Roma employees of the pre-school and the local government, all withdrew their children from the school in Csököly at the same time. The parents justified their decision by stating that the high number of Roma children in the school led to a decline in the quality of education.

In the second case study site, Ónod, the problem of non-Roma parents withdrawing their children is regarded as more serious and has been actively addressed by the locality. Two or three years ago there was a short period when non-Roma parents enrolled their children in the school of the neighbouring settlement, where the proportion of Roma children was very small. As in Csököly, the parents who made such a decision worked in the local government. School programmes were organised with the aim of stopping or at least reducing this tendency. These appear to have been successful, although it was probably not the programmes, but rather the mayor’s decision to bring his own child back to the local school, that was behind this success, as other representatives in the local government followed his example. To prevent enrolment of children in the neighbouring settlement the school organises various programmes so that parents are better acquainted with the school, the teachers and the methods used, and so that contacts can be developed between parents and the school. In the head teacher’s opinion, the parents’ experience is the decisive factor when they decide in which school they enrol their children. The management of the school considers the school’s pedagogical programmes to be very important in preventing the past practice of sending children to other schools:

Parents did not admit why they had decided to enrol their children in another school, but probably the reason was that the proportion of Roma children had increased. The decision was not made on the basis of bad experiences or because these parents had been convinced of anything. It was those who did not know the school who enrolled their children in the school of the neighbouring settlement, saying there were no Roma pupils there. There are parents who would like to bring their children back to the village, but they are ashamed. But this tendency has stopped, partly due to the school programmes and partly due to the fact that parents got convinced that it was not worth enrolling their children in the other village. The mayor

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<sup>75</sup> For each country report in this series of EUMAP reports on “Equal Access to Quality Education for Roma”, three case studies were carried out to supplement and corroborate data gathered from other sources. Information from the case studies are integrated throughout the body of each country report. Annex 2 includes additional details from each of the case study sites. In Hungary the three sites are: Csököly, Ónod and Tiszabura.

himself as a parent walked into this trap, but he was fair and admitted publicly that he had been disappointed by the school of the other settlement and regretted that he had enrolled his children in that school. He can see now that here we take better care of children, the atmosphere is much friendlier and more programmes are offered for pupils.<sup>76</sup>

The mayor indicated the following:

We have conducted this positive campaign this year as well. Many children had been enrolled elsewhere before. I myself and other representatives brought our children back. In 2005–2006 no children were enrolled in other schools. It is true, no more children were brought back, but no children were sent to other schools, either. When I enrolled my children in the school of the neighbouring village I was considering the interests of the children. My experience, however, shows that no elite school can make up for the tortures of having to travel to the school. It is also interesting that based on other experiences it is not sure that elite schools prepare children better for life skills or for further studies.<sup>77</sup>

The number of pupils enrolled in the school has not increased in the past years, and remains between 300 and 310. The previous practice of enrolling children in other schools threatened the school, and, in addition, the proportion of Roma pupils has increased considerably. According to the President of the Roma Minority Self-Government, the “Romafication” (*elcigányosodás*, indicating an increasing proportion of Roma) of the school had begun.

In 2002 Kemény, Havas and Liskó reported that segregation is expensive to maintain. The smaller the school, the more expensive the education of its students. Indeed, “while in schools with less than 25 per cent Roma children one student cost HUF 185,000 *per annum* (€678),<sup>78</sup> in schools with over 75 per cent Roma children this cost went up to HUF 265,000 (€971)”. That year schools examined spent an average HUF 213,000 (€781) per student. The smaller the town or village, the less was the spending per student, except for the smallest villages, where HUF 30,000 (€110) more was spent on one student than in bigger villages.<sup>79</sup>

#### 2.4.2 Separate classes in mainstream schools

Maintaining separate classes within schools in the form of remedial or catch-up classes is an endemic and problematic form of segregation in Hungary, and appears to be relatively unchanged from 2000–2004.

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<sup>76</sup> Interview with school director, case study Ónod.

<sup>77</sup> Interview with school director, case study Ónod.

<sup>78</sup> The exchange is calculated at HUF 266 = €1.

<sup>79</sup> Havas, Kemény and Liskó, 2002, pp. 124–125.

Data from Havas and Liskó paint a more polarised picture in 2004 than in 2000, although the proportion of Roma in their sample was lower. As shown in Table 9, the proportion of Roma children attending majority or homogenous Roma classes remained stable in this period.

**Table 9: Frequency of primary school classes with various proportions of Roma students (2000 and 2004)**

Type of class		2000		2004	
		Number of classes (N)	Share of total classes (per cent)	Number of classes (N)	Share of total classes (per cent)
Homogenous non-Roma classes		161	5.6	932	10.1
Proportion of Roma students (per cent)	0.1–25.0	863	30.0	2,824	30.6
	25.1–50.0	890	30.9	2,410	26.1
	50.1–75.0	397	13.8	1,191	12.9
	75.1–99.9	258	9.0	620	6.7
Homogenous Roma classes		306	10.6	1,253	13.6
<b>Total</b>		<b>2,875</b>	<b>100</b>	<b>9,227</b>	<b>100</b>

Source: Havas and Liskó, 2004, p. 18.

The research of Havas and Lisko in 2004, based on school questionnaires, found that segregation at the class level – whereby Roma children are assigned to a separate class apart from their majority peers – is most common in small towns<sup>80</sup> (69.5 per cent of such towns were included in the survey), in larger villages (60.1 per cent) and in towns that are not county centres (58.8 per cent). This type of segregation is more likely if the proportion of Roma within the school is relatively low.

Table 10 shows the numbers of Roma students attending predominantly Roma classes. According to these data, in 2000, 55.6 per cent of Roma students attended majority or homogenous Roma classes. Data for 2004 – based on a far larger sample – indicate a similar proportion, at 53.6 per cent.

<sup>80</sup> Havas, Kemény and Liskó, 2002, pp. 124–125.

**Table 10: Number of Roma students in predominantly Roma primary school classes (2000 and 2004)**

Type of class		2000		2004	
		Number of Roma students	As a share of all Roma students (per cent)	Number of Roma students	As a share of all Roma students (per cent)
Proportion of Roma students (per cent)	50.1–75.0	4,303	20.7	11,167	21.3
	75.1–99.9	3,597	17.3	7,466	14.2
Homogenous Roma classes		3,636	17.5	9,487	18.1
Total (in majority Roma and homogenous Roma classes)		11,536	55.6	28,120	53.6
<b>Total in the study</b>		<b>20,740</b>	<b>100</b>	<b>52,503</b>	<b>100</b>

Source: Havas and Liskó, 2004, p. 18.

Based on their research findings in 2000, Havas, Kemény and Liskó provided estimates for all the schools in the country. They estimated that approximately 770 homogenous Roma classes existed, accommodating about 9,000 Roma children. They also estimated the number of classes where the share of Roma children was between 50 and 99 per cent and came to a total figure of about 1,970.<sup>81</sup> Out of the 311 homogenous Roma classes in the research sample, 128 were remedial classes, accommodating 41.2 per cent of those Roma children attending homogenous Roma classes. Another 57 classes provided a “catch-up” curriculum, comprising a further 18.3 per cent of Roma children in homogenous Roma classes. The research showed that the remaining 123 of these purely Roma classes (or 39.5 per cent of Roma children attending such classes) followed a standard curriculum.<sup>82</sup>

For the whole sample in 2000, the proportion of Roma children in standard classes was 45.2 per cent, in catch-up classes 81.8 per cent and in remedial classes 84.2 per cent.<sup>83</sup> In the 2000 sample 37 per cent of primary schools maintained remedial classes. Special schools were not included in the sample.

In 2004 Havas and Liskó found 799 homogenous Roma remedial classes and recorded the proportions found in Table 11.

<sup>81</sup> Havas, Kemény and Liskó, 2002, p. 81.

<sup>82</sup> Havas, Kemény and Liskó, 2002, p. 85.

<sup>83</sup> Havas, Kemény and Liskó, 2002, pp. 84–85.



**Table 11: Correlation between Roma class density and class types in primary schools (2004)**

Type of class (Roma density)		Share of pupils in each density level, per class type (per cent)				
		Normal	Extra curriculum	Catch up	Remedial	Total number of classes
Homogenous majority classes		69.8	13.2	0.5	16.5	831
Proportion of Roma students (per cent)	0.1–25.0	92.4	4.2	0.6	2.9	2,685
	25.1–50.0	86.7	1.9	1.0	10.4	2,291
	50.1–75.0	72.5	1.8	3.5	22.2	1,153
	75.1–99.9	67.0	0.6	10.0	22.3	609
Homogenous Roma classes		26.7	0.1	7.8	65.2	1,224
<b>Total (all classes)</b>		<b>75.3</b>	<b>3.3</b>	<b>2.7</b>	<b>18.7</b>	<b>8,793</b>

Source: Havas and Liskó, 2004, p. 23.

As shown in Table 11, in 2004 Havas and Liskó observed that the higher the proportion of Roma students in a class is, the more likely the class is to follow a catch-up curriculum, or to be a remedial class teaching an inferior curriculum, thereby enhancing the relative educational disadvantages of children attending. Only those Roma children who attend classes where their proportion stays below 25 per cent have chances equal to those of majority children.

**Table 12: Proportion of Roma children according to class type (2000 and 2004)**

Type of class	Share of Roma students in each type of class (per cent)	
	2000	2004
Standard	45.2	29.7
Extra curriculum	16.1	14.6
Catch up	81.8	78.1
Remedial	84.2	71.2
<b>Total</b>	<b>40.4</b>	<b>31.6</b>

Source: Havas and Liskó, 2004, p. 23.

Table 12, above, further demonstrates inequalities in education. Havas and Liskó note an apparent decrease in the proportion of Roma students in remedial classes from 2000 to 2004, but argue that this result is merely a side effect of sampling, as in 2004 they selected every school maintaining remedial classes, even those with a low proportion of Roma within the student body. In fact, the researchers conclude that often these are the schools that employ the most severe forms of segregation. Their study found 50 schools in which the number of Roma in remedial classes was dramatically out of proportion to the number of Roma in the schools as a whole. In 16 schools, the proportion of Roma students overall was 10 per cent, but over 50 per cent in remedial classes, and in 13 schools, Roma represented 5 per cent of the total student body but made up over 30 per cent of students in remedial classes. In a school in Borsod-Abaúj-Zemplén County, which 19 Roma students attended altogether, every single Roma student was placed in remedial classes. Only one student in the remedial classes was non-Roma. This research clearly indicates that remedial classes are one of the most pervasive forms of segregation in Hungary.

### 2.4.3 Other forms of segregation in mainstream schools

Roma are also excluded from mainstream schools altogether, through a procedure that exempts children from attending classes. This is recognised as a problem in the Action Plan developed for the Decade of Roma Inclusion (*Decade Action Plan* – see section 3.1), which calls for greater overseeing of the procedures used to determine whether a child can become a “private pupil”.<sup>84</sup> This process is defined as follows:

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<sup>84</sup> Government of Hungary, *Action Plan Developed for the Decade of Roma Inclusion*, available in English on the Decade website at [http://www.romadecade.org/Action%20Plans/actionplan\\_hung\\_UNDP1.doc](http://www.romadecade.org/Action%20Plans/actionplan_hung_UNDP1.doc) (accessed on 24 February 2007) (hereafter, *Decade Action Plan*).

Becoming a private pupil is a special possibility parents can initiate for their child, if for certain reasons like longer illness, active professional sports, etc. their child could not attend school on a regular basis during the school term. Instead of going to school every day, the child becomes a private pupil and passes exams once a year in order to receive his/her school report. It was noticed that the number of pupils of Roma origin among “private pupils” is disproportionately high, so the “private pupil system” might have become a tool of keeping “troublesome” Roma pupils away from the classroom.<sup>85</sup>

Finally, another kind of segregation that can be identified is that of effectively excluding Roma from participating in extra courses in language and arts, due to entrance exams and extra fees to pay for such courses (see section 4.5). Given that segregation is often based on the provision of supplementary language or art education – which is followed by additional support from the central budget – for majority children and that these subjects can only be taught in small classes – which presupposes the recruitment of scarce human resources and the allocation of further and specialised classrooms – the established patterns of segregation are proof of unequal local spending.

#### 2.4.4 Special schools

Overrepresentation of Roma in special schools for children with intellectual disabilities is a widespread phenomenon in Central Europe.<sup>86</sup> In 2000 Havas, Kemény and Liskó did not look at special schools, and nor did Havas and Liskó collect data on them in 2004. Based on data available prior to the research in 2000, the researchers noted that despite a small but constant rise in the number of special schools between 1990 and 1999 (from 179 to 199), and despite relative fluctuation, student numbers remained almost identical (25,146 in 1990 and 25,368 in 1999). They depicted a far clearer increase in the number of students enrolled in remedial classes maintained by mainstream primary schools. Nevertheless, the overrepresentation of Roma within special schools is still a problem in Hungary.

A recent OKI publication summarised segregation based children’s assessed intellectual abilities as follows.

Where doubts emerge about the ability of students to cope with normal school, a so-called “expert panel” examines them for possible attendance at a “special school”, intended for children with physical or mental disabilities with lower requirements for pupils. Children remain at these schools until their abilities are considered to be sufficient for elementary education, and may continue through the auxiliary system throughout primary level, with practically no chance of continuing to secondary schools afterwards.

<sup>85</sup> *Decade Action Plan*, p. 3.

<sup>86</sup> See the series of EUMAP reports: EUMAP, *Access to Education and Employment for People with Intellectual Disabilities*, Budapest: OSI, 2005. Available at <http://www.eumap.org/reports/intdis> (accessed on 24 February 2007).

Available statistics show a depressing picture. The percentage of Roma children in special schools rose from about 25 per cent in 1974–1975 to 42 per cent in 1992. No official statistics are available after this date, but numerous sociological studies have dealt with the issue. A 1997 survey involving 309 special schools estimated the percentage of Roma pupils to be over 40 per cent, whereas a 1998 survey in Borsod County showed over 90 per cent of students attending schools with special curricula to be Roma. Most experts agree that a good number of Roma children attending special schools are not even slightly mentally disabled and are only relegated to such institutions due to the negligent failure to take into consideration their specific socio-cultural characteristics and owing to – conscious or unconscious – discriminatory considerations.<sup>87</sup>

Roma NGOs charge that flaws in the assessment procedure have contributed to the placement of Roma children in disproportionate numbers in special schools and classes (see section 4.5). There have been allegations and anecdotal evidence suggesting that Roma parents are not provided with enough information by expert panels that would ensure their informed consent for such placement. This is crucial, because parents must consent to or appeal against the opinions of expert panels in writing.<sup>88</sup>

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<sup>87</sup> András Kádár, *Legislative Review for the Hungarian Roma Education Policy Note*, available on the OKI website at <http://www.oki.hu/oldal.php?tipus=cikk&kod=eselyaz-kadar-legislative> (accessed on 24 February 2007).

<sup>88</sup> Art. 15 (1) of Ministerial Decree 14/1994 (VI.24) MKM on Education Obligation and Pedagogical Services.

### 3. GOVERNMENT EDUCATIONAL POLICIES AND PROGRAMMES

*A number of different programmes and policies have been adopted to address issues relevant to Roma children. Most of these Government initiatives aim to support the education of children from “socially disadvantaged” families, rather than Roma as such, although it is clear that Roma are intended to benefit from such programmes. The Government has so far not adequately addressed the needs of Roma and socially disadvantaged children in schools located in segregated residential areas (including town districts, villages and micro-regions), where there is no non-Roma population with which to integrate.*

*The Government has implemented a funding scheme intended to integrate schools, offering a subsidy and other support through the National Network of Educational Integration (OOIH). While the number of schools using these subsidies has been steadily increasing, research suggests that true integration remains a slow and uneven process. The Government has suggested that NGOs join the process and bring cases of segregation to the attention of the authorities, rather than improving the internal means of identifying problems. But without funds opening up for such activities, NGOs and activists will not be able to contribute to the fight against segregation as envisaged. Civil society has been active in the educational sphere, but the central Government itself should assert a more active role in moving desegregation forward, rather than relying on local authorities for implementation without providing support or external monitoring of progress. The lack of a mechanism to monitor and oversee the implementation of integration programmes has been identified as a problem, but no solution has been put forward.*

*The absence of a centralised system to track or administer programmes dealing with Roma teaching assistants and Romanes teachers also leads to a lack of data in these areas. While teaching assistants have received training on both Government and non-governmental courses, there are no centralised regulations for employing Roma mediators/teaching assistants, nor information about the number of such assistants working in schools. Likewise, the number of teachers proficient in Romanes is unknown, but is almost certainly very small. Little attention has been given to these issues in the Hungarian Government’s National Action Plan for the Decade of Roma Inclusion (hereafter, Decade Action Plan), despite their importance in creating an educational environment that is receptive to Roma children. Indeed, biased and insulting material about Roma remains in some Hungarian textbooks, and there are no courses for teachers focusing on tolerance or multicultural education available as part of standard teacher training. A number of different avenues for addressing complaints about discrimination in education exist; while only a limited number of cases have been brought forward, activists have successfully pursued charges of segregation in the courts.*

#### 3.1 Government policy documents

The Ministry of Education and Culture (2002–2006) drew its policy from the platform of the Free Democrats Party. Government programmes were and continue to be largely based on this policy,<sup>89</sup> with the notable exception of a concept advanced by

<sup>89</sup> Election programme of the Free Democrats Party, available at [http://program.szdsz.hu/valasztsai\\_program\\_2006.pdf](http://program.szdsz.hu/valasztsai_program_2006.pdf) (accessed on 24 February 2007), p. 105.

the Prime Minister aimed at retaining schools in small villages, despite the cost, quality and implications of segregation.<sup>90</sup>

Reforms within the Ministry of Education and Culture are aimed first at the socially disadvantaged as defined in Act No. 79 of 1993 on Public Education (PEA) and second at those with special educational needs. The PEA defines socially disadvantaged children as follows:

Children who are taken into protection by the notary pursuant to their family conditions or social status and/or children whom the notary declares eligible for regular child protection benefits. Multiple disadvantage results from parents' education level not exceeding eight grades – including unsuccessful further education – and also from placement in long-term State care.<sup>91</sup>

The focus on these two groups overlaps with a focus on Roma children – overrepresented in both groups – and blurs the focus of this policy approach. In short, although on the surface public education policy is class-based, it is supported by a very strong undercurrent of an ethnicity-based approach. In many ways, these focuses correlate with the findings of Havas and Liskó, who strongly argue that segregation is primarily based on social class and secondarily on race.

The socialist-liberal coalition governing between 2002 and 2006 implemented the “Hundred Steps” programme, comprising “Seven Steps for Just and Modern Schools”.<sup>92</sup> Two of these steps address the issue of unequal and unjust education, offering programmes for disadvantaged students, among them those living in small villages. The steps dealing with equal opportunities address systemic problems that impact negatively not only on disadvantaged but also on Roma students. However, given the large number of Roma in these schools and the poor-quality education

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<sup>90</sup> PM Gyurcsány passionately believes in keeping schools in small villages running at least in grades 1–4. See “Az új iskolai cél a helyben járás” (New Aim of Schools Is to Stay Local), 9 September 2005, online edition of *Népszabadság* (the largest daily newspaper), available at <http://www.nol.hu/cikk/376505/> (accessed on 24 February 2007). However, professionals caution otherwise. See, for example, Center of Public Education Analysis, *The Small Schools of Small Villages*, a public policy analysis, March 2006, available at <http://www.sulinova.hu/cikk.php?sess=&alsite=32&trovat=119&alrovat=&cid=2161> (accessed on 24 February 2007).

<sup>91</sup> Art. 121 (1) 14. PEA.

<sup>92</sup> Details on the “Hundred Steps” programme are available at <http://www.magyarorszag.hu/100lepes/oktatas/kozoktatas.html> (accessed on 24 February 2007) (hereafter, “Hundred Steps” Programme). The new Government taking office in 2004 reinforced this programme. See Government of Hungary, “Lendületben az ország, a Köztársaság kormányának programja a szabad és igazságos Magyarorszáéért” (Hungary on the Move, The Programme of the Republic’s Government for a Free and Just Hungary), Government programme, available at <http://www.miniszterelnok.hu/domain2/files/modules/module15/3403A2F6A41C017.pdf> (accessed 7 March 2007) pp. 24–25.

coupled with bad physical conditions, money invested in small schools in small villages might easily be spent in a manner counterproductive to desegregation. To overcome this, for example, the system of school buses – if indeed introduced as proposed in the “Hundred Steps” programme – could act as a stimulus for Roma parents to send their children to schools in larger towns.

The “Hundred Steps” programme recognised that the Hungarian school system increased societal differences, and pledged to strengthen efforts, such as language pre-schooling, the provision of internet access and a two-year baccalaureate to minimise differences.<sup>93</sup> A grants scheme was launched to help disadvantaged children in primary, secondary and tertiary education and from 2006 preparatory classes opened in vocational schools for students who could not successfully finish their primary school education. Step one, entitled “Equal Opportunities for Good Education”, introduced new admission rules effective as of 1 January 2007. If the current Government maintains this programme, the reform will see schools operate admission rules ensuring that students from the village or town are admitted, giving preference to disadvantaged students. In order to provide a realistic picture about the output and quality of schools, competence and quality assessment programmes should have been developed and introduced as of 1 January 2006. Step two, entitled “Education in Small Villages Creating Opportunities and Supporting Micro-Region Cooperation”, aimed at stimulating the provision of pre-school education in every village in the framework of micro-region cooperation, retaining primary schools in small villages and extending public education to secondary schools by doing away with admission in newly established schools covering grades 1–12.

Several years ago, a new financial incentive was introduced to address social disadvantages. In 2002 Article 39/D of the Ministerial Decree on the Operation of Educational Institutions<sup>94</sup> was amended with a view to providing competence development that can foster socially disadvantaged children’s catching up with their education. Competence development is envisaged as taking place in an integrated setting and requires written parental approval. Since amendments in 2005, State support for competence development can only be obtained for children who are multiply socially disadvantaged. All such support goes to maintainers (such as local governments) on a *per capita* basis and is then transferred to schools.

The Government prepared an Action Plan for the Decade of Roma Inclusion (*Decade Action Plan*) in 2005.<sup>95</sup> This document clearly places itself in the context of existing Government policy, in particular Governmental Decree 1021/ 2004 (III.8) on promoting governmental programmes and measures to help the social integration of

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<sup>93</sup> “Hundred Steps” Programme.

<sup>94</sup> Decree No. 11/1994 MKM on the Operation of Educational Institutions.

<sup>95</sup> *Decade Action Plan*.

Roma. The *Decade Action Plan* sets out targets and indicators in the area of education, although it does not provide a budget; these targets include the following:<sup>96</sup>

- Increasing the number of schools, utilising special financial incentives for integrated education;
- Reducing the number of Roma children incorrectly diagnosed with intellectual disabilities;
- Reintegration and questioning of children previously diagnosed with intellectual disabilities into mainstream classes;
- Increasing the number of pre-school spaces, compulsory admission of children of vulnerable families, providing free meals for those in need;
- Improving overseeing of the process to qualify as a “private pupil”;
- Enforcing anti-discrimination provisions under existing law and legal background;
- Further disseminating alternative, extracurricular methods in order to help a more successful educational performance of children coming from vulnerable groups;
- Elaboration of a special vocational educational programme in order to reduce the number of drop-outs;
- Providing positive discrimination in the admission of students from vulnerable backgrounds to higher education institutions.

The *Decade Action Plan* also cites several current developments considered to be good practice for the further implementation of the action plan; the work of the Ministerial Commissioner for Educational Rights is noted as is the integration allowance programme (see section 3.2) and Roma teaching assistants (see section 3.4). The action plan states that a working group will prepare an annual report on its implementation. In early 2007 the Ministry of Education and Culture reported that its staff were preparing the relevant sections of the report.<sup>97</sup>

In May 2006 the new Government – and the Hungarian Socialist Party’s delegated Minister of Education and Culture (István Hiller) – pledged to “continue and deepen

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<sup>96</sup> *Decade Action Plan*, pp. 3–4.

<sup>97</sup> Information from Gabriella Varró, Ministry of Education and Culture, 23 February 2007.



the reform of public education initiated in the last four years”.<sup>98</sup> The new programme promises to provide adequate State funding and simplify the normative financing.<sup>99</sup> It also promises funding for a large-scale school reconstruction programme. Alarmingly, it sets out to enhance the present, non-functional system of review and quality control, and remains controversial as regards its policy of retaining small village schools for children in lower grades.

Tellingly, the programme pledges to ensure that socially disadvantaged children will indeed be admitted to pre-school from the age of three, years after legislative amendment required such admission. In parallel to ensuring integrated education for children with disabilities “in the case that their condition so allows”, the Government reinforces its commitment to fight segregation in schools. However, like many previous official documents, this one too remains silent about the racial element of segregation. Alarmingly, it fails to present an adequate response for segregating schools and local governments; instead, it counts on NGOs and activists joining the anti-discrimination alarm system in putting an end to discrimination:

From September 2007 catchment areas will have to be redrawn so as to prevent segregation among children who suffer from cumulative social disadvantage. We will further develop the anti-discrimination alarm system and count on NGOs in putting an end to discrimination in education. We will carry on with the “Out of the Back Row” programme [see section 3.3] and retain competence building and integrative normative support. [...] We will continue with the “Road Pack” scholarship programme, which today supports the individual development of 20,000 socially disadvantaged children.<sup>100</sup>

Without funds opening up for such activities, NGOs and activists will not be able to contribute to the fight against segregation as envisaged. It remains unclear whether the existing enforcement mechanism can be made effective, and whether there will be Government funding for such efforts.

The Roma Education Fund (REF), established alongside the “Decade of Roma Inclusion,” is currently funding several projects in Hungary, and many in cooperation with Government agencies, including one supporting the development of local

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<sup>98</sup> Government of Hungary, “Új Magyarország: Szabadság és szolidaritás, A Magyar Köztársaság kormányának programja a sikeres, modern és igazságos Magyarorszáért 2006–2010” (New Hungary: Freedom and Solidarity, Government Programme for a Successful, Modern and Just Hungary, 2006–2010”), Government Programme, available at [http://www.magyarorszag.hu/ShowBinary/repo/root/mohu/hirkozpont/hatteranyagok/kormanyprogram\\_tordelt20060530](http://www.magyarorszag.hu/ShowBinary/repo/root/mohu/hirkozpont/hatteranyagok/kormanyprogram_tordelt20060530) (accessed on 7 March 2007) (hereafter, *New Hungary: Freedom and Solidarity, Government Programme*), p. 23.

<sup>99</sup> Normative financing: the *per capita* student funding provided to schools from the central State budget (see Annex 1.1).

<sup>100</sup> *New Hungary: Freedom and Solidarity, Government Programme*, pp. 25–26.

NGOs.<sup>101</sup> The REF is also funding projects on implementing education legislation in Roma settlements, and research on the problem of dropping out.

### 3.2 Government education programmes

#### 3.2.1 Programmes to reduce drop-outs and segregation

In June 2005 the Hungarian Government reported to the European Commission on measures aimed at social inclusion.<sup>102</sup> This report makes it clear that the chief recipients of many of these measures in public education were Roma.

A measure of the Operational Programme of Human Resource Development (OPHRD), which was implemented between 2004 and 2006 in order to support the increase of pre-school places and the infrastructure and IT development of primary schools in disadvantaged micro-regions, primarily in settlements with a high ratio of Roma, promotes the participation of Roma children in primary education. In 2005 the Ministry responsible for regional development subsidised the development of schools from its own budget. In the 2004–2005 funding period of the multi-purpose micro-regional associations, priority was given to provide basic education in the public education sector by associations.<sup>103</sup>

To prevent disadvantaged and Roma students from dropping out and to reduce segregation, as of September 2003 a programme of integrated education was made available starting in grades one and five in primary schools, and grade nine in vocational schools. Schools participating in this programme were required to integrate disadvantaged students with non-disadvantaged students, thereby eliminating segregation. The National Network of Educational Integration (OOIH), through its regional coordinators, assists schools engaging in the programme. Altogether 360 schools (45 base institutions) operate in regions with a high proportion of Roma. In 2003 the number of students involved in integrated education reached 8,800, which grew to 16,300 in 2004, with the per-child subsidy due from the central budget (integration normative) provided to the school rising to HUF 60,000 *per capita* (€226).

Disadvantaged students in other grades, and in schools that do not wish to participate in integrated education, or – due to a high concentration of disadvantaged students, which prevents them from becoming eligible for *per capita* funds – are unable to do so,

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<sup>101</sup> Further details available on the REF website at [http://www.itweb.hu/partners/RomaEducationFund/documents/Annex\\_2.doc](http://www.itweb.hu/partners/RomaEducationFund/documents/Annex_2.doc) (accessed on 24 February 2007).

<sup>102</sup> Government of Hungary, *Light Update of the First Hungarian National Action Plan on Social Inclusion (NAP/incl) 2004–2006*, Budapest: June 2005, available on the European Commission website at [http://ec.europa.eu/employment\\_social/social\\_inclusion/docs/2005/hu\\_en.pdf](http://ec.europa.eu/employment_social/social_inclusion/docs/2005/hu_en.pdf) (accessed on 24 February 2007), (hereafter, *Light Update of the First Hungarian National Action Plan on Social Inclusion*), pp. 24–26.

<sup>103</sup> *Light Update of the First Hungarian National Action Plan on Social Inclusion*, pp. 24–26.

can obtain normative funds for competence development programmes. In 2004 as many as 31,300 students participated in these programmes.

Prior to 2006, OOIH planned to train as many as 11,500 teachers and professionals in integrated education. OOIH has also devised new teacher training and training packages.<sup>104</sup> No problems regarding teacher training have been reported.

In September 2005 an expansion of the scholarship system targeting four groups of disadvantaged students began with the “Road Pack” (*Útavaló*) programme, consisting of the “Road to secondary school”, the “Road to Baccalaureate”, the “Road to a profession”, and the “Road to science”. The four branches attracted applications from 27,896 students, 9,570 mentors and 85 researchers from across 1,549 educational institutions. Grants were distributed to 20,045 students and 7,739 mentoring teachers. However, by the end of the 2005–2006 school year the number of students still receiving scholarships had fallen to 18,728. The Ministry found two reasons for students dropping out: first, students could no longer meet the eligibility criteria, and second, the student–mentoring teacher team failed to make a declaration relating to their future commitment to the programme.<sup>105</sup>

Using an idea borrowed from NGOs operating after-school classes (*tanoda*) mainly for Roma, “Study Halls” have been funded since 2004 in a grants-based scheme in order to provide extra assistance to disadvantaged students. This is with a view to raising educational achievement and reducing drop-out rates. The Government charges that Study Halls chiefly assist Roma students in higher grades of primary schools and secondary education. Under the Operational Programme of Human Resource Development (OPHRD) Measure 23, Study Halls were established in 2004, involving 2,000–2,500 students and staff. At present 50 Study Halls operate across the country.<sup>106</sup>

From September 2004 primary school students in grades 1–3 cannot be failed. Given that student failure for want of literacy and numerical skills can be addressed within extra classes, amendments have allowed for the period devoted to obtaining such skills to be prolonged. This measure has attracted fierce criticism from various strata of society.<sup>107</sup>

The objective of the “Digital Secondary School” programme is to assist Roma early school-leavers in obtaining a Baccalaureate and vocational qualifications with information technology support. In 2004 course materials for grade 9 were prepared

<sup>104</sup> These should be available at <http://www.sulinova.hu/rovat.php?sess=&alsite=23&rovat=12>. Unfortunately, materials from this site are still not accessible. Nor are they accessible from <http://www.om.hu/main.php?folderID=125>.

<sup>105</sup> Information from the Ministry of Education and Culture, 10 November 2006.

<sup>106</sup> Information received from the Ministry of Education and Culture, 10 November 2006.

<sup>107</sup> The topic was debated in newspapers with various political perspectives, from *Népszabadság* to *Magyar Nemzet*.

and the first groups were taught on that basis. In the 2003–2004 school year 120 students enrolled, but 28.3 per cent dropped out. In 2004–2005 159 students enrolled in the programme and grade 10 also started. The programme is expected to extend to regions with a high proportion of Roma. Experts claim that competence-based education is slowly but surely taking root within public education, and that this system-level change will have a positive impact on disadvantaged students.<sup>108</sup>

September 2005 saw the introduction of a positive measure aimed at the promotion of higher education of disadvantaged students and students receiving child protection services.<sup>109</sup> According to the amendment, disadvantaged candidates can be admitted to their first basic training in higher education if they reach 80 per cent of the scores required for their selected subjects, if this is publicly funded and taught full time. Alternatively, out of a maximum of 120 points 78 must be reached. The total number of students thus admitted cannot exceed 20 per cent of the number given for guidance for the subjects or department chosen. Disadvantaged candidates gaining entry to full-time, not publicly funded, higher education become eligible for free tuition. The Ministry of Education and Culture foresees that 500–1,000 students could gain admission to higher education in this fashion.<sup>110</sup>

The Ministry of Education and Culture emphasises the importance of the amendment to Article 7 PEA, pursuant to which officials expect that the number of disadvantaged students receiving home schooling – a status granted by schools on request by parents and allowing children to have private tutoring and exams (*magántanuló*) – would drop.<sup>111</sup> Notably, however, the amended legislation remains silent on the implementation and enforcement of these safeguards.

### 3.2.2 Reintegration programmes

The “Out of the Back Row” (*Utolsó Padból*) project was aimed at reducing the number of students – the majority of whom were Roma – misdiagnosed as having intellectual disabilities, by re-diagnosing them and returning them to classes teaching the general curriculum (see section 3.3). Although legislative amendments resulted in requiring

<sup>108</sup> Public education expert András Nyíri calls attention to Component I. C. of the Vocational School Development Programme, which provides competence-based training for disadvantaged students, in order to open the gate to a higher level vocational education. Written comments on the present report from András Nyíri, 10 November 2006 (hereafter, Written Comments, András Nyíri).

<sup>109</sup> Government Decree No. 269/2000 (XII.26) on the General Rules of Admission Procedures to Institutions of Higher Education. Art. 19/A lays down the eligibility criteria.

<sup>110</sup> REF, *Needs Assessment Study for the Roma Education Fund Background Paper, Hungary*, available at <http://siteresources.worldbank.org/INTROMA/Resources/NARreportFinalHungary.pdf> (accessed on 24 February 2007) (hereafter, *REF Needs Assessment*), p. 19.

<sup>111</sup> The Ministry calls attention to the fact that under Art. 7 PEA school directors are now under the obligation to consult child welfare services before deciding to *de facto* expel a disadvantaged student from school.

Expert Committees to ensure that children diagnosed as having intellectual disabilities undergo medical examination, culturally neutral tests to help the work of Expert Committees still have not been developed, although efforts by NGOs have begun in this area (see section 4.5). In 2004 independent experts examined 2,100 children, out of whom 212 returned to mainstream classes. Since 2004 local governments have been entitled to a higher normative subsidy for children who were redirected into mainstream classrooms. The subsidy is due for two years following redirection, and amounts to 70 per cent of the special education normative subsidy above the basic normative subsidy paid after each student.

### 3.2.3 Minority education policy

Ministerial Decree No. 32/1997 (XI. 5) MKM on the Guidelines of National and Ethnic Minority Education in Pre-Schools and Primary Schools governs education in the minority language. The Act on the Rights of National and Ethnic Minorities No. 77 of 1993 recognises both Romanes and Beash as ethnic minority languages spoken by Roma.<sup>112</sup> Procedural laws allow for the use of one's mother tongue, regardless of citizenship, but official forms are missing in both languages spoken by Roma. No information as to how many children using Romanes or Beash as their mother tongue are also proficient in the majority language is available.

OKI reports the following:

The model for minority education is based on the notion of providing for the collective right of national minorities to organise their own education. The basic principle of national minority education is to secure the right to formal schooling for nationality groups living within the boundaries of the nation state in order to preserve their mother tongue and their culture. This practice, however, is less sensitive to closing the cultural gap between the different groups. In the curricular content of mainstream education there is hardly any material on the language, history, and culture of national minorities, ethnic groups and immigrants. In Hungary, ethnic education has three forms: the language of instruction is the language of the minority, bilingual education, and the teaching of *minority languages* as a subject. The majority of national minorities have no secondary schools, and apprenticeship training is absent from minority education.<sup>113</sup>

<sup>112</sup> Art. 42 MA. This provision is located under the heading of the cultural and educational self-governance of minorities.

<sup>113</sup> Erzsébet Cs. Czachesz and Péter Radó, "Oktatási egyenlőtlenségek és speciális igények" (Educational Inequalities and Special Needs), in Gábor Halász and Judit Lannert (eds.), *Jelentés a magyar közoktatásról 2003* (Report on Public Education 2003), OKI, Budapest, 2004, available at <http://www.oki.hu/oldal.php?tipus=cikk&kod=Jelentes2003-Egyenlotlensegek> (accessed on 24 February 2007).

### 3.3 Desegregation

Although much emphasis is placed on ensuring equal treatment in education in Hungary, few provisions are devoted to desegregation. In fact, the Public Education Act (PEA) omits such an obligation, and a Government policy aimed at integration may only be discerned from a couple of provisions in a ministerial decree regulating the integration quota for the socially disadvantaged. Express obligations to desegregate are not imposed on school maintainers, nor, first and foremost, on local governments. Given that it is highly contentious whether civil courts can impose such an obligation on the latter, and the Offices of Public Administration that have the exclusive right to sue local governments in administrative courts have not so far demonstrated their engagement on this issue, the prospects for individual rights-based enforcement appear bleak. Integration does not extend to people with disabilities; indeed, as in other countries, some groups advocating for people with disabilities have indicated a preference for segregated and specialised education.<sup>114</sup> Specialised schools cater, for example, to children with hearing or visual impairments.

Children with or without disabilities cannot be denied access to education on any ground. In fact, parents who fail to ensure their children's attendance are liable in petty offence or criminal law. Studies, however, show that schools often rid themselves of difficult children – the majority of them Roma – by asking their parents to request home education, which may equal no education at all.<sup>115</sup>

Article 4 (7) PEA prohibiting discrimination had on several occasions been amended prior to the adoption of Act No. 125 of 2003 on Equal Treatment and the Promotion of Equal Opportunities (Equal Treatment Act, ETA). The ETA devotes a chapter to education, as a result of which the bulk of anti-discrimination provisions are now to be found there. Some, however, remain in a further amended Article 4/A PEA.

Article 7 (1) of the ETA directly addresses segregation, which “shall be regarded as a form of breach of the requirement of equal treatment.” Article 10 (2) claims that “segregation is a behaviour aimed at separating individual persons or a group of persons from others based on a characteristic defined in Article 8, without any ground that seems reasonable by objective consideration”. The provision on segregation is included in the Act to clearly deem “equal but separate” types of behaviour unlawful. If separation also entails some disadvantage (such as lower-level education for a separated Roma class within an elementary school), direct discrimination can be applied; if, however, in a given case it is difficult to prove that the separated group (the Roma class) suffers disadvantages other than those stemming from the nature of such a separation, the provision on segregation may be relied on.

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<sup>114</sup> Interview with participants of the conference “Equal Treatment” organised by the National Union of People with Hearing Impediment, 5 September 2004.

<sup>115</sup> Havas, Kemény and Liskó, 2002, pp. 163–168.

In its chapter entitled “Education and training” the ETA stipulates that the principle of equal treatment extends to any care, education and training under the State’s auspices or according to its regulations. Furthermore, the ETA details which aspects of the education process fall within its scope, from access through accommodation through certification.<sup>116</sup>

Voluntary single-sex, religious or ethnic minority education is deemed compatible with the principle of non-discrimination only if participation is voluntary. At the elementary and secondary level, parents must initiate such classes or groups on a voluntary basis, whereas in higher education it shall be based on the students’ voluntary participation. A further condition is that such education shall be of equal value to ordinary (not separated) education.<sup>117</sup>

Under Article 29 of the ETA, a Government decree may order positive discrimination to a specified group of participants in education within or outside the school system with regard to education or training.

The authorities have acknowledged segregation as a problem within the Hungarian education system, most notably in the annual activity reports of the Parliamentary Commissioner for the Rights of National and Ethnic Minorities (Minorities Commissioner) from 1995 on.<sup>118</sup> In January 2003 the Ministry of Education and Culture addressed segregation in the programme description of the National Network of Educational Integration (OOIH).<sup>119</sup>

The OOIH programme aims at establishing a network of educational institutions and cooperating organisations working for the educational integration of socially disadvantaged – in particular Roma – students. The programme aims at significantly decreasing the segregation of the target group in schools, promoting their successful further education, suitable for their abilities and interests, by ensuring the quality of their education, and strengthening their status in the labour market.

The programme aims at opening up in three regions (the North, the Northern Great Plain and the South-West) and Budapest, supporting 50 complex integration programmes. It describes the status of base institutions – primary schools cooperating with pre-schools and experienced in educating disadvantaged children, and the centre of integration, the unit responsible for coordinating the network of base institutions

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<sup>116</sup> ETA Art. 27 para. 2.

<sup>117</sup> ETA Art. 28 para. 1–2.

<sup>118</sup> See the annual reports of the Parliamentary Commissioner for National and Ethnic Minorities Rights (NEKH), 1995 to 2005, available on the NEKH website <http://www.obh.hu/nekh/en/index.htm> (accessed on 24 February 2007).

<sup>119</sup> OOIH programme description, available at <http://www.om.hu/main.php?folderID=723&articleID=2263&ctag=articlelist&iid=1> (accessed on 24 February 2007).

and supported by regional coordinators and micro-regional coordinators in charge of monitoring. The programme maintains an integration fund.

According to the Ministry's former Commissioner for Roma and Disadvantaged Children, the number of schools using the OOIH subsidies (see section 3.2) has been growing annually since they were first made available in 2003.<sup>120</sup> The former Commissioner acknowledged that there has not been sufficient progress towards eliminating segregation among different schools. The Ministry paid HUF 1.67 billion (€6.68 million) for 46,561 children in 800 schools as an incentive for integration during this school year, but it has been difficult to stop the flight of middle-class families from poor villages, according to the Commissioner.<sup>121</sup> Other problems with this programme have also been reported. In Miskolc, a local Roma school that had been the site of an NGO-run pedagogical training programme was merged with another local primary school. After the merger technically took place, in fact Roma remained in physically separate classes in separate buildings, although the local government collected the allowance for the integration programme.<sup>122</sup> Hungary's Gypsy Self-Government (*Országos Cigány Önkormányzat*, OCÖ) has said that better-skilled teachers and more equipment could better address segregation, not subsidies paid to the schools per child without conditions on delivering results.<sup>123</sup>

The Ministry of Education and Culture has no means to ensure effective and central control. It could, however, push forward amendments, such as some form of centralised overseeing system over quality control and the review process and selection for review of individual pedagogical experts. Such changes could be a way to counter abuses flowing from local government autonomy.

The OOIH integration programme has been evaluated by the National Institute on Public Education (OKI), but its findings are not yet public. The Parliamentary Commissioner for National and Ethnic Minority Rights (Minorities Commissioner) is presently carrying out an *ex officio* investigation into the use of normative funds for integrated education.<sup>124</sup> There is another ongoing evaluation regarding the same programme due to yield results in 2007. Expert András Nyíri argues that OOIH is too understaffed and underfunded to fulfil all expectations arising on the part of schools, particularly those relating to the provision of educational expert services. He urges the involvement of other players in the field, such as educational experts affiliated with the National Public Education Evaluation and Examination Centre (*Országos Közoktatási*

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<sup>120</sup> Reuters Interview.

<sup>121</sup> Reuters Interview.

<sup>122</sup> *REI Final Report Hungary*, forthcoming.

<sup>123</sup> Reuters Interview.

<sup>124</sup> Information obtained from the Office of the Parliamentary Commissioner for the Rights of National and Ethnic Minorities (NEKH), 7 December 2006.



*Értékelési és Vizsgaközpont, OKÉV*),<sup>125</sup> county-level pedagogical services and other ministerial background institutions.<sup>126</sup> Clearly, a strong central review mechanism could contribute to raising the quality of pedagogical expertise in schools. Last, Nyíri notes the complexity of rules and regulations pertaining to the integration of disadvantaged children, and calls for unified and simplified guidance.<sup>127</sup>

In practice, research carried out in the framework of this report, in Csököly and Tiszabura, found that that the results of integration support are mixed at best. The Csököly elementary school was partnered with the Darány base school at the same time that the integration and skill-development programme was introduced. At first the school received methodological help as part of the programme, but later the good professional cooperation deteriorated. Reportedly, the failure to establish planned forums to facilitate exchanging experiences contributed to this problem, and while the central school received significant external financial and professional aid, the schools joining gained little from the partnership.

The school employs one developmental teacher who usually works with the children in groups of two or three in the afternoons, or pulls students out from class for developmental support where the need is perceived. Apart from the developmental teacher, the teachers of specialised subjects also work with the children after school. It demands great flexibility from the teachers to insert individually tailored, personal development into the daily schedule for the great number of students who have learning disabilities. There are cases when in addition to the compulsory classes they give two to three support sessions per day. Developmental support is available to all children who need it, not only those for whom the school receives an integration normative (a *per capita* subsidy due from the central budget, see chapter 3.2).

All but one of the teachers interviewed in local research conducted in Csököly support integrated education for children with special educational needs and for socially disadvantaged children. According to teachers, children with different abilities can help each other a lot; both the pupils who learn fast and the ones who are slower can gain from working together. One of the instructors mentioned the important socialising role of integration in later life:

I think that when they get into real life [...] by all means they must make their way in a community where there will also be people with better abilities and also people who are weak.<sup>128</sup>

The research conducted in Tiszabura indicates that the integration programme has failed to make an impact on all the staff that it targets. In 2004, the school became the

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<sup>125</sup> National Public Education Evaluation and Examination Centre (OKÉV) See sections 3.8.2 and 5.7 and the OKÉV website, <http://www.okm.gov.hu/main.php?folderID=261>.

<sup>126</sup> Written comments, András Nyíri, 10 November 2006, pp. 2–3.

<sup>127</sup> Written comments, András Nyíri, 10 November 2006, p. 3.

<sup>128</sup> Interview with a teacher, case study Csököly.

base institution of OOIH and as such is the regional centre for integrated education, providing methodological support to others. The base institution's official status also meant that the teachers should regularly attend training courses of the Integrative Pedagogical System (IPR), to learn about new methodological elements. Regional coordinators and advisors assist the work of the base institution.

In practice, establishing integrated classes or organising participation in the methodology training courses remain the responsibilities of the school's management, which have met with some success.

So we designed a good many training courses and courses [in the project] to be really prepared and more informed about this field, because, as I already said, we were not up-to-date enough at individual skills development. We had a goal and it was approved by the colleagues, as I said, in 1998 we wanted this to be, but on the everyday level it didn't work out as it could have. All these training courses our colleagues attended in large numbers, everybody at something, there were people who went to many of them, in here also and they liked to go. I have to emphasise that it also changed the approach of the majority of teachers, the majority I say because there are many elderly colleagues whose approach we cannot modify.<sup>129</sup>

However, interviews suggest that many teachers remain uninformed about the activities and purpose of OOIH and IPR:

I heard about it [OOIH], but that's all. [...] I don't know who runs it [...] I heard something about it. Please, don't ask me what I heard about it, it is a custom, the management usually tell us about it but don't ask.<sup>130</sup>

The small regional coordinator? I cannot say anything about it, because I don't know what his duty was, what his task was, so I don't know. He must have done something, only I didn't see. [...] The regional coordinator? I have heard about him too, I know he exists, but I didn't have an insight into his scope of duties either. [...] IPR? System of Integrated Education? I don't know about it; maybe there was something but I don't know; maybe I should know this?<sup>131</sup>

My work-relationship is not with them [OOIH], so why should I care? They can say anything, but I have to sort things out here, here in the institution, so who sits at the wheel there, we don't care, because we hear so many names anyway; we would anyhow forget – so we are not admirers. See, they come and go: these teachers won't remember; there were many people; I could list the names in vain; they wouldn't know who was who [...].<sup>132</sup>

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<sup>129</sup> Interview with a teacher, case study Tiszabura.

<sup>130</sup> Interview with a teacher, case study Tiszabura.

<sup>131</sup> Interview with a teacher, case study Tiszabura.

<sup>132</sup> Interview with a teacher, case study Tiszabura.

In Tiszabura, the mixed feedback on the process of integration was also evident in the project “Out of the Back Row,” which aimed at reintegration from special schools. In many instances, local decision-makers did not support reintegration, and the lack of methodological assistance also contributed to a certain level of failure.<sup>133</sup>

In the process of integration, the Ministry of Education and Culture has no means to ensure effective and central control. It could, however, push forward amendments, such as some form of centralised control system over quality control and the review process and selection for review of individual pedagogical experts. These amendments could effectively counter abuses flowing from local government autonomy.

Indeed, one of the suggestions of the REF *Needs Assessment* report is for Hungary to develop a measurement and evaluation system, in order to provide feedback on the efficiency and successfulness of the operation of schools, primarily in the education, instruction and training of disadvantaged children, and to develop packages of intervention to address the problems identified.<sup>134</sup>

Research has indicated that good high-quality pedagogy and technical assistance to schools and teachers are needed in the integration process.<sup>135</sup> But not only that: supports and support systems were emphasised as important components in education quality for integration in a report prepared for the multi-country NGO project, the Roma Education Initiative (REI). The final REI report of 2005 states that “mentoring for teachers and others who are engaged in professional learning and change was viewed as critical.”<sup>136</sup> The breakdown in the quality of practice in the above Csököly-Darany example attests this fact, too.

Neither of these is explicitly addressed in the *Decade Action Plan* points. The *Decade Action Plan* does mention the need to “increase the number of schools utilising special financial incentives for integrated education” and “fight against the practice of false diagnosis, stigmatisation (mentally impaired) of Roma children in the educational system,” to end segregation.<sup>137</sup> However, as for the former, this is purely a quantifiable indicator with no provisions for how it is qualitatively implemented on the schools’ level, and as for the latter, although there are reportedly activities aiming at the standardisation of psychological tests, to date no concrete steps or results are available from the Government.

<sup>133</sup> Interviews with Gábor Sárközi, Gábor Bernáth and Viktória Mohácsi MEP, March 2006.

<sup>134</sup> REF *Needs Assessment*, p. 30.

<sup>135</sup> See Proactive Information Services, *Transition of Students: Roma Special Schools Initiative Year 4 Evaluation Final Report*, February 2004, available at <http://www.osi.hu/esp/rei/Documents/Roma%20Year%204%20Final%20Evaluation%20Report%20March%2018%202004%5B1%5D.pdf> (accessed 7 March 2007), pp. 33–35.

<sup>136</sup> Roma Education Initiative (REI), *Final Report*, June 2006, p. 40 available at [http://www.osi.hu/esp/rei/Documents/REI%20Final%20Report\\_Final%20Full%20Report.pdf](http://www.osi.hu/esp/rei/Documents/REI%20Final%20Report_Final%20Full%20Report.pdf) (accessed on 24 February 2007).

<sup>137</sup> *Decade Action Plan*, Education Goal 1.

### 3.4 Roma teaching assistants/school mediators

There are no centralised regulations for employing Roma mediators and Roma teaching assistants (RTAs). They must have a secondary school education to qualify.

Accordingly, there are no centralised data available on Roma teaching assistants, as there is no centralised programme relating to this position. The Ministry of Education and Culture has for some time been running a training programme for Roma unemployed with a view to their employment in institutions of public education. The programme has been accredited (RKF/2003/2), and participants are promised employment during training. However, the number of retrained Roma unemployed is presently not known, and nor is the number of those presently employed by schools reported by the Ministry.<sup>138</sup> Some local governments, on the other hand, pay the full salary of Roma teaching assistants and employ them. In some cases Roma teaching assistants are perceived as being mainly there to “keep Roma parents out of school” and generally act as a buffer between the Roma community and majority teachers and other majority stakeholders.<sup>139</sup>

There have been efforts, however, on behalf of civil society to register and make official this position. The educational NGO Ec Pec Alapítvány (hereafter, the Ec Pec Foundation) in its REI project trained and worked with RTAs, and lobbied to register the position. However, the European Union (EU) requires a reduction in the number of such positions and, consequently, the Roma teaching position was not registered. The Ec Pec Foundation, the OKTÁV Kht. and the Adult Training Department of the Teacher’s College in Nyíregyháza are together implementing a project in the framework of the EU’s EQUAL Program “Equal Chances in Employment”. In the framework of this project they provide training and employment for 40 RTAs at primary schools in Hungary over two years. On its website, the Ec Pec Foundation describes the project as follows:

The goal of the programme is to support schools in employing people, who are qualified to support teachers in cooperation with parents, to introduce Roma culture in schools and to manage possible conflicts related to the integrated education of Roma and non-Roma students. The project’s flexible adult training methodology and regular mentoring are meant to support Roma people to have continuous employment, to receive vocational training and to prepare them for the final secondary school exam. The programme is implemented with the support of the European Union and the Government of Hungary in the framework of the Human Resources Development Operational Programme of the Ministry of Employment and Labour.<sup>140</sup>

There is nothing in the *Decade Action Plan* that relates to this topic.

<sup>138</sup> Information received from the Ministry, 10 November 2006.

<sup>139</sup> The villages of Szendrőlád and Tiszabura have been identified by experts as employing Roma teaching assistants for such purposes.

<sup>140</sup> See the Ec Pec Foundation’s website at [http://www.ecpec.hu/content/content\\_73.html](http://www.ecpec.hu/content/content_73.html) (accessed on 24 February 2007).

### 3.5 Romanes Teachers

While no official statistics are available, one researcher estimates that there might only be a handful of educators working with Roma who speak Romanes or Beash and are prepared to teach using these languages.<sup>141</sup>

The number of teachers who speak Romanes or who are prepared to teach in Romanes or using bilingual techniques is negligible, given that in 2004–2005 Romanes/Beash was taught to 274 children in pre-school, 1,014 in primary school and 299 in grammar school, while at the corresponding levels 15,637, 31,503 and 299 children received Roma minority education without a minority language element.<sup>142</sup> Research estimates the number of Roma teachers to be around 100, out of which approximately 20 may be able to use Romanes or Beash as the language of instruction.<sup>143</sup> In after-school study halls instruction in Romanes/Beash might be far more frequent, often given by Roma who are not qualified teachers, such as in Kiskőrös, Gilvánfa, Pécs, Hidas and Pereske. An expert reports that since 1993 on average 20–30 teachers per year have obtained an official language qualification in Romanes or Beash, but believes that the majority would not be able to speak, let alone instruct students in these languages.<sup>144</sup> It is noteworthy that a language exam is a prerequisite of a pedagogical diploma.

No bilingual schools exist for Roma. In 2003 the National Public Education Evaluation and Examination Centre (OKÉV) found three schools out of the 327 running Roma minority education programmes that provided some sort of minority language instruction – and only two of them in compliance with the law.<sup>145</sup> By 2006 the number of such schools had allegedly increased, reaching approximately 20. In these schools Romanes or Beash is usually taught in one block, and all the classes are delivered within a month. This is due to a shortage of teachers who are qualified as such, as well as speaking the relevant languages.

There are no schools in Hungary where the entire curriculum is taught exclusively in Romanes.

The *Decade Action Plan* does not address this issue.

### 3.6 Educational materials and curriculum policy

Textbooks are free to eligible children – such as those who receive the permanent child protection allowance (see section 4.3). It is a State obligation to provide teachers and

<sup>141</sup> Interview with Tibor Derdák, 7 March 2006.

<sup>142</sup> Ministry of Education and Culture *Statistical Yearbook of Education 2004/05*, pp. 27 and 29, available at <http://www.om.hu/doc/upload/200506/oe050531.pdf> (accessed on 24 February 2007) (hereafter, MoE, *Statistical Yearbook 2004/05*).

<sup>143</sup> Interview with Tibor Derdák, 7 March 2006.

<sup>144</sup> Information from Magdolna Debre.

<sup>145</sup> OKÉV Report 2003, pp. 39–40.

textbooks in minority languages.<sup>146</sup> The Minister has the power to fix the price of textbooks printed in fewer than 1,000 copies. Notably, however, the latest ministerial information sheet on the maximum price of textbooks in minority languages does not contain a single textbook written in Romanes.<sup>147</sup>

No reliable information is available as to whether there are any references to national minorities in national history or literature textbooks. Ministry of Education and Culture officials charge that certain national minorities (such as Germans and Jews) are more frequently referred to in the many textbooks that are available on the market, which is completely liberalised. Since no authoritative studies or analyses have been made of the large existing body of schoolbooks in Hungary, the extent of references to Roma, in history or literature, cannot be tracked.

The National Core Curriculum (NCC) contains the framework curriculum on the basis of which individual schools have to adopt their pedagogical programmes (the actual curriculum taught in the school). The NCC prescribes that “every child at every level of education shall be acquainted with the culture and common history of the minorities constituting the nation.” In the chapter “Man and Society” the NCC stipulates that in grades 9–12 pupils shall be provided with information on the history of national and ethnic minorities living in Hungary, including that of the Roma. Some textbooks on “Man and Society” contain such information. However, some reflect deeply rooted anti-Roma stereotypes and bias.<sup>148</sup>

According to Government Decree 243/2003 (XII.17) on the Publication, Introduction and Application of the National Core Curriculum,<sup>149</sup> minority education aims at preserving and strengthening minority self-identity. Its objectives therefore relate to the use of minority languages, the cultivation of minority culture, the knowledge of the history of the so-called “Mother Country” (which is not supposed to be applicable to Roma), tolerance and the social advancement of Roma. Undoubtedly, as the mandate of the Ministerial Commissioner in charge of the Integration of Roma and Socially Disadvantaged Children (Integration Commissioner) demonstrates, the objectives relating to Roma have somewhat changed in recent years. On this note, in his latest

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<sup>146</sup> Pursuant to Art. 44 of 1993 on the MA, the additional costs of minority mother-tongue education shall be borne by the State. Pursuant to Art. 46 (2), teacher training and retraining with a view to ensuring minority language education is a State duty.

<sup>147</sup> Ministry of Education and Culture Information Sheet, listing the highest price of school books on ethnic and national minority language, literature and history printed in fewer than 1,000 copies in 2006–2007, 28 February 2006, available at <http://www.om.hu/main.php?folderID=723&articleID=6969&ctag=articlelist&iid=1> (accessed on 24 February 2007).

<sup>148</sup> Interview with Gábor Daróczy, March 2006.

<sup>149</sup> Ministry of Education and Culture website Information sheet 3 December 2000 on the role of the National Core Curriculum], available at <http://www.om.hu/main.php?folderID=391&articleID=2337&ctag=articlelist&iid=1> (accessed on 24 February 2007).

activity report the Integration Commissioner noted that contrary to an express obligation in Article 48 (1)b PEA, the history and culture of Roma have not been taught to majority children.

In 2000, a case was brought to the Legal Defence Bureau for National and Ethnic Minorities (*Nemzeti és Etnikai Kisebbségi Jogvédő Iroda*, NEKI)<sup>150</sup> regarding a textbook used in the fifth grade that included the following: “Life for a part of Gypsies has been marked by crime. Education and learning may raise Gypsies to a level where they can integrate into society through work. This process requires a lot of patience and time, but there is no better or other way.” Following an investigation, the publishing house withdrew the text from circulation on request by the Ministerial Commissioner for Education Rights (see also section 3.8.3).<sup>151</sup> Four years later, the same publishing house published an ethics textbook for children aged 13 to 14. The book contained an extremely offensive chapter on Roma lifestyle, education, and criminality. NEKI described the book as “capable of reinforcing already existing prejudices against the Roma minority and of justifying discriminatory behaviour against Roma in society”.<sup>152</sup> Following a heated public debate, the publisher pledged to withdraw the book from shops. Nevertheless, NEKI staff were later still able to buy three copies.

Two texts on Roma history and culture exist, and a third is under preparation. However, these books are intended for minority education, and Ministry of Education and Culture officials indicate that they are not used in mainstream education. *Szaffi*, a Roma history and culture education pack and programme, has been prepared by a group of educators, although it is yet not officially approved and printed. Some experts suggest that this pack sets a promising precedent and is the only one that provides guidance to teachers on approaching this minority culture. The pack contains a handbook for teachers, a textbook for children, a puzzle, a memory game, cards and CDs with films and stories.<sup>153</sup>

There are no provisions to address the issue of diversity in the curriculum and textbooks within the *Decade Action Plan*, and nor was this issue addressed in the REF *Needs Assessment* report.

<sup>150</sup> The Legal Defence Bureau for National and Ethnic Minorities (*Nemzeti és Etnikai Kisebbségi Jogvédő Iroda*, NEKI) is an NGO established in 1994 within the framework of the Otherness Foundation to provide legal defence for persons whose rights were violated as a result of their ethnic origin. See the NEKI website, <http://www.neki.hu/news.html>.

<sup>151</sup> Legal Defence Bureau for National and Ethnic Minorities (*Nemzeti és Etnikai Kisebbségi Jogvédő Iroda*, NEKI), *White Booklet 2000*, annual report, available on the NEKI website at <http://www.neki.hu/indexeng.htm> (accessed on 24 February 2007) (hereafter, NEKI, *White Booklet 2000*).

<sup>152</sup> NEKI, *White Booklet 2000*.

<sup>153</sup> Tibor Derdák, Gábor Fleck, László Tenigl-Takács, János Orsós, Aranka Varga and Erika Varga, *Szaffi*, unpublished.

### 3.7 Teacher training and support

Universities enjoy a high level of autonomy, which in turn entails that information about their activities in this field is scarce, although there are professors/teachers in pedagogical departments who are interested in diversity, and often courses are delivered in the psychology departments. Universities are not obliged to report on the topic, and these activities have not been externally reviewed so far. Ministry of Education and Culture officials acknowledge that courses dealing especially with tolerance, multicultural education and anti-bias training are not running. Teacher training courses in Kaposvár and Szarvas, as well as the Romology course in Pécs University, cover minority language – and culture in Pécs – but teachers graduating from these institutions are not believed to be capable of instruction in Romanes or Beash.<sup>154</sup> The Government-run institute Sulinova<sup>155</sup> provides methodological background for integrative education, and the Ministry supports about a dozen applications each year for officially approved minority language and cultural education.

Research suggests that not all teachers welcome the additional training and professional organisation that have become available in recent years. One teacher perceived them in a very negative light:

This hocus-pocus that is now going in the field of education, because I dare to say it is hocus-pocus: what job is done, it's all the same; what matters is that it should be written down. So all these things turn my stomach and I mean it. There is a different way I think about what decent work is.<sup>156</sup>

Another teacher expressed the view that it is an impossible professional task for a teacher to provide integrated education for children in need of special education, and it does not help the children either. According to the teacher, only a skilfully trained, homogenous group of children can be successfully educated, and thus he supports the idea of dividing classes based on average educational results. As most teachers reported that children's results were not connected to their ethnicity, such a practice would not necessarily result in ethnic segregation.<sup>157</sup>

There are no pre-service training courses in bilingual techniques envisaged in the formation of educators and teachers, and nor are there specific courses oriented towards communication with children whose mother tongue is Romanes or Beash. Ministry officials report that a realistic objective within 5–10 years is to provide good-quality minority language books and dictionaries. The fact that Romanes and Beash are not unified should not pose a challenge, as techniques such as for those used for German already successfully address concerns arising from different dialects.

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<sup>154</sup> Information obtained from various experts, including Tibor Derdák, community leaders, including János Orsós, and Ministry officials in the Minority Education Department.

<sup>155</sup> The Agency for Educational Development and In-Service Teacher Training (Sulinova).

<sup>156</sup> Interview with a teacher, case study Tiszabura.

<sup>157</sup> Interview with the only teacher supporting this view, case study Csököly.



Though information on special courses and training for teachers working in schools with a high percentage of Roma is available, training programmes financed by the Ministry have not so far been externally evaluated. Monitoring takes place on an *ad hoc* basis. Regular in-service training programmes in bilingual education organised for teachers from majority Roma schools do not exist in Hungary. However, a high percentage of Hungarian Roma speak Hungarian, and language issues are less of a concern than they are in other countries with large Roma populations. Certainly, it is of concern whether the language requirements are suitable for socially disadvantaged children – be they majority or minority children.

One teacher interviewed in the framework of the case study on Csököly said that she would gladly attend a language course in a Roma language. The deputy head teacher had attended a course in Lovari language for three years, but had not completed it, as she felt that she could better use a qualification in public education management better, stating the following:

I can read the language; I have no difficulties with reading; I understand a few words – but I could not translate a text. I remember grammar structures but I lack vocabulary. I can use my qualification in public education management better in my work; I get a wider insight into the operation of a school. I chose this school mainly because I wanted to get more information.<sup>158</sup>

While teachers in Ónod had the opportunity to take several in-service courses related to integrated education, the impact has been limited. Several of the teachers did not remember the training, and, based on teachers' responses, although all members of the teaching staff had acquired the techniques of cooperative teaching, only a few used them. The teachers participated in mentor training, which they found very useful as they could exchange their experiences with other teachers teaching disadvantaged pupils of Roma origin. In this programme, a teacher works with five or six pupils while being trained, the programme lasts for one and a half years and then the teacher decides whether to go on with mentoring or not.

### 3.8 Discrimination monitoring mechanisms

#### 3.8.1 Judicial procedures

Victims of discrimination may sue in civil courts based on Articles 75 and 76 of the Civil Code, claiming that civil rights are protected by the Civil Code, and that the right to equal treatment is a civil right. The possible remedies are listed under Article 84 of the Civil Code. Judicial review is available under Article 84 PEA against decisions brought pursuant to educational complaints. No such procedure has been reported so far.

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<sup>158</sup> Interview with deputy head teacher, case study Ónod.

Out of 32 cases that the Legal Defence Bureau for National and Ethnic Minorities (NEKI) took on in 1995, one was related to education. The figures for the following years were as follows: in 1999 one case out of 28, in 2000 six out of 46, in 2003 three out of 27, and in 2004 one out of 2004. Some examples of judicial practice follow.

In the so-called Tiszavasvári case,<sup>159</sup> the plaintiffs were Roma pupils of an elementary school. Because they had occasionally been diagnosed as suffering from lice, the plaintiffs were for eight years not allowed to use the physical education facilities for the pupils, and, as a deviation from the previous years' school practice, the plaintiffs had to attend a different "School-Leaving Ceremony", which was held separately from the one for the "Hungarian" pupils finishing their education. The court established that the segregation of the plaintiffs from the pupils of the school in this way was a discrimination against the plaintiffs, that this was based on the origin and the nationality of the plaintiffs, and that this, in itself, could not be explained solely by the occasional health issues of certain Roma children. According to the court's argumentation,

the fact that the defendant local council (the maintainer of the school) and the school wanted to protect the health of the other pupils with this decision is irrelevant when the determination of the discrimination is assessed. It is clear that the school must protect the rights and interests of every pupil, but the school cannot comply with this obligation by regularly discriminating against the minority to protect the majority. This cannot relieve them from the consequences of illegal behaviour.<sup>160</sup>

On 7 October 2004 the Metropolitan City Court of Appeals (*Fővárosi Ítéltábla*) upheld the first instance judgment in the Tiszatarján case, the first Hungarian test case on school segregation. The Court of Appeals' judgment is final and enforceable. In its judgment from June 2004 the Borsod-Abaúj-Zemplén County Court ordered the primary school of Tiszatarján and the local governments of Tiszatarján and Hejőkürt to pay HUF 3,650,000 (€14,600) plus interest in damages to nine families whose children had been unlawfully kept in a segregated class and taught a special curriculum between 1994 and 1999 despite the fact that they were not certified as having intellectual disabilities, in a primary school under their authority.

In the Jászladány case (see section 4.3), a complex legal battle contesting the establishment of a private school began between the local government, the mayor and the notary and the Minorities Commissioner, the Ministry of Education and Culture and the Office of Public Administration. The school could not open in September 2002 but started a new registration procedure for the 2003–2004 school year and is now in full operation. The case is now pending repeated appeal.

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<sup>159</sup> Reported Supreme Court, EBH 2001. 515 (Complex CD Corpus Iuris).

<sup>160</sup> Reported, Supreme Court, EBH 2001. 515 (Complex CD Corpus Iuris).

In June 2005 the Chance for Children Foundation (CFCF) brought an *actio popularis* claim against the local council of Miskolc, in northern Hungary, alleging that the council was indirectly responsible for the segregation of Roma children in primary education. On appeal, a higher court reversed an earlier decision where no segregation was found, and found that the authorities had violated the rights of Roma children to equal treatment, based on ethnic origin. Furthermore, the court ordered Miskolc to publicise its finding through the Hungarian Press Agency (MTI). The court agreed with CFCF that not only active, but also passive conduct could lead to a breach of the obligation of equal treatment, especially of the obligation to accord similar quality service in education to all. The court noted Miskolc's efforts at integration, but it found them to be belated with regard to redrawing school catchment areas. It emphasised the point that Roma clearly suffered disadvantage as a result of this discrimination and that evidence offered by the town could not justify it.

Finally, the court explained that it could not grant the order requested by CFCF to integrate Roma children into mainstream classes along the relevant provisions and ministerial guidance, as this would amount to the enforcement of measures in public law. The court noted that in lieu of a detailed and school-specific integration plan it could not render any other decision.<sup>161</sup>

The Equal Treatment Authority has commenced *ex officio* proceedings against Miskolc for the segregation of Roma children in schools excluded from the lawsuit. Based on a hidden camera recording screened on a national television station and showing discrimination during the enrolment procedure of a Roma child, in May 2006 OKÉV began proceedings against the director of an elite school affected by the lawsuit.

The Kesznyéten case commenced pursuant to a criminal complaint brought by CFCF on account of endangering minors, against primary school teachers and school director for segregating a class of Roma. The class was made up of two grades – one comprising Roma children with behavioural problems and another comprising Roma children in special education – and was taught by a former Russian language teacher. The prosecution refused to press charges in the case, arguing that it was up to Parliament and the Minister of Education to dismantle segregation in schools. Supplementary private prosecution was not allowed, and the case is now pending before the European Court of Human Rights.<sup>162</sup>

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<sup>161</sup> The first instance court's failure to proceed correctly along provisions pertaining to the reversed burden of proof blocked CFCF from presenting evidence in this regard, which could not be remedied on appeal.

<sup>162</sup> Horváth and Vadászi, Hungary, Application No. 2351/06.

### 3.8.2 Administrative procedures

The Equal Treatment Authority (*Egyenlő Bánásmód Hatóság*)<sup>163</sup> has authorisation to act against any discriminatory act irrespective of the ground of discrimination (including race and social status) or the field concerned (including education).

Pursuant to Article 80 PEA, notaries at the local or county level are in charge of controlling the legality of operations in private schools. Parallel to suspending the transfer of *per capita* support, pursuant to complaints by parents or NGOs, notaries can challenge an illegal action, decision or omission in court. In the case that the private school continues in its failure to comply with the law, notaries have the power to revoke the permission and strike the school out of the registry.

In the case that teaching violates public order, public health or public morals, or is directed against the fundamental rights of others, or the school lacks the conditions necessary for its operation, the competent notary may order it to terminate such a situation. Should the school fail to comply, the notary has the power to suspend its activities and challenge its action in court. The procedure following such a suspension is as described above.

Articles 83 and 84 PEA provide for an administrative complaint mechanism against unlawful decisions of a school (to the maintainer) or the maintainer (to the notary or in the case of local government-run schools to the Office of Public Administration). Decisions that discriminate are null and void. Judicial review is available against such decisions, but in the latter case it can only be brought by the Office. It shall be noted that sanctions available under Article 80 PEA against unlawful acts of private schools seem far more effective than those available against public schools. Ultimately, public schools cannot be closed down, and nor can State funding be withheld from them.

OKÉV can also investigate discrimination in schools and impose fines for petty offences or as a result of its administrative review, pursuant to Article 95/A(5) PEA.

In February 2004, OKÉV reported that the establishment of the Antal Mihály Private Foundation School in Jászladány was not in accordance with the law and led to the segregation of socially disadvantaged students. OKÉV further stated that the establishment of the school resulted in the polarisation of the two halves of the school in such a way that children coming from average families ended up in the private part of the school, while those coming from disadvantaged families ended up in the municipal section of the school. According to OKÉV, the local decision violated the constitutional rights of citizens as well as certain legislative prohibitions.<sup>164</sup> Information on sanctions imposed by OKÉV is not available. This case has highlighted the way in

<sup>163</sup> Further details on the Equal Treatment Authority are available in English on its website at [http://www.egyenlobanasmod.hu/index.php?g=ebh\\_aboutEN.htm](http://www.egyenlobanasmod.hu/index.php?g=ebh_aboutEN.htm) (accessed 1 March 2007).

<sup>164</sup> ERRC, “Private Foundation School Found Segregative in Hungary”, news item, 28 May 2004, available at <http://www.erc.org/cikk.php?cikk=1869&archiv=1> (accessed on 24 February 2007).

which the present legal regulations are incapable of addressing segregation and the legislative loopholes that need to be filled if Hungary is to move towards an effective system tackling racial discrimination in education.

### 3.8.3 Conciliation procedures

#### *Mediation by the Equal Treatment Authority*

The Equal Treatment Act does not explicitly authorise the Equal Treatment Authority to mediate between parties, but under Article 64 of Act No. 140 of 2004 on the General Procedure and Services of State Authorities, the Authority, as a public administrative organ, is authorised to try to resolve the conflict through forging an agreement between the parties, if the circumstances of the case seem to allow it. Pursuant to Article 75 of the same Act, if the parties reach an agreement in the course of the complaints procedure, the Authority includes the agreement in a formal decision,

If the attempt to have the parties reach an agreement is not successful, the Authority continues its proceedings, and – depending on the result of the investigation – imposes a sanction or rejects the complaint.

The Equal Treatment Authority has reported that, on request from a president of a Roma minority self-government, the Authority launched an investigation against a school director who had been alleged to impose harsher sanctions on Roma students brought under disciplinary proceedings. Given that the case was also brought to the attention of the Commissioner and that his colleagues' intervention was successful, the Equal Treatment Authority terminated its investigation.<sup>165</sup>

#### *Ministerial Commissioner for Educational Rights*

Decree 40/1999 of the Ministry of Education and Culture established the Ministerial Commissioner for Educational Rights (hereafter, Education Commissioner). Under Article 1 of the Decree, the Office of the Commissioner for Educational Rights is an independent, internal organisational unit of the Ministry of Education and Culture that promotes citizens' rights concerning education. The Decree establishes a special conciliation procedure.

Parents, students, teachers, and so on, have the right to complain, provided that all available administrative remedies are exhausted and less than a year has elapsed since the measures complained of (Article 5). Complaints relating to Articles 70/F and 70/G of the Constitution, public education, higher education and vocational education and training can be brought to the Education Commissioner (Article 3). The explicit inclusion of Article 70/A of the Constitution (on non-discrimination) in the scope would be highly advisable. In 2001 the Education Commissioner examined discrimination only in relation to disabled students.

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<sup>165</sup> See the website of the Equal Treatment Authority, <http://www.egyenlobanasmod.hu/> (accessed 7 March 2007).

Complaints not dismissed by the Education Commissioner undergo the conciliation procedure. The Education Commissioner sends the petition to the institution complained of for a declaration and initiates the process whereby consensus may be reached with the petitioner. In the case of an agreement the Commissioner prepares a report and sends it to the parties concerned. If no consensus is reached, the Commissioner prepares a report on the results of the conciliation and calls on the institution to terminate the infringement. In the case of non-compliance the Commissioner sends a recommendation to both the institution and its supervisory organ. The latter have the duty to respond within 30 days. The Commissioner reports to the Minister of Education (Article 7). In 2001 the Office issued initiatives and recommendations on 51 occasions. Following changes in the Ministry's leadership, the Commissioner's office has been restructured. Information as to present practices is not available.

The Ministry has established another conciliation procedure: the Education Mediation Service, which has a handful of staff.<sup>166</sup>

### 3.8.4 Other forums to be approached in cases of discrimination

#### *The Parliamentary Commissioners*

Under Article 32/B of the Constitution, the Parliamentary Commissioners investigate violations of constitutional rights and initiate general or individual measures to remedy such violations. There are currently four such commissioners in Hungary:

- The Parliamentary Commissioner for Civil Rights (General Commissioner);
- The Deputy Parliamentary Commissioner for Civil Rights;
- The Parliamentary Commissioner for the Rights of National and Ethnic Minorities (Minorities Commissioner);
- The Parliamentary Commissioner for Data Protection.

Parliamentary commissioners are appointed by a two-thirds parliamentary majority vote.<sup>167</sup> Financial independence and immunity are provided for. Any victim of acts or omissions of public authorities or public service providers can complain to their office, provided that all administrative remedies are exhausted or none exists. Commissioners can proceed *ex officio*, and the Minorities Commissioner has done so on many occasions in relation to the segregation of Roma children in education.

They can investigate any authority, including local governments. They may request information, a hearing, a written explanation, a declaration or an opinion from the

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<sup>166</sup> Its mandate is based on Act No. 55 of 2002 on Mediation in Civil Law Disputes. It is not expressly mentioned in the PEA.

<sup>167</sup> Act No. 59 of 1993 on the Parliamentary Commissioner for Civil Rights.

competent official, or demand that a superior conduct an inquiry. When finding a violation, they issue recommendations, to which perpetrators must respond within 30 days. Further, they may (i) petition the Constitutional Court; (ii) initiate proceedings for the prosecutor to issue a protest; and (iii) propose that a legal provision be amended, repealed or issued. Commissioners may initiate disciplinary or criminal proceedings. Their main publicity weapon is their annual report submitted to Parliament. Furthermore, they can request parliamentary investigations and debates.

Accessibility, although a concern, is greatly promoted by the good level of cooperation among these bodies.

The number of complaints to all bodies and forums is not high. In 2005, the Minorities Commissioner received 12 complaints against schools; 52 per cent of complainants in all cases brought to the Commissioner were Roma.<sup>168</sup> In one of these cases, the Minorities Commissioner reported on a complaint filed by a Roma parent against decisions referring his two children to a special school after they had finished grade two in normal classes. The Commissioner noted that there might have been professional flaws in the examination of the Expert Panel and found that the Panel's opinions had breached the relevant laws<sup>169</sup> when failing to inform the parents about their right to appeal against the placement recommendation. The Commissioner also noted that, as before during 2005, numerous complaints were filed against teachers for racial harassment, which was often manifested in physical abuse.<sup>170</sup>

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<sup>168</sup> Parliamentary Commissioner for the Rights of National and Ethnic Minorities (NEKH), *Annual Report 2005*, Budapest: 2005, available in English on the NEKH website at <http://www.obh.hu/nekh/en/reports/reports.htm> (accessed on 1 March 2007).

<sup>169</sup> Art. 15 (1) 1 of Ministerial Decree No. 14/1994 (VI.24) MKM provides an appeal against placement recommendations to the notary.

<sup>170</sup> Parliamentary Commissioner for the Rights of National and Ethnic Minorities (NEKH), *Annual Report 2005*, Budapest: 2005, available in English on the NEKH website at <http://www.obh.hu/nekh/en/reports/reports.htm> (accessed on 1 March 2007), pp. 148–153.

## 4. CONSTRAINTS ON ACCESS TO EDUCATION

*Due to a lack of pre-schools in small villages, almost 20 per cent of Roma children live in areas with no pre-school nearby, and the transportation to villages where there is a pre-school may not be provided. Overcrowding is also a problem in areas where there are pre-schools. Generally, administrative requirements for enrolment in school are not an obstacle for Roma families; however, cases have been reported where Roma children were turned away from pre-schools due to their parents' social disadvantage or unemployment. Private schools are increasingly popular in Hungary; however, as most of these are too expensive for Roma families to afford, many function as segregated institutions. Although there are no conclusive data in this regard, education in public schools does not seem to impose a serious financial burden on low-income families, as the State and municipal support for socially disadvantaged children alleviate most costs.*

*The physical separation of Roma communities is increasing, with a growing number of Roma children living in homogenous settlements. Schools draw their pupils from a legally defined catchment area, although parents can choose to send their children to another school outside the area. In practice, however, few Roma parents elect to send their children to other schools, while non-Roma parents are more likely to withdraw their children from schools with a high proportion of Roma. While the parents' wishes must be taken into account, the Ministry of Education and Culture should take steps to mitigate "white flight" and ensure that integration by law is not undone through segregation by choice. It is very common to assign children to classes based on their intellectual abilities. Assessments for placing children in special schools or classes for students with intellectual disabilities are sometimes conducted under inappropriate conditions and without appropriate attention to language or cultural issues. Although mechanisms exist for re-transfer of children into mainstream schools and classes, there are no statistics maintained on the actual number that take place.*

*Roma children are not consistently able to gain access to education in their mother tongue, although minority language education is provided for by law. Minority education, which does not necessarily mean minority language education, has been a longstanding problem in Hungary: in several cases Roma children have been given remedial "catch-up" classes rather than authentic minority education. Roma alone among the country's ethnic and national minorities have no accredited teaching material in their mother tongue at all, nor accredited teacher training courses where minority language-speaking teachers can study.*

### 4.1 Structural constraints

According to recent research, 41 per cent of Roma children attending pre-school live in villages with a population between 1,001 and 3,000, while 66 per cent live in villages with a population upto 3,000.<sup>171</sup> The relationship between the proportion of Roma children in pre-schools and the size of the village/town quite naturally mirrors the particularities of the residential situation of Roma. In almost half of the towns (48.8 per cent) with a population over 10,000, the proportion of Roma children is below

<sup>171</sup> Ferenc Babusik, "Roma gyerekek óvodáztatása" (Roma Children in Kindergartens), *Új Pedagógiai Szemle* (New Pedagogical Review), 2003/6 (hereafter, Babusik, 2003 (2)), available at <http://www.oki.hu/oldal.php?tipus=cikk&ckod=2003-06-ta-babusik-roma> (accessed on 24 February 2007).



13.3 per cent. At the same time, the smaller the pre-school, the greater the proportion of Roma children attending it.

As shown below in Table 13, Babusik observes that the size of the pre-school has a far more significant impact on the use of preschool capacity<sup>172</sup> than does the proportion of Roma children.

**Table 13: The average use of pre-school capacity – breakdown by pre-school size and the proportion of Roma children in the pre-school**

No. of children in the pre-school	Pre-school capacity				
	Proportion of Roma children in the pre-school (per cent)				
	Below 13.30	13.4–25.8	25.9–38.0	38.1–53.6	Over 53.70
Max. 45	178.2	190.2	188.0	196.9	186.6
46–66	177.5	196.6	108.0	103.7	109.1
67–111	105.2	105.1	108,8	102.1	107.3
Over 112	102.8	123.9	113.7	113.9	102.6

Source: Babusik, 2003 (2)

In the 1999–2000 school year 92 per cent of the pre-school-age population (365,704 children) actually attended pre-school. Although calculating with an overall Roma population of 609,200, Babusik concluded that 17.39 per cent of pre-school-age children were Roma in 2000.

According to Babusik, in 2003 there were 864 villages in Hungary without pre-schools (these villages had an average population of 401). This shortage was the most severe in Baranya County (182 villages), Zala County (139), Borsod-Abaúj-Zemplén County (112) and Somogy County (94). Given the geographical isolation of these villages, travelling to pre-school poses considerable difficulties. The proportion of Roma in the villages without pre-schools far exceeded the proportion in the counties with significant shortages. Babusik also concluded that 19.8 per cent of Roma children lived in villages without pre-schools.

The former Integration Commissioner is of the view that mainly in smaller villages where Roma and socially disadvantaged families are overrepresented, pre-schools have been closed or new places have not been created to keep up with local need and legal obligations. For example, there is a serious lack of places in Szendrőlád and Hajdúhadház. In other villages – such as Jászládány – families in which one or both parents are unemployed are asked to take their children home for the afternoon.

<sup>172</sup> Capacity is the pre-school's maximum potential intake. Notably, however, under Appendix III PEA each child with behavioural problems or dyslexia counts for two.

Research carried out in the framework of this project found that, in Csököly, pre-school places are allocated by a committee, which makes the decision on the basis of the child's age, social status and the financial status of the parents. Children from a disadvantaged background, for whom pre-school care is considered to be necessary in order to ensure that they have access to regular meals and personal hygiene, are given preference.<sup>173</sup> The most serious problem in Tiszabura is the shortage of rooms at the pre-school. Although the pre-school was recently enlarged, there are still many parents who cannot send their children to the pre-school. There are roughly 150 children there, but far more spaces need to be filled. The staff adapt the organisation of education to these circumstances, so the pre-school has implemented a selection process in which the more well-to-do children (both Roma and non-Roma) get put into separate groups, and these groups are very likely to further remain at the elementary school as well.<sup>174</sup>

Babusik found that absenteeism among Roma children in pre-schools is not significant, and that levels of absenteeism were independent of both the size of the pre-school and the proportion of Roma children attending it.<sup>175</sup> Absenteeism was found to be solely dependent on whether the local pre-school was operating at capacity, and the average time spent away from pre-school was 12 days. Babusik concluded that the enrolment of Roma children in pre-schools is not dependent on a so-called Roma culture but on external factors, such as the lack of a pre-school in the village or, if there is one, the level to which it is used.<sup>176</sup> The majority of Roma children not attending pre-schools live in small villages.

In Ónod, a village with a population of 2,500, teachers reported that each child attends the pre-school from the age of three, but according to the president of the Roma Minority Self-Government, the following is the case:

From the age of five it is obligatory to attend pre-school. I think this one year is too little time for a Roma child who cannot catch up with the Hungarian child who started pre-school at the age of three. In the Roma families there are no storybooks, no bookshelves. I can argue with any of the Roma parents and can prove that children read very few storybooks. At Ónod I saw that Roma children rarely go to the pre-school – and when they are there, the atmosphere is strange for them and they are distressed.<sup>177</sup>

Children who start pre-school later than their peers may spend less time in the community before going to school, making adaptation more difficult for them; the

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<sup>173</sup> Case study Csököly.

<sup>174</sup> Case study Tiszabura.

<sup>175</sup> Babusik, 2003 (2).

<sup>176</sup> Babusik, 2003 (2).

<sup>177</sup> Interview with the president of the Roma Minority Self-Government, case study Ónod.

new environment may make them more reserved, and starts their education on an uncertain note.<sup>178</sup>

The 2005 Hungarian report to the OECD (Organisation for Economic Co-operation and Development) stressed the fact that the second-most frequent reason that school directors give for the refusal to enrol children in pre-school is closely linked to the social disadvantage of the family, especially the unemployment of one parent (in 46 per cent of the cases).<sup>179</sup> This is corroborated by the findings of a 1999 study.<sup>180</sup>

Annex 3 PEA stipulates that the average number of children in one pre-school class is 20, while the maximum number is set at 25. Legislation does not regulate the number of children within one pre-school. Educational statistics show that in 2004–2005 the national average of the number of children in pre-school classes was 22.3, exceeding 20 in all counties.<sup>181</sup>

If regulations were respected, fewer than 92 per cent of the pre-school-age children could be accommodated in existing pre-schools. Calculating using figures provided by Babusik, it is estimated that 11,259 Roma children cannot enrol in pre-schools for want of such facilities at their place of residence. If average class numbers were observed, 563 new classes would have to open. 450 new classes would have to open with maximum class sizes.

The *Decade Action Plan* does recognise the need for more space, and sets as a specific target the expansion of pre-school spaces, compulsory admission of children of vulnerable families, and provision of free meals for those in need.<sup>182</sup>

## 4.2 Legal and administrative requirements

The date on which children should enrol both for pre-schools and for primary schools is made public by the respective institutions. No written request is required. The child's identity needs to be established with official documents such as a birth certificate or a parent's identity card. Residence in the catchment area is not a prerequisite, but residents of the catchment area must be admitted. The lack of places and possibly proof of child immunisation against diseases – although most frequently for children of middle-class families who oppose certain forms of immunisation – can pose obstacles in the way of enrolling children in pre-schools. However, concerns relating to immunisation or any other condition have not been publicly reported. Homeless parents and children are registered with the town that provides shelter to them, and can seek admission there. The majority of children whose parents are

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<sup>178</sup> Case study Ónod.

<sup>179</sup> OECD, *Equity in Public Education 2005*, p. 21.

<sup>180</sup> Loss, 1999.

<sup>181</sup> MoE, *Statistical Yearbook 2004/05*, p. 88.

<sup>182</sup> *Decade Action Plan* [page or point?].

homeless are taken into State care and placed in foster homes or with foster parents. Children in foster homes or with foster parents attend schools based on their temporary residence.

Given falling student numbers, actual administrative barriers to enrolment in primary school are very rare, although enrolment in a so-called elite school outside the catchment area might pose serious problems, even if the child successfully passes the aptitude tests that are commonly employed, although illegal.

According to Article 90(1) PEA, local governments maintaining educational institutions define and make public the catchment areas of pre-schools and schools. These pre-schools and schools cannot refuse the enrolment of children living in the catchment areas.

Furthermore, entrance examination to the first grade in primary schools is prohibited, although not penalised if occurring. However, schools maintained by churches and foundations are not bound by the obligation to enrol children.

### 4.3 Costs

Pursuant to Article 3(3) PEA, primary schooling is compulsory and free of charge in schools maintained by local governments. Furthermore, pre-school education, pedagogical services supplementing pre-school and school education, and all types of secondary schooling and dormitory services are free of charge.

In 1999 a study registered the fact that in Borsod-Abaúj-Zemplén County every third Roma family lacked the necessary financial resources to ensure the regular attendance of their children in pre-school education, despite the fact that pre-school education is free of charge.<sup>183</sup> Costs for private pre-schools vary greatly from HUF 30,000 to 40,000 per month and upwards (€110–137 or more), which constitutes approximately 30 per cent of the average salary of a skilled worker.

The estimated monthly costs of education differ among schools. In an average school in Budapest, where a child eats in school (school meals cost HUF 4,000 per month per student, approximately €15), and attends camps and forest school, the estimated average is above HUF 10,000 a month (€37), a bit less than ten per cent of the national average salary for skilled workers. The costs might be more in elite schools, or less – only a couple of thousand forints – in small village schools. In a training course on equal treatment held in June 2005, teachers from trade unions proposed that beyond clothes, shoes, a daily meal and schoolbooks, additional expenses should also be covered by the State, such as class money collected to decorate schools for school-

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<sup>183</sup> Loss, 2001.

leaving ceremonies and entrance and travel fees for cultural events.<sup>184</sup> A school director from a Roma-only school in Budapest claimed that due to financial constraints some of his students had never visited key cultural sights in the capital.

At the start of the 2005–2006 school year, the following State support was available:<sup>185</sup>

- Schoolbooks – State support amounts to HUF 2,400 (€9) per student. Vulnerable groups, such as students with special educational needs, those chronically ill, students living in families with three or more children, and students receiving regular child protection allowance (*rendszeres gyermekvédelmi támogatás*)<sup>186</sup> are eligible for further support to the amount of HUF 3,600 in grades 1–4, HUF 7,200 in grades 5–8 and HUF 9,600 in secondary schools (€13, €27 and €35, respectively). Eligibility must be proven to the school administration, which is tasked with distributing State support in order of priority. First, free schoolbooks shall be distributed to those in need. State funds can be reallocated from grades studying from cheaper books to grades in which books are more expensive. Schools are then free to distribute remaining funds as they wish.
- Double family allowance (*családi pótlék*) – In August 2005 every family received a double family allowance. For a family with one child this amounted to HUF 10,200 (€38), with two children to HUF 12,400 (€46), with three or more children to HUF 15,600 (€57), and with children who have special educational needs or are chronically ill to HUF 27,800 per child (€102). Additional sums were available to single parents.
- Employers' contribution – Between 2 July and 31 October 2005 employers could provide HUF 17,000 (€63) tax-free for each child whose parents were eligible for family allowance.
- School meal contribution – Children attending pre-school and receiving regular child support allowance are eligible for free meals (usually three times a day). Students in grades 1–4 with special educational needs, those chronically ill, students living in families with three or more children, and students receiving regular child protection allowance are eligible for a 50 per cent discount. Further students in this age group may receive State support from a fund worth HUF 1.5 billion (€5.5 million).

<sup>184</sup> Legal training in the framework of the Project “Developing Non-Discriminatory Quality Education for Roma Children” was implemented by the European Trade Union Committee for Education (ETUCE). See the ETUCE website at [http://www.etcue.homestead.com/ETUCE\\_en.html](http://www.etcue.homestead.com/ETUCE_en.html).

<sup>185</sup> Dóra Varga, “Segítség az iskolakezdéshez” (Help to Start School), *Népszabadság*, 25 August 2005, available at <http://www.nol.hu/cikk/374765/> (accessed on 24 February 2007).

<sup>186</sup> Note that since 1 January 2006 this allowance has been built into family allowance and regular child protection benefit, as a new form of supplementary support that can be requested to cover various school-related expenses.

- Family allowance at the start of the school year (*Tanévkezdési családi pótlék*) – See Table 14.

**Table 14: Levels of family allowance (2005)**

	Level of allowance (HUF/child/month)	
	Family	Single parent
One child	5,100	6,000
Two children	6,200	7,200
Three or more children	7,800	8,400
Permanently ill child or child with special educational needs	13,900	15,700

Source: *Népszabadság*, 25 August 2005.

Pursuant to amendments in 2005, as of 1 January 2006 a regular child protection allowance has formed part of the family allowance, and those eligible can now request from village and town notaries a regular child protection benefit (*rendszeres gyermekvédelmi kedvezmény*). This HUF 5,000 (€18) benefit was first paid in May 2006, as a rule to parents if the average income in the family does not exceed the amount of an old age pension. More favourable rules apply to more vulnerable groups.<sup>187</sup> Students receiving this benefit are also eligible for tuition and dormitory fee support. The Integration Commissioner reports that in many instances Roma parents are not aware of their eligibility for such benefits and that therefore they do not apply for this type of social support.<sup>188</sup>

As data are not available for Roma households, it is difficult to determine whether the incidental costs of school represent a barrier to education. It has, however, been reported that in some instances buying shoes and clothes for Roma children attending school poses a problem. According to the most recent data provided by the Central Statistical Office, the value and volume of current consumption expenditure for education, culture, recreation and entertainment show the following pattern:

<sup>187</sup> Art. 19 of Act No. 31 of 1997 on Child Protection.

<sup>188</sup> Interview with Gábor Daróczi.

**Table 15: Per capita expenditure on education, culture, recreation and entertainment**

Current consumption expenditure on education, culture, recreation	Year (first half)		
	2003	2004	2005
<i>Per capita</i> (HUF/month)	2,883	3,035	3,372
<i>Per capita</i> volume indices (per cent)	115,2	97,6	106,2

Source: Central Statistical Office 2005.

Having a child diagnosed as chronically ill or having special educational needs opens the door for a wide range of support. The more severe the diagnosis of disability, the higher the amount of State support. Children with more than a slight level of disability, however, attend special boarding schools and receive State support within the school. The Integration Commissioner has asserted that it is not monetary incentives that play a role in Roma parental choices but disincentives, such as pressure or mild threats from local officials who have a vested interest in maintaining special classes. He is of the view that normative support coming from the State for special education is often spent on education in the normal classes of the same primary school.<sup>189</sup>

In Csököly, education does not impose a serious financial burden on low-income families, as the State and municipal support for socially disadvantaged children alleviate most costs. All the children in the local pre-school and most of the pupils at the primary school are, to some extent or fully, given meal subsidies at school. Out of 184 students, there are only ten children whose parents pay the total cost of school meals, HUF 5,600–6,200 (€21–23) per person a month. None of the families pays for schoolbooks, because according to the law most of them are entitled to them for free. The municipal government undertakes the others' costs. The school also pays for the 49 pupils who attend school from other settlements. The cost of school excursions is also built into the budget of the school, although junior school trips are on a voluntary basis, so the parents pay these costs. In planning extracurricular activities, the school takes into account the restricted financial situation of families and carries out these excursions with great invention and minimal costs. One of the teachers reported personally buying some school equipment or clothes for a child in need.<sup>190</sup>

Corruption in the pre-school enrolment process is not officially reported, but in professional circles it is held to be rife and reinforced by the freedom to choose among schools. Rumours about practices of the virtual bribing of heads of classes in primary schools and sometimes in pre-schools by parents wishing to secure a better educational position for their children are quite common. Teachers in pre-schools play a pivotal role in shaping children's educational career regardless of whether the child has special

<sup>189</sup> Interview with Gábor Daróczy.

<sup>190</sup> Case study Csököly.

educational needs, behavioural problems, or indeed a disability. At the same time, as Kertesi argues in relation to primary schools, the freedom of choice is counterproductive to any attempt at providing equal opportunities and chances in education. Havas and Liskó's work from 2004 concludes that the freedom of choice strengthens segregation. Still, the majority of policy-makers do not question this cornerstone of educational liberalism. This conclusion is corroborated by findings from the REI *Hungary Final Evaluation Report*.<sup>191</sup>

An ongoing court case (see section 3.8) illustrates current conflicts over private schooling. Early in 2002, the local government in Jászládány decided to rent out a part of one of its three school buildings to a foundation that wished to launch a private school.<sup>192</sup> The express objective of the private school's establishment was to bring home approximately 70 pupils who lived in Jászládány but attended school elsewhere. Although in theory the private school was open to all, the HUF 3,000 (€11) tuition fee was clearly beyond the capacity of almost all the Roma families in Jászládány. The building rented out to the foundation was the most modern one in which the Jászládány public primary school had operated. Its gym was given over to the exclusive use of the private school, so that public school students who attended the other half of the same building had to walk about a kilometre to the other gym located in one of the older buildings. The rent more or less equalled overhead costs (gas, electricity, water), which the local government had undertaken to pay.<sup>193</sup>

#### 4.4 Residential segregation/Geographical isolation

In February and March 2003 Kemény and Janky conducted representative research based on ethnicity data from the 2001 national census, covering 5,408 people in 1,165 residences (including houses, buildings, and other dwellings).<sup>194</sup> They found that residential segregation is rapidly growing. As shown below, in Table 15, in 23.4 per cent of Roma households included in the survey the immediate neighbourhood was solely Roma, while in 31.8 per cent of households the great majority of neighbours were Roma (while these two categories together amounted to 30 per cent in 1993). Roma and non-Roma live mixed in 22.3 per cent of households (as opposed to 29 per cent in 1993), the majority of neighbours are Roma in 17.2 per

<sup>191</sup> REI *Hungary Final Evaluation Report*, available on the REI website at <http://www.osi.hu/esp/rei> (accessed on 24 February 2007).

<sup>192</sup> The case is described on the basis of the Minorities Commissioner's account. See Parliamentary Commissioner for the Rights of National and Ethnic Minorities (NEKH), *Annual Report 2002*, Budapest: NEKH, 2002, available in English on the NEKH website at <http://www.obh.hu/nekh/en/reports/reports.htm> (accessed on 1 March 2007), pp. 296–303.

<sup>193</sup> Reported on the OKI website at <http://www.oki.hu/oldal.php?tipus=cikk&kod=eselyaz-kadar-legislative> (accessed on 12 March 2007).

<sup>194</sup> István Kemény and Béla Janky, 2003, *Települési és lakásvizonyok* (Residential Conditions) book chapter available online at <http://beszelo.c3.hu/04/04/13kemeny.htm> (accessed on 24 February 2007) (hereafter, Kemény and Janky, *Residential Conditions*).



cent of households (29 per cent in 1993), and other Roma do not live in the neighbourhood in 4.9 per cent of households (9 per cent in 1993).

**Table 16: Degree of residential segregation (2003)**

Type of location (ethnic mix)	Degree of residential segregation (per cent)			
	Village	Town	Budapest	Total
Roma only	24.0	25.5	6.7	23.4
Great majority Roma	31.9	33.6	23.3	31.8
Mixed	24.5	19.0	29.2	22.3
Majority not Roma	13.2	15.8	39.3	17.2
No Roma	5.4	5.2	1.7	4.9
Cannot tell	–	0.5	–	0.3
<b>Total</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

Source: Kemény and Janky, 2003

Great differences can be found between regions, and segregation is on the rise even in Budapest and Pest County. As shown below, in Table 17, 49.8 per cent of Roma families in the sample live inside the village or town, 41.6 per cent live on the outskirts but adjoined to the village or town, and 6.3 per cent live in settlements away from the village. However, almost 50 per cent of those living inside the village or town are greatly separated from the majority. In total, therefore, 72 per cent of the Roma families in the sample lived in segregated conditions.

**Table 17: Location of Roma households (2003)**

Location of households	Share of household, per location (per cent)			
	Village	Town	Budapest	Total
Inside	40.5	46.8	100	49.8
Outskirts	54.7	39.7	–	41.6
Outside but not in settlement	3.0	1.6	–	2.0
Settlement	1.7	11.3	–	6.3
Other	–	0.7	–	0.3
<b>Total</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

Source: Kemény and Janky, 2003

Kemény and Janky recall that in 1971 – at the time of the first nationwide Roma research – 66 per cent of Roma lived in settlements with strong segregation. By 1993 this type of segregation had decreased, but in 2003 proportions of segregation are again at the level experienced in 1971. The only difference discernable is the form of segregation, as settlements are far fewer.

Kemény and Janky found that only a small minority, 6.3 per cent, of Roma (36,000 people) live in isolated settlements (see Table 18). Such settlements can be found in Békés, Borsod-Abaúj-Zemplén, Csongrád, Heves, Jász-Nagykun-Szolnok and Nógrád Counties. Approximately 10 per cent of the Roma population lives in settlements in the eastern and northern parts of the country, as well as on the Great Plain. In Budapest, 30 per cent of Roma live in Roma-only buildings or in buildings where the great majority are Roma. In Budapest, those living in mixed neighbourhoods comprise 30 per cent of the Roma population, while 39.3 per cent of Roma live in neighbourhoods where Roma are not the majority. More than half the Roma living in rural areas (60 per cent) live in village outskirts or away from the village, and 57 per cent of this group has neighbours that are exclusively or majority Roma.

The main reason behind segregation is poverty and unemployment,<sup>195</sup> still around 15–20 per cent in the north, but disproportionately high in various parts of the country with a higher proportion of Roma.<sup>196</sup> Segregation was also compounded by the meticulous separation of Roma during the construction of flats in social policy programmes and the rehabilitation of certain areas in towns on the basis of hidden cleansing policies.<sup>197</sup>

In the 2004 school segregation survey Havas and Liskó looked into the housing conditions of Roma children included in the survey. They found that residential segregation was more common than the average rate in medium-sized towns (in 78.9 per cent of cases), and in villages in the south of the Great Plain (75.8 per cent) and in the northern region (72.8 per cent). 499 districts densely populated by Roma were found in 353 villages and towns.<sup>198</sup> Of these settlements, 36 per cent were situated inside the borders of villages and towns, 58 per cent on the outskirts, and 6 per cent beyond these borders. In half of these settlements some residents lived in huts and in 14 per cent of them the number of huts was relatively large. In 30 per cent of these settlements roads did seem to be in satisfactory condition and in 38 per cent there were only dirt roads. As shown below in Table 18, in 8 per cent of the segregated settlements there was no running water, in 63 per cent there was no sewage system, and in 36 per cent there were no gas pipes.

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<sup>195</sup> Kemény and Janky, *Residential Conditions*.

<sup>196</sup> Kemény and Janky, *Residential Conditions*.

<sup>197</sup> Kemény and Janky, *Residential Conditions*.

<sup>198</sup> Havas and Liskó, 2004, p. 30.

**Table 18: Infrastructure in settlements densely populated by Roma (2004)**

Infrastructure	Availability of infrastructure in the settlements (per cent)				
	None of the buildings	In public places	In some of the buildings	In every building	Total
Water pipes	8.3	17.6	57.0	17.0	99.9
Sewage	63.3	12.2	18.2	25.9	119.6
Gas pipes	35.8	17.7	40.9	5.5	99.9

Source: Havas and Liskó, 2004<sup>199</sup>

Based on these data, Havas and Liskó concluded that the residential segregation of Roma families did not simply equal ethnicity-based segregation, but that it comprised the spatial separation of the residence of lower social classes.

The European Commission against Racism and Intolerance (ECRI) also draws attention to segregation and poor infrastructure, characteristic for segregated Roma settlements: “Roma in Hungary are in some cases confined to segregated settlements which lack the basic amenities for a decent life, with serious consequences for their health and their capacity to improve their situation in other areas.”<sup>200</sup>

In towns and larger villages – where more schools operate – segregated Roma schools are almost always in the proximity of majority schools, or at least one of the buildings of such schools. The proportion of such schools must be rather great, given in particular the relatively great number of settlements that are densely populated by Roma and situated inside villages and towns.

#### 4.5 School and class placement procedures

The school that a child attends is determined by the child’s place of residence or parent’s place of work; therefore transfer is automatic in these cases, subject to a request and decision by the school director, who can take advice from teachers.<sup>201</sup> Appendix No. 3 PEA provides minimum and maximum student numbers per class (between 21 and 30 in primary schools) and regulates other aspects of transfer. Although entrance examinations are forbidden in the course of admission procedures to primary schools, they are still prevalent.

In small villages, there is only one school and parents therefore see themselves as having no choice but to enrol their child there. Research carried out for this project in Ónod found that parents can select a class teacher, as in each grade there are two classes to

<sup>199</sup> Havas and Liskó, 2004, p. 30.

<sup>200</sup> ECRI, *Third Report on Hungary*, p. 20.

<sup>201</sup> Art. 66 (5) PEA.

choose from. The pre-school and the school organised joint programmes financed by money won at tenders. These programmes included visiting each others' institutions, which proved to be very useful, in the opinion of schoolteachers:

Here parents do not choose a school but a class teacher. If a child in the family was taught by a class teacher, the parents ask her to teach their other child or children. When children come to school from the pre-school they are grouped alphabetically: one half of the children get into one class; the other half will constitute the other one. [...] Acquaintance matters a great deal – “the teacher is my neighbour, a relative” etc. – but I haven't heard any pedagogical arguments from any of the parents choosing a teacher. This may lead to conflicts at school but parents do not care and the colleagues concerned try to handle such situations with intelligence and agree, as there are no other possibilities. The school usually grants parents' requests. Officially they say children are selected in first grade but I have seen pupils in fourth grade; there are two classes in this grade and I can find it difficult to believe they were not selected. They were not selected according to their ethnicity, Roma or non-Roma, but on the basis of sympathy towards a teacher that families or friends show. I think it happens everywhere; maybe it is managed differently, I don't know.<sup>202</sup>

As noted above, parents' right to choose where their child will study can lead to segregation; according to the head teacher in Ónod, there are no segregated classes at the school and they avoid having only one class in a given grade because that would mean that the proportion of disadvantaged pupils would be around 50 per cent.

This is difficult and I wouldn't like to give up parallel classes as it is very difficult to teach in a class where there are 30 pupils, and 50 per cent of them are disadvantaged. Such high numbers are not good for either the children or the teachers. We have to make a compromise. From first to eighth grade there are two classes but these classes are not segregated.<sup>203</sup>

According to the support teacher responsible for individual development in Ónod, the procedures for determining whether a child received specialised support have been rather informal, although official assessment is part of the process:

Development work at our school starts with asking the parents to sign a declaration that they agree to individual development – although I do not find it very sensible. Next year we will formulate the declaration in another way. The head teacher has found some law. I develop the pupils based on the expert opinion and I have to know which child has to be sent for further medical examinations. It is a long process to agree on the development programme. If the class teacher notices some problem with a particular child we discuss it. If we find it necessary we send the child to the Educational Centre where they decide if the child is suspected of having some intellectual disability. If yes, they send him to the Committee for Assessing Learning

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<sup>202</sup> Case study Ónod.

<sup>203</sup> Interview with the school director, case study Ónod.

Abilities and Rehabilitation. The Committee decides if the child can be educated in an integrated or in a segregated way.<sup>204</sup>

According to the president of the Roma Minority Self-Government in Ónod, pupils of Roma origin are more likely to be placed in the special class than their non-Roma peers. In the higher grades (5–8) the president supports catch-up programmes instead of inclusion, in the belief that if Roma pupils who attended a special class in grades 1–4 then transfer to a mainstream class – based on the expert opinion of the Committee – they will not be able to adapt, they will drop behind, and will fail, as the amount of the teaching material is greater in the mainstream class. Some teachers agree, and suggest that students cannot compensate for these disadvantages in the higher grades, and will probably repeat a year or drop out.

Remedial classes – otherwise known as special classes – are established pursuant to Article 30 PEA. Assessment procedures leading to placement in remedial classes are the same as for those preceding placement in special schools.

Primary school teachers may visit pre-schools and inform parents about the possibility of enrolling their children in classes providing extra services such as language classes, or certain subjects taught in a foreign language, or additional arts or other classes. Entrance examinations for such classes usually take place prior to normal enrolment procedures, before most Roma parents take steps to enrol their children. Children who pass the exams can enrol in these classes, whereas other children not diverted to special education may enrol at the date and place given for normal enrolment. It is very common to assign children to classes based on their intellectual abilities. Dissenting parents have a right to complain against assignments under the PEA complaint mechanism, but as Roma parents only rarely make use of the complaint mechanism and generally abide by the decision of teachers, majority children are likely to benefit from the extra curricular courses, whereas Roma children are not.

Children attending pre-school are to be referred for an assessment of their potential intellectual disabilities or behavioural problems by their teachers.<sup>205</sup> Educational counselling services or schools refer children not attending pre-school.<sup>206</sup> There is a special procedure to make parents comply with these proposals. Assessments are then administered by Expert Panels for Assessing Learning Abilities (expert panels).<sup>207</sup> Expert panels have three members: a physician (psychiatrist or neurologist), a psychologist and a special teacher. All three experts shall examine the child and ensure the presence of his or her parent. There have been allegations that often a parental presence is not ensured and assessment procedures are hurried and happen in

<sup>204</sup> Interview with the support teacher responsible for individual development, case study Ónod.

<sup>205</sup> Art. 15 (5) of Ministerial Decree No. 11/1994 (VI.8) MKM on the Operation of Educational Institutions.

<sup>206</sup> Art. 22 (5) of Decree No. 11/1994.

<sup>207</sup> Art. 65 (2) PEA.

unfortunate conditions – after long hours of travelling, little sleep and distracting noises.<sup>208</sup> Furthermore, the panels are overburdened, and inconsistencies in their assessments are reported.<sup>209</sup> Various sources allege that expert panels also misdiagnose children because of panel members' lacking proficiency in Beash/Romanes.<sup>210</sup>

In lieu of standardised tests, expert panels are at liberty to choose the psychological tests and pedagogical as well as medical methods through which they establish the intellectual abilities of children. Thus, even though above a certain IQ level children should be transferred, establishing this IQ level is very controversial. Expert panels also use evaluations of social skills, capacity for self-determination and general behaviour. They follow international standards, such as ICD-10.<sup>211</sup>

The Ec Pec Foundation, which implements the Open Society Institute's "Step-by-Step" Programme<sup>212</sup> as part of a desegregation project under the Roma Education Initiative (REI), managed the cooperation of different pedagogical expert committees from all around the country with the aim of creating less biased and culturally neutral assessment tools with which to test children. The Ec Pec Foundation lobbied the Hungarian Government to create better assessment instruments to decrease the misdiagnosis of Roma students. As part of a sub-project,

four culturally independent measurement tools were developed by the No. 3 Pedagogic Expert Committee of Budapest and other expert committees from Hungary. These tools were used [...] to measure students involved in the project, moreover we intend to standardise and adapt them in cooperation with the [Ministry of Education and Culture].<sup>213</sup>

Children may transfer from a special class to a mainstream one subject to a reassessment procedure by an expert panel that parents can request any time under Article 12 (2) of Decree No. 14/1994. Subject to a reassessment procedure, children may also transfer from a special school to a mainstream one.

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<sup>208</sup> EUMAP *Report on Access to Education and Employment for People with Intellectual Disabilities in Hungary*, SOI, Budapest, 2005, available at <http://www.eumap.org/reports/intdis> (accessed on 24 February 2007) (hereafter, EUMAP, *Report on People with Intellectual Disabilities in Hungary*), p. 59.

<sup>209</sup> EUMAP, *Report on People with Intellectual Disabilities in Hungary*, p. 59.

<sup>210</sup> While interviewed, Béla Berkes alleged that children from Bag village had been misdiagnosed. Gábor Bernáth, a colleague of sulíNova, interviewed on 7 March 2006, alleged that children from Pátka village had also been misdiagnosed. Gábor Sárközi, a colleague of the Commissioner, interviewed on 8 March 2006, also alleged that children in Pest County and Borsod-Abaúj-Zemplén County had also been misdiagnosed.

<sup>211</sup> EUMAP, *Report on People with Intellectual Disabilities in Hungary*, p. 58.

<sup>212</sup> "Step-by-Step" is an education reform programme that introduces child-centred teaching methods and supports community and family involvement in pre-school and primary school. Further details are available at [http://www.soros.org/initiatives/children/focus\\_areas/a\\_step](http://www.soros.org/initiatives/children/focus_areas/a_step) (accessed on 24 February 2007).

<sup>213</sup> REI, *Final Report Hungary*, forthcoming.

Reassessment procedures should be regularly carried out every two years up to age 12, thereafter every three years,<sup>214</sup> and can be carried out more frequently on parental request. However, certain expert panels are overworked and cannot keep up with such requirements. There may be problems with delays in the activities of other actors liable for making sure that a child turns up for reassessment, namely that of the notary, who has the duty to send out reminders, and parents, who may not have the financial means to travel to where the expert panel is situated.<sup>215</sup>

However, the president of the Roma Minority Self-Government in Ónod supports the idea that the medical examination should be repeated in the lower grades (1–4) and based on favourable expert opinions pupils could continue their studies in mainstream classes.

A child got into the pre-school at the age of five. He/she did not know [what] storybooks [were]; the parents did not have money they could spend on books. The child got into school, his/her abilities were examined and s/he was placed into a special class. It was a very bad decision to transfer him/her to an ordinary class in grade 7. It is not easy to involve these children in education. They experience failures. They need catch-up programmes as they used different textbooks in the special class. Due to the failures they drop out at the end of grade 7 or in grade 8. The abilities of these children should have been reexamined in grade 2 or 3 when they could have been integrated into the ordinary class more easily. But in the higher grades there are gaps as they learned a different material. There are children who attended a special school [for pupils with mild intellectual disabilities] for eight years and they could not continue their studies in secondary schools or at the end of the first year of secondary school they failed and dropped out.<sup>216</sup>

Appeals can be filed with the notary.<sup>217</sup> Appeals lead to reassessment<sup>218</sup> and decisions are subject to judicial review under the general provisions of administrative procedures. Appeals are uncommon, most likely due to a lack of information regarding the possibility; local authorities can send a child to a particular school against the wishes of the parents in any case.<sup>219</sup>

<sup>214</sup> Art. 20 (4) of Decree No. 14/1994.

<sup>215</sup> See Ágnes Torda, A Borsod-Abauj-Zemplén, *Megyei Pedagógiai Szakmai és Szakszolgálati Intézet keretei között működő Megyei Tanulási Képességet Vizsgáló Szakértői és Rehabilitációs Bizottság szakmai tevékenységének elemzése* (Analysis of the Professional Activities of the County Rehabilitation and Expert Committee Examining Educational Competences Functioning under the Auspices of the Borsod-Abauj-Zemplén County Pedagogical Institute), 14 August–16 September 2003, unpublished.

<sup>216</sup> Interview with the President of the Roma Minority Self-Government, case study Onod.

<sup>217</sup> Art. 15 (1) of Decree No. 14/1994.

<sup>218</sup> Art. 21 (2) of Decree No. 14/1994.

<sup>219</sup> EUMAP, *Report on People with Intellectual Disabilities in Hungary*, p. 62.

There are no statistics maintained on transfers between segregated classes, from remedial classes, or from special schools to the mainstream. In the framework of the programme “Out of the Back Row” 11 per cent of children with mild intellectual disabilities examined in the course of the regular revisions were recommended to be placed back into mainstream schools in the 2003–2004 school year.<sup>220</sup> However, there are rumours that in the majority of these cases re-placements did not take place.<sup>221</sup> The Ministry has released no actual data on the number of placements, or on the status of the children who were recommended for transfer to mainstream schools.

Research conducted for this report in Tiszabura revealed an approach to class placement that relied primarily on factors other than ethnicity, with the result that, while Roma and non-Roma are mixed, attitudes remain sharply divided. In pre-school, one class was fully Roma, while the other formed a mixed group in which non-Roma children and supposedly children of more well-to-do Roma parents studied together. These same groups were continued at both the junior and the upper school: one class followed a standard curriculum; the other was considered a catch-up class, according to school staff:

There were non-Roma in our catch-up classes too; as they also appear in the special curriculum classes now, so when the previous leaders of this school established these classes they indeed tried to select on the grounds of abilities.

Generally the B [class] used to be the worse and the proportion of Roma was higher but it is not true now; because there are so many of them now, it would be impossible to establish a separate class for them.<sup>222</sup>

The educational work was also different in the two classes:

The pace was slower in the other class. I’d rather put it this way: there [in the weaker class] work was slower; they had to use different methods or they had to explain everything many times, giving more material ready-made to the students. Here [in the better class] there is an opportunity for more individual work, or the student could prepare and practise at home, I don’t really know, in some subjects, that was the difference.<sup>223</sup>

The two classes, or the “A and B classes”, were differentiated first on a social basis, and then the process was further “assisted” by the teachers’ approach:

[In the A class] a maximum 20–30 per cent of children were Roma. I still attended a group; the seventh and eighth grade was one group, and those who performed better got into a separate group. But this was not perfect either, because – for example – I wasn’t really good at maths but I went to

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<sup>220</sup> Information from Gábor Daróczy.

<sup>221</sup> Information received on 10 March 2006 from Viktória Mohácsi MEP, Integration Commissioner 2002–2004.

<sup>222</sup> Interview with a teacher, case study Tiszabura.

<sup>223</sup> Interview with a teacher, case study Tiszabura.



the better group, so it caused me plenty of difficulties. Those who performed better went to the good group, those who did worse to the other.<sup>224</sup>

Children's careers at the local school demonstrate how social discrepancies evolve into differences in personal abilities – all assisted by the school:

Say 15 or 16 years ago [...] a class of 20 pupils contained 14 Hungarian children and six Roma. But interestingly enough, those six children were not chosen because they were brighter but back in the pre-school the nurses had already put those six, who were cleaner, next to the Hungarians. These Roma children very often fought their way to the mid-field of the class by the end of school, which means that they overtook Hungarian children of weaker abilities. At the same time, just because someone was dirty or louserridden, the nurse put them in the worse group and they stayed together; not all of the students with good abilities from there could fully utilise what they had, because learning was not a fashion there.<sup>225</sup>

The A and B classes diverged from both social and ethnic aspects, and the complexity was further increased by the children's own abilities, but to what extent, opinions vary again. What is certain is that most interviewees said that the B class was always considered as the worse of the two.

Since becoming an integration base school in 2004, the school has made changes to its placement system, which appears to be having an impact:

I can say that last year we really had problems in making the first and fifth years' students meet these requirements. We had to use questionnaires to select among pre-school exiters, so the parents agreed to their data being used, indicating their school graduations, and how they get child support, so we created the first classes on these grounds and formed three fifth grades out of the fourth years. We also had to pay attention not to have A, B and C classes, because the C first class had a catch-up year and the catch-up class had always been indicated with letter C. So then we used colours in the first and fifth year calling them red, blue and green groups. That's how I thought, but I knew it was all the same whether we indicate a class with A and B or colours. This year, in the 2004–2005 year, I had a much easier job, because it was now obvious for the pre-school that we were an integration school and we even shaped the pre-school groups so that we could take them, because they met the requirements.<sup>226</sup>

The *Decade Action Plan* does address the issue of misplacement of children in special schools with one target, "reintegration and questioning of children previously diagnosed with intellectual disabilities into mainstream classes".<sup>227</sup>

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<sup>224</sup> Interview, case study Tiszabura.

<sup>225</sup> Interview with a teacher, case study Tiszabura.

<sup>226</sup> Interview with a teacher, case study Tiszabura.

<sup>227</sup> *Decade Action Plan* target 3.

## 4.6 Language

In general, 90 per cent of students receiving national minority education learn the minority language in simple language classes. For Romanes, however, in 2003 the National Public Education Evaluation and Examination Centre (OKÉV) found altogether three schools in which Romanes and Beash were taught to Roma children. For 2004–2005, the Ministry reported that Romanes and/or Beash were taught to 274 children in pre-school, 1,014 in primary school and 299 in grammar school education. This compares to 14,753, 46,722 and 2,133 pupils respectively for German as a minority language. Curiously, 15,637 pre-school, 31,503 primary level and 299 grammar school students received Roma minority education.<sup>228</sup>

Clearly, ethnic minority education for Roma does not automatically entail minority language education, which might be explained by the proportion of Hungarian-speaking Roma in the country. However, there are alarming reports, such as that from Bag village in Pest County, that even if Roma children speak Romanes, they are not educated in their mother tongue; furthermore, they might suffer disadvantages through placement in special education.<sup>229</sup>

Teachers in Csököly report that there is no language problem for the Roma children, since the language difficulties are already addressed in pre-school or in the first years of school at the latest. The majority of the parents, who usually speak Romanes among themselves, make a point of communicating with their children in Hungarian when they start school. Bilingualism mirrors the mobility efforts of the parents and their recognition that language competency has a key role in later prosperity. However, a great number of the Roma children now only understand Romanes and cannot speak the language very fluently.<sup>230</sup> In Ónod, however, a common problem with Roma pupils is the lack of vocabulary. Teachers believe that the vocabulary can be developed and that with the help of parents the disadvantage experienced in this field in the first grade can be overcome.<sup>231</sup>

The teachers' remarks with regard to the children's use of Romanes in Csököly indicate that – functionally – they only see this as a jargon of the students' subculture, and they do not see the difference between their and the children's mother tongues as a negative factor in their connection with Roma children.

Many people understand, because at home they still often speak, and they mostly like the swearing part of it. Because they know that we usually don't understand, because very few of us teachers speak Gypsy. And from this point of view it would be a good thing to do; it would be good to understand what they say. But it rarely occurs that they become very loose-

<sup>228</sup> MoE, *Statistical Yearbook 2004/05*, pp. 27 and 29.

<sup>229</sup> Information received from Béla Berkes, a monitor with the Ministry of Education and Culture.

<sup>230</sup> Case study Csököly.

<sup>231</sup> Case study Ónod.

tongued during classes. Maybe during the breaks; then sometimes it happens.<sup>232</sup>

At the same time, a director in Csököly who speaks Beash at the upper level sees that the mother tongue and culture of the Roma children contribute to the establishment of a tighter connection with the children and their families.

A further concern regarding minority education for Roma originated from certain legal provisions. Similarly to the Minorities Act (MA),<sup>233</sup> the Ministerial Decree on National and Ethnic Minority Education,<sup>234</sup> until its amendment in 2002, conflated ethnic minority education for Roma with catch-up education, on account of social disadvantages. The provision of Roma minority education thus often resulted in *de facto* segregation. Amendments to the PEA in 2003 strengthened the right of minority self-governments to control the outcome of minority education. Their consent is needed for the approval of pedagogical programmes and so on, and if it is withheld then an expert body shall be established with the power to review the content of minority education.<sup>235</sup> Still today, Roma minority education, especially in the north of the country (in 17 per cent of all schools in the region) has been used as a pretext to not teach a contemporary foreign language.<sup>236</sup>

In 2002–2003 the National Public Education Evaluation and Examination Centre (OKÉV) investigated schools administering Roma minority education. Out of the 327 schools reviewed, only three taught Romanes or Beash. Given, however, that the investigation did not focus on the details of Romanes teaching, it could not clarify whether a lack of need, the low number of teachers proficient in the minority language, or both served as root causes for such a low figure. Nevertheless, OKÉV noted that only two out of the three institutions taught Romanes or Beash in compliance with the relevant legal regulations.<sup>237</sup>

Roma minority education is only seldom provided in Romanes or Beash, even to Roma children whose mother tongue is not Hungarian. By contrast, far more schools provide German – the language of the second-most sizeable minority in the country – not only in pre-school and primary school education, but also for secondary schooling. Anecdotal evidence suggests that in many instances additional lessons are provided from the basic curriculum under the pretext of Roma minority education.

<sup>232</sup> Interview with a teacher, case study Csököly.

<sup>233</sup> Art. 45 (2) MA.

<sup>234</sup> No. 32/1997 (XI.5) MKM.

<sup>235</sup> Art. 102 (11) and (12) PEA.

<sup>236</sup> Information from Gábor Daróczy.

<sup>237</sup> OKÉV, *Jelentés a cigány kisebbségi oktatást folytató intézmények tanügy-igazgatási tevékenységének és működésük szakmai feltételrendszerének ellenőrzéséről* (Report about the Review of Administration and Professional Operational Conditions of Schools Providing Roma Minority Education), Budapest: OKÉV, 2003 (hereafter, OKÉV Report 2003), pp. 39–40.

Prior to amendments in 2002, minority education was used as a method of segregation for which schools could even obtain additional State funds. In April 2002, the Parliamentary Commissioner for National and Ethnic Minority Rights (Minorities Commissioner) declared that the segregation of Roma students at a primary school in Verpelét in Heves County in north-eastern Hungary was unlawful, and that students were subjected to discrimination as a result of the school's practices. The Commissioner's office found that Roma pupils were educated in separate classes from the first grade on, without the express request or consent of their parents. On 24 February 2002 the Hungarian national daily newspaper *Népszava* reported that the Commissioner had also noted that the school had been unlawfully applying for and receiving "supplementary ethnic funding".<sup>238</sup>

In October 2001 in an unprecedented decision, the State Audit Office found that the primary school in Bogács in north-eastern Hungary had inappropriately spent Government funds intended for minority educational and catch-up programmes. As a result of the finding, the school's subsidy for the provision of minority education was withdrawn because it was unable to prove that such a programme existed. The decision of the State Audit Office follows an investigation commenced in February 2001, at the request of the Ministry of Education and Culture, by the National Public Education, Evaluation and Examination Centre.<sup>239</sup>

In 2001, Ernő Kadét explained why the system of Roma minority education had to be amended:

The [supplementary ethnic] allocation is intended to be spent primarily on bringing Romani children up to the educational level of the majority via so-called 'catch up programmes', and on programmes to raise Romani children's awareness of their cultural identity. Some schools have already received their share of the total HUF 1.7 billion (approximately €6.6 million), but in the case of many schools, the sums are doomed to be lost in budgetary deals at the local council level, in which the local councils simply deduct from their contribution the same amount as the schools receive in subsidy. Moreover, many educational experts believe that, in many cases, these funds contribute to the segregation of Romani children, and ultimately to a lower standard of education for Romani pupils. [In 2000 Kemény, Havas, and Liskó's] research confirmed experts' earlier opinions.<sup>240</sup>

<sup>238</sup> Roma Press Center, "Ombudsman Finds Discrimination against Roma in Education in Hungary", web article, available on the ERRC website at <http://www.errc.org/cikk.php?cikk=921&archiv=1> (accessed on 27 February 2007) (hereafter, Roma Press Center, "Ombudsman Finds Discrimination").

<sup>239</sup> Roma Press Center, "Ombudsman Finds Discrimination".

<sup>240</sup> Ernő Kadét, "Creative Accounting: State Spending on Programmes for Roma in Hungary," web article, available on the ERRC website at <http://www.errc.org/cikk.php?cikk=1748&archiv=1> (accessed on 27 February 2007).

In Csököly in 1998 the primary school director and the teaching staff proposed the establishment of minority education, but due to the strong resistance of the local residents it was not carried through.

When in about 1998 we proposed, or to be more precise I did, I was a deputy and quite simply there had been a revolutionary mood sweeping through the village, that we wanted to make a Gypsy school out of our institution. And to tell the truth it was very hard to live here in those days. And they said that they could bear anything except for this. Because they were going to take out their children.<sup>241</sup>

Despite the fact that the school does not claim available support for Roma minority education, last year a teacher majoring in Romology – who has since left the school – held Roma folk-knowledge classes for the pupils and prepared them for a Roma storytelling contest where the children won second prize with their tale told in Romanes.

According to the director of the primary school in Csököly, the mayor recently proposed to work out an “ethnic minority” programme for the school, and – again after the opposition in 1998 – would try to establish minority education, since the available State *per capita* education funding would add a significant additional resource for the institution.<sup>242</sup>

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<sup>241</sup> Interview with the school director, case study Csököly.

<sup>242</sup> Case study Csököly.

## 5. BARRIERS TO QUALITY EDUCATION

*Reforms aimed at improving the quality of education in Hungary have not reached Roma children to the extent needed. School funding is a particularly contentious issue; various subsidies and forms of support are available to schools that meet specific criteria, but this approach can create incentives for schools to skew data in order to qualify for as many grants as possible. Schools without the necessary experience in applying for these funds may also lose out in this competitive process.*

*The Government cannot track school results for Roma, as records on achievement, disaggregated by ethnicity, are not maintained. A set of indicators, and the collection of data needed to monitor progress in key areas of school performance, should be established to determine in which areas Roma children need more support to succeed academically. Roma children are frequently relegated to classes or schools where teachers acknowledge that they have lower expectations for their students' performance, and curricula with lower standards are used. Teachers may receive training in current student-centred techniques, but in practice often rely on lectures and more traditional methods. The Ministry of Education and Culture should support greater access to in-service training and classroom support so that teachers can continue to develop their skills, particularly when working with Roma students.*

*In smaller villages school–community relations are often informal, but where such day-to-day contacts do not take place, there is little evidence that more structured mechanisms engage Roma parents as needed. Research on discriminatory attitudes indicates that many teachers and school directors harbour negative perceptions of Roma students, but that such attitudes are not overtly expressed, and rather come across in the form of low expectations. In addressing the more direct consequences of such prejudice, such as segregation in special classes or the inclusion of biased material in textbooks, the Ministry of Education and Culture should also focus on these indirect forms of discrimination and take steps to eliminate them in the classroom.*

*School inspections are performed by independent experts commissioned by the local authorities. As these same authorities are ultimately responsible for the school, they may be motivated to select experts predisposed to give the school a good report. The National Public Education Evaluation and Examination Centre (OKÉV) has the authority to sanction schools for discrimination, but the maximum penalty that it can impose is low, and there are examples where its inspectors have failed to note physical segregation in schools under review. Better central overseeing of the inspection system should be a priority in the desegregation process.*

### 5.1 The school financing system

The National Institute on Public Education (OKI) has summarised the characteristics of the financing system of public education as follows.

The financial support for public education is provided primarily by the central budget, with contributions from the revenues of school maintainers, optionally augmented by the contributions and tuition fees paid by students and additional revenues of the schools. The amount of financial support for public education provided by the State is defined by the annual budget.

There are two types of State support for the system of public education: per student capita grant and earmarked subsidies. Local governments automatically receive per student subsidies, whereas they have to apply

individually for earmarked subsidies. Per student formula funding is generally calculated according to the number of students and type of tasks undertaken, and the local governments are free to spend the per student capita grant as they see fit. There is no direct financial link between the educational institution and the central budget, yet local governments may utilise additional resources in financing public education. Local government expenditure on public education exceeds the educational subsidies received from central budget. On a national average, central budget support covers only 50–70 per cent of educational expenditure.

School maintaining local governments and other institutions are also free to decide on their school budgets, with the only restriction that the budget must cover the expenses of compulsory tasks of the school defined in the PEA. Coverage in this case means that the educational institution must have the sufficient resources to pay for the minimum number of lessons whilst providing students with services that they are entitled to free of charge.

Local governments determine the level of expenditure in their yearly budgets, by defining school revenues and the amount of contribution they intend to allocate to school. Given that a school has complied with the budgetary requirements, but its own income fails to cover its expenses, the competent maintainer shall allocate further funds to cover the costs of necessary expenses.

According to the principle of *sectoral neutrality*, the per student capita grant given to school maintainers (other than local governments or the State) may not be less than the amount provided to the local governments. Denominational institutions are further entitled to additional support on the basis of their agreement with the state. Other school maintainers such as private foundations are also entitled to additional support if they have an agreement with the local government to provide for the compulsory public tasks of education.

*Vocational training contribution* is an important independent source paid by economic organisations, partly used directly by these organisations to finance their own practical training, and partly transferred to the national Labour Market Fund. The various training institutions may apply to this Fund for support.<sup>243</sup>

Clearly, however, sectoral neutrality is lacking within the education system. Whereas church schools receive almost double the amount per student from the central budget, this is not the case for local government-run and private foundation schools. There are allegations that private foundation schools may even receive less central budgetary support.<sup>244</sup> Considering, however, that only local government-run schools are subject

<sup>243</sup> OKI, *Education in 2003*, Chapter 3 on Financing Public Education, available in English on the OKI (NIPE) website at <http://www.oki.hu/oldal.php?tipus=cikk&kod=Education2003-Financing> (accessed on 24 February 2007).

<sup>244</sup> Written Comments, András Nyíri, p. 5.

to compulsory enrolment, and that other types of schools can impose tuition fees, sectoral neutrality in practice is highly contentious.

In 2004–2005 HUF 273,558 million (€1,003,759,549) – out of which HUF 205,179 million (€752,830,474) went to tertiary education – was allocated from the central budget and HUF 815,532 million (€2,991,679,061) from local government budgets for public education purposes.

**Table 19: Educational expenditure – as a share of GDP and of the State budget (2000–2004)**

Description of expenditure	Expenditure – as a share of GDP (per cent)				
	2000	2001	2002	2003	2004
Pre-school education	0.71	0.72	0.78	0.85	0.80
Primary, lower and upper secondary education combined	2.71	2.76	3.01	3.32	3.13
Total expenditure on public education (incl. pre-school education)	3.41	3.48	3.79	4.17	3.93
Higher education	1.09	1.05	1.05	1.12	1.01
Other education <sup>1</sup>	0.21	0.20	0.21	0.23	0.22
Other expenditure related to education <sup>2</sup>	0.40	0.47	0.52	0.25	0.22
Total educational expenditure	5.11	5.19	5.57	5.77	5.39
	Expenditure – as a share of the State budget (per cent)				
	2000	2001	2002	2003	2004
<b>Total public expenditure on education</b>	11.13	11.39	10.98	12.29	N/A

Source: MoE<sup>245</sup>

Reviewing the distribution of educational expenditure up until 2001, OKI observed two continuous trends. First, after 1997, the growth rate for expenditure on goods and services consumed (real costs) fell below that for personnel expenditures (compensation for all staff), one of the reasons being the fact that central wage provisions resulted in the growth of payments, to the detriment of real costs. Second, the rate of capital expenditure stayed low throughout the 1990s – this rate was approximately five per

<sup>245</sup> MoE, *Educational Yearbook 2004/2005*.



cent, all levels of public education included (pre-primary, primary, lower and upper secondary education).

Funds are allocated per pupil – the amounts being dependent on the grades attended – and per specific activity that the school chooses to undertake, such as competence development or art classes. Misuse of funds has been reported concerning funds directly or indirectly relating to Roma, previously the Roma minority education allowance and most controversially of all, the special education allowance.<sup>246</sup>

Funds are transferred from the central budget by the Ministry of the Interior to school maintainers. As there are no effective control mechanisms, maintainers that run more than one school – typically local governments – are free to further allocate funds among schools at will; it is even possible that they allocate education funds for entirely different purposes. In reality, however, while a small village's school runs almost entirely on State funds, larger towns add substantial amounts from their local budget to school budgets. The local allocation of funds is subject to local decision-making processes. Schools that have closer links with local decision-makers – or indeed where teachers are local decision-makers – and schools that are seen to serve local priorities – such as an art or elite school as opposed to an ordinary or segregated Roma school – might fare better in the process.

Local research carried out in the framework of this project addressed the question of school funding. In Tiszabura, the school's application to be part of the integration network was part of a larger pattern of funding through grants:

Because Tiszabura – where we are now – is a settlement heavily stricken by unemployment, and the municipal government, even with their best will, fails to provide the school's education with the support that we want, consequently since 1995 we have made every effort to grab available grant opportunities and further develop our work from these supports, these innovative grants, etc. We often have problems with maintaining our present activities as well.<sup>247</sup>

In Csököly, a school director indicated that the municipal government supported the school in seeking access to the highest possible level of State support, as this reduced the expenditures from municipal funds. For example, the municipal government had no objections when the school applied for the complementary State support aiming to implement the integrated education of socially disadvantaged and Roma pupils.

And if he [the mayor] wants to spend money on other projects, roads, channels or whatever, civil centre or this or that, he can only do that if he lets the institution work and do educational work that would get a higher normative support and consequently will allow him to reduce the local government's own contribution. In this respect he is clever enough, in my opinion. And this has a very rational financial aspect from the local

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<sup>246</sup> OKI, *Education in 2003*, Chapter 3.

<sup>247</sup> Interview with a teacher, case study Tiszabura.

government's side. This is not theory, not faith, not enthusiasm but plain economy.<sup>248</sup>

Such grants are increasingly important, and the process has become more and more competitive, with the result that schools lacking an able grant coordinator stand to lose out.

According to the director of the Csököly primary school, the school is at a disadvantage in terms of their access to grant applications for many reasons. One of the obstacles is the fact that since Csököly is located in a region that is not classified as underprivileged they are automatically excluded from a significant number of grant opportunities. Another difficulty is the fact that the staff members of the school do not have the special qualifications, experience and time necessary to write successful applications, and the institution cannot afford to hire a professional consultant. Furthermore, the director indicated that most of the grants are repeatedly given to the same "privileged" schools and that accessing these grant opportunities without personal connections is impossible:

[...] you have to find the people who can indeed help you to win these grants. Because we know that it works like that. I mentioned that Phare grant in which we had a strong belief, the 60 million one, which would have been very good for us, and I really think that we deserved it anyway, and it passed all the evaluation processes. There were no formal, content or any other sort of mistakes in it. Indeed there was a lot of work in it. We didn't win. [...] everybody knows that if you don't have that kind of help somewhere above there, then in these types of million-forint grants the institutions have minimal chances of winning.<sup>249</sup>

The school has had other successful applications, however. The complementary language therapist is paid from the Somogy County Public Foundation's language therapy grant, which they are awarded from year to year. The school is constantly applying for grants accessible for individual disadvantaged and Roma children previously from the Soros Foundation, now the Public Foundation for Hungarian Roma and within the "Road Pack" Programme. At present, there are many grantees who attend the school.<sup>250</sup>

One of the leaders of the Tiszabura primary school's partner institution in the small region reported that they were unable to access certain funds because their school was almost exclusively Roma.

[Former Education Commissioner] Viktória Mohácsi was talking about integrated education when it was just a proposed legislative amendment. Then the story was that only those schools can apply for the normative support that have the proportion of Roma and disadvantaged children under

<sup>248</sup> Interview with school director, case study Csököly.

<sup>249</sup> Interview with school director, case study Csököly.

<sup>250</sup> Case study Csököly.

50 per cent. So the idea started with this 50 per cent, and the real number is pretty high and even there I said it wouldn't work out. And besides that I told it in words too; we wrote a letter to Viktória Mohácsi [...] that this proposal was wrong because precisely those schools that undertake Roma children and are in this situation through no fault of their own would not be able to apply for that normative support. And I had some 30–40 schoolteachers who signed this letter. [...] We didn't make suggestions to the percentage of the quota, [...] since we have 100 per cent [Roma enrolment]. And finally I can say that we dug this out for others but we still don't have the chance.<sup>251</sup>

In Ónod, the main sources of maintaining the schools are per-pupil State grants and grants for integration and improvement. The head teacher says that they decide together with the mayor which additional per-pupil grant they apply for:

When applying for the additional per-pupil grants, filling in the application forms of the Hungarian State Treasury, we agree with the local government on which grant to apply for, based on what programmes we can run at school and what we can document.<sup>252</sup>

Research conducted for this report in Ónod, found that school staff aim to supplement the per-pupil grants with subsidies awarded at competitions, and therefore they apply when there is an opportunity. Awareness of these programmes for regular support for Roma pupils is good, and there is also a Learning Centre (*Tanoda*, see section 5.2).

Similar research in Tiszabura suggests that the integration normative has become a tool that the school management is trying to use – provided that its internal mechanisms need not change too drastically. As a result of its restricted financial resources, the school constantly applies for external grants and struggles to meet their formal requirements in the first place, not always to the betterment of the school or its students.<sup>253</sup> Schools may be encouraged to misrepresent their situation to better fit grant conditions, rather than focusing on those programmes that best fit their communities' needs.

There are no provisions for local tax-based financing. However, the better off a local government is, the greater its share in school financing is. In larger towns the estimated share of local government spending is 30–40 per cent. Teachers are public employees and are therefore paid from the central budget, although in certain instances they are repeatedly employed on a short-term (one year and renewed) contract.

Certain funds for school maintenance and utilities are available on a project basis from the Ministry of Education and Culture. Central budgetary support is also available on a project basis, such as funding to obtain computers. Between 2000 and 2004 expenditure

<sup>251</sup> Interview with a leader of the Tiszabura elementary school's partner institution in the small region, case study Tiszabura.

<sup>252</sup> Interview with headmistress, case study Ónod.

<sup>253</sup> Case study Tiszabura.

on investment, as a proportion of total educational expenditures, showed the following trend: 6.7 per cent, 7.1 per cent, 7.6 per cent, 5.5 per cent and 4.4 per cent.

Parents are generally responsible for school manuals, educational materials, school supplies and a daily meal. Free schoolbooks are available in limited numbers, and socially disadvantaged children are eligible for State support to buy manuals, books and educational materials, as well as to have a free meal. Certain local governments have been reported to retain the costs of school meals and transfer them straight to schools from child protection allowances paid to parents.

Travel to school outside the permanent residence is covered from the central budget.

Although financing systems and mechanisms are in place to support disadvantaged students, and these appear to be appropriate on the policy level, they often get abused on the local level. First, schools apply for normative support, which often is not used to support that for which it was intended. Due to the way in which school financing is set up on the national level, schools are in a way forced to do this to be able to cover all of their expenses. So there is misuse of funds. Second, schools that are really in need of such funds lose out, either due to their lack of human capacity to apply for grants or because they do not have the correct statistical ethnic make-up in their schools.

In contrast, participants at an EUMAP roundtable discussion organised in Budapest in October 2006 emphasised the point that schools are not doing their job, and that ongoing central monitoring is needed, both issues that must be remedied regardless of funding constraints. An expert present at the meeting critiqued schools and local governments, noting that there were only a couple of dozen schools in which geographical reasons could explain segregation. The expert recalled that under National Development Plan I, 50 towns and villages were invited to apply for a fund worth HUF 50 million (€185,185) for desegregation. Six applications arrived and only two met the eligibility criteria.<sup>254</sup>

Another expert emphasised the point that the Hungarian Government had no say in the use by beneficiaries of EU funds, whereas another viewpoint expressed criticised the Ministry for not making sure that funds reached NGO grantees.<sup>255</sup> The example of Human Resource Development Operational Programme 2.1.8 was raised. This was intended to ensure quality education in small village schools. At the beginning of the grant-making process it transpired that the lack of adequate human resources posed an insurmountable challenge.<sup>256</sup>

Another participant summarised the concerns expressed by many experts: money that is spent without control and monitoring is always spent ineffectively. Integration is not

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<sup>254</sup> OSI Roundtable, Budapest, October 2006.

<sup>255</sup> OSI Roundtable, Budapest, October 2006.

<sup>256</sup> OSI Roundtable, Budapest, October 2006.

a matter of financial resources, and nor is it a matter of professional skills.<sup>257</sup> Segregation can be seen first and foremost as a problem that arises from inadequate legislation, such as problems relating to quality control and professional monitoring, as well as the free choice of schools.<sup>258</sup>

Another expert stated a view shared by many participants at the roundtable, that local governments and schools will have no option other than to desegregate in the coming four years, as in the light of the austerity measures the only way to secure additional resources will be through EU-funded projects. These projects are likely only to be available to those who commit to desegregate.<sup>259</sup>

## 5.2 School facilities and human resources

Comparative statistical data are not available for average facilities in mainstream and segregated Roma schools. Over the past few years there have been isolated reports about the lack of running water and modern heating facilities, as well as indoor toilets. In 2004 Havas and Liskó found the following: “The more Roma students a school teaches, the more likely it is that its building is in worse condition than the average. Furthermore, majority Roma classes are more likely to be placed in run-down school buildings even if there are relatively few Roma in the school.”<sup>260</sup> Material conditions are the worst in bigger village schools: “Schools with the highest proportion of Roma lack computers, libraries and sports facilities the most frequently.”<sup>261</sup> “In 40 per cent of schools there were differences between the equipment of segregated and majority classrooms. In over a third of schools majority Roma classes had fewer teaching aids, whereas in under a third of these schools the furniture was in a worse state in majority Roma classes.”<sup>262</sup>

The criteria for allocating funds among schools in the territory of a given local government are not publicly available. However, research has shown that given their initial physical conditions, location and teachers’ attitudes, special schools and ordinary primary schools teaching a great number of, or teaching mainly, Roma are far worse off than schools attended by majority children.

In 2004 Havas and Liskó concluded thus: “When assessing data relating to material conditions, it transpires that Roma suffered the greatest disadvantage in terms of the quality of school buildings, and that their disadvantage in relation to classrooms offering special educational provisions was also significant.”<sup>263</sup> Their research found

<sup>257</sup> OSI Roundtable, Budapest, October 2006.

<sup>258</sup> OSI Roundtable, Budapest, October 2006.

<sup>259</sup> OSI Roundtable, Budapest, October 2006.

<sup>260</sup> Havas and Liskó, 2004, p. 37.

<sup>261</sup> Havas and Liskó, 2004, p. 38.

<sup>262</sup> Havas and Liskó, 2004, p. 40.

<sup>263</sup> Havas and Liskó, 2004, p. 41.

that, in every third school with over 80 per cent Roma enrolment, unqualified teachers are employed: 71 per cent of such schools employed one, while 22 per cent employed two such teachers – mainly in the subject of foreign languages. In 58 per cent of the schools in Havas and Liskó's sample teachers taught subjects for which they were unqualified. "The higher the proportion of Roma children, the higher the likelihood of non-qualified teachers teaching certain subjects (this is the case in 70 per cent of the schools with over an 80 per cent Roma ratio)." This most frequently occurs in relation to drawing, music and IT.<sup>264</sup>

The research on Csököly carried out in the framework of this project is also relevant in this regard. In Csököly school, the school management has attempted to reduce costs primarily by cutting personnel expenditures. For the first time since 1987, they dispensed very small bonuses in 2005, which only affected a few teachers. No extra payment is available for remedial teachers or overtime work, and nor is there any for supply teaching. If there is need for supply teaching, teachers exchange their classes, and so the school is not required to pay the stipulated allowance. Besides cutting expenses, this practice has a further advantage: the curriculum is taught by teachers with subject specialities, although students have to adapt to relatively frequent changes in their timetables.

Staff turnover is also reported as a serious problem in Csököly. Recently, the average age of the teaching staff has significantly decreased, and maternity and family leave is more common. Frequent changes in the teaching staff make it hard to renew the culture of the school's methodology. The introduction of special educational practices was abandoned in many cases because of these repeated changes in staff.

In Ónod, there was a Learning Centre established by the Ec Pec Foundation, an NGO that is based in Budapest but works nationally. The local government provided the space for the Learning Centre, which was equipped with computers and a library, and so both the pupils and the teachers of the school went there. The teachers support the *tanoda* as a very good initiative, as at the school they indicated that there was not enough support and there were no material resources for study circles, and this centre offered a good opportunity for organising leisure time activities for pupils. In addition, the teachers in the local school prepare pupils for various subjects; they work with pupils individually, which gives them extra income as well. It is not only children of Roma origin that go to the Learning Centre. At present the Learning Centre faces financial problems and as a consequence it has closed, although the programme started working with 25 children. In the meantime a Telehouse was established in the village.<sup>265</sup>

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<sup>264</sup> Havas and Liskó, 2004, pp. 58–59.

<sup>265</sup> Information on telehouses is available at <http://www.telehaz.hu>. This site defines telehouses as communal access points equipped with modern information technology. When travelling in the Hungarian countryside, one cannot escape the sight of telehouse signs that promise internet and email access in the most remote places.

The president of the Roma Minority Self-Government did not support the operation of the Learning Centre:

Integration is only pretence; our Learning Centre, and working with pupils in the afternoon, are all pretence; I don't think they can really work. If a teacher cannot teach the material to the pupil in the morning, the child will not go to the same teacher to learn in the afternoon. That is why I think that the Learning Centre is only pretence; some people get money at the expense of Roma children, at the expense of disadvantaged children. I don't like it. Furthermore, the money spent on these programmes is not controlled. Nobody checks where the money goes, what happens. And this is terrible.<sup>266</sup>

### 5.3 School results

Only very limited data are available relating to school performance and results, as records indicating ethnicity are not maintained. Havas and Liskó in 2004 found that while on average 1.5 per cent of majority children in schools in their sample repeated classes in 2002–2003 and only 0.2 per cent of them could not be marked due to missing classes, the repetition rate for Roma was fivefold higher and missing classes eightfold higher – 7.8 per cent and 1.5 per cent respectively. Medium-sized schools situated in towns and schools in the north saw the highest level of repetition – here almost ten per cent of Roma child had to repeat a grade. The repetition rate of Roma children is higher than the average in schools where their ratio is below 20 per cent.<sup>267</sup>

Depending on their abilities and on parental request, children might remain in pre-school for an additional year or, pursuant to the proposal of the Education Counselling Services (*Nevtan*),<sup>268</sup> might start their primary education in small classes. Although children cannot be failed in grades 1–3, Kemény, Havas and Liskó, as well as Babusik, observed that if underperforming, pupils are retained in grade 1 for an additional year.

Research conducted for this report in Ónod suggests that poverty is perceived as a greater obstacle to school success than ethnic origin: teachers reported no difference in academic achievement according to ethnic origin. But if children come from a disadvantaged background and, in addition, they are Roma, their situation is more difficult, as it is harder to compensate for the disadvantages originating from both the socio-economic status of the family and the ethnic origin. In this case it is inevitable that they lag behind their peers in the higher grades (5–8).

The achievement of Roma and non-Roma pupils is different when the Roma comes from a disadvantaged family. When a Roma child lives in good family

<sup>266</sup> Interview with the President of the Roma Minority Self-Government, 12 May 2006, case study Ónod.

<sup>267</sup> Havas and Liskó, 2004, p. 73.

<sup>268</sup> Pursuant to Article 34 d, PEA educational counselling is one form of educational counselling. Such services support the educational duties of teachers and parents, and support the fulfilment of the duties of schools and kindergartens.

conditions and parents follow their school career with attention, there is no difference. On the other hand, if a Roma child comes from a disadvantaged family, however good abilities they may have, they will drop behind. In grade 7 it is nearly inevitable that they will drop behind, as the teaching material changes and the amount of this material is very great. There is no difference, and I haven't noticed whether Roma are better or worse.<sup>269</sup>

According to the teachers, pupils who do well in general at school will continue their studies irrespective of their ethnic origin. However, the issue of ethnicity is present in the life of the school when pupils think that they will have better chances for further studies if they attend a school where there are no Roma. According to a teacher, the following is the case:

Roma pupils usually go to secondary vocational school. Now, in grade 8 there was a [Roma] pupil who asked me to find a school where there were few Roma.<sup>270</sup>

Roma and non-Roma students from the Csököly primary school participate in history, knowledge of the environment, and reading and drawing contests in equal numbers. In 2005, Roma children also participated in the Contest of Knowledge about Roma Culture and Contest of Roma Storytelling, in which their school's Romani language production won the second prize.<sup>271</sup>

#### 5.4 Curricular standards

Segregated Roma classes within mainstream education use standard curricula, although many focus in their pedagogical programmes towards catching up, assuming that Roma children are not as well prepared as their majority ethnicity peers. Segregated classes in special schools use a special curriculum.<sup>272</sup>

The National Core Curriculum (NCC) sets minimum requirements in text comprehension and so on for grades 4, 6, 8 and 10. These requirements are uniform for mainstream and special schools, but the latter can take into account the individual situation of every child, pursuant to the opinion of the expert panel.

In 2004 Havas and Liskó found that in 17 per cent of the schools teachers required lower than the average performance from Roma students. In 27 per cent of the schools Roma students expressed a lower preference for attending school than their non-Roma counterparts and in 16 per cent of the schools they accepted their teachers to a lesser degree than majority children. Inappropriate educational methods were more common in medium-sized towns, and their frequency correlated to the proportion of Roma

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<sup>269</sup> Interview with a teacher, case study Ónod.

<sup>270</sup> Interview with a teacher, case study Ónod.

<sup>271</sup> Case study Csököly.

<sup>272</sup> EUMAP, *Report on People with Intellectual Disabilities in Hungary*, p. 83.



within the school.<sup>273</sup> In sum, Havas and Liskó observed the following: “The less qualified the teachers are in pedagogy and methodology, the more frequent their discrimination against Roma students is, and consequently the worse Roma students feel in school.”<sup>274</sup> This conclusion is supported by the conclusions in the REI *Final Report*, which states the following: “Quality teaching and inclusive educational environments make a difference to children’s success. Children achieve in supportive environments that are child-centred, respectful, and where high expectations for success are the norm.” As noted earlier, “Quality education practice helps the process of desegregation through stimulation of high academic results.” Change in teacher practice and attitudes are intertwined, but both have an impact on student success.<sup>275</sup>

Havas and Liskó charge that the refusal of integrated education, poor relations between teachers and Roma students and the bad atmosphere of Roma students in school are closely interrelated factors.<sup>276</sup> Indeed, they suggest that home schooling – something that they term individual segregation and that in the majority of cases amounts to a *de facto* expulsion order – is a direct consequence of such bad relations, where the grounds of home schooling – such as aging-out and starting families – in fact stem from problems in school.<sup>277</sup>

## 5.5 Classroom practice and pedagogy

The importance of high-quality pedagogy is important to student success and achievement, as attested by past projects and research.<sup>278</sup> Teacher’s attitudes towards change in practice, and supplying the proper supportive environments for them to be able to change, are obstacles to real improvement in this area. For example, with regard to integrated education and what is termed “differential instruction” – a type of individualised approach – there is evidence that such a pedagogical approach is beneficial for all children. The REF *Needs Assessment* report acknowledges, furthermore, that a move to such a pedagogical approach in Hungary is needed. It states the following: “The integration of different learners’ groups has to be promoted: the replacement of Roma children who were educated in a segregated way earlier, and the integration of slightly mentally disabled children, etc.”<sup>279</sup>

The issue of the larger society’s acceptance of pedagogical innovation and change was recognised by the REF *Needs Assessment* as an issue to be addressed as well. The report states the following: “It is not enough that researchers and developers of education

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<sup>273</sup> EUMAP, *Report on People with Intellectual Disabilities in Hungary*, pp. 62–65.

<sup>274</sup> EUMAP, *Report on People with Intellectual Disabilities in Hungary*, p. 66.

<sup>275</sup> REI, *Final Report*, p. 42.

<sup>276</sup> EUMAP, *Report on People with Intellectual Disabilities in Hungary*, p. 67.

<sup>277</sup> EUMAP, *Report on People with Intellectual Disabilities in Hungary*, pp. 70–71.

<sup>278</sup> REI *Final Report*, p. 42.

<sup>279</sup> REI *Final Report*, p. 31.

elaborate effective pedagogical methods. Their values have to be justified before the broader public opinion, too.”<sup>280</sup> There is no specific mention of addressing these issues, however, in the *Decade Action Plan* or the *REF Needs Assessment*, although it is clear that attention should be paid to this area.

Local research indicates that while school management may report that teachers primarily use a project-based approach and techniques advanced by the “Step-by-Step” Programme, teachers themselves indicate that they rely heavily on lecture-based lessons and seldom use cooperative methods:

Everybody chooses one [method], so there isn’t a worked-out or compulsory [one]. Everybody develops his or her own methods. But there is trouble if a colleague does not have a method. We’re sort of a band in disorder.<sup>281</sup>

One of the teachers, for example, believes that individualised education is a task for the child: “Yes, in the bigger part of the class I must use the lecture method, because otherwise I cannot convey factual material; then they determine how much of it they can memorise.” Regarding group work: “I don’t really like group work. For group work one should have some culture of labour but in this class a culture of labour has not developed.”<sup>282</sup>

About the importance or inevitability of lectures, a teacher expressed the following view:

[Lectures are] probably a little bit more than half of the class, but it has to be like that [...] in most of our children’s cases – and I am talking about our school – they lack reading skills that would be required to reach good results by individual work or cooperative studying; they don’t understand words or expressions that must be used. Therefore we cannot really use it, or at least not with all the syllabus.<sup>283</sup>

Such responses suggest that teachers of the upper classes implicitly blame their colleagues in the junior classes by saying that they have failed to develop certain skills of pupils, which should be carried on at upper classes or on which they could build. At the same time, the management of this particular school is trying to make the majority of teachers sensitive to modern approaches.<sup>284</sup>

While the educators in the lower primary use alternative methods more boldly, in that regard there is a much higher resistance in the upper primary. When giving a reason for the refusal of the new alternative pedagogical methods, the educators often transfer the responsibility onto the students, saying that their “manpower” does not allow them to apply those methods.

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<sup>280</sup> *REF Needs Assessment*, p. 31.

<sup>281</sup> Interview with a teacher, case study Tiszabura.

<sup>282</sup> Interview with a teacher, case study Tiszabura.

<sup>283</sup> Interview with a teacher, case study Tiszabura.

<sup>284</sup> Case study Tiszabura.

The explanations offered seem to form a vicious circle. Teachers in grades 5–8 implicitly point accusing fingers at the ones in grades 1–4, believing that the latter had failed in developing the competences that could be further developed in grades 5–8, on which they could base their work. Meanwhile, the head teachers are trying to sensitise a significant part of the teachers to the new methods, but when their efficiency would show up in the everyday pedagogical work remains a question.

In the last year the result of the tender was the organisation of the course of the efficient learning, which we get here from Pilisborosjenő, and 16 of our colleagues took part in it. After that we created the BGR (internal caring system), in which 14 people also participated. We at Soros studied the project method at self-developing Roma schools, so we brought it into our school, and it is not only applied here but also at the different curriculum section.<sup>285</sup>

In the school the fluctuation of the teachers is high. In recent years the age composition of the school's board members has shifted towards younger educators, but they very often – and often unexpectedly – go on maternity leave. The director considers these frequent changes to be very problematic from a professional point of view, especially with regard to the lower primary classes.

The fluctuation of the school board members also makes the renewal of the school's methodological culture more difficult. The process of introducing alternative education methods was prevented several times because of the rotation of teachers.

In Ónod, 17 pupils in the first grade were assessed as needing special support, which the committee recommended could be carried out in an integrated class. In practice, however, these pupils are taken out of the class and the support teacher works with them (frequently in small groups) in a separate classroom.

The teachers decided in which lessons individual development should take place. Individual development is obligatory for all twice a week. The expert opinion always speaks of one hour. Most pupils come twice a week, but there are pupils who come only once, as there is little time. Last year there were more pupils, but this year there are many pupils that need individual development and because of them the time available for grade 3 pupils has been reduced. We consult with the class teacher what material they work with during the lessons. If there is some new material we try to incorporate it into the developing lesson. In a way it has advantages, in that we work with the pupils individually; although less time is available for us, it is more useful for them. Pupils like these lessons of individual development and they would like to participate *en masse*; they say the support teacher teaches very well. There are several interesting tasks that other pupils would also like to get.<sup>286</sup>

A teacher in the same school indicated that the staff make a point of working with children's strengths:

<sup>285</sup> Interview with a head teacher, case study Tiszabura.

<sup>286</sup> Interview with support teacher in charge of competence development, case study Ónod.

We see that there are many children who do not like learning, who are not motivated. We know that pupils who come from an environment where nobody motivates them are the least motivated. But these children may be more successful in other activities, and that is why they have to be given opportunities for becoming successful, and such opportunities are provided by arts programmes and sport. When children are successful in sport it motivates them to learn as well.<sup>287</sup>

Alternative methodologies have evidently been introduced in Hungary, and teachers appear to have access to training. However, the degree to which those pedagogies are uniformly used at the school level, coupled with a lack of a systematic support and mentoring structure for teachers to succeed in using those methodologies, hinders the widespread use of truly child-centred alternative teaching, most probably to the detriment of the students.

## 5.6 School–community relations

Parallel to parents' organisations that monitor the implementation of pupils' rights and the efficiency of teaching,<sup>288</sup> boards of education can be established to partake in managing the school, by providing an opinion on its pedagogical programme, for example.<sup>289</sup> Boards of education are made up of an equal number of representatives delegated by teachers, parents and student councils. These bodies do not have the power to take decisions, unless specifically delegated such a power by the maintainer – local governments in most cases.

Parental involvement in school affairs depends primarily on parental activism. There is no evidence that Roma parents are involved in the activities of self-governing bodies to the same extent that majority parents are. Allegations point, on the contrary, to the idea that in certain schools Roma parents are segregated in the same manner as their children.<sup>290</sup>

In 2004 Havas and Liskó looked at the attitude of school directors towards parents and families. They found the following:

Today the school directors of primary schools aim at blaming the families and parents of Roma students for the failure of the latter in school. We have come to understand that the majority of school directors do not realise the extent to which pedagogical methods and processes employed in their schools can have an impact on the success of the education of Roma students and the severity of the liability that primary schools bear in fostering the advancement of Roma in society.<sup>291</sup>

<sup>287</sup> Interview with a teacher, case study Ónod

<sup>288</sup> Art. 59 (5) PEA.

<sup>289</sup> Art. 61 PEA.

<sup>290</sup> Interviews with Béla Berkes and Gábor Sárközi.

<sup>291</sup> Havas and Liskó, 2004, p. 85.

Teachers interviewed in Csököly reported that they were in a constant, active connection with parents. They noted the importance of informally discussing the students' behavioural and educational problems with the parents, and they encourage parents to call on them at any time, as well as the parent–teacher meetings and the consultation hours, and to take their time for longer talks. They regularly go for family visits, and if needed they are willing to communicate with the parents through mail or telephone or in person. Many teachers mentioned the fact that they had discussed the children's performance of oral evaluation with the parents, and were also interested in the opinion of the parents.

There is no experience of ethnicity-based difference in the attitude of the teachers toward the parents. The teachers all said that their connections with the Roma and non-Roma parents were equally balanced and without conflicts.

I get on really well with the parents. But I think that we can say that here everybody gets on really well with them, since that is how we accept them and this is how we always have accepted them. I have no problem. None. Today, as well, I have spent my free hour talking to a Roma foster-mother: she has three Roma kids, three. We talked about her daughter for an hour. So I feel that I get on really well with everybody.<sup>292</sup>

[...] I have even held the quarter-year oral evaluations with the parents coming to me. So when I held an oral evaluation they received an invitation that I would like them to come and talk over every child's oral evaluation. I tried to send simple messages [...]. I asked [the parents] about my oral evaluation: do they accept it or do they have anything to say about it? [...]<sup>293</sup>

If there is some kind of problem and by any chance I cannot go out to them, then I invite them to the school. I write a letter to them. We meet very often in person; I meet a lot especially with the local parents and then we always discuss what is going on. Also on the phone, if there is a problem, the child got sick or something bad happened, then I call them and they always come. So I can say that I have always had a good relationship with the parents. There have been no problems.<sup>294</sup>

However, in Ónod, the various means of keeping contact with parents within the school are considered to be ineffective. Parents do not come for consulting hours or parent–teacher meetings, as parents seek the advice of the teacher directly. According to teachers, keeping contact with parents in a village is different from the situation in cities:

In a village everything is more direct: the parent comes to the school and we talk; on paper we have consulting hours but we never have official ones. We organise parent–teacher meetings, we are in constant contact with parents, but it is very difficult to organise a programme when nobody comes.<sup>295</sup>

<sup>292</sup> Interview with a teacher, case study Csököly.

<sup>293</sup> Interview with a teacher, case study Csököly.

<sup>294</sup> Interview with a teacher, case study Csököly.

<sup>295</sup> Interview with a teacher, case study Ónod.

Teachers are expected to visit the families of their students, but this rarely occurs. The last time that teachers reported visiting a family was nearly six months previously, after the school year had started. The president of the Roma Minority Self-Government mentioned the fact that the teachers asked him to visit the families, to help develop parent–teacher connections. He refused this request, as he thinks that teachers have to know the families of their pupils and therefore it is the teachers who have to visit their pupils at home.

In the framework of the National Network on Educational Integration (OOIH) this same president of the local Roma Minority Self-Government was employed as a small region coordinator<sup>296</sup> in Ónod, to assist in the introduction of integrated education at the school. The position was created to help to develop contacts between parents and the schools, and in 2005 he offered his support for schools working in consortium in the Human Resource Operative Programme, a local initiative. However, he did not accept the final report of this project, because in his opinion the students had not attended the planned programmes and had organised a joint programme only once.

A report was prepared recently and a photo was shown to me. They organised a common programme only once. I think this is self-deception that they do concerning the report, because the pupils of the schools concerned did not attend these programmes. One occasion is captured on the photo, the only one occasion in a whole-year programme when they did something together. I could not see the active work that would make the programme successful.<sup>297</sup>

## 5.7 Discriminatory attitudes

The education system cannot escape general attitudes in society. According to the most recent ECRI report, anti-Roma sentiment, although decreasing, still affects a large segment of Hungarian society:

While the anti-Roma feelings have slightly decreased from 40–42 per cent in 1993–94 to 36–38 per cent in 2001–2003 according to a poll, such results remain very disturbing. Stereotypes and prejudices about the Roma population continue to be widely held among the general public, particularly outside the capital and the main cities of Hungary.<sup>298</sup>

Babusik calls attention to the role that school directors' and teachers' attitudes play in getting Roma children into secondary schools that can provide better chances on the labour market.<sup>299</sup>

<sup>296</sup> In the interviews the words “small region coordinator” and “minority coordinator” are used interchangeably, irrespective of the context. In fact they were small region coordinators, but as they employed mainly Roma people, they were called minority coordinators by the public.

<sup>297</sup> Case study Ónod.

<sup>298</sup> ECRI, *Third Report on Hungary*, p. 22.

<sup>299</sup> Babusik, 2003 (1).

**Table 20: School directors' attitudes towards Roma students and school advancement (2003)**

School Director's attitude <sup>300</sup>	School advancement from primary school (per cent)							
	All students				Roma students			
	VS	VSS	GS	Total	VS	VSS	GS	Total
Average manager	48.4	33.8	17.8	51.6	77.3	18.8	3.9	22.7
Professional pragmatist	45.6	37.2	17.3	54.4	74.9	16.2	9.0	25.1
Roma expectations	47.0	36.6	16.4	53.0	84.1	12.4	3.5	15.9
School can do nothing	52.9	29.8	17.4	47.1	80.0	15.3	4.7	20
Everything counts	45.1	33.7	21.2	54.9	76.4	14.3	9.4	23.6
Pragmatists	44.1	37.0	18.9	55.9	70.9	17.9	11.2	29.1
Average	47.1	34.4	18.5	52.9	77.4	15.9	6.7	22.6

VS = vocational school, VSS = vocational secondary school, GS = grammar school, Total = total with baccalaureate.

Source: Babusik, 2003 (1)

The evidence from the 2004 Havas and Liskó research, furthermore, demonstrates the impact of teachers' attitudes on students. Teachers were documented as having lower expectations of students, and students, consequently, expressed a lower level of enthusiasm for school.

<sup>300</sup> *Average managers* believe that the recommendation of the school has primary importance in decision-making about further studies, the second most important factor being the child's results. Less than average importance is attributed to the proximity of secondary schools and the expectations of Roma parents. *Professional pragmatists* believe that the most important issue is the value of the profession offered by secondary school. Factors such as the primary school's recommendation, proximity and parental expectations are irrelevant. Managers with *Roma expectations* believe that the expectations of Roma parents are the most important. They attribute less than average importance to school expectations, how professions taught in secondary school fare on the labour market, financial, social and cultural traditions, and the family background. *School can do nothing* type of managers attribute the highest level of significance to the financial situation of Roma families and the parental expectations of secondary schools providing a Baccalaureat. Other factors are attributed with less than average importance. *Everything counts* directors believe that significant factors are the proximity of the school, family traditions and Roma parental expectations. Other factors are also thought to be important at a medium rate. *Pragmatist* directors see as the most significant factors the secondary school's proximity and the results of the student continuing in vocational secondary education. Also significant is the parental financial and social situation if the student continues in a secondary school awarding a Baccalaureat. They attach significance at a much below average rate to the financial situation of parents and parental expectations. They agree that students should seek admittance in school where admission is certain.

The ruling in the Tiszatarján case (see section 3.8) demonstrates the effects that inappropriate placement in special schools can have on children. According to the court, the act of segregation will cause lasting psychological damage to the children. They also suffered harm because the school did not recognise and treat their learning difficulties and administered instead a lower-quality curriculum, jeopardising their mental and psychological development. The court pointed out that on completing their studies the plaintiffs will suffer disadvantage in their chances for further education as well as in their opportunities to find employment compared to their peers completing a standard curriculum. The fact that the local authorities in their capacity as the source of funds and supervisors of the school did not secure and maintain its lawful operation constitutes major negligence.

Not all the plaintiffs are Roma, and therefore racial discrimination could not be established as the cause of segregation. Instead, it seems to have stemmed from an ill-advised attempt at sorting out problematic pupils. All children affected by the case, however, come from families with low income and social standing in their community and accordingly suffer problems in asserting their rights and interests.

Data taken from local research in Csököly demonstrate that prejudiced attitudes and bias do exist, but that they are often unspoken and hidden. According to one administrator, much of the adult population is characterised by prejudice and tend to exclude Roma:

I have to say that anti-Gypsyism is not very common, and colleagues don't dare to express it, especially not in front of me, because they know I am sensitive to this. But, as in most people, there is this little machine inside; here many of them articulate their opinions inside and draw a discriminative judgement. Only they are too clever, intelligent and informed – in my opinion – to say it out loud explicitly.

[...] Rather in the municipal government or among the councillors, among adults, you can find discrimination based on ethnicity.<sup>301</sup>

Interviews with teachers in Csököly, however, reveal that ethnic conflicts between Roma and non-Roma students are infrequent.

Well, I think that the number of Roma children in this school is so high, they are so many, that there is no such problem. I cannot remember any case where there was a problem or they yelled at each other “You Gypsy” or something here. No. I cannot even remember that at the time when I attended here there was any kind of discrimination or we didn't sit next to each other. I think it is because they grow up together. In the pre-school and in the families, there is no such thing. None of the parents tell me their child should not make friends with the Roma child. Nothing like that happened.<sup>302</sup>

<sup>301</sup> Interview with headmistress, case study Csököly.

<sup>302</sup> Interview with a teacher, case study Csököly.



The teachers interviewed also emphasised the fact that they had not observed any difference in the behaviour or the mentality of Roma and non-Roma pupils, which they mainly attribute to their similar social and cultural background. Teachers report that discipline and integration problems are chiefly caused by bad family affairs and serious social disadvantages, which – in their experience – are independent of ethnic origin.

There are exactly the same amount of problems occurring with non-Roma and Roma children. I can't see any difference [...] If the family's approach to the child and the problems that arise materialise in the behaviour of the child then it makes absolutely no difference if he is Roma or not.<sup>303</sup>

None of the teacher–student conflicts reported suggested deeper conflicts based on ethnic differences.

According to the head teacher in Ónod, there are rare examples of serious conflicts, especially among Roma children, and suggested that “economic factors, rather than ethnicity, were most often the cause.”<sup>304</sup> The president of the Roma Minority Self-Government in Ónod also mentioned the fact that there were conflicts between teachers and pupils, which may be based on ethnicity but not necessarily.

A child was sitting on the stairs and a teacher told him to shift his black arse. [...] The teacher was rude, the child called back in a rude way, so they went to the head teacher together. The teacher was complaining that the boy had been rude. I told the teacher that the child had his own name and he could have been asked in a different way, like “Stand up because you are in the way”, or “Stand up or else you'll catch cold” or simply “Come on my boy, stand up”. Had he been asked like this he wouldn't have been hurt. Of course, the child has also his emotions; he also reacts. He calls back. I don't want to say that a child or a teacher should abase themselves, but the teacher should seek common ground with the child.<sup>305</sup>

Research in Ónod in the local government and in the school brought out the general conclusion that inclusion is an important goal. Some teachers expressed the view that it can bring conflict, however:

Sometimes it is very difficult, especially when children reach adolescence. This process is totally different with Roma children. This process is much more vehement, much more intense, I don't know, much louder, much more vivid, and there are more conflicts, but it changes with each child. But all teachers of our school say that it is not worth organising a separate class for children causing problems.<sup>306</sup>

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<sup>303</sup> Interview with a teacher, case study Csököly.

<sup>304</sup> Interview with head teacher, case study Ónod.

<sup>305</sup> Interview with president of the Roma Minority Self-Government, case study Ónod.

<sup>306</sup> Interview with a teacher, case study Ónod.

Teachers rarely use the word “Roma” in discussion with researchers, and prefer to use the word “ethnic,” possibly due to concerns about the collection of ethnic data. The head teacher reported thus: “I don’t really know how many ‘ethnics’ we have, because we do not have any record of this; now, I see there are 121, about 30 per cent of the pupils, I think...”<sup>307</sup>

In the words of another teacher,

What shall I say? You mean semi-Roma or those who identify themselves as Roma? We decide it by looking at them, but we do not mean Roma but someone from a disadvantaged background. We do not use the word “Gypsy” – we make sure we don’t use it.<sup>308</sup>

One of the teachers said that she had not heard any of her colleagues using the word “Gypsy” or expressing a negative opinion of Roma or the inclusion of the Roma:

The pupils learn together. I tell you the truth. I have never talked to anyone about the inclusion of Roma pupils: When adult people talk about this topic they do not necessarily voice all their thoughts. I have never heard a colleague using the word “Gypsy”.<sup>309</sup>

## 5.8 School inspections

No centralised school inspection is established in Hungary; instead, the local governments or other bodies maintaining the schools are charged with substantive and procedural control, in the course of which they can commission public education experts to carry out reviews.<sup>310</sup> Local maintenance and development plans must be prepared to serve these functions and reassessed every two years.<sup>311</sup> These experts, however, are independent, virtually not liable to a governing body or controlled as to whether they abide by centralised requirements of review in school practices. Given that they are paid by the local governments that commission them, it is questionable whether their control is in fact reliable. Also, local governments set the terms of commission and impose sanctions – if there are any. Based on the findings of public education experts, maintainers have the power to deny their approval of pedagogical programmes. As maintainers employ school directors – who are in turn liable for teachers they employ – it is in their power to take steps against underperforming heads.

Quality control programmes<sup>312</sup> denote another scheme through which local governments monitor the activities of schools, but this type of monitoring focuses on

<sup>307</sup> Interview with head teacher, case study Ónod.

<sup>308</sup> Interview with a teacher, case study Ónod.

<sup>309</sup> Interview with a teacher, case study Ónod.

<sup>310</sup> Art. 91 (4)a, and 91 (6) PEA.

<sup>311</sup> Art. 85 (4) PEA.

<sup>312</sup> Art. 85 (7) PEA.

the professional, legal and financial control mechanism within a wider social, economic and other policy-oriented context of public education. None of these quality control programmes has raised concerns about segregation at the town or village level. More so, this scheme has rather focused on the material conditions of education.<sup>313</sup>

The form and content of measures that inspections can impose are left up to school maintainers, and may include disciplinary sanctions against teachers and school directors. Maintainers are also free to report crimes – such as the endangering of a child – to the police.

Although the National Public Education Evaluation and Examination Centre (OKÉV) has the right to review school activities, its sanctioning powers are extremely limited. It can fine – up to €400 – teachers and other officials for intentionally discriminating against children<sup>314</sup> in the course of public education, or the Ministry can deny the registration of schools that are in serious breach of the law, such as in the case of the private foundation school in Jászladány.

OKÉV has appointed monitors in charge of equal treatment in schools in each of its district units.<sup>315</sup> They have conducted some official reviews and found against schools for discrimination, but these reports are not available on the Internet and the fines imposed on schools are very low. Fines imposed after such reviews cannot exceed HUF 100,000 (€367) in any case.<sup>316</sup>

On 26 May 2006 OKÉV imposed a fine of HUF 40,000 (€147) on Count István Széchenyi Primary and Basic Art School in Tápiószecső for teaching children with mild intellectual disabilities in a separate building that was in a bad condition and for merging grade 1–8 classes educating children with special education needs in two classes.<sup>317</sup> On 29 May 2006 OKÉV imposed a fine of HUF 50,000 (€184) on Mihály Váci Primary School in Nagykáta for teaching children with mild intellectual disabilities in a separate, run-down building that in part lacked necessary educational equipment, and for exceeding the maximum student number in its class merging grades 1–3 of children with special educational needs.<sup>318</sup> On the same day OKÉV imposed a fine of HUF 20,000 (€73) on Ágoston Kubinyi Primary School in Tápiószentmárton for failing to provide a teacher with necessary professional

<sup>313</sup> András Nyíri joins in questioning the reluctance/failure of quality control schemes in addressing the issue of equal treatment. Written Comments, András Nyíri, p. 4.

<sup>314</sup> Pursuant to Art. 142 (5) of Government Decree No. 218 of 28 December 1999 on certain petty offences, it is a petty offence to discriminate against a child by intentionally breaching legal rules on public education. No imposition of such fines has so far been reported.

<sup>315</sup> Ministry of Education and Culture, details in Hungarian on the official controlling/supervision system of OKEV, webpage on the OKÉV website at <http://www.om.hu/main.php?folderID=1168> (accessed on 24 February 2007).

<sup>316</sup> Art. 95/A (5) c, PEA.

<sup>317</sup> OKÉV file No. 7138-13/2006.

<sup>318</sup> OKÉV file No. 7138-23/2006.

requirements in one class and for breaching the law regulating the merger of classes.<sup>319</sup> Still on that day OKÉV imposed a fine of HUF 40,000 (€147) on the primary school in Tápíósele for breaching the law regulating the merger of classes and exceeding the maximum student number in its class merging grades 5–8 of children with special educational needs.<sup>320</sup>

There are no county inspectorates; the system is central (OKÉV) and school maintainer-based (local or county government-appointed educational experts). No public data are available either on Roma public education experts, or on OKÉV equal treatment inspectors. OOIH employs several Roma monitors and colleagues who undertake inspection-like visits to notoriously segregating schools and feed their findings back into the system. Their reports seem to differ greatly in their take on segregation from reports by official inspectors.<sup>321</sup>

Such reports are not public, but those available to the reporter reveal a heightened level of insensitivity on the part of official inspectors with regard to any aspect of segregation. A revealing example of this is the difference between Béla Berkes' report for OOIH, and OKÉV's 2004 report on the review of compliance with regulations relating to equal treatment and the education of students with special needs in the János Arany Primary School and Basic Art Institution in Bag village. Although the latter review was done pursuant to an order of the Minister of Education, it found it of no consequence that Roma children were *de facto* spatially segregated in the school.<sup>322</sup> During the Equal Treatment Authority's investigation against Miskolc (see section 3.8.4), despite its clear legal obligation to engage, OKÉV effectively refused to cooperate, referring to its insufficient funding, lack of order from the Ministry of Education and Culture, and lack of expertise in the field of equal treatment.<sup>323</sup>

The activities of the Parliamentary Commissioner for the Rights of National and Ethnic Minorities (Minorities Commissioner) are noteworthy in that his constant attention and thematic reports on the education of Roma children and their segregation has helped to characterise the issue as a legal issue and pinpoint structural problems within the public education system that enforce and fail to tackle segregation (see also section 3.8.4).<sup>324</sup>

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<sup>319</sup> OKÉV file No. 7138-33/2006.

<sup>320</sup> OKÉV file No. 7138-43/2006.

<sup>321</sup> See, for example, OKÉV, *Report 2003*. Despite the fact that this form of education served as a show case of segregation, the report fails to mention it.

<sup>322</sup> Information obtained from Béla Berkes. The ministerial order referred to is Order No. 22819/2004.

<sup>323</sup> OSI Roundtable, November 2006.

<sup>324</sup> See, most notably: Parliamentary Commissioner for National and Ethnic Minority Rights, *1999 Annual Report*, Chapter VI, point 5. Negative discrimination in education: the findings of the ombudsman in relation to the segregation in school and education in schools with different curriculum. Budapest: 1999, available in English at <http://www.obh.hu/nekh/en/reports/reports.htm> (accessed on 1 March 2007).

## ANNEX 1. ADMINISTRATIVE STRUCTURE

### A1.1 Structure and organisation

The Hungarian education system provides for the following:

- Pre-school education (3–6 years of age).
- Primary education (7–14 years of age). According to parental choice, this may be spent in: a comprehensive school (grade 1–8); a primary school (grade 1–4) and then, subject to enrolment, in a secondary school (grade 5–12); or a primary school (grade 1–6) followed by secondary school (grade 7–12).
- Secondary education (14–18 years of age). Various types of secondary schools exist: grammar schools (*gimnázium*), secondary vocational schools (*szakközépiskola*) and vocational schools (*szakiskola*).

In the 2004–2005 school year, out of a total of 193,366 grammar school students, 28,184 studied in six- or eight-grade grammar schools.<sup>325</sup> Secondary vocational schools can organise further education for two years providing accredited post-secondary vocational programmes; in 2004–2005, there were 953 secondary school classes.

Since September 2005 public education has been free and compulsory until the age of 18 in primary and secondary schools.<sup>326</sup> The compulsory public education of children with special education needs can be prolonged until age 20. When effecting this change, the Ministry of Education and Culture took into account the fact that, according to Kemény's research in 2003, a quarter of Roma in the age group 20–29 do not finish primary school.<sup>327</sup>

Pursuant to Article 8 (2) PEA, pre-school education may begin at three years of age and finish when primary school education begins. Pre-school is compulsory from the age of five. Following amendments effective as of 1 September 2003, pre-schools “must not refuse the admittance” of disadvantaged children, and from 2005 must not refuse the admittance of “multiply disadvantaged” children – many of whom are Roma – (see section 3.1) from the age of three;<sup>328</sup> otherwise, pre-school is compulsory for a minimum of four hours a day from the age of five.<sup>329</sup>

Pursuant to Article 6 PEA, primary school education may begin between five and eight years of age.<sup>330</sup> The minimum age to enter the first grade is five and the maximum is eight.

<sup>325</sup> MoE, *Statistical Yearbook 2004/05*, pp. 9 and 17.

<sup>326</sup> Art. 6 (3) PEA.

<sup>327</sup> Kemény and Janky, 2003.

<sup>328</sup> Art. 65 (2) PEA.

<sup>329</sup> Art. 24 (3) PEA.

<sup>330</sup> Meaning that the child turns five or eight respectively at the end of the year in which he or she begins school.

Owing to the decentralised nature of the Hungarian education system, the Minister of Education and Culture, through the Department of National and Ethnic Minority Education, is tasked only with the management of minority education at the central level. But local and minority self-governments have the power to provide minority education pursuant to Section VI of the Minorities Act (Act No. 77 of 1993 on the Rights of National and Ethnic Minorities, MA) on the cultural and educational autonomy of minorities. Given that local governments are under the obligation to provide primary schooling (Act on Local Governments No. 65 of 1990, LGA), they must organise minority education on request from eight parents whose children belong to the same minority.<sup>331</sup> Minority self-governments can also establish, take over and maintain schools. They are then eligible for State funds allocated per pupil. Pursuant to Article 29 (2) MA, the appointment of the heads of minority institutions and the local government's decisions concerning the education of people belonging to minorities both require the approval of the local minority self-governments affected.

The former Integration Commissioner (until May 2006) had 15 colleagues on his staff and a yearly budget of approximately HUF 100 million (€370,370). The establishment of the new socialist-liberal coalition Government in May 2006 signalled the end of the Commissioner's office. Some of his colleagues remain in place within the Ministry, either as colleagues of the Roma Integration Secretariat or of the Chief Department for Equal Opportunities and Ethnic Matters under the public education branch. The changes came into effect officially as of 1 August 2006.

The Integration Commissioner's duties included the following:<sup>332</sup>

- Advocacy for equal treatment in the legislative process;
- Cooperation with other ministries in the preparation and implementation of programmes aimed at the integration of Roma and impoverished children;
- Cooperation with the National Network of Educational Integration (OOIH);
- Participation in the decision-making processes as they relate to his mandate, with specific emphasis on the *National Development Plan*, the activities of the National Public Education Evaluation and Examination Centre (OKÉV), the languages spoken by Roma in Hungary, the termination of segregation and the avoidance of misdiagnosis of able children as disabled;
- Launching and support of pilot and scientific research projects.

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<sup>331</sup> Art. 43 (4) MA.

<sup>332</sup> Information available on the Ministry of Education and Culture website at <http://www.okm.gov.hu/main.php?folderID=548> (accessed on 2 March 2007).

## A1.2 Legal roles and decision-making

In its report on public education, the National Institute on Public Education (OKI) summarises the main administrative features of the Hungarian public education system as follows.

The administration of public education is highly decentralised and the responsibilities are shared between several actors;

Horizontally, the responsibility at the national level is shared by the Ministry of Education and Culture, which assumes the direct responsibility for educational matters, and certain other ministries – vertically, the responsibility is shared between the central (national), the regional, the local, and institutional levels;

At the regional (county) and local levels, the educational administration is integrated into the general system of public administration; in other words there is no organisationally separate educational administration;

The local and regional level of public administration (including educational administration) is based on the system of local governments, thus it is under the control of politically autonomous, elected bodies, and the Government cannot issue direct orders to the local governments;

The role of the regional level is quite weak, while the scope of responsibilities at the local level is fairly wide;

The number of local authorities (local governments) is very high, while their average size is small.<sup>333</sup>

Decisions regarding education are taken at the following levels:

- The Ministry of Education and Culture, in cooperation with other ministries, such as the Ministry of Finance, the Ministry of the Interior, and the ministry in charge of the youth (which is now the Ministry of Social Affairs and Labour).
- County governments – chiefly maintaining specialised and secondary educational institutions, the Education Counselling Services (*Nevtan*) and expert panels.
- School maintainers– mainly local governments at the pre-school and primary school level, but at secondary school level it is noteworthy that approximately a quarter of grammar schools are maintained by churches, teaching approximately 20 per cent of grammar school students.<sup>334</sup> Local governments are under the obligation to provide primary schooling.
- Schools: school directors and teachers.

<sup>333</sup> OKI, *Education in 2003*, Chapter 3.

<sup>334</sup> MoE, *Statistical Yearbook of Education 2004/05*, p. 39.

Hungary's education system is extremely decentralised. Although the Minister regulates every detail of public education in ministerial decrees and by way of his power to propose legislation to Parliament, he plays an extremely limited part in implementation, controlling and sanctioning breaches of educational legislation.

The State, local governments, local and national minority self-governments, churches registered in Hungary, charities (foundations and associations), legal entities, companies with legal entity and private individuals may establish public education institutions.<sup>335</sup>

Owing to an unprecedentedly high level of local autonomy, public schools are controlled by the public body that maintains them (be that the State, county or local governments), whose decisions can be subjected to complaint to the Office of Public Administration, which is the only entity that can take a local government to court. Although the National Public Education Evaluation and Examination Centre (OKÉV) has the right to review school activities, its powers of sanction are extremely limited. It can fine – up to €400 – teachers and other officials for intentionally discriminating against children in the course of public education, or the Ministry can deny the registration of schools that are in serious breach of the law, such as in the case of the private foundation school in Jászladány (see section 3.8).

The Ministry of Education and Culture oversees the pedagogical, professional and educational work of public, vocational and higher educational institutions. To this end the Ministry prepares and issues legislation in the field of education, and creates development plans and ensures their adherence to quality standards. In order to ensure quality instruction, the Ministry organises pedagogical, professional assessments, examinations and surveys in the fields of public and vocational education. It supplies children with textbooks and regulates the conditions and registration process for officially registering schoolbooks. It is also responsible for the publication of the National Qualification Registry, the list of professions recognised by the State. Neither the allocation of State funds, nor priority setting in methodology and content, nor the effective overseeing of public education remained in the hands of the Minister after the 1993 reform. An overhaul of this situation would be central to building an effective, responsive and modern public education system where the Minister could indeed assume responsibility for public education.

OKÉV, under the supervision of the Minister of Education and Culture, contributes to carrying out the tasks of assessment and evaluation, the organisation of secondary school-leaving examinations and the assessment of applications and complaints in connection with these procedures. The Agency for Educational Development and In-Service Teacher Training (Sulinova), under ministerial supervision as well, contributes to the Minister's work by updating the knowledge of teachers and providing them with the opportunity of acquiring new and special knowledge. The Ministry emphasises the

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<sup>335</sup> Art. 79 PEA.



importance of deepening the knowledge of children outside school as well. Therefore, it organises national competitions for secondary and vocational education and maintains the Sulinet network and homepage.

The Minister of Education and Culture decides, within his domain, about the allocation of financial resources. However, given that the Ministry of the Interior transfers funds from the central budget directly to the school maintainers (see also section 5.1), the power that remains in the hands of the Minister of Education and Culture is limited to setting the priorities for earmarked budgetary allowances, such as targeted support (*céltámogatás*) and integration support. The Minister takes part in setting up the Human Resource Development Operational Programme of the Hungarian National Development Plan.

School maintainers, be they county or local governments, or indeed private schools with some sort of school boards, enjoy a high level of freedom in governing and – at least in the case of the former – controlling schools. Given that they have the right to appoint school directors, they can easily secure substantive control over the curriculum, human resources, investment and financing policy. Parents can raise complaints, which in public schools as well as private schools will in essence proceed to the notary and further either to the Office of Public Administration or to court. Some critique the present system for a practical imbalance that in fact fails to ensure that students and their parents effectively exercise their rights, as laid down in the Public Education Act (PEA) for example.

The PEA stipulates the National Core Curriculum (NCC) as the pool of common compulsory substantive requirements of education in the country, including minority education and the education of children with disabilities. Between grades 1 and 10 the NCC defines the fields of knowledge and competences and the optimal proportion among these fields (covering minority language and literature parallel to Hungarian language and literature). General development requirements are set by the end of grade 6 and grade 10, and individual development is envisaged as playing a crucial part in education.

Individual schools have the task of creating their own local curriculum, which is approved by the school maintainer (mainly local governments). School maintainers can veto local curricula if those are in breach of the law. The Ministry of Education and Culture provides model curricula for different types of education.

Given that school maintainers employ the school directors and define the school budget, set the number of classes for each school year and merge or terminate schools, as well as control the financial, legal and professional work within schools, a school's autonomy almost entirely depends on the local governments, churches or foundations that run them. Private schools can be controlled by notaries, but that governance and that control are in the same hands when it comes to public schools, unless a complaint is made to the Office of Public Administration.

School directors must turn to the school maintainer for funds to cover the costs of any additional staff. Psychologists and professionals working with children with disabilities or children with some learning deficiencies are, as a rule, not based in schools, but in the Education Counselling Services (*Nevtan*).

In 2003, OKI reported as follows:

While in 2001, the public expenditure on education per student was 15 per cent higher than the year before, and 42 per cent higher than in 1998, public expenditure on education relative to per capita GDP actually dropped. In this period the *per capita* GDP grew more dynamically than the public expenditure on education per student. The fact that the expenditure per student grew more (by 42 per cent) than the total public expenditure on education (which was 39 per cent between 1998 and 2001) may be a sign of deteriorating cost-effectiveness in public education.<sup>336</sup>

According to the REF *Needs Assessment* report of December 2004,<sup>337</sup> per-student public expenditure on primary education amounted to €500, and total public expenditure on primary education to €683 million, while the number of Roma primary school drop-outs stood at 10 per cent (15,000) and the annual financial gap for primary schools amounted to €8 million.

**Table A1: Public expenditure on students in primary, lower and upper secondary education (1998–2001)**

Year	Public expenditure on primary, lower and upper secondary education		
	Per student (HUF)	<i>Per capita</i> GDP (HUF)	As a share of <i>per capita</i> GDP (per cent)
1998	204,004	982,552	20.76
1999	231,814	1,112,915	20.83
2000	251,957	1,287,906	19.56
2001	290,000*	1,455,099	19.93

Source: CSO<sup>338</sup>

It is worth pointing out that the expenditure per student as a proportion of the *per capita* GDP is somewhat higher in pre-school education in Hungary (21 per cent) than the average for OECD countries in this regard (18 per cent). In primary education (ISCED 1) there is no difference. However, both in lower secondary education

<sup>336</sup> OKI, *Education in 2003*, Chapter 3.

<sup>337</sup> REF, *Needs Assessment*.

<sup>338</sup> CSO, Educational Data (Preliminary Data), 2002, estimates, based on calculations by Miklós Balogh.

(ISCED 2) (Hungary 18 per cent, OECD 23 per cent) and in upper secondary education (ISCED 3) (Hungary 24 per cent, OECD 28 per cent) there is a more significant difference between the indicators, and not in Hungary's favour this time.<sup>339</sup>

The normative support (the *per capita* student funding for schools from the central State budget) for minority education is HUF 22,500 (€83) if the language of instruction is Hungarian and HUF 45,000 (€167) if the language of instruction is a minority language. Minority education receives the same funding regardless of the minority to which it is allocated. However, the value that is given for this money is inferior in the case of Roma (see section 4.6).

OKI has established the following local strategies for financing public education:

1) Some *financially constrained local governments* are forced to minimise their expenses, which is achieved by *institutional rationalisation*. They tend to reduce the number of institutions to the bare minimum level and no longer maintain schools that remain outside the scope of their legal obligations. Local governments transfer the responsibility of their secondary and special schools to county governments, making sure they continue their local operation. They cooperate with other school maintainers – mainly churches – and plan to transfer the responsibility of some of their institutions to these maintainers, which are then solely financed by the State or by the new non-local governmental school maintainers.

2) *Financially well-off local governments* often aim to develop a system of institutional financial support based on local needs and the definition of their legal obligations. They guarantee conditions better than the legal minimum with respect to the number of lessons and professional opportunities. These local governments tend to determine well-defined, accountable tasks, and provide space for methods of institutional specialisation. Many of the local governments belonging to this category have established a quality system of local financing, which is clear and predictable, providing long-term guarantees.

3) *Local governments with stable financial conditions* strive to provide 'average working conditions' in the field of education. Going beyond their legal obligations, these local governments are willing to maintain various high-prestige general secondary schools or less costly vocational institutions. They strive to finance the realistic needs of the institutions, seeking a balance in all respects.<sup>340</sup>

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<sup>339</sup> REF, *Needs Assessment*.

<sup>340</sup> OKI, *Education in 2003*, Chapter 3.

## ANNEX 2: CASE STUDIES

For each country report in this series of EUMAP reports on “Equal Access to Quality Education for Roma”, three case studies were carried out to supplement and corroborate data gathered from other sources. Information from the case studies are integrated throughout the body of each country report. Annex 2 includes additional details from each of the case study sites. In Hungary the three sites are: Csököly, Ónod and Tiszabura.

### A2.1 Case Study: Csököly village

#### A2.1.1 Administrative Unit

Csököly village is situated in Csököly Municipality (Somogy County). It has a population of 1,130 people and 300 private properties.<sup>341</sup> According to the mayor, about 28 per cent of the population is of Roma origin. This includes 60 families; or about five people per household.<sup>342</sup> Until the 1970s or 1980s the majority of Roma lived separately from the non-Roma at the edge of the settlement (known as “the Roma settlement of Vigánd”) in huts, but territorial segregation has since vanished. Although there are some streets where the concentration of Roma inhabitants is higher, Roma homes are interspersed throughout the village. The houses inhabited by Roma were typically built using social welfare funds and most of them have running water and electricity. However, some of the families live in derelict dwellings in miserable condition, usually room-kitchen flats with a very low level of comfort.

Csököly is part of the micro-region of Kaposvár that includes 70 smaller settlements. Because of the good economic indicators of the county town, the region does not have the classification of being underprivileged. Therefore, Csököly loses much of the support that is available to deprived settlements, such as the public work programmes subsidised by the State.

The annual budget of Csököly is HUF 260–270 million (approximately €950,000–989,000). In the past seven years, the municipal government has had access to about HUF 600–700 million (€2.2–2.56 million) in grants for development purposes. Using an investment of HUF 300 million (€1.1 million) – solely grant money – a gas system was built to accommodate the whole village in 2000. Most of the roads and pavements in the village, adding up to a total length of 12 kilometres, have been renovated, and for the remaining roads the local government has recently applied for further grants. A library has also been established from grants. Currently, the local government is

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<sup>341</sup> This data is based on the discussions with the mayor. According to an unofficial website source, the village has 1,161 residents and 427 private properties, see <http://www.gyaloglo.hu/telep.cgi?t=591> (accessed 8 March 2007).

<sup>342</sup> Interview with the mayor of Csököly, Csököly, 4 April, 2006.

building a community centre and a new funeral parlour. All 16 official quarters owned by the municipal government are occupied.

Still, the number of registered unemployed in Csököly has gone up in recent years. It is currently estimated at around 150 people, whereas in 2002 it was only 18. The dramatic increase in the unemployment rate is due in part to the difficulties of gaining access to public transport. Work is chiefly found in the surrounding larger towns, especially in Kaposvár, but the local bus transport company, Kapos Volán Ltd, closed down many services, including the Kaposvár-Csököly night line, in the past few years, leaving many people without a way to get to their jobs outside the village. In the mayor's opinion, the support system for the unemployed also encourages people not to take jobs:

If there is a family with three children they will have the child benefit, which is almost HUF 40,000 [€148]. The regular social benefits for two persons are another HUF 40,000 (€148). Plus the housing support. This way they get an income of almost HUF 100,000 [€6,370] for which they don't have to work. [...] And if they don't go to work they have certain extra rights. The supplementary child protection support ended; they included it in the child benefit. This was given to those who didn't work but not to those who did. [...] If they don't work they can get free meals and free books in school. Families in which parents don't go to work do much better than those who are registered at the minimal salary [...] The thing is that this is spreading among non-Roma more and more too. Hungarians also say they wouldn't go [to work]! [...] They take all the benefits and supports instead and say thank you, they're fine.<sup>343</sup>

Contrary to the mayor's opinion, a local teacher believes that only a small part of the village's adult population relies exclusively on social benefits.<sup>344</sup> According to her, the majority of people have jobs, at least seasonally, in which they secure their living.

One of the main sources of income of the people in Csököly comes from growing strawberries. Some of the Roma families grow strawberries themselves and they also work in the fields of other farmers. The other significant work opportunity in the village is the sapling groves, another place where many Roma people work. Therefore, besides being registered as unemployed, most of the adult Roma population have an opportunity to make money throughout the year, except in winter.<sup>345</sup>

### A2.1.2 Roma and the Community

The social situation and lifestyle of Roma and non-Roma are fairly similar, and the lack of regional segregation also reflects the social and cultural integration of Roma. At

<sup>343</sup> Interview with the mayor of Csököly, Csököly, 4 April, 2006.

<sup>344</sup> Interview with a primary school teacher in Csököly, Csököly, 4 April, 2006.

<sup>345</sup> Interview with a primary school teacher in Csököly, Csököly, 4 April, 2006.

present, there is no Roma minority self-government in Csököly. In the previous electoral cycle, there was a minority self-government, which operated with the lowest possible number of members, a chairman and two members, but after the resignation of one member there was no call for applications for the position. Both the mayor and the schoolteacher believe that this can be seen as a sign of indifference on the part of the Roma community and that it again demonstrates the lack of need for an independent representation of Roma interests.<sup>346</sup> There is no informal leader of the Roma community either: since the death of the last *Voivode* (leader), nobody has come forth to take his position. Of those who would be suited for the leader's role, people with higher education have moved away and successful community members who remain in the village are not interested in politics. In short, those Roma families who have managed to rise socially and existentially do not identify themselves with the impoverished Roma.

Due to the demographic features that characterise the Roma population – higher numbers of children and lower life expectancy – and, to a certain extent, to the low number of non-Roma children in the area, the proportion of Roma at the local pre-school and school is significantly higher than their proportion in the overall population of the village.

Most Roma children, like their non-Roma peers, attend the pre-school from the age of three. As a result of this early socialisation with the majority community, by the time that they start school, Roma children's language use and behaviour patterns do not differ from those of the non-Roma.

According to the mayor, ethnic conflicts are not characteristic of the village. Fights that ended in serious injuries or death only happened among Roma in the past few years.

One of the school administrators paints a more detailed picture about the relationship between the Roma and non-Roma population. In his opinion, there are conflicts between them because the adult population – and especially the local councillors and part of the school working team – are characterised by prejudice against and an inclination to exclude Roma, although practically speaking it only manifests itself only to a certain degree and indirectly:

I have to say that anti-Gypsyism is not very common, and colleagues don't dare to express it, especially not in front of me, because they know I am sensitive to this. But, as in most people, there is this little machine inside; here many of them articulate their opinions inside and draw a discriminative judgement. Only they are too clever, intelligent and informed – in my opinion – to say it out loud explicitly.

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<sup>346</sup> Interview with the mayor of Csököly, and a primary school teacher in Csököly, Csököly, 4 April, 2006.

[...] Rather in the municipal government or among the councillors, among adults, you can find discrimination based on ethnicity.<sup>347</sup>

Also, the everyday lives of the Roma and non-Roma are very much interwoven:

Their relationship is very peculiar. Basically, there are contradictions. But they also work together, for it's a region of strawberry harvesting and some of the farmers have 20–30–40–50 thousand stocks for which they must employ seasonal workers. The worker goes in to have lunch or eats together with the non-Roma too, so, from a certain point of view they are in contact on an everyday basis. Either a working site or wherever they are hired. And we also live together. They are there in every street and not separated so we don't only meet at the shop but day to day at any part of the village basically.

### A2.1.3 Education

#### *The school and education network*

Around 70–75 per cent of the 90 children at the pre-school, and 61 per cent of the 184 pupils at the primary school, are of Roma origin. Not surprisingly, over 90 per cent of the school's students are socially disadvantaged.<sup>348</sup>

The pre-school and the primary elementary school at Csököly is one united institution, managed by a board that consists of the school director, the vice-director, the economic manager and the leader of the pre-school. The maintainer of this unified school unit is the managing assembly consisting of the municipal governments of Gige, Rinyakovácsi and Csököly.

The pre-school and the primary school have independent financial management, although the budget is prepared by the unified institutional management. In practice, decisions concerning the institution's finances are made by the economic leader and the director, after consulting the mayor of Csököly. In questions concerning the budget, the mayor of Csököly serves as a mediator between the school and the other two municipal governments who participate in management. Both the mayor and the schoolteacher consider that they have an appropriate cooperation within the economic management of the unified institution. The application for the institution's leading position is announced by the cooperating municipal governments, in the school's case, and the managing board, in the pre-school's case. In decisions concerning human resources and hiring new employees, the schoolteacher relies on the professional experiences of her fellow workers to a great extent, at the job interviews the vice-schoolteacher and teachers of the particular subject(s) are also present, just as the leader of the pre-school is present when hiring a new employee for the pre-school.

<sup>347</sup> Interview, confidentiality requested, Csököly, 3 April 2006.

<sup>348</sup> The students' parents only received eight years of elementary school education or fewer, and their families are entitled to social welfare benefits.

The annual budget of the school is HUF 133 million (€487,000), which includes the normative support that can be requested for the number of students and the integration normative support (complementary quota) that is aimed at advancing the educational integration of socially disadvantaged and Roma students. The municipal government allocated HUF 16 million (€58,600) to the school last year, but the amount is expected to be less this year. Since the school also operates the village library, its material and personnel costs are also covered from the school budget.

The annual budget deficit of the school is HUF 11 million (€40,300), which is solely due to the fact that the central catering support provided to socially disadvantaged children regularly falls behind the real costs; this causes a HUF 3,000 (€11) loss per child every month, and the difference is imposed on the school. All this is based on the headmaster's calculations.<sup>349</sup>

In the previous years the institution successfully applied for the acquisition of sports equipment, lower-value devices and theatre visits. In the 1990s, they bought a printer and a scanner from the grant of the Soros Foundation, and computers and a projector from a HUF 1.8 million (€6,595) allocation from the Ministry of Education and Culture.

Originally the school building at Csököly was built as a six-class institution, and only by reconstructing the former extracurricular room and auditorium could they provide every class with a classroom. The present computer room used to be an equipment store, just as the extracurricular room did, but the school has its own separate gymnasium.

Every year the municipal government spends over HUF 10 million (€36,600) to modernise the pre-school and upper level school building. All the doors and windows were replaced in the school, the plumbing was completely renovated in both institutions, and the canteen of the pre-school was rebuilt. With an investment of HUF 5 million (€18,315) they modernised the school's heating system in 2000, which resulted in such significant savings that the investment was returned in two years. Yet today, the school building is leaking and the necessary funds for the renovations are not available.

There are three groups in the pre-school (30 children per group), each with two pre-school teachers and a nurse. This semester, 12 children could not be admitted to the pre-school, due to lack of space. These will be admitted during the year, if there is a vacancy, or otherwise the following year. There is one person who works in the canteen. All six pre-school teachers have college degrees in pre-school education.

### *Human resources*

There are 17 full-time teachers, all of who have a college certificate but few of whom have a specialist degree. There is no music teacher, and the geography teacher teaches

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<sup>349</sup> Interview with the Director of the Csököly primary school, Csököly, 3 April, 2006.



biology. There is no Roma teacher working in the school. Only the director – who paid for her own education and received an advanced degree in the language – and another teacher speak Romanes.

There is a high staff turnover in the school, and in the past few years the average age of the teaching staff has significantly decreased. This means that maternity and family leave is more common. The director reports that this turnover leads to difficulties, especially for the classes at the junior school.<sup>350</sup> Attempts to advance the school integration of small children were frustrated because the teacher who regularly carried out common programmes for the children from pre-school and lower school went on maternity leave at the beginning of the semester, so the work to familiarise the children with their teacher had to start all over again.<sup>351</sup>

Frequent changes in the teaching staff make it difficult to continuously update and refine classroom practice. The introduction of special educational practices was abandoned in many cases because of these repeated changes in staff.<sup>352</sup>

### *Patterns of segregation*

In the village there are currently 15–20 non-Roma children between the age of 7 and 15 who are attending school in other villages and towns, primarily schools in nearby towns. Residents interviewed interpret “white flight” with different emphasis, but agree that the phenomenon has decreased and it is unlikely that the Csököly school will become an “all-Gypsy” school.<sup>353</sup>

The education of the Roma pupils is integrated in the school. Although in 1998, when there was a school unit initiative to establish minority education, there was a great wave of transfers of non-Roma children, transfers since then have been less dramatic and the institution remains ethnically mixed.

According to the mayor’s interpretation, the last two years of the school have been spent rebuilding after a great crisis and reorganisation. He claims that in the last ten years the educational quality of the school decreased significantly, the connection between the pre-school and the school almost completely diminished, and the institution was in jeopardy. During this period both Roma and non-Roma parents took their children to other schools, and as a result the number of pupils decreased to 170. Since the appointment of the current director, the educational approach, teachers’ attitudes and cooperation between the pre-school and the school have improved significantly, and parents no longer take their children to other schools. In the last two years children transferred to other school only where specific family circumstances

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<sup>350</sup> Interview with the Director of the Csököly primary school, Csököly, 3 April, 2006.

<sup>351</sup> Interview with the Director of the Csököly primary school, Csököly, 3 April, 2006.

<sup>352</sup> Interview with the Director of the Csököly primary school, Csököly, 3 April, 2006.

<sup>353</sup> Interview with the Director of the Csököly primary school, Csököly, 3 April, 2006.

warranted this; however, children especially talented in athletics or the arts have also transferred because the school in Csököly could not meet their needs.<sup>354</sup>

However, according to an interview, a high number of non-Roma children still transfer elsewhere. One teacher alleged that in a current class consisting of 22 pupils, some four or five children transferred to other institutions.<sup>355</sup> Reportedly, parents believed that the current proportion of Roma pupils was too high and would lead to decreasing educational quality.<sup>356</sup>

One of the teachers recalled that in the last few years Roma and non-Roma children were transferring to other schools at about the same rate.<sup>357</sup> On several occasions a transferred child returned after one school year.

### *Academic achievement*

According to the unanimous opinion of the teachers interviewed, there is no correlation between the school performances of particular children and their ethnic origin. In Csököly segregation within the school does not occur in any form: there is no “Gypsy class” (catch-up class or otherwise segregated small class), and furthermore the school does not have private pupils. Many teachers emphasised the fact that there are Roma students with excellent skills and non-Roma pupils who are less gifted or have certain difficulties in the school as well. In the settlement almost every child goes to pre-school from the age of three, and thus any language or social disparities are generally addressed before they start school. The common institutional education starting at an early age also contributes to the fact that later in school ethnic tensions are seldom present among the children.

The leader of the team at the junior school has registered the further education career of children who finish this school by their ethnic origin since 1992. According to this record, it is characteristic of non-Roma students to continue their studies, but there was one year when the proportion of Roma children who attended secondary school was higher than that of non-Roma.<sup>358</sup>

The school director firmly stated that she had never experienced any ethnicity-based difference in secondary education.<sup>359</sup> Roma and majority children are admitted to secondary school in exactly the same proportion and there is no further difference in dropping out.

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<sup>354</sup> Interview with the Director of the Csököly primary school, Csököly, 3 April, 2006.

<sup>355</sup> Interview with a head teacher of the Csököly primary school, Csököly, 4 April, 2006.

<sup>356</sup> Interview, confidentiality requested, Csököly, 4 April, 2006.

<sup>357</sup> Interview with a primary school teacher, Csököly, 4 April, 2006.

<sup>358</sup> Interview with a head teacher of the Csököly primary school, Csököly, 4 April, 2006.

<sup>359</sup> Interview with the director of the Csököly primary school Csököly, 3 April, 2006.

The school director also reports that the number of Roma and non-Roma children who graduate from secondary school is equal, which suggests that – very much in contrast to the general pattern in Hungary<sup>360</sup> – inequalities in the education of Roma children in Csököly could vanish.<sup>361</sup> However, a lack of reliable statistics on the further education of students from Csököly makes it rather difficult to estimate the real significance of this achievement.

The school used to have close contact with the college at Mánfa, which seeks to mentor talented children, and the Gandhi Secondary School,<sup>362</sup> institutions where two or three students from Csököly continue their studies each year. However, recently the relationship with these schools came to an end, because parents were not satisfied with the rules of the dormitory, which they found was not strict enough.<sup>363</sup>

Two Roma graduates of Csököly primary school have received a diploma in recent years (an English teacher and a nurse) and currently three more attend college.

According to the mayor, education of the Roma population in Csököly is characterised by extremes. Either they finish only the first eight classes or they get a university degree, with the smallest number finishing just secondary school.<sup>364</sup>

### *School–community relations*

The systematic connection and successful communication between the teachers and parents, along with the parents' participation in after-school activities, very efficiently promote a positive attitude towards the school among parents, which is very important from the viewpoint of the children's integration into the school and also from the viewpoint of educational success. Many of the teachers are originally from Csököly themselves, and are well integrated with the community as a result, building relationships with Roma and non-Roma families over generations.

The school often organises after-school educational programmes (field trips, dances, cooking contests, and so on) in which they successfully involve the parents, too:

When we organised club afternoons – even on the class level – they came, too, and helped me. So, in a sense, eventually they are helping not just me, because they are also helping other teachers as well. They stand in and they take the role of bartending if there is a school programme, and the parents

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<sup>360</sup> According to national statistics, the proportion of secondary school graduates among Roma students is much lower than that among majority children who also live in bad social conditions and are disadvantaged to the same degree.

<sup>361</sup> Interview with a Headmaster of the Csököly primary school Csököly, 3 April, 2006.

<sup>362</sup> The Gandhi School is based in Pécs, and was established in 1994 with the aims of establishing a secondary school with mainly pupils of Roma origin and of training Roma intellectuals.

<sup>363</sup> There were rumours in the village about problems related to alcohol and drug-abuse, but, when interviewed, no one was sure about the validity of these rumours.

<sup>364</sup> Interview with the Mayor of Csököly, Csököly, 4 April, 2006.

also take part in a disco and they help in whatever way they can. So all in all we try to involve them in everything. We also try to come up with something so we can invite them whenever it is possible.<sup>365</sup>

The teachers interviewed all indicate that there is no difference when it comes to keeping in touch with the parents and the school activities of the Roma and non-Roma families. Many teachers emphasised the fact that even the parents who have the most difficult social situations take part in the parent–teacher meetings and consultation hours, and open days and afternoon school programmes, and they demand the organisation of field trips and other programmes and accept the costs of these events.

### *Teacher training and support*

The director's opinion is that for the successful development of socially disadvantaged children, a more unified approach and more coordinated methodology are needed; she therefore motivates teachers to participate in professional training. However, there have been obstacles to meeting this goal. The high proportion of young and inexperienced teachers, combined with a high staff turnover, means that teachers need training, but then do not remain at the school long enough to put this training to use. In-service courses also cause difficulties, as participation in such courses, presentations, and methodology lectures are hard to fit into the already tight daily schedule. Only five days per year are available to the school as working days without classes.

Despite these difficulties, various teachers have already participated in professional training (computer techniques and English language) and teacher methodology training courses. Five teachers attended the lecture that dealt with cooperative education, organised and held at the methodological basis-school in Darány (which was a part of OOIH). But the planned longer training was cut short because cooperation with the institution of Darány had come to an end, as that school's OOIH project concluded. Another group of teachers finished the course on cooperative methodology organised by the County Pedagogical Institute. A few years prior, two directors were introduced to the "Step-by-Step" Programme and the cooperative method in Pilisborosjenő in a 120-hour training course. They used this knowledge for one school year in one of the first grades. At the course, professional instructors later mentored their work; however, this promising professional programme ended, as none of the teachers who had participated is still working in the school. One fell very ill; the other one went to teach in another school.

One lower-grade director (Vice-director) pointed out that she learnt the cooperative and child-centered teaching techniques from books, by herself, and she mixed these two methods and practised them successfully.<sup>366</sup> Another teacher is currently studying at the Eötvös Loránd University, Bárczi Gusztáv Faculty of Special Education.

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<sup>365</sup> Interview with a class teacher of the Csököly primary school, Csököly, 4 April, 2006.

<sup>366</sup> Interview with the Vice-director of the Csököly primary school, Csököly, 3 April, 2006.

## A2.2 Case Study: Ónod

### A2.2.1 Administrative Unit

Ónod village (a municipality) lies on the right bank of the River Sajó, south-east of Miskolc. The nearest town is Nyékládháza, 7 kilometres away, and the nearest city is Miskolc, 22 kilometres away. The population of the settlement is 2,500, 20 per cent of whom are Roma, making 500 people.

The rate of unemployment in Ónod is high (about 60 per cent),<sup>367</sup> and the number of registered unemployed is 297. According to the mayor, however, the actual rate is even higher, and he cited the main problems as a low level of education and a lack of motivation. Agriculture accounts for 5 per cent of those employed, as farmers cultivating their own land, and 10 per cent are private entrepreneurs or employees in the village, while 25 per cent are commuters to cities such as Miskolc or Budapest.<sup>368</sup> The income of those living in the village consists of social welfare benefits, along with payments for odd jobs and communal work, which is not always enough for a living.

The local government operates a system of communal work, and 20 persons are employed in this programme. According to the mayor, this programme is not efficient:

We employ some people in the programme of communal work, but the quality of the work of the people employed in this form does not reach 10 per cent of the invested fund. It is totally useless. I have to say that in general the State supports communal work to the extent of 90 per cent, and the local government has to contribute the other 10 per cent, but the product is less than this 10 per cent.<sup>369</sup>

The proportion of those engaged in the black economy is high in the village. They often do odd jobs, which could ensure subsistence, but it sometimes happens that they return home without being paid or with less money than agreed. Since there is no protection for informal workers, those who hire them are able to exploit their position.

Another serious problem is usury. Getting a loan seems to be a good opportunity for families in need to improve their situation for some hours or days, but after borrowing the money families often find themselves even worse off. Their chance of repaying the loan is minimal, and the interest increases constantly. If the loan is not repaid on time, the lender claims the money, and the monthly income of the families determines the terms of repayment. The interest often increases so much that it could take years to repay the loan, or it could lead to a situation whereby the families lose their only properties, their houses.

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<sup>367</sup> See [www.falvak.hu/onod](http://www.falvak.hu/onod) (website containing information on villages in Hungary).

<sup>368</sup> See [www.falvak.hu/onod](http://www.falvak.hu/onod) (website containing information on villages in Hungary).

<sup>369</sup> Interview with the Mayor of Ónod, Ónod, 12 May, 2006.

The mayor acknowledges that the town officials know about the usury and are aware of its consequences, but they cannot identify the lenders, as those concerned do not dare to speak openly about the loan or its interests or the unjust terms of repayment.

## A2.2.2 Roma and the Community

Although interviews in the settlement indicated that there is no segregated area for the Roma, one of the streets is called “Roma Row”, where mainly Roma people live, with the exception of two or three families. There are some building plots to sell on the row, but non-Roma do not want to settle there. According to an interview, “There are many ‘social welfare’ houses on the Roma Row, and there are vacant building plots but Hungarians do not go to live there.”<sup>370</sup>

In the village the majority of the Roma speak Hungarian. There are some families that speak Lovari, but even in these families it is mainly the parents who speak the language, and the children do not speak it, or may know only some words. According to most teachers, the children do not speak Romanes at school; they know only some words, or use Roma greetings only.

A five-member Roma Minority Self-Government was elected in the village, but in the local government there is no representative of Roma origin. The president of the Roma Minority Self-Government is invited to the meetings of the local government; he usually participates in the meetings but has no right to vote. In the past years the local government supported the minority self-government by allocating a fixed sum. This sum was reduced in 2006, partly because this kind of support caused conflict among the Roma population and partly because the local government supports the families in disadvantaged situations irrespective of their ethnic background:

Last year we gave HUF 700,000 [€2,564] to the minority self-government but it resulted in a lot of conflicts among the Roma population. The representatives of the local government took the advice of the president of the minority self-government and decided very wisely to allocate HUF 1.1 million [€4,029] for buying coach tickets and notebooks for schoolchildren, and all those in need are entitled to this, not only Roma. The minority self-government gets HUF 500,000 [€1,831] for particular activities earmarked in a system of applications.<sup>371</sup>

As the president of the Roma Minority Self-Government indicated, the support was given on conditions, and the money was allocated for writing applications or tenders:

The Roma Minority Self-Government has HUF 640,000 [€2,344] of State subsidy, the local government allocated HUF 500,000 [€1,831] [...] this latter amount has to be spent on applications and self-contribution. I cannot

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<sup>370</sup> Interview, confidentiality requested, Ónod, 11 May, 2006.

<sup>371</sup> Interview with the Mayor of Ónod, Ónod, 12 May, 2006.

write high-amount applications; I do not know how much money the mayor gives to those who write applications, but I know it is not a small amount. I am trying to do something so that the Roma Minority Self-Government could dispose of the HUF 500,000 [€1,831]; I think we could send our children to camps, buy school equipment for our children as we did in the past years, or buy coach tickets so that the children from disadvantaged families could also get to the school.<sup>372</sup>

The president of the Roma Minority Self-Government mentions three problems in the settlement related mainly to the Roma community:

I can see three main problems that are related to the Roma minority at Ónod. First, the summer jobs, the public or communal work that is mainly in summer: these are only temporary; one cannot plan or build a future based on them. The second problem is that the majority of the local government employees are against the village. They are against not only the Roma but the Hungarian population as well; they do not feel they should serve the village; on the contrary, they think the village should serve them. Thirdly, the unemployment rate is high; few Roma people have permanent jobs. In 1987 1 per cent of Roma women did not have a job. Everybody worked, every man and woman. Since the change of the system in 1989 there have been no jobs: only 10 per cent have jobs. HUF 3.9 million [€14,285] were put into the Labour Centre as subsidy from the European Union. 3,300 people should have entered employment. When I send a Roma or non-Roma youth to the Labour Centre, so that they can get trained for a job or get further training and get a subsidy while being trained, they often come back saying that they did not succeed, as there was no training for them.<sup>373</sup>

In 2005 several people with limited education applied for further training or retraining at the Labour Centre, but as there was no suitable training for them they came back saying that they would not try again as they thought it not worth the effort.<sup>374</sup>

### A2.2.3 Education

#### *The school and education network*

Ónod has both a pre-school and a school. The local government runs both the general school and the pre-school, and allocated HUF 220 million (€805,860) of its budget on maintaining the educational institutions in 2005. The school received HUF 150 million (€549,730), and the pre-school HUF 70 million (€256,540). The school is only partly financially independent as all decisions related to financing (with the exception of distributing the wages) are in the competence of the local government.

<sup>372</sup> Interview with the President of the Roma Minority Self-Government, Ónod, 12 May, 2006.

<sup>373</sup> Interview with the President of the Roma Minority Self-Government, Ónod, 12 May, 2006.

<sup>374</sup> Interview with the President of the Roma Minority Self-Government, Ónod, 12 May, 2006.

The management of the school can make decisions mainly in professional issues related directly to the life of the school. At the school there are four professional teams: primary teachers (years 1–4), class heads (teachers responsible for a whole class of pupils), social science teachers and natural science teachers. At the meeting of the school management the leaders of these teams, as well as the representatives of the public servants' council and the teachers assisting the pupils' self-governments (separately for years 1–4 and 5–8), are also present.

### *Patterns of segregation*

The proportion of Roma among pre-school children increases year by year, and is currently slightly above 50 per cent, which is higher than the overall proportion of the Roma among the whole population (20 per cent). The proportion of Roma pupils in the village school is around 50 per cent as well; out of 302 pupils 121 are of Roma origin. The pre-school has an enrolment of between 120 and 130 pupils. No data were available about the proportion of Roma children in pre-school. According to the head teacher the proportion of the disadvantaged pupils also increases year by year. The tendency is that non-Roma parents send their children to schools in neighbouring settlements, some 5-10 kilometres distant, which caused problems in the previous years as well. The reason for doing so was probably that the proportion of Roma children had increased and therefore the non-Roma parents chose a school for their children where there were no Roma pupils. There are only a few cases when better-off Roma parents chose another school.

The local government provides free meals for each pre-school or school child, and in the morning children get free milk. The pupils received free textbooks at the beginning of the school year. With the help of the Roma Minority Self-Government and that of the Social Welfare Committee, the families in disadvantaged situations get continuous support irrespective of their ethnic origin, in the form of pencils, notebooks and coach tickets.

According to the head teacher, the school administration prevents segregation at both the school and the class level; they make sure that the proportion of Roma pupils is the same in the classes.<sup>375</sup> The teachers, the head teacher, the mayor and the president of the Roma Minority Self-Government all agree that there is no segregation in the school, and that Roma and non-Roma pupils learn together:<sup>376</sup>

It is good if they learn together. Pupils should never be segregated according to colour or other ethnic features. Segregation increases differences. In our school there are no segregated classes.<sup>377</sup>

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<sup>375</sup> Interview with the Headmaster of the Ónod primary school, Ónod, 11 May, 2006.

<sup>376</sup> Interview with the Mayor of Ónod, Ónod, 12 May, 2006.

<sup>377</sup> Interview with the Headmaster of the Ónod primary school, Ónod, 11 May, 2006.



Pupils with special educational needs are educated in an integrated or a segregated way (in a special class). At present, 34 pupils get individual development, and all of them can be educated in an integrated class. In 2004 more third-grade pupils needed individual development, but currently the expert committees stated that several first-grade pupils needed individual development, which reduced the time available for the third-graders.

At the school there is one special class where 12 pupils from grades 1–7 study together in a mixed group, in addition to the 24 pupils receiving special development support. There are two private pupils as well, so the total number of pupils is 14. In the group there are eight children from grades 1–4, and four pupils in grades 5–8. While there is a special education teacher, she has often been absent due to illness and another teacher, not trained in special education, substituted for her. These children remain separated for their whole curriculum, but the number of Roma students in this group is not known.

### *Enrolment and retention*

The number of children attending the village pre-school is between 120 and 130. There are five mixed groups, not organised according to the age of the children; this averages to 25 children per group. According to the schoolteachers, the head teacher of the pre-school continually asserted that there was a need for five groups so that each child of pre-school age could attend.

Absence from school is a problem that can be related to a particular group of pupils. Pupils are not absent due to illnesses but rather due to family problems. These children can easily get a medical certificate as the doctor does not want to argue with their families. The teachers are aware of this fact but they cannot do anything about it.<sup>378</sup> If there is no medical certificate, the absences are considered to be unjustified. According to the head teacher, absences are a serious problem because no grades can be given to a pupil who has been absent and unjustified for more than 50 days.<sup>379</sup> It is reported that children of five or six families have the highest number of unjustified absences, but these are the families with the most children. A consequence of absences may be that two or three pupils have to repeat a year, mainly in higher grades. If absences could be prevented and reduced, these pupils would not have to repeat a year, as the main reason for repetition is the high number of unjustified absences.

Since January 2006 the local government has employed a social worker (who also writes applications). She is a small region welfare worker of three settlements and works in this village only one day a week. In the opinion of the head teacher, her work is really needed every day, especially with families where the problem of absences is acute.

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<sup>378</sup> Interview, confidentiality requested, Ónod, 12 May, 2006.

<sup>379</sup> Interview with the Headmaster of the Ónod primary school, Ónod, 11 May, 2006.

*Academic achievement*

The school has had art education programmes since 1994, and more than half of the 3,000 pupils (50 to 55 per cent) attend these programmes.

*Teacher training and support*

As part of the Human Resource Operative Programme, teachers participated in several in-service training courses, especially in training courses focusing on the integrated education of those from a disadvantaged background (Integrating Education System – training) where they could get acquainted with different learning and teaching methods (cooperative teaching and learning techniques, “Step by Step”, child-centred education) as part of an OOIH project. In addition, the head teacher and a teacher participated in training in Roma studies organised by the Miskolc Pedagogical Institute. The course was 120 hours long and participants heard lectures on Roma ethnography, art, lifestyle and languages. One of the aims of the training courses was that teachers acquire new teaching methods that they could use in educating pupils from a disadvantaged background. Unfortunately it cannot be said that everybody used the acquired methods in their work. One teacher noted that:

There are conflicts among the teachers teaching in grades 1–4; the teachers teaching in grades 5–8 are more unified: they can work together much better.<sup>380</sup>

**A3.3 Case Study: Tiszabura****A3.3.1 Administrative Unit**

Tiszabura village (a municipality) is located in Jász-Nagykun-Szolnok County and its population is estimated at 2,770 residents. The settlement lies 10 kilometres from Lake Tisza to the south, 13 kilometres from Abádszalók and 20 kilometres from Kunhegyes, both of which are part of the same small region. The village’s mayor is of Roma origin, the majority of municipal government board members are also Roma and the settlement has a Roma minority self-government too. Many of the school’s teachers hold this opinion about the cooperation with the leadership of the village: “My boss, she has a good relationship [with the mayor]; we [the teachers] basically have no relationship with the municipality board of the present composition.”<sup>381</sup>

**A3.3.2 Roma and the Community**

There is a separated Roma settlement in the village, where people mostly live in so-called *szocpol* houses, built with State loans. Interviews indicate that the social stratification of the village has developed so that only the poorer Roma remained in the

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<sup>380</sup> Interview with a primary school teacher, Ónod, 11 May, 2006.

<sup>381</sup> Interview with a primary school teacher, Tiszabura, 13 February, 2006.

Roma settlement, while those who were more mobile have moved into the village “of their own volition”, although there are some Roma families who “were moved” because their houses collapsed. Families were not moved into the houses of Roma people but to those that had been abandoned by “original inhabitant families from Tiszabura” who “fled [because] there were no job opportunities; they didn’t [leave] because of the Roma but because there were no job opportunities”.<sup>382</sup>

Poorer Roma people live “outside” the village, in the Roma settlement, while wealthier Roma people, those who were moved in and the non-Roma who remained, live “in” the village. None of the residents interviewed mentioned sharp ethnic conflicts, although people in the village point to a few families who are thought to chiefly live from theft. However, since such crimes affect the Roma population as well, such thefts are not viewed as a “Roma issue”:

So it’s not a Roma issue if there is a conflict, but there are five families whose members go to the courtyard of an old woman and steal the hen from her [...] but it’s also a problem of the Roma because they also steal from their courtyards, so it is the problem of those five families. This village used to be different [...] these Roma went into the courtyard, whitewashed our walls, worked in the vineyards and on the fields. [...] So this is not a Roma issue; there are some families, but I guess it is the same among workers too, that there are five families they dislike on the housing estate.<sup>383</sup>

### A3.3.3 Education

#### *The school and education network*

In 1982 the Public Educational Centre was established in Tiszabura, containing four institutional units: the primary school, the pre-school, the community arts centre and the library. Almost 400 children attend the school, of whom 50 require special education and attend classes in a different curriculum in a separate building. More than 80 per cent of these students are of Roma origin. Of those, 89 that study the normal curriculum were declared to have troubles with some particular abilities. Because of data protection considerations there are no precise figures about the proportions of Roma and non-Roma students. Interviews estimate that approximately 90 per cent of the school’s pupils are of Roma ethnic origin. This works out at two or three non-Roma students in every 20–25-member classroom. Parents of non-Roma origin prefer to send their children to the school in Abádszalók instead.

There are nine classes in the primary school: two first-year, three second-year, two third-year and two fourth-year classes, and also nine upper classes: two classes per year except the sixth, where there are three classes.

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<sup>382</sup> Interview, confidentiality requested, Tiszabura, 13 February, 2006.

<sup>383</sup> Interview, confidentiality requested, Tiszabura, 13 February, 2006.

*Human resources*

The teaching staff consists of 36 teachers but the management of the school considers it insufficient: they claim that the school needs 49 full-time employees.<sup>384</sup> Of the staff, 10–11 teachers work in the classes with a special curriculum. The composition of the staff is currently stable and the fluctuation is rather low. However, interviews revealed a belief that teachers are underpaid, because they work with disadvantaged children, which requires a more intensive approach than in other circumstances. Some of the interviewees also say that many teachers feel overburdened as well, for they have 27 classes a week, and there are concerns that this may result in a loss of enthusiasm, with teachers refusing to participate in extra projects or ultimately burning out.<sup>385</sup> According to one teacher, the situation is as follows:

We may be told what [the meeting] would be about and for whom. We go there and think that's all we need to do. [...] Who cares? We must do it, there is a task and we do it right.<sup>386</sup>

Previously there were a number of unqualified teachers on the school staff, but this phenomenon has decreased in part due to conscious recruiting efforts, particularly by attracting qualified teachers from other counties by providing them with official quarters. Most of the teachers teach their own subjects, but some classes (technical instruction or foreign languages) are taught by those without degrees. For example, the former Russian language teachers now teach Hungarian literature or work as educators for children with disabilities. There are Roma on the staff, including a pre-school teacher, an education assistant for children with special educational needs and a free-time organiser.

*School–community relations*

The upper primary and school–parent relationships are both characterised by informality. There is no structured communication between the schools, and the schools' contact with the parents has a “village-like” nature since the parents may meet the teachers day to day on the street. One interviewee, who performs a methodological special service, added that he always contacts the parents “if a problem occurs”.<sup>387</sup>

Such connections are not effective in the case of disadvantaged parents, since the majority of children who leave the school in the afternoon join an environment that represents very different sets of values from those that the school does. This type of distance between the school and the children will remain if there is a similar distance between the parents and the school. Some adult education programmes have been organised, but as these usually depend on grant applications they are somewhat

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<sup>384</sup> Interview with the Headmaster of the Tiszabura primary school, 12 February, 2006.

<sup>385</sup> Interview with the Headmaster of the Tiszabura primary school, 12 February, 2006.

<sup>386</sup> Interview with a primary school teacher, Tiszabura, 13 February, 2006.

<sup>387</sup> Interview with a teacher for special educational needs, Tiszabura, 13 February, 2006.

irregular. Schools may not take advantage of opportunities to contact parents, since their relations tend to be restricted to celebrations, and traditional and informal ways.

### *Patterns of segregation*

The estimated representation of Roma pupils is 90 per cent in the Tiszabura school, and the number of disadvantaged is also very high; the school was selected to participate in the National Network of Educational Integration (OOIH). Teachers generally identify integration with the elimination of the earlier practice in which pupils were grouped together on the basis of the perceived skills for the creation of so-called “mixed” classes. However, teachers do not agree in their assessment of whether this practice is effective or not, necessary or not, and why they should reshape the classes in that way at all.

The previous practice at Tiszabura was that separate groups were established in pre-school, chiefly in connection with the parents’ social background: “Groups were not established along skills indeed, [and] not along whether the group was good or bad, but poor kids whose clothing was stinky or louserridden [...] got into one branch.”<sup>388</sup> Now the school attempts to establish heterogeneous classes, but it is difficult because the majority of children are of Roma origin

According to current legislation, working towards integrated education and normative support for this process is not bound to the proportion of Roma pupils but to the number of pupils with disadvantaged status. Therefore, the school is required to monitor not the proportion of Roma but rather the number of disadvantaged pupils, according to an interview:

Not all the Roma pupils are disadvantaged and not even all the children in the special class are [...] if we consider the parents’ graduation too, because, for example, child protection support does not fully coincide with what we consider as a disadvantaged status [...] then the proportion of disadvantaged children is around 70–75 per cent.<sup>389</sup>

Research suggests that another selection mechanism still prevails in establishing school classes. One teacher interviewed indicated that roughly 25 per cent of his students can be seen as disadvantaged, but since the overall proportion of disadvantaged children in the school is between 70 and 75 per cent, this suggests that the number of such children is not divided equally among classes. Interviews reveal that some teachers believe that the current integration process follows earlier patterns:

The education of disadvantaged – primarily Roma – children has determined the profile of this school ever since I can remember. So this situation naturally characterises pre-school too [...] to increase the chance for disadvantaged children to catch up was the aim of the pre-school. Even before the [base school] competition this was one of the major tasks.

<sup>388</sup> Interview, confidentiality requested, Tiszabura, 13 February, 2006.

<sup>389</sup> Interview with the Headmaster of the Tiszabura primary school, 12 February, 2006.

This practice of the catch-up class was against my will, so I tried to stop it, [...] there wasn't a positive example.

Do you want me to tell how old this integration is? This is not new at all; it worked like this before. Furthermore, there were classes with slightly the same abilities and there was some good in each of them when I started to teach at the beginning of the 1970s. There is nothing new under the sun in education, and those who are now called the integration mentors have not discovered any miracles, because we have been doing it for a long time.

We were doing the same thing years before, only it didn't have a name. So we haven't introduced many innovations. [...] If we say integration we chiefly mean the integration of disadvantaged children, but our school has this speciality: that there are many children with particular ability disorders. So they are not mentally handicapped but they have difficulties in learning. They are also here integrated in the elementary school.<sup>390</sup>

The research revealed that since teachers viewed this educational practice as something that they had been using previously, they questioned why it was necessary to change the approach and what the additional value of taking part in the integration network could be. The efforts to draw up mixed classes with no grouping by ability, mandated by the normative support that the school receives as part of the network, presents new challenges for the teachers, and some reported that it has created problems for the students as well:

[...] [children] in the sixth grades are less good; they have been mixed and didn't get used to each other, they find it hard to accept each other to this very day, and there are personal antagonisms as well [...] The A and the B classes were muddled; the stronger and the weaker class [are] there, and this has not been working properly to this day.

So much so that these children couldn't make friends with each other, that a kid from ex-class A wouldn't sit next to his mate from ex-class B because he is louseridden and this one is not willing to work in the same group with that one.<sup>391</sup>

The teacher who put forward the grant application related the following about the preparation and participation in the OOIH project:

We had many conversations with [the Soros Foundation] about this school integration, which was only a plan at the time. And [we agreed] that the quota of integration should not be 50 per cent but a little bit higher. We even wrote a petition [...] and we got the answer and they indeed increased the quota, and that was the starting point that we were trying to apply for the base school status.<sup>392</sup>

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<sup>390</sup> Interview with a primary school teacher, Tiszabura, 13 February, 2006.

<sup>391</sup> Interview, confidentiality requested, Tiszabura, 12 February, 2006.

<sup>392</sup> Interview with a primary school teacher, Tiszabura, 13 February, 2006.

Further interviews also referred to this proportion of Roma students as a prerequisite for funding.

The school's participation in the network requires it to provide certain services, which one of the managing staff members described as follows:

My interpretation for services is that we are here to ensure that children have a good time in the school, so we make every effort to give them what they need and get parents to accept this sort of service and the maintainer [of the school] to be satisfied with our activities as well.<sup>393</sup>

However, the OOIH concept requires that participating schools be a provider of education methodology services, while the response above uses the language of the Comenius project<sup>394</sup> and thus reflects ideas of quality development. The term integration has not even been defined for the maintainers of the national network (regional, small region coordinators, advisors): "Integration was not defined like that. It was not said what integration was. Or at least I can't remember that."<sup>395</sup>

The school also provides education for the approximately 50 students who need special schooling. Those interviewed expressed the view that this type of education is generally good for the parents, so that their children can receive adequate training locally.<sup>396</sup> However, it is rare that parents want their child to go to the school if their older one had attended the school previously.

One of the people interviewed said that parents of these children are also mentally retarded and they had also received this sort of education (which has existed since 1966).<sup>397</sup> The school recently renovated the separate building where children receiving special education go, and people widely thought of the facility as a waste of space, but the renovation may change this view. The representation of Roma and disadvantaged people in this system of schooling is even higher, and transfer from the special classes to the mainstream group seldom happens.

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<sup>393</sup> Interview with a primary school teacher, Tiszabura, 13 February, 2006.

<sup>394</sup> An EU-funded project for quality assurance in schools.

<sup>395</sup> Interview with the local coordinator of National Integration Network (OOIH), Tiszabura, 12 February, 2006.

<sup>396</sup> Interview with a teacher for special educational needs, Tiszabura, 13 February, 2006.

<sup>397</sup> Interview, confidentiality requested, Tiszabura, 12 February, 2006.

### **ANNEX 3. LEGISLATION CITED IN THE REPORT**

The Constitution of the Republic of Hungary

#### **Acts**

Act No. 63 of 1992 on the Protection of Personal Data and the Publicity of Public Data.

Act No. 77 of 1993 on the Rights of National and Ethnic Minorities.

Act No. 79 of 1993 on Public Education

Act No. 31 of 1997 on Child Protection.

Act No. 55 of 2002 on Mediation in Civil Law Disputes.

Act No. 125 of 2003 on Equal Treatment and the Promotion of Equal Opportunities

#### **Decrees**

Ministerial Decree No. 11/1994 (VI.8) MKM on the Operation of Educational Institutions

Ministerial Decree 14/1994 (VI.24) MKM on Education Obligation and Pedagogical Services

Government Decree No. 269/2000 (XII.26) on the General Rules of Admission Procedures to Institutions of Higher Education.

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Equal access to quality education for  
Roma

Romania

## Table of Contents

1. Executive Summary and Recommendations .....	331
1.1 Executive Summary .....	331
1.2 Recommendations .....	334
1.2.1 Recommendations on monitoring and evaluation .....	334
1.2.2 Recommendations for improving access to education .....	335
1.2.3 Recommendations on improving quality of education .....	338
2. Basic Education Indicators .....	342
2.1 Data collection .....	342
2.2 Enrolment data and trends .....	345
2.3 Retention and Completion .....	351
2.4 Types and extent of segregation .....	357
3. Government Educational Policies and Programmes .....	363
3.1 Government policy documents .....	364
3.1.1 Decentralisation .....	364
3.1.2 General policies for Roma .....	365
3.2 Government education programmes .....	368
3.2.1 General programmes and projects .....	368
3.2.2 Phare-funded projects .....	369
3.2.3 Minority language education .....	376
3.3 Desegregation .....	377
3.4 Roma teaching assistants/school mediators .....	383
3.5 Romanes teachers .....	386
3.6 Educational materials and curriculum policy .....	387
3.7 Teacher training and support .....	389
3.8 Discrimination monitoring mechanisms .....	395
4. Constraints on Access to Education .....	397
4.1 Structural constraints .....	397
4.2 Legal and administrative requirements .....	400
4.3 Costs .....	403
4.4 Residential segregation/Geographical isolation .....	406
4.5 School and class placement procedures .....	407
4.6 Language .....	413

5. Barriers to Quality Education .....	416
5.1 School facilities and human resources .....	416
5.2 School results .....	421
5.3 Curricular standards .....	424
5.4 Classroom practice and pedagogy .....	426
5.5 School–community relations .....	431
5.6 Discriminatory attitudes .....	434
5.7 School inspections .....	439
ANNEX 1. Administrative Structure .....	441
A1.1 Structure and organisation .....	441
A1.2 Legal roles and decision-making .....	443
A1.3 School funding .....	444
ANNEX 2. Case Studies .....	447
A2.1 Case Study: Bobesti village .....	447
A2.1.1 Administrative Unit .....	447
A2.1.2 Roma and the Community .....	447
A2.1.3 Education .....	448
A2.2 Case Study: Şimleu Silvaniei city .....	456
A2.2.1 Administrative Unit .....	456
A2.2.2 Roma and the Community .....	456
A2.2.3 Education .....	459
A2.3 Case Study: Roman Municipality .....	464
A2.3.1 Administrative Unit .....	464
A2.3.2 Roma and the Community .....	465
A2.3.3 Education .....	467
ANNEX 3. Legislation cited in the report.....	471
ANNEX 4. Bibliography .....	474

## Index of Tables

Table 1:	Roma demographic structure (2004) .....	345
Table 2:	Pre-school- and school-age population – for Roma and the national population, breakdown by age groups (2002) .....	346
Table 3:	Proportion of Roma who drop out or are never enrolled in school (1993 and 1998) .....	347
Table 4:	Number of Roma students (1989–2007) .....	348
Table 5:	Enrolment rate for Roma and majority population in close proximity to Roma (2005) .....	349
Table 6:	Average age of Roma and non-Roma students at primary and secondary levels – breakdown by grade (2006) .....	350
Table 7:	Evolution of the drop-out rate for compulsory education during the school year – breakdown by place of residence (1990–2005) .....	352
Table 8:	School situation of Roma children (1998) .....	353
Table 9:	Early primary enrolment – breakdown by age (2002) .....	354
Table 10:	Proportion of pupils starting grade 1 who reach grade 5 and who complete grade 5 – for Roma and non-Roma (2002) .....	355
Table 11:	School attainment level – for the Roma population and national population (2002) .....	356
Table 12:	Relation between educational attainment level and age – for Roma and non-Roma (2007) .....	357
Table 13:	Number of segregated Roma pre-schools and schools (2006) .....	362
Table 14:	National pre-school data (2005–2007) .....	398
Table 15:	Pre-school capacity (2000–2004) .....	398
Table 16:	Pre-school enrolment rates (1999–2004) .....	398
Table 17:	Identity documents situation .....	402
Table 18:	Children transferred from special schools to mainstream schools (1999–2006) .....	411
Table 19:	Enrolment in Romanes language programmes (2004–2005) .....	414
Table 20:	Results of a survey of school buildings – for 70 schools (2006) .....	419
Table 21:	Illiteracy rates for the Roma population, by age group (2002) .....	423
Table 22:	Overall literacy rates – for Roma and non-Roma (2005) .....	424



Table 23:	Popular attitudes towards Roma (2004) .....	437
Table 24:	Social distance (2004) .....	438
Table A1:	Public spending for education as a share of GDP (2005) .....	444
Table A2:	Per pupil costs – breakdown by source of income (2001–2005) .....	445
Table A3:	Estimated spending on education personnel as a percentage of total school spending, by level of education (2001–2005) .....	446
Table A4:	Total education spending – breakdown by education level .....	446
Table A5:	Case study Șimleu Silvaniei: students in Pustă Vale primary school .....	460
Table A6:	Case study Roman Municipality: number of students at the Rom Sports School (school year 2006–2007) .....	468

## List of abbreviations and acronyms

ALSDGC	Romanian branch of the International Reading and Writing for Critical Thinking Association ( <i>Asociația Lectura și Scrierea pentru Dezvoltarea Gândirii Critice, România</i> )
ARACIP	Romanian Agency for Ensuring Quality in Pre-University Education ( <i>Agenția Română de Asigurare a Calității în Învățământul Preuniversitar</i> )
CCD	Teacher Training Centres ( <i>Casa Corpului Didactic</i> )
CEDU	Center Education 2000+ ( <i>Centrul Educația 2000+</i> )
CNFP	National Centre for Training of the Pre-University Teaching Staff ( <i>Centrul Național de Formare a Personalului din Învățământul Preuniversitar</i> )
CREDIS	Department of Open Distance Education of Bucharest University ( <i>Departamentul de Învățământ Deschis la Distanță, Universitatea din București, dezvoltat din Centrul de Resurse, Documentare, Informare și Servicii pentru Învățământ Deschis la Distanță</i> )
CSI	County School Inspectorate ( <i>Inspectorat Școlar Județean</i> )
DPPD	Departments for Teacher Training ( <i>Departamentul pentru Pregătirea Personalului Didactic</i> )
ICCV	Research Institute for Quality of Life ( <i>Institutul de Cercetare a Calității Vieții</i> )

INS	Romanian National Institute of Statistics ( <i>Institutul Național de Statistică</i> )
ITP	Individual Training Plan ( <i>Planul Individual de Pregătire</i> )
MARODIS	Methodology for Application of the Rules for Organisation and Implementation of School Inspection ( <i>Metodologia de Aplicare a Regulamentului de Organizare și Desfășurare a Inspecției Școlare</i> )
MER	Ministry of Education and Research ( <i>Ministrul educației și cercetării</i> )
NCCD	The National Council for Combating Discrimination ( <i>Consiliul Național pentru Combaterea Discriminării</i> )
PNMFCDN	Multi-Annual National Training Programme for Non-Roma Teachers Working with Roma Children and Students ( <i>Programul național multianual de formare a cadrelor didactice nerome care lucrează cu elevi și copii rromi</i> )
REF	Roma Education Fund
RODIS	Rules for Organisation and Implementation of School Inspection ( <i>Regulamentul de Organizare și Desfășurare a Inspecției Școlare</i> )
RWCT	Reading and Writing for Critical Thinking ( <i>Lectura și Scrierea pentru Dezvoltarea Gândirii Critice</i> )
TAB	Textbook Approvals Board ( <i>Consiliul Național de Aprobare a Manualelor</i> )
UNICEF	United Nations Children's Fund

# 1. EXECUTIVE SUMMARY AND RECOMMENDATIONS

## 1.1 Executive Summary

The Romanian Government has energetically adopted policies and programmes aimed at improving the situation of Roma generally, and has made Roma education a priority for the use of European Union (EU) funds. However, implementation of these policies has been far weaker than the ambitious targets suggest, and a range of serious obstacles to quality education remains for Roma children. An active civil sector has acted in partnership with the Government in a number of successful projects designed to increase Roma access to education, and the gradual scaling-up of these initiatives should be monitored to track results. With Romania now a member of the EU, it is vital that the international encouragement that has played such an important part in past efforts to better address the needs of Roma does not falter. The “Decade of Roma Inclusion 2005–2015” could be a framework for Romania to consolidate and broaden improvements in education for Roma, rather than yet another programme promising more than it delivers.

Romania has a high proportion of young Roma, making access to quality education all the more urgent. While comprehensive official data are not available, a number of independent studies have collected relevant information on the Roma population and educational issues. The numbers of Roma – and importantly, the numbers of Roma who identify themselves as such – enrolling in school have been steadily increasing. However, despite the important contribution that pre-school makes to a child’s later school success, there is still a large number of Roma children who do not attend pre-school, due to costs, lack of space, and geographical isolation. Roma also appear more likely to drop out of school than their non-Roma peers, and a much higher percentage of Roma over the age of ten have not completed any level of schooling.

Segregation is a persistent and pervasive issue in Romania; the separation of Roma settlements from majority communities has led to the growth of Roma-only schools serving these settlements and neighbourhoods. However, practices such as deliberately placing Roma children in separate classes, or channelling them into special schools for children with intellectual disabilities, have also been reported. As various studies have used different methods for determining what constitutes a segregated school, a comprehensive survey using a consistent methodology and definitions should be a priority for the Government.

The main Government document addressing the situation of Roma in general is the *Strategy for the Improvement of the Condition of the Roma*, adopted in 2001 and updated in 2006. Research has shown that *Strategy* implementation has been uneven in the areas that it targets, which include education. The “Access to Education for Disadvantaged Groups, with a Special Focus on Roma” project, which has been developed and run since 2003 with support from the EU’s Phare programme, includes support for county-level strategies and has been effective in piloting a variety of

approaches aimed at improving Roma access to education. In 2004, the Government also drafted an Action Plan as part of the Decade of Roma Inclusion (*draft Decade Action Plan*), but this has not yet been adopted.

The ongoing process of decentralisation particularly affects education, as local authorities gain greater autonomy, but often without clear responsibilities, and the central Government retains fewer and fewer mechanisms to combat negative trends such as segregation. As this process continues, the Government should ensure that there are accessible and competent bodies to address potential problems within a more decentralised system, that local authorities are given clear mandates and support to implement their new level of autonomy, and that the needs of Roma communities are appropriately addressed by local policies.

A notification issued by the Ministry of Education and Research in 2004 outlines the steps that schools and school inspectors must take to identify and eliminate segregation; however, as this notification lacks the force of law, its implementation has been limited.

Roma mediators have been working in Romanian schools since 2000, and while the selection and training of 200 mediators were carried out as part of the Phare programme's "Access to Education for Disadvantaged Groups, with a Special Focus on Roma" project, limited resources and a lack of clear regulations for hiring additional mediators have limited the expansion of this initiative and threatened the position of existing Roma mediators. Government efforts to increase the number of Roma teachers and teachers speaking Romanes, as well as Romanes language classes, have been more successful. However, more material reflecting the Roma minority should be included in curriculum content, and made an integral part of the education on offer for all children in Romania, not only the minority itself.

NGO-funded and Government-funded teacher training is available on topics relevant to Roma education, and the Government should establish a system to monitor and evaluate all courses in order to consolidate and build on their good practices.

The National Council for Combating Discrimination (NCCD) has been operating since 2002, but to date has received only one complaint related to access to education, where the Council issued a warning to a school found to be segregating Roma students. The capacity of schools for handling discrimination is low, and there should be local solutions in place for dealing with different situations.

While precise figures on the number of Roma without identity papers are not available, research clearly indicates that the scope of the problem is large; the Government should take steps to collect more data on this issue and, in particular, to assess its significance as a barrier to school enrolment. The costs for maintaining a child in school are not affordable for most Roma families: a clear connection exists between the economic status of Roma and the educational attainment of their children.

The public authorities still largely ignore the problem of residential segregation of Roma communities, and a real change will take place only with systematic State intervention. Widespread geographical segregation in Romania has led to a high proportion of Roma children living in Roma-majority settlements and neighbourhoods, often at a distance from majority communities and infrastructure, including schools.

Although overrepresentation of Roma in special schools for children with intellectual disabilities is not as serious a problem in Romania as in other countries in the region, some Roma children are still placed in these schools to take advantage of meals and accommodation benefits. Such benefits should be made available to students from disadvantaged backgrounds attending any schools, to eliminate any incentive to attend special schools. The Government's "Second Chance" programme, while generally involving exclusively Roma students, remains a better option than previous efforts to integrate older-than-average students, which tended to place such children in classes with younger peers.

Romania has an established system offering Romanes language instruction, with the numbers of both students and teachers increasing steadily, supported by the good cooperation between civil society and Government efforts in this area.

Romania has made some important advances with regard to the quality of education available to Roma. Nevertheless, serious inequalities remain, and the Government must ensure that education reform takes the specific needs of Roma students into account.

Despite a number of reports highlighting the poor condition of schools with a high proportion of Roma students, little has been done to address the basic conditions of such schools – poor heating, inadequate sanitation, and overcrowding. As schools receive much of their funding from local revenue, specific action at the central Government level is needed to supplement funds in disadvantaged areas.

The school results of Roma pupils have been improving, although this is still measured in terms of declining failure rates. Decentralisation has had a positive impact on curricular development, as schools are encouraged to develop modules reflecting local culture and traditions. However, the Ministry of Education and Research should ensure that materials about Roma culture and contributions are part of all Romanian children's education.

A range of training opportunities related to Roma education are available to teachers, many offered by NGOs with specific experience in the field. This is a positive step towards more active techniques; however, after training, there is little support provided to teachers to help them to continue to innovate in their classrooms. In addition, more focused efforts are needed to involve Roma communities in schools; sustained outreach and communication from all parties are needed to bridge the enduring gap between Roma parents and schools. Low expectations and negative perceptions of Roma in the classroom are pervasive, and the Government must take steps to enhance tolerance in schools as a corollary to measures addressing physical segregation.

Romania's informal network of Inspectors for Roma Education is a model in many regards; the Ministry of Education and Research should reinforce this system and ensure that it continues to work to enhance the inclusion of Roma throughout the country, and through all levels of education.

## 1.2 Recommendations

### 1.2.1 Recommendations on monitoring and evaluation

#### *Data collection*

The Ministry of Education and Science should do the following:

1. Improve the data collection mechanisms related to the school population, in particular for Roma students and migrant students, with adequate safeguards for protecting sensitive information and identity and privacy of individuals.
2. Ensure the public availability of statistical data disaggregated by age, ethnicity and gender, on the situation of Roma in the field of education; this could, for example, be made available on the Ministry of Education's portal website.
3. Design samples of the pupils participating in international educational testing, such as PISA and TIMSS, to include consistent sub-samples of Roma pupils. Report the results of these international testing disaggregated on ethnicity in order to allow the identification of trends in Roma school achievement of throughout the "Decade of Roma Inclusion".
4. Use the existent data collection systems in the longer term; for example, the Roma database software designed in the frame of the Phare 2003 project could provide reliable data, if used in the future to track student records and school achievement.
5. Develop a "tracking" system between schools for students who migrate with families inside the country or abroad.

#### *Evaluation*

The Ministry of Education and Science should do the following:

6. Monitor desegregation actions and the impact on the beneficiaries.
7. Initiate evaluation research in order to document the impact of different interventions, projects and programs after the formal end.
8. Balance quantitative data collection mechanisms with qualitative data collection in order to get system-related data, as well as information related to people's lives.

School Inspectorates should do the following:

9. Monitor and respect quality standards for the school's environment, including with respect to ensuring adequate space, heating, lightening, space available per child; to this end, the ARACIP (the Romanian Agency for Ensuring Quality in Pre-University Education) quality criteria and self-assessment forms should be used at the school level.

### 1.2.2 Recommendations for improving access to education

#### *Structural Constraints, Legal and Administrative Requirements, Costs*

The Ministry of Education and Science should do the following:

10. Ensure that all children have access to full-day two-year preschool, by:
  - Extending the compulsory preparatory class (*grupa pregatitoare*) to two years for all disadvantaged children;
  - Ensuring that adequate space is available to accommodate all children; this could be through construction of new classrooms, revision in class scheduling, or reviewing the requirements for the number of children per class;
  - Providing free, full-day educational programmes for disadvantaged children.
11. Make provisions for those children who do not have the appropriate papers to have access to preschool education.
12. Allocate funding for primary and secondary schools to ensure that children who qualify can receive support such as meals, clothes and after school programmes.
13. Take concerted action to tackle child labour; specifically find ways to target child labourers to return to, and stay in, school, such as through the above-mentioned incentives.
14. Provide full-day educational programmes for disadvantaged children ("after school programmes"), including tutoring and mentoring. Teachers should receive financial incentives for extra-hours; children should receive a free lunch, at a minimum.
15. Continue and encourage more "Second Chance" classes where necessary, and further ensure appropriate implementation of the recruitment, teaching, assessment and certification procedures for "Second Chance" students.

#### *Residential segregation/geographic isolation*

The Government of Romania should do the following:

16. Adopt the National Action Plan of the Decade of Roma Inclusion – the *National Action Plan at the National Level* (hereafter, *draft Decade Action*)

*Plan*)<sup>1</sup> – including the section on Education issues and especially its provisions for combating school segregation.

17. Ensure that appropriate and clear roles and responsibilities are set out for the new structures designated for implementation of the *Roma Strategy* in a decentralised system:
  - Working Group for Public Policies for Roma (Grupul de lucru pentru politicile publice pentru romi);
  - Ministerial Commissions for Roma (*Comisiile ministeriale pentru Romi*);
  - County Offices for Roma (*Birourile Judetene pentru Romi*);
  - Local experts for Roma issues (*Expertii locali pentru problemele romilor*).
18. Fulfil the goals set out in *The Governmental Strategy for Improvement of the Condition of the Roma*,<sup>2</sup> especially in regards to ending the practice of placing Roma children in separate classes.
19. Involve the representatives of Government in territory (*Prefecturi*) in facilitating institutional dialogue among local stakeholders, such as the local authorities, school staff, county school inspectorate, parents councils and NGOs, in desegregation projects.
20. Allocate governmental and EU funds as a priority to localities demonstrating efforts to improve social cohesion through school desegregation initiatives.

The Ministry of Education and Science should do the following:

21. Issue a ministerial order on the elimination of segregation, defining segregation broadly so as to include separation on the basis of the socio-economic status of parents, occupational class, gender, religion, or academic abilities. School directors who maintain separate school classes for Roma, or not elaborating and implementing desegregation plans in the case of separate schools, should be subject to financial and professional sanctions.
22. Create a working group to reunite the National Agency for Roma, the National Council for Combating Discrimination (NCCD), as well as Roma NGOs, in order to design a nationwide strategy for school desegregation, drawing on the best practices on desegregation established in the Phare 2001 and Phare 2003 educational programmes.

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<sup>1</sup> *The National Action Plan at the National Level (Planul Național de Acțiune)* (hereafter, *draft Decade Action Plan*)

<sup>2</sup> *The Governmental Strategy for the Improvement of the Condition of the Roma (Strategia Guvernului României de Îmbunătățire a Situației Romilor)*.



23. Train the county school inspectorates to carefully prepare for the desegregation process; this includes preparing teachers, parents and pupils, creating and maintaining a welcoming school environment, and delivering educational and social support for pupils in need until their complete integration in their new classes and schools, as part of a comprehensive desegregation programme.
24. Strongly support and empower the role played by school inspectors in monitoring school and placement procedures, and assisting schools in desegregation efforts, as identified in the Ministry of Education Notification 29323 of 20 April 2004 on school desegregation; this could be through training, best practice exchange, and by channelling resources for implementing the activities.
25. Provide assistance to the county inspectorates, to ensure that experts on community facilitation and desegregation go into schools and the community, to provide mediation and counselling in case of debates or conflicts.
26. Support inspectorates in the use of school self evaluation – which includes school de-segregation as a topic – to encourage schools nationwide to use these instruments in the process of desegregation.
27. Continue to collect data, and monitor desegregation measures started in the 2005–2006 school year through the Phare 2003 project.

The Regional Inspectorates of Education and local education authorities should do the following:

28. Set up long-term and short-term desegregation plans; assist schools, monitor and support desegregation at the school level, including through their regular school inspections.
29. Support the creation of school networks at the local level, with the aim of sharing experience and adopting optimal desegregation plans.
30. Ensure that the free transportation of all children to the host schools as required by law is available as needed, and offer their full assistance for the process of desegregation.
31. Address non-educational barriers to school desegregation, including not only transport, but also other poverty-related barriers.

### *School and Class Placement Procedures*

The Ministry of Education and Research should do the following:

32. Fulfil the commitments made in Government Emergency Ordinance No. 192/199 and the Education Law No. 218/ April 2004 that stipulate the integration of children from special schools to mainstream schools.

33. Demonstrate commitment to, and progress in, the improvement of diagnostic and assessment tools/instruments used in the assessment of children with special educational needs.
34. Develop standards, methodologies, and financing mechanisms for the inclusion of children from special schools in mainstream classes, ensuring that mainstream schools offer all of the support and resources necessary for inclusive education.

### *Language*

The Ministry of Education and Research should do the following:

35. Commit itself to the curriculum and curricular materials development to support the Roma language and culture classes that are occurring across the country.
36. Pilot a Romanes language curriculum in grades one to four.
37. Encourage and support in-service and pre-service teacher institutions to offer courses in language acquisition, methodologies for bilingual education and techniques, intercultural education, inclusive education.
38. Create a clear job description for the inspectors for Roma regarding language learning.

## 1.2.3 Recommendations on improving quality of education

### *School Facilities and Human Resources*

The Ministry of Education and Research and the County School Inspectorates should:

39. Ensure that more qualified teachers are appointed in the schools from disadvantaged communities, specifically in the rural areas.
40. Control the turn-over rate of teachers by providing incentives for teachers working in disadvantaged and Roma communities, including free training programmes.
41. Extend the decentralisation process by increasing the use of local school and community recommendations and needs in appointing teachers rather than using the computer-based teacher job allocation system.
42. Make basic investments in infrastructure.
43. Find a means of ensuring that trained Mediators can subsequently be employed, and those that are hired can remain in service.

### *Curricular Standards*

The Ministry of Education and Research should do the following:

44. Review the educational philosophy and common set of principles and norms for all schooling in pre-tertiary education in regards to diversity and the multicultural nature of Romanian society, and make necessary changes in creation criteria to integrate cultural and ethnic diversity issues both at the level of objectives (attainment targets and specific objectives) and at the level of content.
45. Cooperate with the National Textbook Agency in order to strengthen the cultural diversity dimension in textbooks at all the school levels.
46. Support the creation of good quality learning materials that take into account Roma history, culture and values, and also reprint such materials already developed by NGOs.
47. Open a competition for the creation of books in Romanes that comply with the national curriculum for at a minimum the early primary grades, and identify financial resources to ensure the costs are not prohibitive.
48. Review the proportion of school based curricula in the general context of the national curriculum, such that schools and teachers can effectively adapt the educational offer to the real needs linked with ethnic structure of the students and community.
49. Elaborate of a set of professional incentives to encourage teachers to develop alternative learning resources.

### *Classroom Practice and Pedagogy*

The Ministry of Education and Research should do the following:

50. Support schools and teachers to use new standards to help in the quality of the education they deliver.
51. Monitor the implementation of those teaching standards that incorporate indicators regarding quality education, such as those prepared by the Romanian Agency for Ensuring Quality in Pre-University Education (ARACIS); these standards incorporate lessons learned from various projects and programs in the field of inclusive education, education in Roma communities or disadvantaged communities.
52. Continue training, employ and engage school mediators in the education process.
53. Elaborate a new national policy for initial and continuous teacher training with explicit references to include in the curriculum intercultural or multicultural education as a specific component.

54. Glean the experience in in-service teacher training that has occurred in projects run under Phare and NGO projects, and mainstream that practice into pre-service and in-service teacher training institutions.
55. Encourage innovations in schools with highly mobile student populations, such as the children of seasonal labourers who are away for the same period every year; this could be in the form of, for example, summer study packs, and student portfolios.

County level and local pedagogical authorities, inspectorates, and in-service training institutions should do the following:

56. Provide training for teachers and administrators in pre-service and in-service training institutions, in child-centred pedagogy, anti-bias education, methodologies for second language learning, multi-cultural education, and effective ways of involving parents and communities.
57. Provide support for the in-service teacher training institutions (and encourage their cooperation with the inspectorates), to encourage new models and practices of school-based leadership and management, student-centred instruction and parent and community involvement, including the use of school self-evaluation as a quality assurance tool.
58. Support teachers' pre-service and in-service training institutions to include school improvement theory and practice into their official curriculum.

### *School-Community Relations*

The Ministry of Education and Science should do the following:

59. Continue to stimulate Roma to work in schools by providing scholarships and distance education programs for teachers and school mediators; Roma NGO involvement in the trainings would be recommended.

Local Inspectorates should support schools to do the following:

60. Encourage the increased involvement of Roma parents in school decision-making.
61. Actively pursue their own institutional development and improvement.
62. Reinforce school improvement and school development efforts by building on the experience gained in some schools with other projects, and organising exchange visits and networking between schools.
63. Foster links wherever possible with organisations such as community development NGOs, that can work with groups of parents to enhance their capacity for meaningful involvement with school life, to increase their

confidence and ultimately to enable them to influence school policy and practice.

### *Discriminatory Attitudes*

The Government of Romania should do the following:

64. Increase the visibility of the National Council for Combating Discrimination (NCCD) and other national institutions charged with countering discrimination.
65. Address quality differences between schools and discriminatory practices by enforcing respect for legal regulations and norms.
66. Encourage and support financially programs for interethnic tolerance and cooperation.

Universities and pedagogical high schools should:

67. In their initial training of teachers, extend to a larger scale specific training modules on elements such as: intercultural education, equal opportunities, family involvement in school life.

### *School Inspections*

The Ministry of Education and Research and the County School Inspectorates should do the following:

68. Ensure that all schools, including special schools and segregated Roma schools, are inspected regularly and held to the standards defined by law.
69. Train and nominate inspectors in charge with segregation issue and require all inspectors to take action in line with desegregation policy.
70. Support and encourage inspectors to undertake the monitoring process as a learning and supportive function, not as control function.

## 2. BASIC EDUCATION INDICATORS

*Romania has a high proportion of young Roma, making access to quality education all the more urgent. While comprehensive official data are not available, a number of independent studies have collected relevant information on the Roma population and educational issues. The numbers of Roma – and importantly, the numbers of Roma who identify themselves as such – enrolling in school have been steadily increasing. However, despite the important contribution that pre-school makes to a child's later school success, there are still a large number of Roma children who do not attend pre-school, due to costs, lack of space, and geographical isolation. Roma also appear more likely to drop out of school than their non-Roma peers, and a much higher percentage of Roma over the age of ten have not completed any level of schooling.*

*Segregation is a persistent and pervasive issue in Romania; the separation of Roma settlements from majority communities has led to the growth of Roma-only schools serving these settlements and neighbourhoods. However, practices such as deliberately placing Roma children in separate classes, or channelling them into special schools for children with intellectual disabilities, have also been reported. As various studies have used different methods for determining what constitutes a segregated school, a comprehensive survey using a consistent methodology and definitions should be a priority for the Government.*

### 2.1 Data collection

This report takes into consideration the most relevant research reports and statistics published recently. However, the availability and reliability of data are problematic, due to a lack of consistent collection and publication of Roma-related statistics, as well as education statistics in general. Several data collection initiatives are relevant to this report, published with the participation of organisations that are constantly involved in the promotion of access to quality education for children. These include UNICEF, the Institute for Educational Sciences (*Institutul de Științe ale Educației*), the Research Institute for Quality of Life (*Institutul de Cercetare a Calității Vieții*, ICCV) and others. With support from the European Union (EU), the Phare programmes implemented by the Ministry of Education, and research in recent years on access to education for disadvantaged groups, some baseline studies were started, which should lead to more consistent and constant updating of the data available.

The official Census of Romanian Population and Households from 2002 (hereafter, 2002 census) presents several relevant figures regarding the situation of Roma in Romania. According to the census, the total population of Romania was 21,680,974.<sup>3</sup> After 1989, the birth rate in Romania plummeted, from 2.2 (number of children borne by a woman during her fertile life) in 1989, to 1.8 in 1990 and 1.3 in 2004; over the

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<sup>3</sup> Romanian National Institute of Statistics (Institutul Național de Statistică, INS), results of the 2002 population census, available in English and Romanian on the INS website at [http://www.insse.ro/index\\_eng.htm](http://www.insse.ro/index_eng.htm) (accessed on 28 February 2007) (hereafter, 2002 Census).

same period the mortality rate increased from 10.0 (deceased per 1,000 inhabitants) in 1991 to 10.8 in 2004.<sup>4</sup>

According to the 2002 census, the Roma population in Romania is 535,140, or 2.46 per cent of the total population. The 2002 census data show a significant increase in the Roma population since 1992, when the census registered 401,087 Roma or 1.75 per cent of the total.<sup>5</sup> This increase of 0.71 per cent must be seen in the context of a decreasing total population and an increasing openness to declaring oneself as Roma. According to ICCV, the unofficial Roma figure is around 6.7 per cent of the total population.<sup>6</sup> The Roma Education Fund (REF) *Needs Assessment Paper*, prepared for the “Decade of Roma Inclusion”,<sup>7</sup> notes that Roma activists and NGO leaders estimate that there are between 1,010,000 and 2,500,000 Roma in Romania, representing between 4.65 per cent and 11.52 per cent of the total population.<sup>8</sup>

The complex issue of “who is Roma” and the characteristics that define someone as Roma both remain unresolved. The use of language is one indicator, and the 2002 census indicates that about 43.9 per cent of people who identify themselves as Roma speak Romanes. According to recent research of the Open Society Foundation, Romania (hereafter, OSF-Romania),<sup>9</sup> within a nationally representative sample of self-

<sup>4</sup> INS, statistical data available in Romanian and English on the INS website at <http://www.insse.ro/Anuar%202005/CAPITOLE/cap2.pdf> (accessed 9 March 2007).

<sup>5</sup> INS, statistical data available in Romanian and English on the INS website at <http://www.insse.ro/RPL2002INS/vol4/tabele/t1.pdf> (accessed 9 March 2007).

<sup>6</sup> C. Zamfir and M. Preda (eds.), *Romii in Romania (Roma in Romania)*, Bucharest: Expert Publishing House, 2002. Data gathered refer to 1998. The percentage of 6.7 per cent represents an accurate estimation of the percentage of Roma who are identified by others as such. It is estimated by the same source that the percentage of Roma who declare themselves as Roma is lower, at 4.3 per cent of the total population (pp. 13–14). The estimation of 6.7 per cent is quoted also in Anti-Poverty and Social Inclusion Commission (APSIC), *Suportul social pentru populatia de romi* (Social Support for the Roma Population), Bucharest: APSIC, 2002. This is an official document elaborated by the Anti-Poverty and Social Inclusion Commission under the Romanian Government.

<sup>7</sup> The “Decade of Roma Inclusion 2005–2015”, an initiative supported by the Open Society Institute (OSI) and the World Bank, is an unprecedented international effort to combat discrimination and ensure that Roma have equal access to education, housing, employment and health care. Launched in February 2005 and endorsed by nine Central and Eastern European countries, the Decade is also supported by the European Commission, the Council of Europe, the Council of Europe Development Bank, and the United Nations Development Program. For further details, see the Decade website at <http://www.romadecade.org>.

<sup>8</sup> Roma Education Fund (REF), *Needs Assessment for Romania*, August 2004, available in English at <http://siteresources.worldbank.org/INTROMA/Resources/NAREportFinalRomania.pdf> (accessed on 28 February 2007) (hereafter, REF, *Needs Assessment*).

<sup>9</sup> Open Society Foundation, Romania (hereafter, OSF-Romania), *Roma Inclusion Barometer*, Bucharest: OSF-Romania, 2007, available at <http://www.osf.ro/en/publicatii.php> (accessed on 28 February 2007) (hereafter, OSF-Romania, *Roma Inclusion Barometer*) p. 8.

identified Roma, almost half (45 per cent) declare themselves as “Romanianised” Roma, members of groups known as woodworkers (*rudari*) or hearth-makers (*vatrasi*).

In Romania, during the process of harmonisation of the Romanian legislation to the *acquis communautaire* of the European Union (EU), the National Authority for the Supervision of Personal Data Processing was established as a public, independent and autonomous authority of the Romanian public administration, with the goal of protecting the fundamental rights and freedoms of natural persons, especially the rights of intimate, family and private life, in connection with the processing of personal data and the free circulation of these data.<sup>10</sup> The authority supervises and oversees the legality of personal data processing that falls under Law No. 677/2001, where personal data are defined as “any information referring to a physical person, identified or identifiable, direct or indirect, particularly through an identification number or one or several more specific factors of his or her physical, physiological, psychic, economic, cultural or social identity (for example, name, surname, address, habits, telephone number and salary).”<sup>11</sup> The supervisory authority can decide, if it determines that this law has been violated, to temporarily suspend data processing, to erase all or part of the processed data or to take legal action. The authority can also undertake investigations, on its own initiative or to follow up on a complaint filed, and issue recommendations on data processing.

However, the process of collecting data related to the situation of the Roma population in Romania is still in the early stages. The National Agency for Roma, through an EU-funded programme,<sup>12</sup> is undertaking research that will present representative data on the condition of Roma in areas related to Government policy.

Schools are required to collect data annually and to send this information to the County Inspectorate, using a common form (*SC Situatie Centralizata*). The Inspectorate centralises the data and sends it to the Ministry of Education. These data include tables to be filled in by the directors regarding the number of people who repeat the school year, the number of students enrolled, and the like, but the age or ethnicity of students is not included.

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<sup>10</sup> Law no. 102/2005 on Setting up the National Authority for the Supervision of Personal Data Processing, entered into force on 12 May 2005.

<sup>11</sup> Law 677/2001 on Protection of Persons Concerning the Processing of Personal Data and Free Circulation of Such Data.

<sup>12</sup> Phare, *Phare 2004, Consolidarea Capacitații Instituționale și Dezvoltarea de Parteneriate pentru Îmbunătățirea Percepției și Condițiilor Romilor* (Phare 2004, Strengthening Capacity and Partnership Building to Improve Roma Condition and Perception), Bucharest: Phare, 2004 (hereafter, *Phare 2004, Strengthening Capacity and Partnership Building*).



## 2.2 Enrolment data and trends

Research by the Centre for Health Policies and Services (*Centrul de Politici și Servicii de Sănătate*), from 2004, presents the following data on the demographic structure of the Roma population:<sup>13</sup>

**Table 1: Roma demographic structure (2004)**

Age	Roma Population (sample, 2004)		Total Romanian population (2000 census) <sup>14</sup>	
	Number	per cent	Number	per cent
Under 18	3,487	43.6	5,391,401	24.0
18–24	968	12.1	2,323,894	10.4
25–34	1,357	17.0	3,644,244	16.2
35–44	851	10.7	2,880,033	12.3
45–54	721	9.0	2,914,862	13.0
55–64	344	4.3	2,295,258	10.2
over 65	262	3.3	2,985,513	13.3
<b>Total</b>	<b>7,990</b>	<b>100.0</b>	<b>22,435,205</b>	<b>100.0</b>

Source: Centre for Health Policies<sup>15</sup>

From these data, it is clear that the Roma population in Romania is young: approximately 50 per cent are under 24 years old, while the general population under 24 years old is approximately 25 per cent. (However, this high percentage of Roma under 24 years old has been called into question.)<sup>16</sup> On the other hand, the situation is reversed among the elderly population, where Roma are less represented. The most significant difference is found in the population over 55 years old and over 65 years old

<sup>13</sup> The research was implemented by the Centre for Health Policies and Services (*Centrul de Politici și Servicii de Sănătate*) and funded by the Open Society Institute (OSI), New York. It was based on a representative sample including 1,511 Roma households; a total of 7,990 Roma. See S. Căce and C. Vladescu (eds.), *Health Status of the Roma Population and Its Access to Health Services*, Centre for Health Policies and Services, Bucharest: Expert Publishing House, 2004 (hereafter, Centre for Health Policies and Services, *Health Status of the Roma Population*).

<sup>14</sup> Data from INS, *Romanian Statistical Yearbook*, Bucharest: INS, 2000.

<sup>15</sup> Centre for Health Policies and Services, *Roma Population Research 2004*, p. 16.

<sup>16</sup> OSI Roundtable, Bucharest, February 2007. Explanatory Note: OSI held a roundtable meeting in Romania in February 2007 to invite critiques of the present report in draft form. Experts present included representatives of the Government, education professionals, and non-governmental organisations.

– where there are proportionately three times more non-Roma than Roma (3.3 per cent of the Roma population aged over 65, against 13.3 per cent of the general population). Table 2, with data from the 2002 census, further illustrates the variations between Roma and national averages by age group.

**Table 2: Pre-school- and school-age population – for Roma and the national population, breakdown by age groups (2002)**

Age group (years)	Proportion of the population (per cent)	
	National level	Roma population
0–4	5.0	12.8
5–9	5.2	10.7
10–14	7.2	12.7
15–19	7.5	10.9

Source: INS<sup>17</sup>

The proportion of the Roma population under age 19 is approximately twice that of the Romanian population. These data deserve special attention with respect to the educational system and educational policies, given the general context of negative natural population growth in Romania and its long-term implications for the education system and for society in general. The implication of these numbers on the age structure of the Roma population in Romania is that achieving better access to quality education for Roma has even greater importance.

Pre-school education enrolment is 66.1 per cent for the country as a whole (2000–2001); the one third of children who do not attend pre-school mainly comprise the most economically disadvantaged, with less educated parents.<sup>18</sup> Pre-school education enrolment for the Roma community is as low as 20 per cent.

The fact that such a small percentage of Roma children attend pre-school, in comparison with non-Roma children, is an important factor that contributes to school failure. Children go to school without any prior experience with a structured learning environment, and find it very difficult to keep pace with children who attended a regular pre-school programme of three years. In response to this, intensive summer pre-schools are being organised in more and more schools. Most of the Inspectorates involved in a Phare-funded project (see section 3.2) developed a methodology,

<sup>17</sup> 2002 census.

<sup>18</sup> P. Cronin, M. Dvorski, A. Valerio, M. Kovacs, “Education Sub-Sector Review: Romania,” unpublished paper, Education Support Programme (ESP), OSI-Budapest, 2003 (hereafter, Cronin *et al.*, *Education Sub-Sector Review*), p. 14.

educational materials, assessment instruments and handouts, which both primary and pre-school teachers are encouraged to use. However, this can be only a temporary solution, and the focus should instead be on encouraging Roma children to attend mainstream pre-schools.

**Table 3: Proportion of Roma who drop out or are never enrolled in school (1993 and 1998)**

Age group (years)	Share of total school-age population (per cent)			
	Dropped out		Never enrolled in school	
	1992	1998	1992	1998
7–10	10.1	1.9	27.9	15.4
11–14	24.4	8.6	17.6	15.8

Source: C. Zamfir and E. Zamfir<sup>19</sup>

Table 3 above demonstrates that Roma enrolment in school has been increasing steadily over the past ten years. There are two main reasons for this. First, according to teachers, a policy measure introduced in 1993 has had an impact on increased enrolment.<sup>20</sup> This was the regulation of conditioning payment of the school allowance benefit on school attendance introduced by the Law no.61/1993.<sup>21</sup> Table 3 shows the reduction in drop-out rates, and in numbers of Roma never enrolled in school, after the introduction of the Regulation in 1993.

The second reason for the increase in Roma children's school participation is a probable increase in the self-identification of Roma as a result of introducing a Roma-oriented curriculum and affirmative measures for Roma for secondary education and university.

<sup>19</sup> C. Zamfir and E. Zamfir (eds.), *Tiganiii intru ignorare si ingrijorare* (Roma between invisibility and worry) and *Roma Social Observer*, database of the Research Institute for Quality of Life, both sources quoted in M. Surdu, "Conditionarea alocatiei pentru copii de prezenta scolara si efectele sale asupra educatiei copiilor rromi" (Children's social allowance and school attendance – effects on Roma children), in *Calitatea Vietii Review*, No. 1, February 1998, p. 179. The article notes that almost 15 per cent of Roma who remain outside of the education system after implementation of this regulation are consequently deprived of the child allowance that is supposed to be a universal benefit for all children.

<sup>20</sup> This was a recurrent theme appearing in almost all interviews or informal discussions with teachers carried out in the framework of the local case studies carried out for this project (see Annex 2).

<sup>21</sup> Law no. 61 from 22 September 1993 Referring to the Child Allowance Offered by the State (*Legea nr. 61 din 22 septembrie 1993 priviind alocatia de stat pentru copii*). Published in Monitorul Oficial (Official Monitor), no. 233 of 28 September. 1993, available at [http://www.cdep.ro/pls/legis/legis\\_pck.htp\\_act\\_text?id=13808](http://www.cdep.ro/pls/legis/legis_pck.htp_act_text?id=13808) (accessed on 9 March 2007).

Finally, the recruitment and activity of Roma teachers have also contributed to the greater numbers of Roma children enrolling; these teachers have had a direct motivating effect on the school participation of Roma children.<sup>22</sup> In 1990, the first Inspector for Education in Romanes, encouraged by Professor Nicolae Gheorghe, made an initial census of Roma children, which provided the first statistics regarding Roma children's participation in education.<sup>23</sup> Since 1990, different measures have been gradually introduced to improve collection of data on the number and attainment of Roma students; these were initiated either by civil society or by the Ministry of Education (see section 3).

Following the employment of Inspectors for Roma Education, Professor Sarau established a national network of school mediators and Roma teachers, and was involved in the organisation and development of teacher training programmes. Professor Sarau has been able to document the increase of the number of children who identify themselves as Roma, as shown in Table 4 below.

**Table 4: Number of Roma students (1989–2007)**

School year	Number of Roma students	
	Total	Studying Roma history and language
1989–1990	129,000	50
1990–1991	138,000	–
2002–2003	158,128	15,708
2003–2004	183,176	20,528
2004–2005	220,000	24,129
2005–2006	243,008	24,903
2006–2007	250,000	25,525

Source: OSI Roundable<sup>24</sup>

Although these data show that the number of children who identify themselves as Roma has steadily increased, this may not in fact reflect growth in the enrolment rates within the Roma population. Students who were already in school, but registered as

<sup>22</sup> Comments submitted to EUMAP by Professor Gheorghe Inspector for Education in Romanes, following the OSI roundtable.

<sup>23</sup> The informal census was the work of Roma teacher Ina Radu, following the recommendations of Nicolae Gheorghe and Gheorghe Sarau.

<sup>24</sup> Data were collected with the support of Romanes teachers and Roma School Inspectors working at the county level, as well as with direct support of the schools.

having Romanian or Hungarian ethnicity, may now have elected to declare themselves as Roma, while the situation of the *most* marginalised Roma children – the ones who have never been to school at all – remains unchanged.<sup>25</sup> Indeed, data show that there is still a gap between overall enrolment for Roma and their non-Roma peers, as Table 5 indicates.

**Table 5: Enrolment rate for Roma and majority population in close proximity to Roma (2005)**

Education level	Enrolment rate (per cent)	
	Majority population in close proximity to Roma	Roma
Primary (ages 7–15)	94	76
Secondary (ages 16–19)	69	17
Tertiary (20>)	5	1

Source: UNDP<sup>26</sup>

While data disaggregated for ethnicity are not available, according to data from the Ministry of Education and Research, 73 per cent of all children of pre-school age (between two and seven years old) attend pre-school,<sup>27</sup> whereas over 86 per cent of five-year-olds attend pre-school.<sup>28</sup> On average, a child spends 2.9 years in pre-school.<sup>29</sup> According to data from the 2002 census, the average number of years that Roma spend in school is 6.8 years for the population over ten years old, while for the population over the age of ten as a whole the average is 11.2 years.

Table 6 below further demonstrates, that on average, Roma children are older than their majority peers within the classes of primary school, and that the age gap increases in the higher grades of primary school. This may indicate that Roma are more likely to repeat grades than non-Roma. However, other factors may also contribute, such that Roma are likely to begin pre-school late, or not at all, and to enter first grade at a later

<sup>25</sup> Comments submitted to EUMAP on the present report in draft form, February 2007 by Maria Andruszkiewicz, independent consultant and former Roma Education Expert and Team Leader for the Phare project “Access to Education for Disadvantaged Groups with a Special Focus on Roma”.

<sup>26</sup> UNDP, *Vulnerable Groups in Central and Southeastern Europe*, Bratislava: UNDP, 2005, available at <http://vulnerability.undp.sk/> (accessed on 28 February 2007) (hereafter, UNDP, *Vulnerable Groups*).

<sup>27</sup> Ministry of Education and Research (MER), *Raport asupra stării sistemului național de învățământ (Report on the Situation of the National Education System)*. Bucharest: MER, 2005 (hereafter, MER, *Report on the Situation of the National Education System 2005*), p. 77, selected data.

<sup>28</sup> MER, *Report on the Situation of the National Education System 2005*, p. 77, selected data.

<sup>29</sup> MER, *Report on the Situation of the National Education System 2005*, p. 77, selected data.

age.<sup>30</sup> The data from Table 6 further suggests that many Roma who are asked to repeat the fifth year<sup>31</sup> may instead drop out, as the age discrepancy decreases after this point.<sup>32</sup>

**Table 6: Average age of Roma and non-Roma students at primary and secondary levels – breakdown by grade (2006)**

Education level	Grade	Average age of students (years)		Age difference
		Non-Roma	Roma	
Primary	I	7.3	7.7	+0.4
	II	8.1	8.8	+0.7
	III	9.2	9.7	+0.5
	IV	10.3	11.1	+0.8
Secondary	V	11.4	12.3	+0.9
	VI	12.4	13.0	+0.6
	VII	13.4	14.0	+0.6
	VIII	14.4	14.9	+0.5

Source: Nigel Simister<sup>33</sup>

An interesting project addressing this issue is the project developed by CEDU (Center Education 2000+, *Centrul Educația 2000+*) and UNICEF addressing early marriage and early pregnancy amongst Roma girls. The project, which started in 2004, is based on a peer counselling approach and the use of community mediators. The concept of this intervention is twofold: on the one hand it approaches the gender issue in education and on the other it addresses the issue of cultural identity and tradition in Roma communities.

<sup>30</sup> Simister, *Phare Baseline Report*, p. 15.

<sup>31</sup> Primary education ends in the fourth grade. The fifth grade is a critical year, when secondary education begins, which is still part of compulsory education. While during the first four grades students have only one teacher, in grades four to eight, there is one teacher for each subject taught. Usually students at this level report a lack of the emotional support they had previously received from teachers. This is correlated with the “atomisation” of the study programme in specialised subject matters and lessons, with strict time scales (45 or 50 minutes per lesson), which allows fewer opportunities for individualised instruction and support.

<sup>32</sup> Simister, *Phare Baseline Report*, p. 15.

<sup>33</sup> Nigel Simister, *Baseline Report Prepared for the PHARE Project RO 2003/005-551.01.02 on Access to Education for Disadvantaged Groups*, WYG International, for the Ministry of Education and Research, 2006 unpublished, p. 15 (hereafter, Simister, *Phare Baseline Report*). The report covers 109 schools from 12 counties. The sample size for students is large, with over 29,000 students.

## 2.3 Retention and Completion

There are no current data available in Romania on the drop-out rates for Roma as compared to the general population, nor on the difference in drop-out rates in segregated versus integrated schools. However, the Ministry of Education has reported that between 12 and 20 per cent of Roma drop out of primary and lower secondary school.<sup>34</sup> Some partial data presented in Table 7 show general trends in drop-out rates for the general school population, disaggregated by location.

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<sup>34</sup> MER, *Strategia pentru Educația timpurie* (Strategy for Early Education). Budapest: MER, 2005 pp. 3–4, available at <http://www.edu.ro/index.php/articles/c486> (accessed on 28 February 2007).

**Table 7. Evolution of the drop-out rate for compulsory education during the school year – breakdown by place of residence (1990–2005)**

School year	(1) TOTAL			(2) URBAN			(3) RURAL		
	No. registered		Abandoned (per cent)	No. registered		Abandoned (per cent)	No. registered		Abandoned (per cent)
	Beg. of the year	End of the year		Beg. of the year	End of the year		Beg. of the year	End of the year	
89/90	2,892	2,824	-2,4	1,668	1,630	-2,3	1,224	1,194	-2,5
90/91	2,701	2,653	-1,8	1,594	1,567	-1,7	1,107	1,085	-2,0
91/92	2,609	2,575	-1,3	1,564	1,539	-1,6	1,045	1,036	-0,9
92/93	2,541	2,503	-1,5	1,539	1,506	-2,1	1,002	997	-0,5
93/94	2,501	2,485	-0,6	1,515	1,503	-0,8	985	982	-0,3
94/95	2,497	2,472	-1,0	1,493	1,490	-0,2	1,003	982	-2,1
95/96	2,506	2,486	-0,8	1,501	1,488	-0,9	1,004	999	-0,5
96/97	2,509	2,490	-0,8	1,483	1,470	-0,9	1,027	1,020	-0,7
97/98	2,523	2,504	-0,8	1,469	1,454	-1,0	1,054	1,050	-0,4
98/99	2,519	2,496	-0,9	1,439	1,420	-1,3	1,080	1,076	-0,4
99/00	2,461	2,440	-0,9	1,373	1,355	-1,3	1,089	1,085	-0,4
00/01	2,377	2,362	-0,6	1,291	1,283	-0,7	1,085	1,079	-0,6
01/02	2,290	2,262	-1,2	1,220	1,203	-1,4	1,070	1,059	-1,0
02/03	2,171	2,144	-1,2	1,130	1,117	-1,2	1,041	1,027	-1,3
03/04	2,099	2,067	-1,5	1,062	1,048	-1,3	1,037	1,019	-1,7
04/05	1,975	1,942	-1,7	980	965	-1,5	995	977	-1,8

Source: CNS/INS<sup>35</sup>

Rates of dropping out of school and of lower education levels appear higher in Roma communities.<sup>36</sup> As Tables 8 and 9 demonstrate, in 1998 the drop-out rate in the general population was 0.8 per cent, while the research data provided by the Research Institute for Quality of Life (*Institutul de Cercetare a Calității Vieții*, ICCV) show that 11.6 per cent of Roma children stopped going to school at some point in primary

<sup>35</sup> Data compiled from: CNS, Education in Romania. Statistical data, 1994, 1996; CNS/INS, Primary and secondary education at beginning of school year for: 1996/1997, 1997/1998, 1998/1999, 1999/2000, 2000/2001, 2001/2002, 2002/2003, 2003/2004, 2004/2005; CNS/INS: Primary and secondary education at the end of school year 1996/1997, 1997/1998, 1998/1999, 1999/2000, 2000/2001, 2001/2002, 2002/2003, 2003/2004, 2004/2005.

<sup>36</sup> MER, ISE, UNICEF, ICCV, “Drop-Out and Non-Schooling”, Chapter 4 in *School Participation of Roma Children: Problems, Solutions, Actors*, Marlink Publishing House, in English and Romanian, p. 47.



school, usually fourth grade. Comparing the two data, the difference is extremely significant, more than ten times higher for the Roma population.

**Table 8: School situation of Roma children (1998)**

School situation	Proportion of school-age children (aged 7–16) (per cent)
Registered	61.4
Stopped going to school	11.6
Never registered	18.3
No answer	8.7

Source: ICCV<sup>37</sup>

Data from the 1998–1999 school year demonstrate that the drop-out rate is greater in segregated Roma schools, as compared with that for the education system as a whole. For example, the proportion of rural primary schools registering a drop-out rate of over 5 per cent was 1.9 per cent for the system as a whole, but 4.6 per cent for primary schools accommodating Roma pupils.<sup>38</sup>

Non-enrolment was also found to be higher in segregated Roma schools as compared with the education system overall. While for the total of rural schools, 3.6 per cent of schools report over 5 per cent of non-enrolled students, in schools with a majority of Roma pupils (over 50 per cent Roma) this proportion rose to 14.1 per cent.<sup>39</sup>

Data from the 2005 UNDP survey show a significant drop in enrolment for Roma as children grow older throughout the primary school years, thus indicating that Roma children are much more likely *not* to stay in school than their majority peers. The narrowness of the gap at the age of eight may also indicate the late enrolment of Roma into primary education.

<sup>37</sup> Research Institute for Quality of Life (*Institutul de Cercetare a Calității Vieții*, ICCV), *Indicators Regarding Roma Communities in Romania*, Bucharest: Expert Publishing House, 2002.

<sup>38</sup> M. Jigau and M. Surdu (eds.), *Participarea la educatie a copiilor romi – probleme, solutii, actori* (School Participation of Roma Children: Problems, Solutions, Actors), in English and Romanian, MER, ISE, UNICEF, ICCV. Bucharest: Marlink Publishing House, 2002, (henceforth Jigau and Surdu, *School Participation of Roma Children*) p.50.

<sup>39</sup> Jigau and Surdu, *School Participation of Roma Children*, p. 49.

**Table 9: Early primary enrolment – breakdown by age (2002)**

Age (years)	Enrolment rate (per cent)	
	Majority population in close proximity to Roma	Roma
7	95	83
8	92	93
9	100	85
10	96	95
11	100	81
12	88	72
13	96	66
14	91	59
15	88	55

Source: UNDP<sup>40</sup>

Another source of data from UNDP sheds light on the situation of drop-outs. Their data show the percentage of people over the age of twelve who have reached the fifth grade from the Roma and non-Roma communities. The data demonstrate a much lower percentage for Roma for having reached the fifth grade or some level of secondary education, which at the same time demonstrates a high drop-out rate for Roma (see Table 10 below):

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<sup>40</sup> UNDP, *Vulnerable Groups*.

**Table 10: Proportion of pupils starting grade 1 who reach grade 5 and who complete grade 5 – for Roma and non-Roma (2002)**

Share of pupils aged 12 and over:	Proportion of pupils starting Grade 1 (per cent)		
	Majority population in close proximity to Roma	Roma	National average
With at least incomplete secondary education (i.e. beyond eighth grade)	63	13	–
Who have spent more than 4 years in school (i.e. have at least completed fifth grade)	83	46	94.4

Source: UNDP<sup>41</sup>

An expert working on a Phare project targeting education for Roma (see section 3.2), found drop-out rates at the secondary level to be as high as 35 per cent among project schools in some counties at the start of the project in 2003. Roma families in more disadvantaged communities frequently withdrew children from the sixth and seventh grades to work, both outside the home and on domestic responsibilities.<sup>42</sup>

According to data compiled from the 2002 census, 26.2 per cent of the Roma population over ten years old had not graduated from any level of school, as compared with only 4.9 per cent of the total population. The same census data indicate that 25.6 per cent of the Roma population aged over ten years old (in total 104,737 people) are illiterate, as compared to 2.6 per cent of the total population aged over ten years old.<sup>43</sup>

Table 11 shows significant differences in school attainment. This reveals that the percentage of Roma that have no education is, at 34.2 per cent, extremely high, given that only 5.5 per cent of the general population are in the same situation.

<sup>41</sup> UNDP, *Vulnerable Groups*.

<sup>42</sup> Comments submitted to EUMAP by Maria Andruszkiewicz to the present report in draft form, February 2007.

<sup>43</sup> 2002 census, Demographic Tables 11, 12, 13, 14.

**Table 11: School attainment level – for the Roma population and national population (2002)**

Population aged over 10 years old:		Proportion of students attaining this level of education (per cent):				
		No education	Primary education (1–4)	Lower secondary (5–8)	Secondary overall (general (9–12) / professional / vocational (9–10))	Higher education
General population	Total	5.5	20	27.6	64.2	7
	Urban	3	13.5	21.9	67	11.7
	Rural	8.4	27.6	34.2	60.9	1.6
	Boys	4.1	18	25.3	66.6	7.7
	Girls	6.8	21.9	29.7	62	6.3
Roma population (research estimates)	Total	34.2	35.7	23.1	29.1	0.16
	Urban	32.6	33.5	24.4	32.7	0.28
	Rural	35.4	37.2	22.3	26.7	0.08
	Boys	29	36.6	25.1	33.5	0.20
	Girls	39.6	34.9	21.1	24.7	0.12

Source: 2002 census<sup>44</sup>

To allow for a certain level of comparison, another source provides slightly varying information. Table 12 shows a comparison of the educational attainment and age.

<sup>44</sup> 2002 census.

**Table 12. Relation between educational attainment level and age – for Roma and non-Roma (2007)**

Age	Education level	Proportion of the population (per cent)	
		Non-Roma	Roma
Over the age of 40	No education at all	2.3	26.3
	Primary education	17.7	33.4
	Lower secondary (5–8)	27.2	26.7
	> Upper primary school, <high school (9–10)	22.4	10.7
	High school (9–12)	22.2	2.2
	Higher education	8.2	0.6
Under the age of 40	No education at all	0.8	20.9
	Primary education	2	23.1
	Lower secondary (5–8)	18.7	38.2
	> Upper primary school, <high school (9–10)	25.3	12.6
	High school (9–12)	42.4	4.3
	Higher education	10.8	0.8

Source: OSF Romania<sup>45</sup>

## 2.4 Types and extent of segregation

In their analysis of the phenomenon of Roma school segregation, researchers classify as segregated those schools that artificially direct the enrolment of a large proportion of Roma, resulting in separate classes with Roma, or where Roma make up the entire student population.

According to sociologist Mihai Surdu, the situation is as follows:

The use of the term segregated schools for the Romanian case means a *de facto* segregation. *De facto* segregation, in the Romanian case, is not a consequence of a certain law, of a public policy, but a continuation of a tradition, prejudices and inertia. The segregated schools are usually located nearby compact Roma communities, communities that are usually characterised by high poverty. Even if there are no legal barriers in

<sup>45</sup> OSF-Romania, *Roma Inclusion Barometer*, p. 82.

registering or transfer of children to other schools, in practice there are a set of economic, bureaucratic and mentality barriers.<sup>46</sup>

In April 2004, the Ministry of Education and Research issued Notification 29323 of 20 April 2004 on School Segregation in an attempt to better define the term for the national discourse:

Segregation is a very serious form of discrimination [...] segregation in education involves the intentional or unintentional physical separation of Roma from the other children in schools, classes, buildings and other facilities, such that the number of Roma children is disproportionately higher than that of non-Roma compared to the ratio of Roma school-aged children in the total school-aged population in the particular area [...] the Ministry of Education and Research prohibits the setting up of pre-school, primary and lower secondary classes comprising exclusively or mainly Roma students. This way of setting up classes is deemed a form of segregation, irrespective of the explanation called upon.<sup>47</sup>

According to a recent evaluation report on the 2003 Phare project, “Access to Education for Disadvantaged Groups, with a Special Focus on Roma” (see section 3.2), various practices that led to segregation in the past were as follows:

- The channelling of Roma children into segregated all-Roma schools within, or close to, Roma neighbourhoods. Often, even if there was another school within walking distance of the neighbourhood, parents seeking to enrol their children at the alternative school were turned away by school managers with the explanation that Roma children should go to “their” (Roma-only) residence school.
- The deliberate placement of Roma students in separate all-Roma or mainly Roma classes in mixed schools, due to the fact that school managers expected at least some non-Roma parents to object to ethnically mixed classes.
- “Well-intentioned” segregation, most often seen in situations where schools had very traditional Roma families, including here the use of traditional clothing, in their catchment areas and where school managers perceived Roma parents to have concerns about their children adopting behaviour or forming relationships that would be inappropriate to family customs and traditions if they were allowed to mix with non-Roma children or “Romanianised” Roma.
- “Unintentionally” segregated classes arising from practices such as placing all late-enrolling children in the same class (often the children of Roma occupational travellers), or keeping all-Roma class groups intact when students

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<sup>46</sup> Mihai Surdu, “*Segregare scolara si reproducerea sociala a inegalitatilor*” (School Segregation and Social Reproduction of Inequalities), in *O noua provocare: Dezvoltarea Sociala* (A new challenge: Social Development). Iași: Polirom Publishing House, 2006.

<sup>47</sup> MER Notification 29323 of 20 April 2004 on School Segregation.

transferred from an all-Roma pre-school or primary school into an ethnically mixed school.<sup>48</sup>

The Phare evaluation report goes on to describe schools located in Roma settlements. While not all of these geographically isolated schools manifested the typical lack of resources and other characteristics of “Roma ghetto schools”, exceptions to the “ghetto school” profile were rare, as this excerpt indicates:

- A number of schools were both residentially segregated and isolated, being in or close to a “compact” Roma neighbourhood, but with no alternative non-segregated school provision within walking distance or easy reach by public transport. Although not all of these schools could be described as “Roma ghetto schools”, most shared some or all of the following characteristics.
- 80 per cent or more of students at the school were from Roma families.
- School managers reported problems in hiring well-qualified and committed teaching staff, there was a high staff turnover and an over-reliance on supply teachers who, because they were not permanently attached to the school, tended to have low levels of commitment to the students there.
- The schools were overcrowded, teaching in two shifts, making it difficult to run catch-up or after-school activities that could improve academic performance, especially of children of seasonal agricultural workers who miss school when they travel with their families.
- The school buildings lacked the facilities that other schools in the area had, such as for teaching science at the lower secondary level. Compared to other schools in the county, school buildings provided an inferior learning environment – conditions were unhealthy, unsanitary, unsafe, cold, overcrowded and poorly lit.
- There were high drop-out rates and problems with student attendance, but little support available to deal with these problems; for example, local authorities were unable or unwilling to fund a School Mediator post to help deal with absenteeism.
- Entrance and pass-rates for the National Exams were well below the County average.
- Low expectations of students: if students achieved basic literacy and completed 8 grades, this was seen as a good achievement.

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<sup>48</sup> Maria Andruszkiewicz, *Desegregarea școlilor – progrese și provocări. Experiențele Programului PHARE 2003: “Acces la educație pentru grupurile dezavantajate”* (School Desegregation – Progress and Challenges; Experiences from the Phare 2003 “Access to Education for Disadvantaged Groups” Project), unpublished report prepared for Phare 2003, presented in a roundtable in May 2006, pp. 6–10, available at <http://www.edu.ro/index.php/articles/6758> (accessed on 28 February 2007) (hereafter, Andruszkiewicz, *School Desegregation*).

- Entry into an Arts and Trades College for vocational training was a very good achievement. University was an aspiration that was rarely, if ever, mentioned.<sup>49</sup>

Although there are no national data on the percentage of schools in Romania that could be considered segregated, according to data provided in the Phare evaluation report, of the 108 schools that were included in the 12 county projects, 35 had segregation issues to address, which constitutes 32 per cent of the schools included in the projects.<sup>50</sup>

Different studies offer an estimate of the extent of Roma segregation in the educational system. According to a study released in 2002, 12.2 per cent of the total number of Roma pupils enrolled are learning in segregated educational settings (where the student population at the school is 50 per cent Roma and above).<sup>51</sup>

The research quoted does not account for segregation of Roma in separate classes or special schools, and data refer to rural schools only. A characteristic of segregation is that in a majority of cases “Roma schools” are within walking distance from other schools with a non-Roma majority. In this regard, 56.2 per cent of majority Roma schools (50 to 70 per cent Roma pupils) are less than three kilometers from neighboring non-Roma schools, and 52.8 per cent of predominantly Roma schools (over 70 per cent Roma) are less than three kilometers from similar educational level schools.<sup>52</sup>

Field research conducted by the ERRC in 1997 identified the phenomenon of creating special classes as a problem in Romania. At that time, the creation of separate classes for over-aged children was common, and those classes often used the same curricula used in special schools, that is, one of a lower standard than that of mainstream schools. Since the introduction of the “Second Chance” programme, however, this particular policy problem seems to have been addressed both for primary and secondary level of compulsory education. While the “Second Chance” programme is almost always implemented in a segregated setting, one observer has noted that it remains an improvement over earlier practices of seating over-age children with younger pupils, which many of the older students found humiliating.<sup>53</sup>

There is no official information regarding special classes in mainstream schools, even if anecdotal information suggests that the practice of creating separate classes for children for other reasons (behavioural, family violence, a parent’s drug abuse<sup>54</sup>) is still present in Romania. An expert reports that some schools expressed concern that there are not

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<sup>49</sup> Andruszkiewicz, *School Desegregation*, pp. 5–6.

<sup>50</sup> Andruszkiewicz, *School Desegregation*, pp. 6–7.

<sup>51</sup> Jigau and Surdu, *School Participation of Roma Children*, p. 15.

<sup>52</sup> M. Surdu, *Final Research Paper*, International Policy Fellowship, 2002, p. 87, Annex 3, Table 3, available at <http://www.policy.hu/surdu/> (accessed 8 March 2007).

<sup>53</sup> Comments submitted to EUMAP by Maria Andruszkiewicz on the present report in draft form, February 2007.

<sup>54</sup> OSI Roundtable, Bucharest, February 2007.



enough support teachers available to work with teachers and children in an inclusive model; not all schools know how to go about getting a support teacher or have the confidence to promote an inclusive model to parents.<sup>55</sup>

Using another methodology based on a questionnaire applied to a representative sample of Roma for both urban and rural inhabitants, UNDP research<sup>56</sup> from the same year finds a quite similar extent of segregation. By posing the question, “What is the ethnic affiliation of the majority of the children in the class in the school your children are attending?”, the UNDP study obtained the following answers:

- Most of them are from the ethnic majority – 55.5 per cent
- Most of them are Roma – 13.5 per cent
- Most of them represent another ethnic minority – 6.5 per cent
- Do not know – 10.2 per cent

It could be assumed that the 13.5 per cent of predominantly Roma schools found by the UNDP research pinpoints segregation of Roma at the school class level as well as segregation of Roma in separate school buildings. However, the extent of segregation could be higher, if the answers from the “do not know” category prove also to be cases of segregation.

Data collected by the Ministry of Education and Research give quite another picture. Having provided the number of pre-schools and schools that may be considered segregated, this research also provides the percentage of Roma pupils, disaggregated by gender, who may be studying in such environments. The data suggest a potentially even higher percentage, between 37.9 per cent to as high as 45.4 per cent (see Table 13).

Considering that the proportion of the schools described as having segregation issues within the Phare projects stood at 32 per cent, the corresponding UNDP statistic is 13.5 per cent, and the variance in the Ministry data between 37.9 and 45.4 per cent, the actual percentage may lie somewhere in between.

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<sup>55</sup> Comments submitted to EUMAP by Maria Andruszkiewicz on the present report in draft form, February 2007.

<sup>56</sup> UNDP, *The Roma in Central and Eastern Europe. Avoiding the Dependency Trap*, Andrey Ivanov (coord.), Bratislava: UNDP, 2002, available at [http://roma.undp.sk/reports\\_contents.php?parent\\_id=1&id=217](http://roma.undp.sk/reports_contents.php?parent_id=1&id=217) (hereafter, UNDP, *Avoiding the Dependency Trap*), Annex 1, p. 91.

**Table 13: Number of segregated Roma pre-schools and schools (2006)**

		Pre-school	Primary education (1–4)	Lower secondary (5–8)	Secondary overall (general, professional, vocational) (9–12)
Total number of segregated schools		162	315	112	17
Number of Roma enrolled in segregated pre-schools and schools, as a proportion of all Roma enrolled (estimates) (per cent)	Boys	42.14	52.67	37.88	39.10
	Girls	43.68	52.80	41.15	45.43

Source: MER<sup>57</sup>


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<sup>57</sup> MER, Department of Statistics, information provided in August 2006 by email.

### 3. GOVERNMENT EDUCATIONAL POLICIES AND PROGRAMMES

*The main Government document addressing the situation of Roma in general is the Strategy for the Improvement of the Condition of the Roma, adopted in 2001 and updated in 2006. Research has shown that Strategy implementation has been uneven in the areas that it targets, which include education. The “Access to Education for Disadvantaged Groups, with a Special Focus on Roma” project, which has been developed and run since 2003 with support from the EU’s Phare programme, includes support for county-level strategies and has been effective in piloting a variety of approaches aimed at improving Roma access to education. In 2004, the Government also drafted an Action Plan as part of the Decade of Roma Inclusion (Decade Action Plan), but this has not yet been adopted.*

*The ongoing process of decentralisation particularly affects education, as local authorities gain greater autonomy, but often without clear responsibilities, and the central Government retains fewer and fewer mechanisms to combat negative trends such as segregation. As this process continues, the Government should ensure that there are accessible and competent bodies to address potential problems within a more decentralised system, that local authorities are given clear mandates and support to implement their new level of autonomy, and that the needs of Roma communities are appropriately addressed by local policies.*

*A notification issued by the Ministry of Education and Research in 2004 outlines the steps that schools and school inspectors must take to identify and eliminate segregation; however, as this notification lacks the force of law, its implementation has been limited.*

*Roma mediators have been working in Romanian schools since 2000, and while the selection and training of 200 mediators were carried out as part of the Phare programme’s “Access to Education for Disadvantaged Groups, with a Special Focus on Roma” project, limited resources and a lack of clear regulations for hiring additional mediators have limited the expansion of this initiative and threatened the position of existing Roma mediators. Government efforts to increase the number of Roma teachers and teachers speaking Romanes, as well as Romanes language classes, have been more successful. However, more material reflecting the Roma minority should be included in curriculum content, and made an integral part of the education on offer for all children in Romania, not only the minority itself.*

*NGO-funded and Government-funded teacher training is available on topics relevant to Roma education, and the Government should establish a system to monitor and evaluate all courses in order to consolidate and build on their good practices.*

*The National Council for Combating Discrimination (NCCD) has been operating since 2002, but to date has received only one complaint related to access to education, where the Council issued a warning to a school found to be segregating Roma students. The capacity of schools for handling discrimination is low, and there should be local solutions in place for dealing with different situations.*

### 3.1 Government policy documents

#### 3.1.1 Decentralisation

Several governmental policy documents address the issue of education for Roma, including the most recent developments with respect to decentralisation,<sup>58</sup> an ongoing process for all public administration structures in Romania. The most significant of these documents are the governmental *Strategy for the Improvement of the Condition of the Roma* (hereafter, *Roma Strategy*)<sup>59</sup> and several Phare programmes implemented by the Ministry of Education and Research (see section 3.2.2).

Decentralisation is a concept and an essential process earlier envisaged during the Government reform programme of 1998–1999, which effectively started in 2004.<sup>60</sup> In 2006<sup>61</sup> decentralisation was adopted as an approach to the functioning of public administration.

According to the Ministry of Education, decentralisation of pre-university education is a process of transfer of authority, responsibility and resources, for decision-making and general and financial management, to the local community and education units.<sup>62</sup> Today, the main issues revolving around decentralisation are the following:

- Redistribution of responsibilities, decision-making authority and public responsibility for specific educational functions, from the central to the local level;
- Participation of non-administrative factors, civil society representatives, to the process of decision-making (parents, NGOs, business, professional associations, social partners);
- Transfer of competencies from central levels to local ones.

In 2001 it was reported that the process of reforming the overall education system in Romania was slow, including with respect to attempts to decentralise financial matters and some decision-making areas, but that at that time, the school capacity in Romania was not being adequately optimised, and nor was it being given appropriate inputs and resources.<sup>63</sup> The process of decentralisation continued, moving towards a system giving

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<sup>58</sup> Framework Law no. 339/2004 on Decentralisation.

<sup>59</sup> Government Decision No. 522/19 April 2006, for the Modification and Completion of the Government Decision No. 430/2001 Regarding Approval of the *Strategy for the Improvement of the Condition of the Roma*.

<sup>60</sup> Framework Law no. 339/2004 on Decentralisation.

<sup>61</sup> Framework Law no. 195/2006 on Decentralisation states the principles, rules and institutional framework that will rule the process of administrative and financial decentralisation.

<sup>62</sup> MER, *Decentralisation Strategy for Pre-university*.

<sup>63</sup> UNDP 2000–2001, p. 8.

local administrations more autonomy. Starting in 2004, eight pilot counties<sup>64</sup> were selected for implementation of a decentralised funding and administration of schools system. At the county level, School Inspectorates act as branches of the Ministry of Education and Research. Elected local authorities assume responsibilities for most pre-university school functions, such as rehabilitation and maintenance of school buildings, teachers' salaries and textbooks. Decentralisation has been accompanied by measures to maintain central monitoring of outcomes with the introduction of two national learning assessment examinations – the capacity exam (“*examenul de capacitate*”) at the end of the eighth grade and the baccalaureate (“*bacalaureat*”) at the end of the twelfth grade).

In terms of education for Roma, the decentralisation process has a possible negative impact on the financial resource allocation to schools. Particularly in economically depressed areas where there is no tax revenue for the local contribution, families may not even receive the full amount of the minimum social benefit payment.<sup>65</sup> A special issue is the position of Roma mediators within the school system (see section 3.4): the local administration can choose not to retain the school mediators and opt to fund other local priorities, unless there is a conditional transfer of budgets involved.

### 3.1.2 General policies for Roma

The *Roma Strategy* was adopted on 25 April 2001, and was recently modified and completed by the Government Decision No. 522/19 in April 2006.<sup>66</sup> According to the *Roma Strategy*, the scope is the “significant improvement of the condition of the Roma through promotion of social inclusion measures”.<sup>67</sup> The *Roma Strategy* is intended to last ten years (2001 to 2010), while a *Master Plan of Measures for the Period 2006–2008* has also been developed in the framework of the Strategy.<sup>68</sup>

The *Roma Strategy* does address and include education. The main problems identified by the Government and outlined in this document are as follows:

- Poor school participation in the educational system as well as early school abandonment;

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<sup>64</sup> Government Decision No. 1942/2004 regarding the nomination of the eight pilot counties in which the decentralisation of school funding and administration is applied.

<sup>65</sup> Comments submitted to EUMAP by Maria Andruszkiewicz on the present report in draft form, February 2007.

<sup>66</sup> Government Decision No. 522 of 19 April 2006, for the modification and completion of the Government Decision No. 430/2001 regarding approval of the Governmental *Strategy for the Improvement of the Condition of the Roma*; Government of Romania, *Strategy for the Improvement of the Condition of the Roma* (hereafter, *Roma Strategy*), available in Romanian at [http://www.anr.gov.ro/docs/Politici/0371-28\\_noua\\_strategie\\_522.pdf](http://www.anr.gov.ro/docs/Politici/0371-28_noua_strategie_522.pdf) (accessed on 8 March 2007).

<sup>67</sup> *Roma Strategy*, Chapter III, Scope and General Objectives of the Strategy.

<sup>68</sup> *Roma Strategy*, General Plan of Measures.

- The tendency to create separate classes, for Roma children only;
- Non-involvement of the members of Roma communities in programmes of school recovery;
- Lack of adequate housing and infrastructure;
- The high number of unemployed within this ethnicity;
- The absence of readjustment or re-qualification and vocational courses for Roma.<sup>69</sup>

The political objectives undertaken by the Government by adopting the *Roma Strategy* in 2001 were aimed first of all at ensuring the full accountability of local and central authorities for the practical implementation of the measures designed to improve the situation of the Roma. Due to Romania's largely decentralised structure, many of the actions organised in the *Roma Strategy* fall to the local authorities. In this regard, according to the updated *Roma Strategy* document,<sup>70</sup> there are several structures that should be established<sup>71</sup> to ensure an appropriate level of organisation and coordination for the *Roma Strategy* implementation. These are:

- Working Group for Public Policies for Roma (*Grupul de lucru pentru politicile publice pentru romi*);
- Ministerial Commissions for Roma (*Comisiile ministeriale pentru Romi*);
- County Offices for Roma (*Birourile Judetene pentru Romi*);
- Local experts for Roma issues (*Expertii locali pentru problemele romilor*).

Early reports on *Roma Strategy* implementation were critical, indicating that both at the local level and in terms of the central coordination, little progress could be identified.<sup>72</sup> No recent data on the level of achievement of the measures are currently available, but a system of monitoring and evaluation of the *Roma Strategy* implementation is in preparation with support from a Phare-funded project,<sup>73</sup> and it is expected that regular

<sup>69</sup> *Roma Strategy*, Chapter V, Duration.

<sup>70</sup> *Roma Strategy*, Chapter VIII, Structures.

<sup>71</sup> According to the *Master Plan of Measures for the Period 2006–2008*. See *Roma Strategy*, General Plan of Measures.

<sup>72</sup> See EUMAP, *Monitoring the Local Implementation of the Government Strategy for the Improvement of the Condition of Roma in Romania*. Budapest: Open Society Institute, 2004, available at <http://www.eumap.org/topics/minority/reports/roma> (accessed on 28 February 2007); and Focus Consulting, *Assessment of the Roma Strategy Implementation Mechanism*, report, July 2005. A project supported and funded by the European Commission Delegation in Romania, RO/PHARE 2003 SSTA 05, Bucharest: July 2005, available at [http://www.anr.gov.ro/docs/rapoarte/Focus\\_Final\\_Evaluation\\_Report\\_181.pdf](http://www.anr.gov.ro/docs/rapoarte/Focus_Final_Evaluation_Report_181.pdf) (accessed on 28 February 2007).

<sup>73</sup> *Phare 2004, Strengthening Capacity and Partnership Building*.

monitoring and evaluation activities will be performed by the National Agency for Roma.

Within the *Roma Strategy*, there are now six main sectorial domains,<sup>74</sup> of which one is dedicated to child protection, education, culture and denominations; this includes the following measures:

- Inclusion of Roma personnel, with appropriate training, in institutions for the protection and education of children;
- Improvement of access to quality education, both pre-school and school;
- Continuation of the opportunities for pre-university and university education for young Roma;
- Reviewing the school curricula in order to promote a favourable climate for inclusion of disadvantaged categories, including Roma within the school environment.<sup>75</sup>

In 2004, the Government also drafted an Action Plan as part of the “Decade of Roma Inclusion”, but did not adopt it – the *National Action Plan at the National Level* (hereafter, *draft Decade Action Plan*).<sup>76</sup> The National Agency for Roma representative declared that the adoption of such action plans should take place only when the documents have been elaborated with overarching goals, specific targets, with indicators and monitoring arrangements defined.<sup>77</sup>

The *draft Decade Action Plan* was developed in March 2004 by the Office on Roma Issues (now the National Agency for Roma), as a “monitoring instrument”.<sup>78</sup> Its goals in education are the following:

- Increasing the participation of Roma children in pre-school education (by 5 per cent each year);
- Increasing the completion rate of compulsory education (grades 1–10) by Roma children;
- Increasing the participation of Roma children in post-compulsory and tertiary education (by at least five per cent per year);

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<sup>74</sup> *Roma Strategy*, Chapter VI Sectorial Domains.

<sup>75</sup> *Roma Strategy*, Chapter VI Sectorial Domains, Section F Child Protection, Education, Culture and Denominations,

<sup>76</sup> Planul Național de Acțiune *National Action Plan at the National Level* (hereafter, *draft Decade Action Plan*).

<sup>77</sup> OSI Roundtable, Bucharest, February 2007.

<sup>78</sup> OSI Roundtable, Bucharest, February 2007.

- Achieving an open, inclusive educational climate (eliminating segregated schools by 2008 and teacher training);
- Valuing and preserving the cultural heritage of Roma (tuition, study of Romanes, history, mainstream curriculum enriched with elements of Roma history and culture);
- Fostering the school–community relationship (training school mediators, “Second Chance” for primary and secondary cycle, adult education courses).

As concrete targets, the Government lists such actions as eliminating segregated classes and schools by 2008, increasing Roma pre-school “zero year” enrolment by five per cent annually, and creating opportunities to ensure a full curriculum in Romanes for children in pre-school and primary education; on the other hand, Roma students will be also be targeted by the general education programmes. So far there is no direct allocation of funds other than the general education State budget.

## 3.2 Government education programmes

### 3.2.1 General programmes and projects

The Ministry of Education and Research has continued to implement strategic measures and programmes for Roma young people and their Roma teachers that were started during the 1990s, on the initiative of Inspector for Education in Romanes Professor Gheorghe Sarau. Some of them were delivered in partnership with NGOs, with the latter providing the financing. Others were carried out with governmental and/or intergovernmental financing. They include the following:

- “Food in pre-schools and schools” programme – this aims at providing a symbolic meal for all children in pre-schools and schools (at least until the fourth grade). This measure is considered necessary because many children, especially Roma, do not attend school due to poverty. The so-called “bread and milk” programme,<sup>79</sup> introduced in September 2002, is dedicated both to pre-school and school children up to the fourth grade. Approximately one million children benefited from this programme between 2002 and 2004 (€0.20 per day per child, total over €40 million) and approximately 1.5 million starting in the 2005 school year (€0.28 per day per child, approximately €70 million per school year).
- Reserved places for Roma students in universities, starting in the 1993–1994 school year – first in social work, and afterwards in a large variety of subjects, including law, sociology, public administration, journalism, political science, drama and psychology.

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<sup>79</sup> Government Urgency Ordinance no. 96/2002 for Ensuring Milk and Bread Products for Children in Grades 1–4 was modified by Government Urgency Ordinance no. 70/2003, extending the allocation for the pre-school and increasing the allocation to 0.96 RON.



- After 2000, the Ministry continued the allocation of special places for young Roma graduates of primary school for admission in secondary schools and art and craft schools. In the 2003–2004 school year 1,918 places were accordingly allocated.
- Starting in 2004, the “Multi-annual National Training Programme for Non-Roma Teachers Working with Roma Children and Students”, PNMFCDN (*Programul național multianual de formare a cadrelor didactice nerrome care lucrează cu elevi și copii rromi*, PNFCDN<sub>r</sub>) was initiated by the Ministry of Education and Research and the NGO Save the Children – Romania branch. The funding for this initiative is ensured by UNICEF Romania, Project on Ethnic Relations (Tirgu Mures office), and the Department for Interethnic Relations within the Romanian Government. Within this programme, 450 Romanian teachers received training on the cultural specificities of Roma communities.<sup>80</sup>
- The “Second Chance” programme started in 2000 (initiated by the Center Education 2000+ in 1999) as an experimental programme, aiming at preventing the social and professional exclusion of young people from very poor families who have dropped out of compulsory education and have not achieved the minimum competencies for getting a job. The programme was initially piloted in 11 schools for 350 students. The programme was then taken over by the Ministry in 2003 and has national coverage through the Phare programme.
- The Roma Education Fund (REF), established alongside the “Decade of Roma Inclusion 2005–2015”, is currently funding several projects in Romania. Most are run by NGOs with one seemingly co-implemented by a local government inspectorate. The Ministry of Education and Research received a REF grant to undertake a project to focus on how well the Ministerial Order on desegregation has been implemented.

### 3.2.2 Phare-funded projects

Considerable EU funding, and matching support from the Romanian Government, have been allocated towards improving the situation of Roma. Before the Phare multi-year programmes, many projects were initiated by NGOs or international organisations. The Phare programme attempted to collect the best practices among these pilot schemes and to formulate a consistent approach with the financial resources and the expertise of Government actors in order to address problems in the educational system as a whole. To promote this approach, the grant-holders became the inspectorates, whereas previous projects emphasised the schools’ ownership and

<sup>80</sup> Department for Interethnic Relations and MER, *Panorama învățământului pentru minoritățile naționale din România în perioada 2003–2006* (Panorama of the National Minorities’ Education in Romania 2003–2006), Bucharest: Coresi Publishing House, 2006, pp. 60–61.

managerial responsibility. In such a framework, the inspectorates were not the main responsible institutions, but were mainly supporting institutions. No evaluation of the capacity or the assumed level of responsibility of inspectorates in dealing with the access of the Roma to quality education is yet available, and it is expected that real changes will take some time. However, Romania's efforts, with the support of EU funds, to capitalise on the extensive experience of the civil sector in addressing the education of Roma could be an important model for other Governments seeking to scale up successful pilot initiatives in this area.

The Phare programme has been the primary channel for such funding in the run-up to EU accession, including the following projects:<sup>81</sup>

- “Improvement of the Condition of the Roma”, implemented in 2000–2001 – within this project, a grant scheme of €900,000 was available for partnership projects between the public administration institutions and Roma communities, as well as support for design of the Strategy and training activities;<sup>82</sup>
- “Fund for the Improvement of the Situation of the Roma” – an approximately €1.153 million grant scheme implemented between 2002 and 2003, allocated for partnership projects between Roma communities and public administration institutions in the fields of social service, public administration, education, health, communications and the like.<sup>83</sup>
- “Support for the Strategy for the Improvement of the Condition of the Roma” – implemented between 2003 and 2005; within this project there were two components: the first for institutional building (€1.2 million) and the second a €4.8 million grant scheme for projects submitted in the framework of the partnership between public administration institutions and Roma communities.<sup>84</sup> Another €1.6 million was allocated by the Government as a contribution to this programme, but administered separately. The Romanian Government and the European Commission signed the funding memorandum for this project in December 2002.<sup>85</sup>

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<sup>81</sup> See the “Sector Fiche document”, describing the previous and current programmes in the Roma domain, available on the Europa Infocentre of the European Union Representation (Centrul Infoeuropa al Reprezentanței Uniunii Europene) website <http://www.infoeuropa.ro/docs/Sector%20fiche-Roma.pdf> (hereafter Sector Fiche document).

<sup>82</sup> Sector Fiche document, Phare Programme RO.9803.01.

<sup>83</sup> Sector Fiche document, Phare Programme Civil Society Development 2000, RO.0004.02.02.

<sup>84</sup> Phare Programme 2002/000-586.01.02, programme brochure available Romanian and English at the website of the Resource Center for Roma Communities, available at [http://www.romacenter.ro/noutati/brosura\\_sprjin\\_strategia\\_imbunatatire\\_situatie\\_romi\\_phare\\_2002](http://www.romacenter.ro/noutati/brosura_sprjin_strategia_imbunatatire_situatie_romi_phare_2002) (accessed on 9 March 2007).

<sup>85</sup> Sector Fiche document, Phare Programme no. 2002/000-586.01.02.

- The multi-annual Phare 2004–2006 “Accelerating the Implementation of the National Strategy for the Improvement of the Condition of the Roma” project – this is both a consolidation of the institutional development process and an extension of direct support for the implementation of specific measures in areas where previous projects were implemented.

The “Improving Access to Education for Disadvantaged Communities, with a Special Focus on Roma” (€17.23 million) will continue these education projects (see below). The “Strengthening Capacity and Partnership Building to Improve Roma Condition and Perception” (€26.83 million) will deal with education, identity documents, community development, vocational training, income generation activities, access to health services, and local small infrastructure. All these will be supported by public awareness and information campaigns.

*“Improving Access to Education for Disadvantaged Groups, with a Special Focus on Roma”*

The most important Phare project on education, “Access to Education for Disadvantaged Groups, with a Special Focus on Roma”, was initiated in 2000 by the Ministry of Education and Research and the National Agency for Roma.<sup>86</sup> The project has two components: (1) identity papers and (2) access to education. From 2001, the Ministry of Education and Research established multi-year projects with Phare funding. Three phases have been already implemented and all deal specifically with education:

*Phase 1 (2001)* The first phase of the project<sup>87</sup> aimed to support the implementation of the Ministry of Education and Research *Strategy of improving access to education for disadvantaged groups with a special focus on Roma*, with the aim to fight social exclusion and marginalisation and to promote human rights and equal opportunities.<sup>88</sup>

The project’s purpose was:

- to increase the availability and to improve the conditions of pre-school education, in order to stimulate early enrolment, as this critical to children’s social and educational development, particularly for children from disadvantaged groups, including Roma;
- to stimulate children to complete compulsory education (prevention of drop-out);

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<sup>86</sup> Most information regarding the training component of the Phare “Access to Education” Programme was provided by Georgeta Costescu, teacher training coordinator in PIU (Project Implementation Unit), Ministry of Education and Research; interviews done in September and November 2006, January 2007.

<sup>87</sup> Project title: “Access to Education for Disadvantaged Groups with a Special Focus on Roma” – Lot 1 (Europeaid/113198/D/SV/RO).

<sup>88</sup> Information provided in the inception report of the project, available at <http://www.edu.ro/index.php/articles/6769> (accessed on 8 March 2007).

- to provide second-chance education for persons who have not completed compulsory education (correction of drop-out).

This 2001 project<sup>89</sup> included two components:

- developing schools' capacity to address the needs of disadvantaged communities, with a special focus on Roma (allocated €3 million);
- a grant scheme for local projects (allocated €4 million), aimed at ensuring better access to education for disadvantaged children, especially Roma, and at preventing and reversing dropping out at the local level.

Projects under the 2001 project were implemented during the 2003–2004 school year, in ten counties.<sup>90</sup>

*Phase 2 (2003):* The 2003 phase formed the second stage of the initial project. It operated between 2004 and 2006, and received €9 million from the EU plus €2.3 million from the Romanian Government. This second phase aimed at promoting the principle of equal chances in education, without focusing on a specific ethnic group. It included activities intended to improve pre-school education conditions and to stimulate early enrolment, to prevent dropping out and to stimulate enrolment in “Second Chance” programmes at the primary and secondary levels for those who have not completed compulsory education.

In the second phase, the project purpose expanded somewhat, to improve access to education for disadvantaged groups and to promote inclusive education for all, with a special focus on the Roma and students with special educational needs.<sup>91</sup>

As with the first (2001) phase, funds were available for institutional development and grant scheme management. Financing was available for activities carried out during 2004–2006, in 12 counties,<sup>92</sup> selected following evaluation of proposals submitted by the counties' School Inspectorates. Three counties, Arad, Dâmbovița and Cluj, received further support to continue the implementation of their county educational strategies and implement new activities designated for supporting inclusive education and desegregation. Education decision-makers (inspectors and directors), teachers, and Roma school mediators were all involved in intensive training programmes for improving school provisions for children belonging to disadvantaged communities and

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<sup>89</sup> Phare Project RO 01.04.02; a description of the project is available in Romanian at the MEW website at <http://www.edu.ro/index.php/articles/3667> (accessed 9 March 2007).

<sup>90</sup> The following counties: Arad, Bucharest, Buzău, Călărași, Cluj, Dâmbovița, Galați, Giurgiu, Hunedoara and Vaslui.

<sup>91</sup> Information provided in the Inception report, June 2005, available at <http://www.edu.ro/index.php/genericdocs/c497/> (accessed on 8 March 2008).

<sup>92</sup> The following counties received funds supporting the implementation of their educational strategies: Alba, Bacău, Brăila, Covasna, Harghita, Ialomița, Iași, Mureș, Maramureș, Neamț, Sibiu and Vâlcea.

promoting inclusive education. After-school and “Second Chance” programmes were implemented in the pilot schools for supporting school participation of children who dropped out or who were at risk of dropping out due to poor school performance.

The project also specifically targeted segregation in 12 pilot counties, and included support to various local actors working on desegregation. Of the 108 pilot schools that were included in projects submitted by the 12 “new” project counties in 2005, 35 had segregation issues to address. The main components and activities implemented were the following:

- Support for County Strategies;
- Training;
- Curriculum and Materials Development;
- Community Participation in Education;
- Desegregation;
- Special Educational Needs;
- Monitoring and Evaluation Activities;
- Information and Dissemination Activities.<sup>93</sup>

Several reports have been developed during the project: inception, progress reports, and a final report. The reports were developed by the consultant Technical Assistance WYG International and circulated inside the project framework.<sup>94</sup>

*Phase 3 (2004)*: This third phase of the project is currently in the process of submission of proposals from School Inspectorates.<sup>95</sup> The project aims at institutional development at the national, county and community level, taking into consideration the Ministry of Education’s strategies related to access to education for all children. The project targets 27 counties that were not involved in the previous phases of the project. The programme is intended to build upon the experience gained under this Phare project’s 2001 and 2003 phases, and focus upon institution and capacity building, as well as seeking to improve the educational environment in specific schools, with financial support through a grant scheme. It is expected that the programme will contribute to results such as the following:

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<sup>93</sup> See WYG International, Fourth Interim Report, covering the period 1 December 2005 to 28 February 2006, available at <http://www.edu.ro/index.php/articles/6752> (accessed on 8 March 2008).

<sup>94</sup> Andruszkiewicz, *School Desegregation* pp. 6–10.

<sup>95</sup> According to Phare, *Standard Sector Programme Fiche for Minorities – “Accelerating the Implementation of the National Strategy for the Improvement of the Condition of the Roma”*, 2004, available at [http://ec.europa.eu/enlargement/fiche\\_projet/document/2004-016-772.01.01%20Sector%20programme%20fiche%20Minorities.pdf](http://ec.europa.eu/enlargement/fiche_projet/document/2004-016-772.01.01%20Sector%20programme%20fiche%20Minorities.pdf).

- Elaboration of county strategies for the improvement of access to education for disadvantaged groups, elaborated with the involvement of stakeholders and implemented in pilot schools.
- Elimination of segregated classes and schools.
- Raising the overall competency level for those involved and contributing to raising the overall standard of education.
- Ensuring a national standardisation of approach on promoting inclusive education.
- Consolidated school mediator programme nationwide.
- Expansion of teacher training for early childhood and remedial education.
- Newly designed school-based curriculum and the revised and adapted “Second Chance” curriculum to demonstrate a deeper understanding of the Roma community; expanded programme.
- Greater student access to ODL (open distance learning)/ RF (reduced frequency).
- Improved education and educational resources in schools from the priority areas for educational intervention.
- A clear image of the results of the project, to help the Ministry of Education and Research and the County School Inspectorates to improve their strategies and to extend the principles of inclusive education in all schools.
- Dissemination of the examples of good practice in order to eliminate segregation and to promote tolerance and multiculturalism.

Phase 3 started in January 2006 and will end in November 2007. With a funding of €5 million, the programme is implemented in the seven counties<sup>96</sup> involved in Phare 2001, as well as 20 new counties.<sup>97</sup> The budget allocated is a total of €17.33 million, comprising a €13.5 million EU contribution and a €3.83 million Romanian Government contribution.

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<sup>96</sup> The following counties: Buzău, Călărași Giurgiu, Hunedoara, Vaslui.

<sup>97</sup> The following counties: Argeș, Bihor, Bistrița, Botoșani, Brașov, Caraș-Severin, Constanța, Dolj, Gorj, Ilfov, Mehedinți, Olt, Prahova, Sălaj, Satu Mare, Suceava, Teleorman, Timiș, Tulcea, Vrancea.

*Phase 4 (2005)*: The fourth stage of the programme,<sup>98</sup> Phare 2005 (€9.33 million), will be implemented from November 2007 in those counties involved in Phare 2004, based on the applications competition.<sup>99</sup>

The Phare financial scheme made it possible to disseminate and strengthen the positive experience gained in various smaller projects initiated either by the Ministry itself, but mainly by NGOs. Expansion of successful pilot projects developed before the Phare “Access to education” projects was implicitly the goal of this large-scale programme.

### *Other Phare projects*

Some initiatives developed before the “Access to education” project, which have become more widely implemented and supported at the regional and national levels since the first or second phases of Phare, include the following:

- Better dissemination of information regarding the reserved places for Roma youth in vocational and arts and crafts schools (starting in the 2000–2001 school year) – this information, disseminated with direct support from different structures (the school system, County Offices for Roma and Roma NGOS) have become more visible and effective. More Roma young people are aware of this opportunity and act accordingly.
- The employment of Inspectors for Roma Education in *all* County School Inspectorates (starting in 1999) – to ensure access to education for Roma children and young people; this process was gradually implemented, and now in almost all counties there are Inspectors for Roma Education.
- Better use and visibility of Romanes and of Roma culture and history in school curricula (starting in 1990) – this campaign is ongoing as part of a long-term process.
- The organisation, by the Ministry of Education and Research, of Annual Olympiads (starting in the 2000–2001 school year) in Romanes – the national contest attracts an increasing number of Romanes-speaking students. It is gaining prestige and the award system is similar to other Olympiad competitions. This idea was initiated by Phoenix foundation NGO.
- Increased quality and availability of Romanes textbooks, including the publication of textbooks in Romanes (starting in 1994).
- Introduction of the “Second Chance” programmes on a national scale (started in 1999–2000 – for young people who have dropped out of school (with support from an active NGO in the field of education, the Center Education

<sup>98</sup> Programme reference: Access to Education for Disadvantaged Groups, PHARE/2005/017-553.01.01.02)

<sup>99</sup> Selected documents of the competition for grants is available in Romanian at <http://www.edu.ro/index.php/articles/c711/>

2000+) this initiative became nationally available. In the framework of the Phare programme the methodology of recruiting, educating, evaluating and granting certification to “Second Chance” students was there were developed. An extensive collection of curriculum materials has been developed (teachers’ guides, student guides and textbooks).

- Strengthening of the “Social Assistance” programme for children in need – Phare strengthened the multi-agency approach, and this was effective in some counties.
- Redesigning of curricula to include multicultural approaches – teacher training programmes improved the knowledge and skills of the teachers. The conferences, roundtables and workshops also challenged the Curriculum Council representative and pre-service teacher training representatives to include multicultural approaches.
- Provision of transport to school for children living in remote areas – this is supported mainly through the “Rural Education” project, but depending on local conditions and needs, this initiative was undertaken by County Inspectorates as well. This was more frequent in cases of desegregation of Roma schools.
- Modernisation of schools by investing in school infrastructure.
- Integration of students enrolled in special education into the mainstream system.
- Increasing the number of “mobile” (itinerant) and support teachers to support students with special needs.<sup>100</sup>

### 3.2.3 Minority language education

Members of national minorities are entitled to study and receive instruction in their mother tongue, at all levels and in all forms of education.<sup>101</sup> In vocational schools, and most forms of secondary and post-secondary public education, specialist training is provided in the mother tongue, but students must also learn specialist terminology in

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<sup>100</sup> For more information regarding these Phare 2003 results, see progress and final reports prepared by the Technical Assistance Team of WYG International available at <http://www.edu.ro/index.php/articles/6752> (accessed on 8 March 2008).

<sup>101</sup> See Romanian Constitution, Art. 32. Right to Education: (1) The right to education is ensured through the general obligatory educational system, the theoretical and professional secondary system and the higher education system, as well as other forms of learning and improvement. (2) At all levels, teaching takes place in Romanian. Under the provisions of the law, teaching may take place in a widely spoken language. (3) The right of the people belonging to national minorities to learn their mother tongue and their right to be educated in this language are guaranteed; the ways to exert these rights are established by law.



Romanian.<sup>102</sup> At all levels of education, the entrance and graduation exams are in Romanian, except for the schools, classes and types of specialisation in which teaching is provided in a foreign mother tongue, with appropriate teaching staff and textbooks.<sup>103</sup>

At their parents' request, Roma students in grades 1–12 may enrol in an additional Roma curriculum, composed of three to four classes weekly for Romanes language and literature and one class weekly on the history and traditions of the Roma in grades 6–7.<sup>104</sup> Many Roma families also choose to study in Romanian or Hungarian. The focus on Romanes is linked to coherent measures taken by the Ministry of Education, especially initiated by Professor Gheorghe Sarau. Beyond these courses targeting especially both Roma students and teachers, additional non-Roma teachers have also been trained.

### 3.3 Desegregation

The *draft Decade Action Plan* lists the elimination of segregated classes and schools by 2008 as a target in the education section. No further details have been elaborated as to how this aim is to be achieved.

Article 6 of the Romanian Constitution had long guaranteed the right to non-discrimination in law. It emerged, however, over the course of the Phare 2001 “Access to Education for Disadvantaged Groups, with a Special Focus on Roma” project, that many inspectorates and school managers did not understand school segregation to be discriminatory and a number of segregation cases were identified in Romanian schools.<sup>105</sup> To further clarify, therefore, in April 2004 the Ministry of Education and Research issued an internal regulation, in the form of a notification, recognising and condemning segregation.<sup>106</sup> The notification authorises Inspectors for Roma Education to formulate action plans to address cases of segregation that they identify, and where schools have a disproportionate number of Roma, or segregate Roma into separate classes. The school itself must ensure that the percentage of Roma is in line with the overall percentage of Roma children in the area within three years.<sup>107</sup>

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<sup>102</sup> MER Order no. 3533 from 31 March 1999 Regarding the Study of Mother Tongue by the National Minority Pupils Learning in Schools Teaching in Romanian Language.

<sup>103</sup> See Velea Simona and Petre Botnariuc, *Education Reform in Romania during the Last 12 years*, working paper for the Summer university. Budapest: CEU, Hungary Education Policy course July 1–12, 2002.

<sup>104</sup> MER Order no. 3533 from 31 March 1999 Regarding the Study of Mother Tongue by the National Minority Pupils Learning in Schools Teaching in Romanian Language.

<sup>105</sup> Andruszkiewicz, *School Desegregation*, pp. 6–10.

<sup>106</sup> Notification No. 29323 on School Segregation of 20 April 2004.

<sup>107</sup> Notification No. 29323 on School Segregation of 20 April 2004.

The inspectorates are required to develop an action plan with the school to eliminate segregation. Such actions should include the following:

- Setting up mixed student groups at all education levels;
- Provision of transport for Roma children to schools with a different ethnic majority, particularly for children from residentially segregated communities;
- Common use of existing school premises and facilities;
- Training and employing Roma school mediators;
- Remedial classes for children with learning difficulties;
- Promoting the Roma ethnic identity in mixed schools, including through the curriculum;
- Roma teachers in schools to teach the specific curriculum (Romani language and history);
- Training teachers in inclusive education to ensure an educational climate suitable for a multiethnic environment;
- Facilitating students' transfer where balancing the Roma to non-Roma students' ratio is required in a school;
- Informing the Roma communities in the quality of education in mixed schools and involving Roma parents in school decisions by regular visits to Roma communities;
- Informing all parents of the benefits of inclusive education, to the end of discouraging parents from requiring that their children be included in classes where there are no Roma children or in all-Roma classes.<sup>108</sup>

Despite the new notification, however, there still remain difficulties in implementing desegregation. Experts have noted that inspectors do not have the institutional authority to oversee desegregation efforts, and lack the expertise and experience in mediation at the community level.<sup>109</sup> Sometimes, community pressure made school management difficult, or hindered the inspectorate's task of tracking the steps towards desegregation. In addition, the lack of a strong legislative tool and the lack of any administrative tool to punish segregation diminish their role in fighting against discrimination and segregation. The evaluation report on the Phare 2003 project, "Access to Education for Disadvantaged Groups Project Report" reported this as follows:

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<sup>108</sup> Notification No. 29323 on School Segregation of 20 April 2004.

<sup>109</sup> OSI roundtable, Bucharest, February 2007.

Nevertheless, problems and misunderstandings continued even after the Notification was issued. Some County School Inspectorates did not submit review documents and action plans, despite the fact that the Notification had specifically requested this. Others responded with a short note to the effect that there was no segregation in their Counties, but provided no evidence to back this assertion. A telephone survey of schools by the [ministry] early in the 2004–5 school year revealed that information about the Notification had not always been passed from Inspectorates to schools and that many teachers were unaware of it. Segregated classes continued to exist and Roma parents seeking to enrol their children in ethnically mixed schools continued to be directed back to their segregated neighbourhood schools.<sup>110</sup>

The decentralised administrative structure presents certain obstacles to the comprehensive implementation of desegregation. To ensure that Government-level instruments are carried out, the local representatives of the State Government (*Prefecturi* or Prefects) should be given a role in desegregation. These offices could coordinate institutional dialogue among local stakeholders in desegregation projects, such as the local authorities, school staff, county school inspectorates, parents councils and NGOs.

The official evaluation of desegregation measures is under way by the Ministry of Education and Research engaged by notification to monitor the desegregation implementation. Data have been collected in the framework of the Phare 2003 project. The Ministry continues to monitor the process of desegregation in the counties involved in this phase of the programme. In addition, the third phase of Phare also has a focus on desegregation. The Technical Assistance team (Finn Consult/Larive) is collecting data from the new counties involved in the project. They are expected to process and analyse these data and to compare them to the Phare 2003 project trends, challenges and achievements.

One particularly invidious case demonstrates that even where desegregation is nominally ongoing, the actual situation may fall well short of integration. In 1993 a report on the dire conditions in a Roma school in Cehei (Sălaj County) was submitted to the National Council for Combating Discrimination,<sup>111</sup> (*Consiliul Național pentru Combaterea Discriminării*, NCCD), which found that the school was, in effect, segregated and issued a warning to the school. Thereafter, the Ministry of Education and Research undertook to remedy the situation by ensuring school transport, and hiring qualified teachers, renovating the building and mixing the Romanian and Roma students in classes. Three years after this decision, despite the commitment of the Ministry to mix classes at Cehei School, and despite the fact that the Sălaj County

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<sup>110</sup> Andruszkiewicz, *School Desegregation*, p. 10.

<sup>111</sup> The National Council for Combating Discrimination (NCCD) was established in 2000 as the public structure responsible for anti-discrimination policies and investigations in Romania. Further details on the NCCD website at <http://www.ncnd.org.ro>.

School Inspectorate was one of the partners in the implementation of a project with external funding to desegregate the school in Cehei,<sup>112</sup> the solution that was chosen was to build a new school where the Roma children in the lower secondary grades previously attending Cehei School would be transferred.<sup>113</sup> By building a new school to serve Roma children of both primary and lower secondary grades, the educational segregation of the Cehei community is virtually complete. The executive director of the local NGO Şanse Egale believes that transferring the Roma students from Cehei School to the new school for first- to eighth-graders is the result of a local educational segregation policy:

In Jibou desegregation of the Roma classes was completed, while in Şimleu Silvaniei, more precisely in Cehei – Pustă Vale, there is a local, regional policy of segregation of the Roma students: those who had previously been at the Cehei School are now moved to Pustă.<sup>114</sup>

Moreover, transfer of the Roma students from the Cehei lower secondary school to the new school in the community is illegal even in the opinion of the newly built school's director. She pointed out that the transfer cannot be legal, since the Roma parents have not applied in writing to the school to demand this transfer, and such an application has not been approved.<sup>115</sup>

According to the Sălaj County School Inspectorate (CSI) Inspector for Roma Education, the building of the new school in the community should not have affected the desegregation process in Cehei, a process which has led to some success in mixing Roma and non-Roma students from the community. The new school in Pustă Vale was, according to this plan, supposed to enrol only pre-school and primary school children, because of the inadequate space that they had had in Cehei. The Inspector for Roma Education believes that it may be illegal for the Roma children to be transferred,

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<sup>112</sup> A project funded by the Roma Education Fund (REF). The project was going to pay for a van to take the Roma children to the school, and for training for the teachers in Cehei.

<sup>113</sup> There is remarkable inconsistency in the educational policy pursued by Sălaj CSI (although engaged in a desegregation project in Cehei, they later decided to build a school in the community to censure educational provision for the lower secondary age Roma children).

<sup>114</sup> The opinion was expressed by Silvia Prodan in the article: “*Potrivit Instituției Prefectului, rromii de la școala din Pustă Vale nu sunt segregati*” (According to the Prefect's Office, the Roma in Pustă Vale are not segregated) in *Salajeanul*, issue 675 of 10 November 2006, available at [http://www.salajeanul.ro/arhiva\\_b.php?act=view&numero=1088](http://www.salajeanul.ro/arhiva_b.php?act=view&numero=1088) (accessed on 28 February 2007) (hereafter, *Salajeanul* article).

<sup>115</sup> Interview with school director, Cehei, 15 October 2006, case study Şimleu Silvaniei. For each country report in this series of EUMAP reports on “Equal Access to Quality Education for Roma”, three case studies were carried out to supplement and corroborate data gathered from other sources. Information from the case studies are integrated throughout the body of each country report. Annex 2 includes additional details from each of the case study sites. In Romania the three sites are: Bobesti village (Ilfov County), Roman municipality (Neamţ County) and Şimleu Silvaniei city (Sălaj County).

in the absence of the parents' explicit request and without the approval of the school, and enrolled in the school in Cehei as well, as there is no legal basis (no record of the parents' request and no written approval of the school or of the CSI). The administrative inconsistency and ambiguity of the decision to transfer the children was clear even to those involved:

This whole issue occurred because the number of children in Pustă Vale went up, and they did not have enough space for the pre-school or for the school. It was impossible for the children to go to school in three shifts, because they were already attending school in two shifts, in the morning, and at noon [...] whereas to come in two shifts would have made no difference. From this perspective, it is clear that the issue of schooling space has to be resolved. At that time they were planning to provide only for first-to fourth-graders; they did not think of moving lower secondary education there, because there was a lower secondary school in Cehei. I saw it as a good intention, but unfortunately the building of the new school came out for the worse [...] Instead of doing good, we did not serve the children well, because the children who were already in mixed classes in Cehei moved to the new school in Pustă Vale. I was in touch with the directors of the two schools. I asked the headmistress of the school in Pustă Vale how she accepted the children, on what basis she transferred them. She was not supposed to accept them because no one asked her officially to transfer the children from one school to another. Nothing was done officially: there are no official documents to serve as evidence; at this point if you go to the school in Cehei, you find that the children should be there, and not in Pustă. The Roma children at the school in Cehei came there from Pustă. According to the law, however, they are entitled to go to the school in their locality of residence; this is the issue.<sup>116</sup>

In a notification filed with the Prefect's Office and CSI Sălaj by the Association Șanse Egale Zalău, together with the Association Șanse Egale pentru Femei și Copii Zalău and ADOSER/S it was requested, *inter alia*, that "transport of the Roma students from Pustă Vale (residentially segregated community) should be ensured to the Cehei School and/or another school in Șimleu Silvaniei, a school with the majority of children of a different ethnic background".<sup>117</sup> According to the local paper, *Salajanul*, in its reply the Prefect's Office stated that "there is no issue of segregation of the 380 Roma, because the school is within a Roma community, and the students were not forced to move to this educational institution".

According to the Inspector for Roma Education of Sălaj CSI, the Pustă Vale School should be included as a beneficiary of the Phare 2004 project, which is going to start in Spring 2007. The programme has a desegregation component, and in this the school would become a magnet school, which would also attract non-Roma children from the area with its higher standards of equipment and curriculum. However, according to the

<sup>116</sup> Interview with inspector for Roma education, Cehei, Zalău, 16 October 2006, date.

<sup>117</sup> *Salajanul* article.

Inspector for Roma Education, the plan of attracting non-Roma students in the Pustă Vale School is not realistic without transport to the school:

Theoretically, according to the courses, it should make the school in Pustă Vale very attractive, so that it would attract the Romanian children from Cehei. This is the theory. Honestly, it is very good, and it works theoretically, but in practice it is very difficult. [...] But this would be solved if free transport was provided from Cehei to Pustă. It might be that poor people would prefer this solution. There are not many rich people in that village, I don't know if there are any rich people, and anyway they would prefer Şimleu.<sup>118</sup>

At present, it is still not clear what solution is preferable: would the notifications of the local NGOs lead to school transport provision and integration of the Roma students of secondary school age in the Cehei School, or would the Roma go to school in the Pustă Vale School, or would the school in Pustă Vale become a magnet school, which would attract – thanks to its curriculum and equipment – non-Roma students, too?

In the Olympic neighbourhood of Roman, a Roma community was resettled from the city centre in 2001, and classes were established for the children. With intervention from the local inspectorate, the children were sent to an integrated school.

In the beginning, we made two classrooms so as to bring the kids to the school, and the result was astonishing [...] Only the inspectorate stepped in and [said that] we were entering the European Community and we must take our children to another school. Of course, in a way they were right; there are no proper conditions for performance at this school. And out of two inconvenient things, we weighed the situation and asked: what's better, to stay at school for hours, there, in the neighbourhood, or to go to the school that was a kilometre away?<sup>119</sup>

However, according to the leader of the Association Romii Romascani, the Roma classes that were moved from the Olympic neighbourhood study separately from the Romanians in the local school, on the first floor of the main building. On the other hand, the deputy director stated that in the first grades the students are mixed, so that the Roma students share classes with majority students. As concerns segregation, the deputy director alleged that there is no ethnically-based segregation, but placement is made because of the students' inappropriate conduct, saying "We do not segregate because of ethnicity, but because they are disrespectful and dirty."<sup>120</sup>

<sup>118</sup> Interview with the inspector for Roma education, Zalău, 16 October 2006, case study Şimleu Silvaniei.

<sup>119</sup> According to the information provided by the vice mayor of Şimleu Silvaniei, Mr. Hanis Geza, 2 November 2006, case study Şimleu Silvaniei.

<sup>120</sup> Interview with deputy director Ana Borcan, Roman, 1 November 2006, case study Roman.

### 3.4 Roma teaching assistants/school mediators

The idea of Roma school mediators in Romania was first introduced in 1996–1997 by the NGO Romani Criss together with the Intercultural Institute Timișoara. The Inspector for Education in Romanes, Professor Gheorghe Sarau, coordinated the design of the job description for school mediators during a national meeting of the Inspectors for Roma Education in Tulcea in 2000 (the event was financed by OSCE and the Ministry of Education and Research). Starting in 1998–1999 community mediators have been trained and worked in the pilot project “Second Chance for Older Drop-Outs”, which was initiated by OSF-Romania, and carried out later on by the Center Education 2000+. Since then, in parallel with the positive experience gained in the framework of health programmes (sanitary mediators), the mediator has been acknowledged as an important stakeholder. Experience gained at the NGO and the Ministry level made it possible to clarify the statute and the training requirements for this job.

Since 2002, the Roma school mediators have played an important role in the framework of all the educational projects financed by the Phare 2001 “Access to Education for Disadvantaged Groups, with a Special Focus on Roma” project (see also section 3.2). The project called for mediators to be appointed in 76 pilot schools in ten counties, with at least one mediator appointed by the County School Inspectorates for each of the pilot schools.<sup>121</sup> Training and appointment of mediators continued in the second and third stages of the multi-annual Phare project. Approximately 200 school mediators were selected and trained during the implementation of the Phare 2001 and 2003 “Access to Education for Disadvantaged Groups, with a Special Focus on Roma” project. Reliable data on the actual number of mediators hired today is not available at present.

The position of school mediators has been a recognised occupation in the Classification of Occupations in Romania (COR) since 2002.<sup>122</sup> According to the Code of Occupations in Romania,<sup>123</sup> the school mediator is part of the “Other personnel in education” sub-group. The main responsibilities of the school mediator include the following:

- Data collection;
- Helping to ensure that all children of compulsory school age are enrolled;

<sup>121</sup> See the information on Roma teaching assistants, available on the website of the Roma Education Initiative (REI), at [http://www.osi.hu/esp/rei/RTAs\\_Romania.html](http://www.osi.hu/esp/rei/RTAs_Romania.html) (accessed on 28 February 2007).

<sup>122</sup> HG no 844 of 31 July 2002.

<sup>123</sup> Code of Occupations in Romania, Code 334010, approved by the Government Directive No. 721 of 14 May 2004, (hereafter, Code of Occupations). Major sub-group 33 “Teachers and assimilated”, Minor sub-group 334 “Other education personnel”, Basic group 3340 “Education personnel not classified in previous groups”.

- Working to prevent dropping out through communication with parents and local authorities;
- Facilitating pre-school enrolment for Roma children;
- Mediating between families and school authorities to promote social inclusion;
- Identifying potential problems;
- Helping to disseminate information throughout the Roma community;
- Supporting teaching staff, particularly through the use of the local community's language;
- Identifying children and youths who might pursue careers as teachers or mediators themselves.<sup>124</sup>

Roma School Mediators also support children directly, and liaise with the community on a variety of levels.<sup>125</sup>

Although school mediators were selected and trained for a long time, their contribution has been greatest within the context of the Phare project "Access to Education for Disadvantaged Groups, with a Special Focus on Roma". County Councils from the counties involved were expected to allocate resources and to hire them, and while the mediator is a formally registered occupation, still there are no supporting rules for hiring or maintaining these positions, and the local authorities have been slow to carry out this process.<sup>126</sup>

The selection of the school mediators is a result of recommendations from the Inspectors for Roma Education and also from the local community Roma leaders; some of the criteria taken into consideration are as follows: residency in the locality, being ethnically Roma, possessing good standing within the local community and coming recommended by a local Roma organisation, speaking the language used in the community, and having communication skills with all parties, including the school director. A high-school level education is considered important but in fact, in some cases, due to the fact that school mediators are formally employed in other positions, this is often not needed; although they work as school mediators, due to budgeting and bureaucratic reasons and maximum limits of the organisational chart, sometimes they are formally hired as guards or cleaners. Given the low prestige associated with this post and the very low wage offered, few applicants actually have a secondary school education. The average salary of the school mediator varies from county to county,

<sup>124</sup> See a document describing the main responsibilities of the school mediator. Available on the MER website at <http://www.edu.ro/index.php/articles/3467> (accessed on 28 February 2007).

<sup>125</sup> See a document describing the main responsibilities of the school mediator. Available on the MER website at <http://www.edu.ro/index.php/articles/3467> (accessed on 28 February 2007).

<sup>126</sup> Interview with Olga Marcus, Inspector for Education for Roma in Cluj County, 17 November 2006, Cluj Napoca.



according to previous work experience, and their level of studies, but is estimated to be around the minimum wage in Romania, which is approximately €100 per month.<sup>127</sup> Mediators are paid through the municipal budget allocation according to the norms existing for budgetary personnel, as well as from donations and sponsorships directly allocated for the purpose.<sup>128</sup>

Mediators must have completed compulsory education and have been registered in secondary school; however, both Roma and non-Roma consider that the standards for mediator candidates are very high. For example, it is required that the candidate have a baccalaureate diploma, which made it difficult, and sometimes even impossible, to find the right person to apply for the training scholarship. Another expert confirms that the higher the educational level, the lower the motivation to work as a community mediator, because of the low status and salary.<sup>129</sup>

Mediator training is subcontracted by the Cluj Napoca Pedagogical College. Training is based on a modular scheme, has a strong focus on practice, and covers topics including the following: child protection legislation, communication, ICT, Romani language and Roma culture, and community involvement. The training took place in three main regions in Romania in 2006, in Neamț, Cluj and Arieseni. Students attend face-to-face and tutorial meetings, apply different instruments and tools in the school and community, and receive supervision from tutors.

Training for the mediators is based upon an Individual Training Plan (*Planul Individual de Pregătire*, ITP). The training is organised and delivered by the institution that won the auction/tender to complete the course. School principals provide assistance and supervise mediator's training on site. The school mediators themselves, in cooperation with school directors and teachers, designed the training. The instructors and tutors conduct monthly progress evaluations accordingly with the activities proposed in the ITP to make any necessary adjustments; school principals monitor the mediator's work on a regular basis. The ITP includes:

- Familiarisation with the application of educational policies in the school where the school mediator operates, and familiarisation with school resources;
- Presentation meeting with school staff in which the school director presents the role and responsibilities of the school mediators in the school and community;
- Individual meetings of the school mediators with the school's staff, and evaluation meetings (once a month);
- The calendar of weekly meetings between the mediator and the school's staff;

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<sup>127</sup> Interview with Olga Marcus, Inspector for Education for Roma in Cluj County, 17 November 2006, Cluj Napoca.

<sup>128</sup> Occupational Profile, according to the Code of Occupation.

<sup>129</sup> OSI roundtable, Bucharest, February 2007.

- The schedule of meeting with NGOs, local authorities, community representatives, and representatives of parents and pupils.<sup>130</sup>

The situation of the school mediators remains rather difficult, as their status is not clear, and hiring and maintaining them remains a struggle.<sup>131</sup> The County Councils facilitated the hiring of school mediators during the implementation of the Phare “Access to Education for Disadvantaged Groups, with a Special Focus on Roma” project, but they seem reluctant or less motivated to continue after the finalisation of their grant contracts.<sup>132</sup> In light of the ongoing process of decentralisation in Romania, and responsibilities being delegated more and more to the local level, the position of and mechanisms for employing mediators remains uncertain and may possibly be under threat. Unless there is a clear conditioned transfer of responsibilities and budgets for the school mediators, the local authorities may simply decide that there are other priorities and abandon the use of school mediators.

### 3.5 Romanes teachers

According to the Ministry of Education and Research,<sup>133</sup> progress has been made in strengthening the process of teaching Romanes in schools and consolidating the informal network of Romani language teachers.<sup>134</sup> According to Inspector for Education in Romanes, Professor Gheorghe Sarau, today Romanes is taught as a mother tongue, according to the legal provisions, as a separate subject, by 480 Roma and non-Roma teachers (around one fifth are ethnically Romanian or Hungarian). The number of pupils studying Romanes and Romani History and Culture has risen from 50 in 1990 to over 25,500 now.<sup>135</sup>

Only one school in Maguri, Timiș County, is developing an experiment of teaching mainly in Romanes language. A core of Roma teachers, with the support of the former school director (now Inspector for Roma Education in Timiș County) made pilot

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<sup>130</sup> See Council of Europe, *The Situation of Roma School Mediators and Assistants in Europe* DGIV/EDU/ROM(2006)3, report established by Calin Rus, CoE, Strasbourg, 2006, available at [http://www.coe.int/t/dg3/romatravellers/Documentation/Education/RomaMediators06\\_en.asp](http://www.coe.int/t/dg3/romatravellers/Documentation/Education/RomaMediators06_en.asp) (accessed on 28 February 2007).

<sup>131</sup> Interview with Olga Marcus, Inspector for Education for Roma in Cluj County, 17 November 2006, Cluj Napoca.

<sup>132</sup> Interview with Olga Marcus, Inspector for Education for Roma in Cluj County, 17 November 2006, Cluj Napoca.

<sup>133</sup> MER Order no. 3533 of 31 March 1999 on Studying Romani Language by the Pupils Belonging to National Minorities Participating in Education in Schools using the Romanian language.

<sup>134</sup> Information provided by Gheorghe Sarau, interview held on 24 October 2006, Ministry of Education and Research.

<sup>135</sup> Information provided at OSI roundtable, Bucharest, February 2007; further details available in Romanian on the Ministry of Education and Research website at <http://www.edu.ro/index.php/articles/c220> (accessed 10 March 2007).

teaching in Romanes possible. For fourth-graders, the main teaching language is Romanes, but educational materials are not available for all subjects. The educational materials printed in Romanes are provided by the Ministry of Education and Research or supplied by NGOs.

The Ministry of Education's representative has indicated that the number of Roma teaching staff has increased as a result of involving young Roma high school graduates in the education system as unqualified teachers to work with children from Roma classes, as primary school tutors or teachers of Romanes as a mother tongue.<sup>136</sup>

In the 2005–2006 school year, out of 280,000 active teachers in Romania, 490 (0.18 per cent) are Roma teachers who had been trained by the Ministry of Education and partners between 2000 and 2005. They are teaching Romanes and Roma History and Culture, starting with the pre-school level and ending with high school, to students who have identified themselves as Roma.<sup>137</sup>

Each year since 1997, approximately 12–16 Roma students have enrolled for regular courses at the Department of Romani Language and Literature of the Faculty for Foreign Languages and Literature of the University of Bucharest. At the same time, 490 students overall have been enrolled since 1997 at the Roma Teacher Training Section of the Department of Open Distance Education of Bucharest University (*Departamentul de Învățământ Deschis la Distanță, Universitatea din București, dezvoltat din Centrul de Resurse, Documentare, Informare și Servicii pentru Învățământ Deschis la Distanță, CREDIS*). Starting in 2007–2008, CREDIS will not select and start another group of students; instead the Department for Romani Language and Literature (*Section Romani-Romanian Language*) will start an open distance education course for approximately 60 students per year.<sup>138</sup>

### 3.6 Educational materials and curriculum policy

The results of education reform<sup>139</sup> on school textbooks creation and provision is visible. The main reform with regard to curriculum and assessment reflected the requirements of the country's new democratic and economic structures, along with the wider principle of access for all. In compulsory education, teachers can choose from more than one textbook per subject, which were based on a first round of new curricula, and the textbook market has been opened up, allowing for competition,

<sup>136</sup> Interview with Professor Gheorghe Sarau, Ministry of Education and Research, 24 October 2006.

<sup>137</sup> They use several textbooks published with various funding resources. The manual they use to teach with was funded by UNICEF Romania, published through RO Media Publishing House.

<sup>138</sup> Telephone interview with Delia Grigore, Bucharest, 18 January 2007.

<sup>139</sup> A comprehensive education reform began in Romania in 1993–1994, and was initiated by negotiations between the World Bank and the European Commission.

which is good for quality. The requirements for textbooks are overseen by the Textbook Approvals Board (*Consiliul Național de Aprobare a Manualelor*, TAB).<sup>140</sup>

Students receive all textbooks required for compulsory education free of charge.

In its 2005 report submitted as part of the monitoring of the Framework Convention on the Protection of National Minorities (FCNM), the Romanian Government noted that the curriculum is being reoriented towards greater inclusion of all national minorities.<sup>141</sup> However, the presence of the Roma minority's contributions to the development of Romanian society is almost nonexistent in school textbooks, and the way in which minorities are handled in the curriculum remains problematic, since it has been included only in those schools for education in the mother tongue, and not provided to the majority. As one expert noted, "Even the textbook on the Holocaust did not include reference to the Roma minority."<sup>142</sup>

Roma language and history subjects have been included in the national education curricula since 1999, when a first curriculum for studying the history and traditions of the Roma (for grades 6–7) was developed by Liviu Cernaianu. Based on this initial curriculum, in 2003, at the initiative of the Direction for Minority Language Education within the Ministry of Education and Research, the first auxiliary manual, *Roma History and Traditions*, was elaborated by young Roma scholars – Petre Petcut, Delia Grigore and Mariana Sandu. With financial support from UNICEF Romania, in partnership with Romani CRISS and Ministry of Education and Research, a book called *Roma from Romania – Historical Landmarks (Romii din Romania – Repere prin istorie)* was published in 2005.<sup>143</sup> Another initiative of the NGO Save the Children Romania, *Roma History and Traditions*<sup>144</sup> (*Istorie si Traditii rrome*), also aims to fill the information gap on Roma history and traditions.

Minority students may study their mother tongue and literature for seven to eight hours per week in the first and second grades; in the third and fourth grades such lessons may take up five to seven hours, in the fifth grade five hours, and in grades

<sup>140</sup> Cronin et al., *Education Sub-Sector Review*.

<sup>141</sup> Council of Europe, *Second Report Submitted by Romania Pursuant to Article 25, Paragraph 1 of the Framework Convention for the Protection of National Minorities*, received on 6 June 2005, Strasbourg, available at [http://www.coe.int/t/e/human\\_rights/minorities/2\\_framework\\_convention\\_%28monitoring%29/2\\_monitoring\\_mechanism/3\\_state\\_reports\\_and\\_unmik\\_kosovo\\_report/2\\_second\\_cycle/2nd\\_sr\\_romania.asp#P475\\_38732](http://www.coe.int/t/e/human_rights/minorities/2_framework_convention_%28monitoring%29/2_monitoring_mechanism/3_state_reports_and_unmik_kosovo_report/2_second_cycle/2nd_sr_romania.asp#P475_38732) (accessed on 28 February 2007) (hereafter, FCNM, *Second Report*).

<sup>142</sup> OSI roundtable, Bucharest, February 2007.

<sup>143</sup> The book was published within a project "Roma Children want to learn" implemented by Romani CRISS, *Roma from Romania – Repere prin istorie* (Roma from Romania – historical landmarks). Bucharest: Vandemonde, 2005.

<sup>144</sup> Save the Children, Romania, *Istorie si Traditii rrome* (Roma History and Traditions), Bucharest: Save the Children, Romania, 2006.

seven and eight four hours.<sup>145</sup> A syllabus on the history and traditions of the Roma minority has been prepared.<sup>146</sup> Textbooks for education in minority languages for different subject matters have been issued for compulsory education.

According to the Government, materials in Romanes, including textbooks and other support materials, have been developed and provided for free by NGOs, or provided through governmental programmes (including the “Access to Education for Disadvantaged Groups, with a Special Focus on Roma” project – see section 3.2).<sup>147</sup> Examples of organisations providing such assistance include the PHOENIX Foundation and the Intercultural Institute Timișoara, and member organisations of the Soros Open Network Romania. Among these, the Resource Center for Roma Communities published support materials for Romanes literature, and poetry; Education 2000+ Center published several materials for teacher training, intercultural education, school management, school participation of Roma children, and a series of Romanes textbooks; the Ethnocultural Diversity Resource Center published intercultural education material consisting of textbooks, workbooks for pupils and a teachers’ guide.<sup>148</sup> These textbooks have been registered and approved by the Ministry of Education and Research and are distributed by the School Inspectorates.

Although positive efforts have been made towards increasing the available curricular material relating to Roma, the current approach tends to take too narrow a view and overlooks the fact that the majority population must also be educated and have exposure to diversity, even more so than the minority groups.

### 3.7 Teacher training and support

In 2003 it was reported that “The system of teacher training has registered a slower development, a certain discrepancy or rhythm and efficiency, as compared with other elements of the education reform in Romania.”<sup>149</sup> Despite legal regulation,<sup>150</sup> and both governmental and non-governmental teacher training programmes, there is a gap between the available resources and the need for teaching improvement. Teachers’ salaries, turnover rate, motivation and teaching conditions represent a few aspects that

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<sup>145</sup> *FCNM Second Report.*

<sup>146</sup> *FCNM Second Report.*

<sup>147</sup> *FCNM Second Report.*

<sup>148</sup> See the websites of the Resource Center for Roma Communities (<http://www.romacenter.ro>), the Ethnocultural Diversity Resource Center (<http://www.edrc.ro>) and Center Education 2000+ (<http://www.cedu.ro>).

<sup>149</sup> Cronin et al., *Education Sub-Sector Review*, p. 16, with reference to: L. B Arrows (ed.), *Institutional Approaches to Teacher Education within Higher Education in Europe: Current Models and New Developments* Bucharest: UNESCO-CEPES, pp. 287–288.

<sup>150</sup> Education Act; Statute of Teaching Staff Law no. 128/1997.

explain the slower level of development for this sector compared to other sectors of the educational system reform.<sup>151</sup>

Initial teacher training is provided by higher education institutions. Universities organise pre-service teacher training through Departments for Teacher Training (*Departamentul pentru Pregătirea Personalului Didactic*, DPPD). The psycho-pedagogical module is composed of both compulsory and optional courses. According to the structure of the compulsory psycho-pedagogical module, most State universities (including Bucharest, Iași, Cluj and Timișoara) provide courses on intercultural education as part of the pre-service teacher training. If followed during the university studies, this module is provided for free. After graduation, it is possible to complete this module by request and a tuition fee is required. After the successful completion of the module, a certificate is issued, which allows the person to work as a teacher.

Many courses that are part of the psycho-pedagogical module cover topics such as anti-bias, tolerance, diversity and multiculturalism. These topics are embedded in different courses, which are part of the teachers' initial training curriculum (Theory and Methodology of Curriculum, Theory of Teaching, Theory and Methodology of Assessment). There are no national available data concerning the teaching and learning strategies or the ratio between theory and practice for these courses. The new regulation regarding the system of quality management in each university (related to the Bologna Process)<sup>152</sup> are expected to increase the availability of data in this regard.

Compared to the courses provided by universities (which deliver both pre-service and in-service teacher training), in-service training courses could be offered by various types of institutions. Training courses provided by NGOs have a more focused target approach than those offered as part of routine teacher training. Taking into account the education for Roma, it is certain that courses and training courses offered by NGOs focus more on the specific needs of Roma children than courses provided by universities do. Most of these NGO courses are developed in the framework of projects and programmes addressing the educational needs of Roma students. As a consequence, these in-service courses mainly target teachers working in schools with a high percentage of Roma, and even more specifically, the courses target only those teachers working in the schools involved as part of the funded projects.

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<sup>151</sup> See D. Potolea and L. Ciolan, "Teacher Education Reform in Romania: A Stage of Transition", in B. Moon; L. Vlasceanu & L. Barrows, eds., *Institutional approaches to teacher education within higher education in Europe: current models and new developments*. UNESCO-CEPES: 2003, which provides a comprehensive description of initial and in-service teacher education system in Romania.

<sup>152</sup> The Bologna Process, following from the 1999 Bologna Declaration, is "a series of reforms needed to make European Higher Education more compatible and comparable, more competitive and more attractive for [European] citizens and for citizens and scholars from other continents." Further details on the Bologna Process are available on the European Commission website at [http://ec.europa.eu/education/policies/educ/bologna/bologna\\_en.html](http://ec.europa.eu/education/policies/educ/bologna/bologna_en.html) (accessed on 28 February 2007).

While the psycho-pedagogical module is compulsory for initial teacher training, active teachers are required to collect a minimum 90 credit points in five years. The number of credits provided by the successful completion of a course is evaluated by the National Centre for Training of the Pre-University Teaching Staff (*Centrul Național de Formare a Personalului din Învățământul Preuniversitar*, CNFP), which provides the accreditation of the course and assesses the value of one professional credit (an average of one credit is four hours' course/training).

Two years after entering the profession, it is compulsory for teachers to successfully pass an examination (*definitivat*). After this, teachers can choose to pursue additional degrees, but these are not compulsory. It is, however, compulsory to attend in-service training courses every five years. Training courses, involvement in projects and skills associated with these training courses (use of interactive methods, alternative assessment methods, differentiated instruction, use of ICT in teaching) are more and more valued within the Romanian education system. Most of the training provided by NGOs is free. Some other training sessions are supported by the State, others require a participation fee.

It is difficult to provide a comprehensive picture of in-service teacher training provision, because the system is decentralised, and at the county level, teachers may attend training courses that are provided by the Teacher Training Centres (*Casa Corpului Didactic*, CCD), by NGOs, or by other training providers. At present these other training providers are in the accreditation process, and are expected to be fully accredited by the CNFP. The offer is assessed by the CNFP and, if accredited, completion of the course provides professional credits for teachers. These are part of the assessment criteria for teachers to benefit from rewarding salary schemes (*salariu de merit* and *gradatie de merit*).

The “Multi-Annual National Training Programme for Non-Roma Teachers Working with Roma Children and Students” (PNMFCDN) has been cited as an effective example, from the perspective of the Roma historical-cultural background and following an intercultural approach.<sup>153</sup> Starting in 2004 every summer hundreds of teachers have received training in the following areas:<sup>154</sup>

- *Roma component*: “the cultural legacy of the Roma child: a mystery for the non-Roma teacher;” Roma traditions, history and Romanes language; educational provision for Roma from the perspective of legislative framework for minorities and for the Roma minority;
- *Intercultural component*: inter-ethnic communication; intercultural and inter-ethnic relations; communication techniques with pre-school and school Roma

<sup>153</sup> Information provided by Gheorghe Sarau, interview held on 24 October 2006, Ministry of Education and Research.

<sup>154</sup> The training was provided by Gheorghe Sarau together with other young Roma scholars previously trained and promoted by him.

children; communication techniques with parents and Roma from the community.<sup>155</sup>

The Ministry of Education and Research and the NGO Save the Children Romania, initiated this programme, which has also received funding from other sources. Through the PNFCND, 420 teachers were trained in 2004 and 580 more teachers in 2005.<sup>156</sup> The programme targets non-Roma teachers teaching in classes and schools with at least 30–35 per cent Roma pupils. The training will continue with support from other non-governmental financial sources such as UNICEF Romania.

The Phare projects have provided a good example of a multi-annual training programme with an almost national coverage (see section 3.2.2).<sup>157</sup> Through these Phare projects, the Ministry disseminated the best practices in the field of Roma education developed by different NGOs on a larger scale.

During each phase of the Phare project, training was directed at all relevant stakeholders, including project teams of inspectors and directors, teachers, parents and school mediators. Since its inception, the project has trained increasing waves of trainers, for a total of 900 who will be responsible for training and providing assistance to their colleagues in schools and at the county level. These courses are accredited or under accreditation by CNFP. Although at the beginning of the project the process of teacher training was centralised (training of trainers, training for inspectors and school principals), further steps were designed to increase decentralisation and increased ownership at the county and school level. In this regard, the CCD in each county has the freedom to use all the project training resources, to design and deliver training sessions tailored to the specific needs of the teachers in school with Roma children. An inclusive approach represents a major trend in teacher training for all the schools at the national level.

All the training courses organised in the Phare project were supported by the project funds. Training-related costs (such as materials, transport or accommodation.) were also covered by the project. In addition to the national training courses, local training took place and is ongoing. While approximately 1,700 teachers were trained in the Phare 2001 phase, in the second phase, Phare 2003, 3,300 more teachers were trained in different areas (such as inclusive schooling, change management, school-based curriculum, inclusive teaching, parental involvement, differentiated teaching, support and itinerant teacher and similar approaches).

<sup>155</sup> See MER Newsletter *Buletin informativ privind învățământul pentru romi nr. 24 din 5 ianuarie 2006*, available at <http://www.edu.ro/index.php/articles/c419/> (accessed on 28 February 2007).

<sup>156</sup> The programme was funded with support from UNICEF, the Project on Ethnic Relations, the Department for Interethnic Relation, and the Intercultural Institute, Timișoara.

<sup>157</sup> Most information regarding the training component of the Phare “Access to Education” Programme was provided by Georgeta Costescu, teacher training coordinator in PIU (Project Implementation Unit), Ministry of Education and Research; interviews done in September and November 2006, January 2007.



School inspectorates from the counties where the Phare 2003 “Access to Education for Disadvantaged Groups, with a Special Focus on Roma” project was applied were encouraged to provide advice to schools on developing desegregation plans (see section 5.7), including directing teachers towards training in inclusive education to ensure an educational climate suitable for a multi-ethnic environment. Most of the inspectors who were part of the Phare project teams have received training related to inclusive education. A few of these inspectors became local trainers and received support from the technical assistance team during the implementation of the project. The trainers trained in Phare 2003 have an informal network, initiated and activated by the local training coordinator, and share information and experience through an electronic forum, *Scoala incluziva*. However, it is difficult to evaluate the quality of the training courses provided at the county level or school level, since the feedback from the participants is collected and assessed only by the training providers and not circulated at the regional or national level.

The aim of this training structure is to cover as many teachers as possible, by empowering CCDs and local trainers and by providing good quality materials. However, there are no available data regarding the quality and the impact of the local training courses, since the CCDs have autonomy in organising the training process. Feedback suggests that the project’s strong points include the school-based training, which takes into account specific conditions in schools and communities; positioning trainers as “critical friends”; facilitating exchange of experience between schools; the use of demonstrative teaching, and use of a formal network to disseminate new pedagogical approaches and teaching strategies (in professional meetings of teachers such as “*cercuri pedagogice*” or “*comisii metodice*”). Concerns have been raised regarding the overwhelming tasks for trainers in this project, who are regular teachers or inspectors; also, a lack of regulation concerning the trainers’ statute is a problem. Other weak points include insufficient training provided through the national training for trainers (two national training courses for one week each), and poor support provided after the official end of the project.<sup>158</sup>

While these examples illustrate training programmes targeting teachers who work in schools with Roma children, other programmes address specifically the pre-service or in-service training needs of Roma teachers. Starting in 1999, the Ministry of Education and Research has organised summer schools, “National Teacher Training Programme for Romani Language and Roma History Teachers” in partnership with other national and international organisations, in which approximately 400 Roma and non-Roma teachers have taken part to date. Funding these summer schools was covered both by the Ministry of Education and Research and other organisations, the most important

<sup>158</sup> Information provided by local trainers involved in the Phare 2003 project and by Maria Kovacs (teacher training coordinator). See also Catalina Ulrich, *Raport privind Studiile de caz – Acces la educație pentru grupuri dezavantajate Phare 2003* (Multiple Case Study Report, “Access to Education for Disadvantaged Groups” projects, Phare 2003), Bucharest: WYG International, 2006, available at <http://www.edu.ro> (hereafter, Ulrich, *Multiple Case Study Report*).

being UNICEF Romania.<sup>159</sup> This programme is still ongoing, with different funding sources (including the NGO Save the Children Romania, UNICEF, and the Regional Bureau of the Project for Ethnic Relations (PER)/Targu Mures). In 2006 the first course took place for national trainers in the field of Roma culture in education, where 150 teachers (Roma and non-Roma) were accredited. As a result of this process, in every county one or two trainers will be available to deliver training on specific cultural issues related to Roma in education. PER's training in the field of education for cultural diversity will soon be accredited by CNFP.<sup>160</sup>

In June 2000 the Ministry of Education and Research and CEDU (Center Education 2000+, *Centrul Educația 2000+*) initiated the first summer school for Didactics of Romanes, and in the same year the first Open Distance Learning Course for Romanes teachers was launched, also with support from the Ministry, CEDU and CREDIS. There are several other distance learning training programmes for Roma teachers (in the framework of CREDIS or the Rural Education Project). Scholarships have been provided for young Roma who qualify as Romanes language teachers from a variety of non-governmental sources, and between 2002 and 2005, UNICEF provided funds for 90–170 scholarships every year, for Roma students enrolled in the distance learning programme run by Bucharest University.<sup>161</sup>

A project called “Empowering Roma Teachers” funded by the Roma Education Fund (REF) is planned to support the continuous training of Roma teachers.<sup>162</sup> The project will train 50 Romanes language teachers who have completed or are still attending CREDIS, in Reading and Writing for Critical Thinking (*Lectura si Scrierea pentru Dezvoltarea Gandirii Critice*, RWCT), a student-centred teaching methodology. The project plans for all trained teachers and trainers to be invited to join the Romanian RWCT Association.<sup>163</sup> At the end of the project it is expected that the RWCT method will be incorporated into the regular CREDIS training curriculum for Roma teachers, and the Roma instructors trained will become permanent collaborators of the CCD within their county of residence. Until 31 January 2007, 22 Roma teachers registered with ALSDGC<sup>164</sup> and 11 Roma teachers will be in the course of launching the ALSDGC courses for their Roma and non-Roma colleagues from local schools.

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<sup>159</sup> See UNICEF, “Quality Education for Vulnerable Groups”, online article, available at [http://www.unicef.org/romania/education\\_1617.html](http://www.unicef.org/romania/education_1617.html) (accessed on 28 February 2007).

<sup>160</sup> Information provided by Maria Korek, from Project on Ethnic Relations, by email.

<sup>161</sup> Information provided by Professor Gheorghe Sarau, Inspector for education in Romanes in MER.

<sup>162</sup> The project “*Empowering Roma teachers*” is implemented by the Resource Centre for Roma Communities, Cluj Napoca, in partnership with the RWCT Association.

<sup>163</sup> A professional teachers’ association and a member of the RWCT International Consortium; see the consortium website at <http://ct-net.net/>.

<sup>164</sup> This is a national professional association – the Romanian branch of the International Reading and Writing for Critical Thinking Association (*Asociatia Lectura si Scrierea pentru Dezvoltarea Gandirii Critice, România*, ALSDGC).

Another initiative, a REF project approved in December 2006, will provide funds to the Ministry of Education and Research to draft and promote a Ministerial Order to encourage Teacher Training Facilities to offer attractive and accredited courses on intercultural education.

There are future opportunities for either initial or in-service teacher training, both for Roma and non-Roma teachers. It has been reported that the planned budget of the Ministry of Education and Research for 2007 will allocate more funding for human resources development as in 2006.<sup>165</sup> European Structural funds will be made available to both training providers and schools, but it is thus expected that County Inspectorates must have the capacity to access structural funds, based on the experience gained in Phare projects.

### 3.8 Discrimination monitoring mechanisms

There is no specific institution for combating discrimination in education. The National Council for Combating Discrimination (NCCD), established in 2002, is the basic structure for addressing complaints and resolution of discrimination cases.

In the context of the preparations for Romania's accession to the EU, the Department for Inter-Ethnic Relations took part in several programmes coordinated by the Ministry of European Integration, since evolutions in the field of minority protection are considered in the chapter "Political Criteria". Moreover, in 2001–2002, the Department for Inter-Ethnic Relations contributed to Romania's EU Accession negotiations for Chapter 13, "Social Policy and Employment"<sup>166</sup> where combating discrimination represents an important issue.

There are no specific complaint measures at the NCCD for different groups. According to the rules of the NCCD, complaints can be addressed in written form, or as result of a direct complaint addressed. Following the registration of a complaint, the NCCD President passes it to the Judicial and Inspection Service; afterwards, the complaint is documented and addressed to the NCCD Board (*Colegiul Director*), which then issues a decision.<sup>167</sup>

<sup>165</sup> OSI roundtable, Bucharest, February 2007.

<sup>166</sup> See details available (in Romanian) in a report called *Raport privind activitatea Departamentului pentru Relatii Interetnice in perioada ianuarie – iunie 2004* (Report on the Activities of Department of Interethnic Relations for the period January 2001 – June 2004), available at [http://www.dri.gov.ro/documents/m\\_2001-2004.pdf](http://www.dri.gov.ro/documents/m_2001-2004.pdf) (accessed 9 March 2007).

<sup>167</sup> See relevant legislation for NCCD activity: Government Ordinance no. 137/2000 on the Elimination of All Forms of Discrimination; Government Decision No. 1194/2001 Regarding the Organisation and Functioning of the NCCD; Law No. 48/2002 for approval of GO no. 137/2000; Government Decision No. 1514/2002 for Modification and Completion of the GD No. 1194/2001; see also the CBCD website at <http://www.cncd.org.ro> (accessed on 28 February 2007).

Where the NCCD finds discriminatory treatment, it can issue the following decisions:

- A fine between 200 and 2,000 RON (Romanian New Lei, approximately €60 to €600),<sup>168</sup> if the subject of discrimination was an individual;
- A fine between 400 and 4,000 RON (€120 to €1,200), if the subject of discrimination was a group of individuals;
- Written notification.

The decisions taken by NCCD Board involving fines are not considered as compensation to the victims – the payment of fines is to the State and not the victims, who must continue with the judicial process if they wish to receive personal compensation.

Between 2002 and 2005, the NCCD received 1,342 complaints, out of which 305 were related to race, nationality and ethnicity (at the time of writing this report, figures for 2006 were not available). During this same period 124 decisions were taken by the NCCD, out of which 48 (38.7 per cent) were related to discrimination against the Roma population. Only one case was related to access to education: the “Cehei case” documented the school segregation existing within the local school unit and issued a decision confirming the existing discrimination.<sup>169</sup> In fact, the complaint was about the existence of segregated classes for Roma children between grade 5 and grade 8.

The NCCD decided<sup>170</sup> that the acts detailed in the report constituted discrimination, and the Cehei School received an official warning. Following the NCCD decision, several measures were taken by the local authorities and School Inspectorate, including ensuring transport of children, mixing classes and using of the same space, other educational activities.

However, the capacity of schools for handling discrimination is low and there should be local solutions in place for dealing with different situations – from verbal discriminatory remarks of children and teachers against Roma children, to harassment and physical threats.<sup>171</sup> Education of school staff and school boards on discrimination issues is a pressing need.

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<sup>168</sup> The exchange is calculated at 3.33 RON = €1.

<sup>169</sup> Documented by the NGO Romani CRISS Bucharest. For details, in Romanian, of the Cehei case and several other cases of discrimination documented, see the Romani CRISS website (Departments section, Human rights, Database), available at <http://www.romanicriss.org/pdf/Raport%20Romani%20CRISS%20vs%20Scoal%20General%20Ungheni%20Mures.pdf> (accessed on 28 February 2007).

<sup>170</sup> NCCD Decision No. 218 of 23 June 2003.

<sup>171</sup> Comments from roundtable, 8 February 2007, Bucharest.

## 4. CONSTRAINTS ON ACCESS TO EDUCATION

*While precise figures on the number of Roma without identity papers are not available, research clearly indicates that the scope of the problem is large; the Government should take steps to collect more data on this issue and, in particular, to assess its significance as a barrier to school enrolment. The costs for maintaining a child in school are not affordable for most Roma families: a clear connection exists between the economic status of Roma and the educational attainment of their children.*

*The public authorities still largely ignore the problem of residential segregation of Roma communities, and a real change will take place only with systematic State intervention. Widespread geographical segregation in Romania has led to a high proportion of Roma children living in Roma-majority settlements and neighbourhoods, often at a distance from majority communities and infrastructure, including schools.*

*Although overrepresentation of Roma in special schools for children with intellectual disabilities is not as serious a problem in Romania as in other countries in the region, some Roma children are still placed in these schools to take advantage of meals and accommodation benefits. Such benefits should be made available to students from disadvantaged backgrounds attending any schools, to eliminate any incentive to attend special schools. The Government's "Second Chance" programme, while generally involving exclusively Roma students, remains a better option than previous efforts to integrate older-than-average students, which tended to place such children in classes with younger peers.*

*Romania has an established system offering Romanes language instruction, with the numbers of both students and teachers increasing steadily, supported by the good cooperation between civil society and Government efforts in this area.*

### 4.1 Structural constraints

Children can be registered for pre-school education starting at the age of three or even earlier (in crèches). It is compulsory for children to attend only the preparatory class before entering the first grade of primary school; they may enroll in this preparatory class between the ages of five and seven (see Annex 1.1). Parents decide whether they enrol their child in pre-school or not, and the law regarding pre-school education does not set a rigid limit.

There is no clear catchment area defined for pre-schools. In urban neighbourhoods and larger villages (*comune*) there is more than one school or pre-school available. Legally, parents can choose any pre-school. In rural areas, primary school buildings frequently also accommodate pre-school groups.

All schools that are functioning legally are part of the national education system and are legally registered. The larger schools have financial autonomy and administrative personnel (*responsabilitate juridical*). The smaller "subordinated" schools are coordinated by these larger schools; they rely on the administrative and financial operations of the larger schools with *responsabilitate juridical*.

Tables 14, 15, and 16 present data on recent pre-school capacity and enrolment.

**Table 14: National pre-school data (2005–2007)**

School Year	Number of pre-school units		
	Legally registered	School subordinated	Total
2005–2006	1,839	8,160	9,999
2006–2007	1,632	8,208	9,840

Source: MER<sup>172</sup>

**Table 15: Pre-school capacity (2000–2004)**

Pre-school capacity	2000–2001	2001–2002	2002–2003	2003–2004
Number of units	10,080	9,980	9,547	7,616
Number of children	611,036	616,014	629,703	636,709
Number of staff	34,023	34,631	34,307	35,485

Source: INS<sup>173</sup>

**Table 16: Pre-school enrolment rates (1999–2004)**

School Year	Children aged 3–6	No. of children enrolled in pre-schools	Enrolment Rate (per cent)
1999–2000	945,333	616,313	65.2
2000–2001	925,001	611,036	67.1
2001–2002	912,440	616,014	67.5
2002–2003	885,898	629,703	71.1
2003–2004	886,205	636,709	71.8

Source: MER<sup>174</sup>

<sup>172</sup> MER, data provided by Viorica Preda, inspector for pre-school education by e-mail, September 2006.

<sup>173</sup> INS, Anuarul Statistic României 2004, *Statistic Annual for 2004*, Chapter 15 Education, Bucharest: INS, 2004, available on the INS website at <http://www.insse.ro> (accessed on 28 February 2007).

National statistics provide information on pre-school capacity against the number of children between the ages of three and six. According to statistical data from the Ministry of Education and Research, for the 2004–2005 school year there were 653,599 places available in pre-schools, with a maximum of 25 children per class. Overcrowding represents a problem especially in urban areas, where the rate of employment is high compared to rural areas and people seek secure, reasonably priced places with good educational support for their children. The national media have reported extensively that at the beginning of the school year, in particular, the lack of places for pre-schools providing full day care (from 7 am to 6 pm) is a problem.<sup>175</sup>

In pre-schools with a high proportion of Roma, overcrowding has also been reported as a problem due to the lack of space. In the Phare 2003 project, schools reported a lack of space and, consequently, an inability to enrol all the children from two to six years old. Priority was given to children entering school in the first grade. It was also reported that a number of pre-school classes were overcrowded, and these children did not have adequate play space or room for movement.<sup>176</sup> This was sometimes because schools were using smaller rooms to accommodate pre-school classes as these classes were more recently introduced in the schools.

According to information provided by a representative of the NGO Şanse Egale in Sălaj County, because of the insufficient space in the local school and the poor quality of education there, in 1996 some Roma parents tried to enrol their children in the “Romanian” school in the nearby neighbourhood of Pustă, which is less than a kilometre away. In this school, there is more space than needed, as there were only 12 children enrolled in the primary grades<sup>177</sup> and 15 in the pre-school. Despite the legislation that allows parents to enrol their children in any school, the parents of non-Roma children already enrolled in the school were hostile to the Roma parents, who were then unable to register their children.<sup>178</sup>

Lack of available classroom space is likely to be a barrier to extending pre-school provision and any expansion of pre-school access may require investment in additional classrooms. Children not enrolled in pre-school may attend summer classes or summer camps (*gradinita estivala*). Three- or four-week summer pre-school targets Roma children six to seven years old. Pre-school and first grade teachers, who teach basic

<sup>174</sup> MER, data provided by Viorica Preda inspector for pre-school education by e-mail, September 2006.

<sup>175</sup> See such examples in the national newspapers, available at [http://www.gandul.info/articol\\_10230/criza\\_a\\_gradinitelor\\_in\\_capitala.html](http://www.gandul.info/articol_10230/criza_a_gradinitelor_in_capitala.html) (accessed on 28 February 2007).

<sup>176</sup> Andruszkiewicz, *School Desegregation*, p. 7; Ulrich, *Multiple Case Study Report*, p. 22.

<sup>177</sup> According to information on the Sălaj CSI website, available, in Romanian, at [http://www.isjsalaj.ro/index\\_files/inv\\_stat\\_urban.html](http://www.isjsalaj.ro/index_files/inv_stat_urban.html) (accessed on 28 February 2007).

<sup>178</sup> Interview with Robert Vazsi, executive director of the NGO “Şanse Egale”, Zalău, 14 October 2006.

skills for children, coordinate activities focusing more on socialisation and familiarisation with school, colleagues and future teachers. Usually a Roma adult attends and help with and language barriers.

Such an initiative was piloted early in 1998–1999 – as a so-called “grandparents’ pre-school”, part of the CEDU/MATRA “Equal Opportunities for Roma Children through School Development” project.<sup>179</sup> The NGO Save the Children, Romania, supported similar activities on a larger scale. The idea was gradually supported by the Ministry of Education and implemented by County Inspectorates. While the summer pre-schools began as fairly informal programmes, under the Phare project these classes became more structured, with a curriculum and assessment materials.

It is expected that school enrolment rates will increase in the next school years, as result of the rehabilitation, extension or construction of new buildings for education purposes, which is being carried out through the “Rural Education Development” Programme (*Proiectul Invatamantului Rural*, PIR)<sup>180</sup> and the multi-annual Phare project.

In general, however, the Phare 2003 project team observed no examples of acute overcrowding in primary and secondary schools. The survey carried out in the framework of this project revealed that over 80 per cent of schools had class sizes below 25.<sup>181</sup> In segregated schools, the situation is different; the same report showed that the segregated schools visited *were* overcrowded. They often had to teach in two shifts, so limiting the possibilities for extended programmes, catch-up classes and the like. In fact, the shift system is common in most of the schools in Romania, both rural and urban areas. Most schools have two shifts, but in some larger cities it is also possible to have three shifts.

## 4.2 Legal and administrative requirements

Parents must present a written request for enrolment, a copy of the child’s birth certificate, copies of the parents’ identification cards, and standard forms filled in by the family doctor to enrol a child in pre-school. To enter the first grade, parents must again present the same documentation, plus the child’s pre-school records. These legal and administrative requirements affect a number of people who lack identification cards, mainly due to their lacking birth registration, which makes it impossible for

<sup>179</sup> “Equal Opportunities for Roma Children through School Development” was initiated in 1998 by OSF-Romania and MATRA, and later carried on by CEDU. See <http://egale.ro/english/proiect/experienta.html> (accessed on 14 March 2007).

<sup>180</sup> The project aims to improve the quality of the education in all the rural areas at the national level. It has 4 components: (1) improving teaching and learning activities in rural schools, (2) improving partnership community-school, (3) capacity building for monitoring, evaluation and policy making, (4) strengthening managerial capacity of the Management Unit. The Romanian Government received a loan from BERD for this (long-term) project.

<sup>181</sup> Andruszkiewicz, *School Desegregation*, p. 8.



them to register with a family doctor. It is difficult to estimate the total number of children in such a situation. The Research Institute for Quality of Life report made in 1998 mentioned 47,000 persons (of whom half are children) without identity papers. Since then, due to several projects funded through Phare<sup>182</sup> that have raised awareness of the importance of identity documents for social assistance benefits, birth registration has increased.

Information from data collected in 1997 identified this issue, lack of proper identification papers, as a major obstacle to access to education for Roma. At that time, Medecins Sans Frontiers, an NGO whose mission was to improve health conditions for marginalised persons, stated the following:

The administrative procedures [Roma] would have to go through to actually get their children into school appear so insurmountable that they don't even know where to begin, and often don't even try [...] the lack of social assistance to marginalized populations often compounds keeping children out of school.<sup>183</sup>

Research in 2004 indicates that over 4.7 per cent of Roma children lack the necessary papers for enrolment.<sup>184</sup> However, it was also reported then that the Ministry of Education Ordinance No. 4562,<sup>185</sup> stated that for nomadic families, registration in school would not be dependent on having an address (a requisite for having identification papers).

The majority of Roma respondents in a survey published in 2002 indicated that they were registered at birth and have birth certificates, while only 11 per cent declared that they never had identity documents.<sup>186</sup> As for those with no birth certificate, most were identified under the age of 25 – no explanation for this situation was offered by the research. In the case of identity papers, about 11 per cent of the population over 14 declared that they did not have such documents. However, it appears that many of those without identity documents are very young (about 39 per cent are under 18 years old). Other results from this research are presented in Table 17.

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<sup>182</sup> See the grant scheme brochure published by the Resource Center for Roma Communities, within Phare 2000 project "Fund for Improvement of the Condition of the Roma", *Parteneriatul dintre instituțiile publice și comunitățile de romi. O monografie a proiectelor implementate în cadrul Fondului pentru Îmbunătățirea Situației Romilor* (Partnership between Public Authorities and Roma Communities. A monograph of the projects implemented within the Fund for Improvement of the Condition of the Roma).

<sup>183</sup> C. McDonald, "Roma in the Romanian Education System: Barriers and Leaps of Faith," *European Journal for Intercultural Studies*, Vol. 10, No. 2, 1999 (hereafter, McDonald, "Roma in the Romanian Education System").

<sup>184</sup> REF, *Needs Assessment*, p. 9.

<sup>185</sup> Ministry of Education Ordinance No. 4562 of 16 September 1996.

<sup>186</sup> Sorin Căce & Cristian Vladescu (coordinators): *The Health Status of Roma Population and Their Access to Health Care Services*, Bucharest: Expert Publishing House, 2004.

**Table 17: Identity documents situation**

Type of document	Proportion of eligible persons with the document (per cent)
Birth certificate	97.6
Identity card (for persons over 14 only)	89.1
Marriage certificate	56.1

Source: Centre for Health Policies and Services<sup>187</sup>

Another recent source, a report commissioned by the European Commission against Racism and Intolerance (ECRI) in 2006,<sup>188</sup> presents extensive data about Bucharest, where there were reportedly 20,000 Roma without identity papers in 2004. A survey of 8,000 people carried out in Bucharest showed that 25 per cent of the Roma population did not have identity cards and that 45.6 per cent did not have birth certificates. The report developed in 2005 by Liga ProEuropa<sup>189</sup> showed that in Sibiu County the leaders estimate that approximately 30 per cent of Roma do not possess identity papers. At the same time, this report records the actions to solve such a problem for 1,000 persons, under a Phare project initiative.<sup>190</sup>

In the framework of the Phare 2003 project, the reported total number of children without birth certificates was 224. Arad County registered the highest number (86), then Harghita (26). Data were collected from databases of the school mediators, school records, students' register, and census lists at the county level with the local implementing agents and regional monitors' contribution. However, even if some children do not have birth certificates, they have been enrolled in schools and pre-schools based on the medical certificates provided by the hospitals where they were born. An observer has noted that in some cases, Inspectors for Roma Education, mediators and teachers from schools included in both the Phare 2001 and 2003 phases assisted families without identification papers to get them; however, the relationships

<sup>187</sup> Data provided through the sample of the Centre for Health Policies and Services, *Health Status of the Roma Population*, pp. 20–21.

<sup>188</sup> Council of Europe, *Third Report on Romania*, commissioned by the European Commission against Racism and Intolerance (ECRI), CRI(2006)3, Strasbourg, 21 February 2006, available at [http://www.coe.int/t/e/human\\_rights/ecri/1-ecri/2-country-by-country\\_approach/romania](http://www.coe.int/t/e/human_rights/ecri/1-ecri/2-country-by-country_approach/romania) (accessed on 28 February 2007).

<sup>189</sup> Liga PRO EUROPA, “*Discriminarea rasială în județele Arad, Cluj, Harghita, Sibiu și Timiș*”, (Racial Discrimination in Arad, Cluj, Harghita and Timiș counties) report developed in the framework of the project “Minority Rights – Monitoring – Advocacy – Networking”. Budapest: Open Society Institute, 2005.

<sup>190</sup> Phare 2000, the “Fund for the Improvement of the Condition of the Roma” project, implemented by Fundatia Comunitatii Sibiu.

that enabled this assistance to be offered only came about because the child was enrolled in one of the project schools.<sup>191</sup>

### 4.3 Costs

In public facilities, pre-school education is free of charge. However, the parents are usually asked to pay for teaching aids and school supplies. Parents must pay for meals (which are subsidised) for children attending “long-programme pre-schools” (*gradinita cu program prelungit*), up to eight hours per day. Additional classes, such as for foreign language, arts, or other extracurricular activities, are also at parents’ expense.

Access to pre-school education has become dependent on the family’s ability to support its share of meals and other costs. Economic background, changes in employment patterns, and demographic patterns have been the main reasons for the decrease in enrolment rates in pre-school. At the same time, the increasing gap between the quality of public pre-schools and private pre-schools – which focus on foreign language study, and individualised and active learning – restricts access to quality due to costs, which go far beyond the possibilities of the average family.<sup>192</sup>

Costs differ from place to place, as they are established at the local level and depend on several factors such as the type of pre-school, whether it is a regular programme from 8 to 12, a long programme from 8 to 5, or a weekly programme, distance, and whether the child takes meals. According to parents interviewed in the framework of this project, monthly cost can run between €10 and €100 for a public pre-school.<sup>193</sup> Many private pre-schools have also been established, especially in cities. The costs for these facilities are known to run between €100 and €300 per month (and even higher for “elite” pre-schools), while the average monthly salary in Romania is approximately €200.<sup>194</sup> Given that a large number of Roma families survive on the minimum guaranteed income and children’s allowances, which equal approximately €25–30 per month, Roma children have sharply limited access to pre-school education.

One disturbing finding with regard to access to pre-school is the fact that a parent’s ability to assist a school financially (through “gifts” or sponsorship) increases the child’s ability to gain access to certain public pre-schools, which have greater demand than their capacity could handle. While Government policy does not allow the exclusion of pupils based on economic grounds, this situation is the result of an imbalance between

<sup>191</sup> Comments submitted to EUMAP by Maria Andruszkiewicz on the present report in draft form, February 2007.

<sup>192</sup> Cronin et al., *Education Sub-Sector Review*, p. 11.

<sup>193</sup> Data provided by Ms Viorica Preda, inspector for pre-school education MER, information provided by e-mail, September 2006.

<sup>194</sup> Data provided by Ms Viorica Preda, inspector for pre-school education MER, information provided by e-mail, September 2006.

supply and demand, especially in pre-schools where teaching is done in a foreign language.<sup>195</sup>

Although free, education requires costs borne by the family. There are costs associated with the purchase of schoolbooks and other educational materials, clothes, meals and transport. These “hidden” costs are associated with enrolment during the compulsory grades – even when education is ostensibly “free”. Usually, the costs of schoolbooks and materials increase in the higher grades. In particular for families coming from poverty, these costs can seem very high, and have a direct impact on access to education.<sup>196</sup> Governmental programmes such as free snacks (*Cornul si laptele*), school aids and supplies (*Rechizite guvernamentale*), scholarships and provision of transport for students from remote areas are targeting these problems which should relieve poorer families from some of the costs.

According to the INS *Statistical Yearbook 2005*, the share of expenditures directly allocated for education by Romanian families varies between 0.7 per cent and 0.9 per cent.<sup>197</sup> Unfortunately there are no data provided specifically on the Roma population. However, the *Roma Inclusion Barometer* presents significant differences in income for the Roma population as compared to the non-Roma population.<sup>198</sup> The average monthly income for October 2006 for Roma respondents was 150 RON (€45) and for the non-Roma was 370 RON (€110).

Children enrolled in special schools can attend day schools or boarding schools. For those children attending day schools, the State provides a monthly allowance for food and school supplies;<sup>199</sup> at present these allowances total 31 RON (€9). Children attending boarding schools receive the same allowances plus accommodation including bed linen and the like. Children in foster care receive an additional allowance as well. A variety of services are also available for free in special schools, including speech

<sup>195</sup> Cronin et al., *Education Sub-Sector Review*, p. 12.

<sup>196</sup> In 1997 during the ERRC field mission to Romania, some data were collected regarding the hidden expenses. At that time, in order to be able to attend school and to function properly, a Romanian pupil needed the following materials per school year: 25 notebooks, 19 fountain pens, pens, coloured crayons, 20 books, book bag, sports clothes and shoes, plus any uniform that may be required in a school. This average has a total cost of €35–40. However, it must be kept in mind that the average Romanian monthly salary at that time was approximately €32 per month. Schools supplies average more than one monthly salary for an average Romanian citizen. This amount would be astronomical for a Roma family living in poverty. See Education Support Project (ESP), *Roma population in Central and Eastern Europe*, OSI, 2001, available at [http://www.soros.org/initiatives/esp/articles\\_publications/publications/rerp\\_20010428/background\\_20010428.pdf](http://www.soros.org/initiatives/esp/articles_publications/publications/rerp_20010428/background_20010428.pdf) (accessed 10 March 2007), p. 37.

<sup>197</sup> INS, *Statistical Yearbook 2005*, Population income, expenditure and consumption, Table 4.18, available on the INS website at [www.insee.ro](http://www.insee.ro).

<sup>198</sup> OSF-Romania, *Roma Inclusion Barometer*, p. 35.

<sup>199</sup> Government Decision no 1251/2005 (Hotărâre de Guvern No. 1251/2005), Annex H, available in Romanian at <http://www.cnop.ise.ro/resurse/capp/reg2005.pdf> (accessed on 28 February 2007).

therapy, physical therapy, counselling and guidance, socialisation activities, and other types of support. All these services are covered by the health care system and make the special schools an attractive alternative for poor parents, including Roma.

According to Romania's *Minorities in Development Processes Report – Romania Case Study on Roma*, "In 2002 the Roma population was almost 5 times more exposed to severe poverty, and more than 50 per cent of Roma ethnics were affected."<sup>200</sup> The unemployment rate among Roma is estimated as being between 24<sup>201</sup> and 56 per cent,<sup>202</sup> although cases of 90 to 100 per cent may be registered in some disadvantaged Roma communities. Poor families cannot provide children with clothes and books, the basic items necessary for school. Poverty also limits access to education by requiring that Roma children be engaged in income-generating activities, or by helping to raise younger siblings.<sup>203</sup> According to an interviewed teacher in Bobesti village (Ilfov county) students from poor Roma families rarely have the resources to allow them to have books at home, which contributes to school success.

I believe that a monthly amount of approximately 30–40 RON would be necessary to build a students' home library. In the classroom I am the class teacher for, there are very few parents who could afford to pay RON 30–40 a month. Out of the 20 students I have, I wonder if four or five families could afford to compile a library for the child, to buy the books the students would like to have, or a school bag, because several students come to school bringing their things in plastic bags.<sup>204</sup>

In the same location, although theoretically textbooks are provided for free by the Ministry of Education, the school received an insufficient number for grades five to eight, so every child did not receive books. Among the textbooks that are in short

<sup>200</sup> UNDP, Consultation on "UNDP's Engagement with Minorities in Development Processes", 18–19 October, New York, Romania Case Study on Roma (12 October 2006), available at <http://www.undp.ro/pdf/Roma%20case%20study%2012%20Oct%202006.pdf> (accessed on 28 February 2007).

<sup>201</sup> UNDP, *Avoiding the Dependency Trap*, p. 33. The percentage is based on the broad ILO definition of unemployment. However, according to the same source, there is a subjective interpretation of unemployment among Roma subjects of the research. 52.6 per cent of Romanian Roma consider themselves to be unemployed while 17.1 per cent see themselves as housekeeping (p. 95, Annex I). Differences between ILO definition and subjective definition of unemployment are due to the fact that while the ILO definition considers informal sector and casual activities to be employment, Roma people have the reverse view.

<sup>202</sup> S. Cace and C. Vlădescu (eds.), *The Health Status of Roma Population and their Access to Health Care Services*, Center for Health Policies and Services, Bucharest: Expert Publishing House, 2004.

<sup>203</sup> Such aspects are well documented in Save the Children studies, such as: *Copiii care muncesc* (Working Children), webpage on the Save the Children site, available at [http://www.salvaticopiii.ro/romania/ce\\_facem/programe/copiii\\_strazii.html](http://www.salvaticopiii.ro/romania/ce_facem/programe/copiii_strazii.html); *Drepturile copilului intre principii si realitate* (Children's Rights, between Principles and Reality). Bucharest: Save the Children, 2005, available at <http://www.salvaticopiii.ro/romania/resurse/rapoarte.html> (both accessed on 28 February 2007).

<sup>204</sup> Interview with a teacher, Bobesti, 22 February 2007, case study Bobesti.

supply are those for religious education, music, English, French, technology and arts. Children have been forced to share their books, or to purchase them.<sup>205</sup>

#### 4.4 Residential segregation/Geographical isolation

A report published by the World Bank in June 2005, *Roma Social Mapping*,<sup>206</sup> shows the following:

the highest concentration of the poor Roma population is in large communities of over 500 people and in medium size communities of 200–500 persons. Over 60 per cent of the Roma population that is clustered lives in large communities of more than 500 persons.<sup>207</sup>

The highest concentration of poor Roma is found in cities and in small towns. The mean average size of Roma communities larger than 19 households is of about 300 people per community, the median average size being much lower, of about 170 persons per community. That size is minimal in marginal rural communities (of about 260 people) and reaches about 500 people in urban non-marginal communities. Generally, the average size of Roma communities increases from rural to urban locations, from marginal to non-marginal locations, and from “high problem” to “non-problematic” types of communities. Research on the level of contacts that such communities have with majority neighbours has not been published.

A recent publication on housing of Roma and poverty presents a classification of Roma communities. According to this, disadvantaged Roma communities may be any of the following: isolated, satellite, tangent, peripheral, non-integrated yet included, disseminated and enclave.<sup>208</sup> Another classification of Roma communities in urban areas defines them as communities “in the centre”, communities in “blocks of flats” and peri-urban communities. For the rural areas, the classification is as follows:

- Para-rural communities – consisting of households of integrated Roma families disseminated in central territory;
- Peri-rural communities – extensions of a village, without access to utilities;

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<sup>205</sup> Interview with the director of the Bobesti school no. 3, 22 February 2007, case study Bobesti.

<sup>206</sup> World Bank, *Roma Social Mapping*, Bucharest: WB, July 2005, p. 22, available at [http://www.anr.gov.ro/docs/statistici/Roma\\_Social\\_Mapping\\_187.pdf](http://www.anr.gov.ro/docs/statistici/Roma_Social_Mapping_187.pdf) (hereafter, *Roma Social Mapping*)

<sup>207</sup> *Roma Social Mapping*, p. 9.

<sup>208</sup> Catalin Berescu and Mariana Celac, *Housing and Extreme Poverty. The Case of Roma Communities*, Bucharest: Ion Mincu University Press, 2006, pp. 30–44.

- Autonomous communities – with a long history of segregation and almost abandoned by local administration.<sup>209</sup>
- According to the same study, Roma communities’ representatives correlate the level of poverty directly with low employment and low income and indirectly with poor education.<sup>210</sup> Roma rank employment as the main problem in their community.<sup>211</sup>
- Poverty often contributes to geographical residential isolation, which has a large impact on access to education for many Roma. According to research conducted for the ERRC in 1997, it was found that for some children, getting to school may be a problem, because they could not afford the bus fare for travel to the school, or because the poor road quality required them to walk through mud in bad weather, and consequently getting so dirty that teachers sometimes would not allow the children to enter the school. It was also reported that Roma community members who live on the margins of cities, in small villages, or even integrated into the city, are separated from regular society and often lack general information about schooling. Poverty was equated with living marginally, which was equated with low access to education.<sup>212</sup>

The residential segregation of the Roma population is directly related to poverty and lack of access to facilities – running water, heating systems, sewage systems, roads, means for public transport, and so on. The *Roma Inclusion Barometer* shows significant differences in perception of satisfaction with one’s own life:<sup>213</sup> 35 per cent of the Romanians declare themselves satisfied with the way they live, while 63 per cent are dissatisfied; for the Roma, the percentage of the satisfied drops to 12 per cent, while the dissatisfied make up 87 per cent.

#### 4.5 School and class placement procedures

Legally, parents may choose any school from the system regardless of their domicile under existing laws.<sup>214</sup> However, some informal agreements of the Inspectorate restrain the free choice of parents to those areas that the county school general inspector defines

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<sup>209</sup> Catalin Berescu and Mariana Celac, *Housing and Extreme Poverty. The Case of Roma Communities*, Bucharest: Ion Mincu University Press, 2006, pp. 30–44.

<sup>210</sup> *Roma Social Mapping*, p. 21.

<sup>211</sup> *Roma Social Mapping*, p. 9.

<sup>212</sup> McDonald, “Roma in the Romanian Education System.”

<sup>213</sup> OSF-Romania, *Roma Inclusion Barometer*, p. 18.

<sup>214</sup> Law of Education No. 84 1995, available in Romanian at [http://www.cdep.ro/pls/legis/legis\\_pck.htp\\_act\\_text?id=21091](http://www.cdep.ro/pls/legis/legis_pck.htp_act_text?id=21091) (accessed on 28 February 2007).

as the catchment areas for a given school.<sup>215</sup> In practice, the school director takes the decision to allow a particular child to enrol. If the school director does not accept the parents' request, parents may go to the Inspectorate and further on, to the Ministry.

Testing and evaluation of children for placement in special schools are initiated by a child's parents or at the request of the school.<sup>216</sup> There is no age limit for evaluations, although it is recommended that evaluations be done as soon as possible to allow for early intervention. The Department for Complex Evaluation (*Serviciul de evaluare complexă*) assesses and determines the diagnosis of children with disabilities. This department is part of the County Directorate for Social Assistance and Child Protection. Legally, before a child can be placed in a separate class or school, he must sit before an evaluative committee (multidisciplinary expertise committee),<sup>217</sup> which consists of a psychologist, a psychologist-pedagogue, a medical doctor and a social worker. Following the complex evaluation procedure, the level of disability is established and the file is submitted to the Commission for Child Protection, which issues a Decision that will have, as annexes, a certificate for the degree of disability, certificate for school and professional reorientation, and a rehabilitation plan.

A national methodology is used for all the children who are assessed. It consists of a national ministerial order and a methodological guide. First, a neurologist examines the child and, according to his observations, a medical certificate is issued. This examination is usually requested by the parents or by the placement centre. The school could also request such an examination. Then experts (psychologists) use a range of tests, including personality tests, intelligence tests, behavioural and other tests. The decision made by a complex commission composed of seven people guides the child's path. Members are representatives of the child protection agency, special education specialists, psychologists, and NGO representatives. Sometimes the representative of the NGOs is Roma. This commission provides a certificate, and decides the child's placement and educational trajectory. All the tests are delivered in Romanian (or Hungarian in Hungarian-speaking counties) and are not standardised.

The Commission for Child Protection is set up and coordinated by the County Council (*consiliul judeţean*) and makes the decision about school placement and guidance for children with disabilities. Within special schools and in some mainstream schools there are Commissions for Continuous Internal Evaluation, which assess

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<sup>215</sup> See for example the Regulation approved through MER Order no. 4925/for the Functioning and Organisation of Pre-university Education 2005, available on the MER website (<http://www.edu.ro/index.php/articles/c21>).

<sup>216</sup> See EUMAP, *Access to Education and Employment for People with Intellectual Disabilities*, report on Romania, Budapest: OSI, 2005, available at [http://www.eumap.org/topics/inteldis/reports/national/romania/id\\_rom.pdf](http://www.eumap.org/topics/inteldis/reports/national/romania/id_rom.pdf) (accessed on 28 February 2007) (hereafter, EUMAP, *Intellectual Disabilities Report – Romania*, pp. 35–38).

<sup>217</sup> Education Act, Chapter VI, Art. 43: The type and degree and disability are diagnosed by inter-school and county expert committees under School Inspectorates.



children's progress during the school year and can request a re-evaluation or recommend support services.

However, in practice there are not enough specialists in schools, and a lack of resources also affects outcomes. According to a special education inspector,<sup>218</sup> other problems include the fact that the assessment service is outside the school, and even if the evaluation is correctly carried out, school services do not meet the individual needs of the children entirely and properly. Sometimes factors outside the child's own capacity influence placement, such as parents' request for social aid, closure of placement centres, and other issues.<sup>219</sup>

Diagnostic criteria are mainly medical and psychological; they rely less on communication skills so that language barriers should not be thought to raise particular problems.<sup>220</sup> Social criteria are also excluded from the diagnosis criteria,<sup>221</sup> although there have been reports that the members of the diagnostic panels receive no special training on the diagnostic procedure<sup>222</sup> and there is little overseeing to ensure that the criteria are applied appropriately. At present there are no provisions for participation of Roma (or other ethnic minorities) representatives within the commissions except as NGO representatives.

Concerns about the overrepresentation of Roma in Romania's special school system have been raised in the past;<sup>223</sup> incentives such as free meals and housing in such schools are generally cited as a draw for children from disadvantaged families, including Roma.<sup>224</sup> According to a representative of the Ministry of Education and Research, until 2000, quite a high number of Roma students were enrolled in special schools due to the social services available there (meals, school supplies, accommodation, therapy, clothes); these students were regarded as "lacking the necessary cognitive skills and

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<sup>218</sup> The Inspectors for Special Education work as part of the County School Inspectorate (CSI). As for their colleagues who are specialised by subject matter or curricular areas, these inspectors are responsible for aspects such as the special education institutions, services and resource centres. They assist and monitor the integration of children with special educational needs into mainstream education, including the activities carried out by support or mobile teachers.

<sup>219</sup> Comments provided by Simona Nicolae, Ministry of Education and Research, September 2006, February 2007.

<sup>220</sup> Comments provided by Simona Nicolae, MER, 2006.

<sup>221</sup> Comments provided by Simona Nicolae, MER, 2006.

<sup>222</sup> EUMAP, *Intellectual Disabilities Report – Romania*, p. 36.

<sup>223</sup> See EUMAP, *Access to Education and Employment for People with Intellectual Disabilities Romania*, Budapest, 2005, pp. 37–38, available at [http://www.eumap.org/topics/inteldis/reports/national/romania/id\\_rom.pdf](http://www.eumap.org/topics/inteldis/reports/national/romania/id_rom.pdf) (hereafter, EUMAP, *Intellectual Disability Report 2005*).

<sup>224</sup> Save the Children UK, *Denied a Future? The Right to Education of Roma/Gypsy and Traveller Children in Europe*, Vol. 1, London, 2001, p. 326, available at [http://www.savethechildren.org.uk/temp/scuk/cache/cmsattach/648\\_dafvol1.pdf](http://www.savethechildren.org.uk/temp/scuk/cache/cmsattach/648_dafvol1.pdf) (accessed on 28 February 2007).

behavioural adaptation needed for school integration”.<sup>225</sup> From 2000 on, a diagnosis of disability has been a prerequisite for enrolment in special schools.<sup>226</sup> A report written for the Phare 2003 project noted the following: “Many students in special schools appeared to be there for social reasons. Children with more severe special needs were often not attending school at all.”<sup>227</sup>

The Government Urgency Ordinance No. 192/1999 and Law 218/2004<sup>228</sup> stipulate the integration of children from special schools to mainstream schools. These legislative changes were mainly related to the EU accession requirements. Based on these regulations, children with intellectual disabilities have been integrated in mainstream schools, but there is little or no monitoring on their school career and achievements in such schools. Curricular standards vary for children with such special needs, according to the type and level of their disabilities:<sup>229</sup>

- Children with sensory-motor difficulties attend mainstream schools and follow different therapies.
- Children diagnosed with *moderate* intellectual disabilities follow the standard curriculum and receive tailored programmes to ensure their integration (personalised individual learning plans);
- Children diagnosed with *severe* intellectual disabilities follow a completely different study programme, focusing on psychometric development, communication stimulation, personal autonomy and social skills.

There are statistics regarding the number of children transferred from special schools to mainstream schools, presented in Table 18:

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<sup>225</sup> Comments provided by Simona Nicolae, inspector for special education in the Ministry of Education and Research.

<sup>226</sup> For a child to be enrolled in a special school, it is compulsory to have a decision of school orientation presented by the Commission for Child Protection, according to the provisions of GD No. 1437/2004.

<sup>227</sup> Pat Chick, *Final Tour Expert Visits*, 2006, WYG International, p. 35 (hereafter Chick, *Final Tour Expert Visits*).

<sup>228</sup> Government Urgency Ordinance No. 192/1999 of 8 December 1999, regarding the Setting Up of the National Agency for Protection of Children’s Rights and Reorganisation of Child Protection Activities; and Education Law No. 218/2004 of April 2004.

<sup>229</sup> For full details, see: EUMAP, *Intellectual Disabilities Report – Romania*, pp. 35–38.

**Table 18: Children transferred from special schools to mainstream schools (1999–2006)**

School year	Students enrolled in special schools	Students integrated in mainstream schools
1999–2000	53,446	1,076
2000–2001	48,237	5,659
2001–2002	37,919	10,779
2002–2003	27,359	11,493
2003–2004	28,043	13,749
2004–2005	27,945	14,179
2005–2006	28,873	14,193

Source: MER 2006<sup>230</sup>

Special classes (or remedial classes) within mainstream school represent rather an exception. Sometimes schools organise classes according to ability level, but this kind of placement is not encouraged. According to the community's needs, some schools provide remedial or literacy classes for small groups either after school or during school hours. Most of the schools involved in Phare projects provide this kind of assistance for children with learning difficulties.<sup>231</sup> Remedial activities were organised and still are organised for children with learning difficulties or for those who are preparing for national exams. Remedial education was a priority activity for the schools involved in the Phare CEDU/MATRA "Equal Opportunities for Roma Children through School Development" project.

Since the methodology for a "Second Chance" programme – which provides a very flexible study and evaluation programme (see section 3.2) – was approved by the Ministry of Education, remedial classes will most likely eventually be phased out of the system, and replaced with "Second Chance" programmes.

<sup>230</sup> MER Department of Statistics, Data provided by Ion Ivan and Florin Anton by email, 11 August 2006.

<sup>231</sup> Chick, *Final Tour Expert Visits*.

There are a few mainstream schools where special classes for Roma children were set up and integrated in one school in Cluj County.<sup>232</sup> Most of the children were mixed within the regular classrooms in the mainstream school, but in two classes children followed a special education curriculum, which testing has indicated is appropriate for their abilities. These students receive free meals, after-school support programmes, school supplies, clothes, and other support. The students are over age and face serious social and economic problems, living in the nearby garbage dump of Cluj Napoca (Pata Rat).<sup>233</sup>

According to the Rules of Organisation and Functioning for Pre-University Education (2005) the transfers of pupils between schools, between profiles or specialisations, or between forms of education, are permitted and specifically regulated. Transfers take place only after approvals of Boards of Administration of both units. As a general rule, transfers should be done at the beginning of school year, and only exceptionally may transfers be made during the school year.<sup>234</sup>

The “Second Chance” programme is the most established governmental programme aimed at reintegrating former drop-outs. No formal assessment exists of how many children have transferred from the “Second Chance” programme to a mainstream class, but anecdotal evidence indicates that very few children have made the move back to mainstream classes.

The phenomenon of “white flight” has not been well documented in Romania. However, the Case Studies Reports developed in the framework of the Phare 2003 “Access to Education for Disadvantaged Groups, with a Special Focus on Roma” project, compiled by school principals, teachers and parents’ comments on this

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<sup>232</sup> School No. 12 Cluj Napoca, together with local Roma and non-Roma NGOs, initiated in the middle of the 1990s different projects targeting the schooling and day care services for children living in the Pata Rat community (the “Dallas” neighbourhood). The school was involved in the “Equal Opportunities” projects developed and funded by the Open Society Foundation and MATRA (1997/2000). The school developed individualised and remedial teaching programmes. In addition, the school provided health projects and care services, and low-income families’ children received free meals, clothes and school supplies. See: *Equal Opportunities for Roma Children through School Development Projects and Parental Involvement*, developed by the Center Education 2000+ (2000–2003), available at <http://www.egale.ro>. The school was also involved in Phare 2001 project “Access to education for disadvantaged groups with a focus on Roma”.

<sup>233</sup> The Pata Rat community is exceptionally poor, but unfortunately is representative of many other such Roma communities. Based in a garbage dump on the outskirts of Cluj-Napoca, people live in makeshift hovels and survive by selling scrap that they scavenge from the dump itself. The children coming from such a community clearly suffer from disadvantage, which has a high impact on their educational process.

<sup>234</sup> Such a curriculum is approved through Orders of the Minister, based on: Government Decision no. 410/ 23.03.2004, Regarding the Organisation and Functioning of the Ministry of Education and Research.

topic,<sup>235</sup> reported that Roma from higher socio-economic households transfer their children to schools with lower numbers of Roma students.

Achievement indicators are reflected in the national curriculum, and for each subject matter there are indications about the minimum, average level of achievement.<sup>236</sup> There are no indicators for transfer, however, only descriptions of behaviours and skills that should be proven by the students. There are no available data on pupil transfer from segregated Roma classes or schools to mixed classes.

## 4.6 Language

A Ministry of Education press release (September 2006) highlighted that in Romania, over 240,000 self-identified Roma students attend schools (pre-school to thirteenth grade) and 10 per cent of them study three to four hours of Roma language and history per week. There are more than 460 Roma teachers in all the 42 counties. Data from 2003 showed that of the 158,124 students who identified themselves as Roma, 15,708 Roma pupils between the first and the thirteenth grade were taking advantage of the supplementary Romanes and literature classes, and history and traditions of the Roma in grades six and seven. The Government's most recent report on the implementation of the FCNM in 2005 reported that Romanes instruction is ongoing in 135 schools, with 15,708 students taking part, under 257 teachers.<sup>237</sup>

There is no clear available information regarding the number of children using Romanes as their mother tongue who are also proficient in the majority language at the age of three. The last census data (2002) recorded 237,570 Romanes-speakers from a

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<sup>235</sup> See Ulrich, *Multiple Case Study Report*. This case studies research was done as part of the Monitoring and Evaluation system, which involved several processes: quantitative reporting, self-evaluation by schools, county level quarterly reporting, case studies, a segregation study and supplementary reporting. Case studies covered a sample of 10 per cent of the total number of schools. The principal responsible researcher was the local expert for Monitoring and Evaluation, who carried out the field research and collected data from students, parents, inspectors, school mediators, local authorities and teachers. Case studies were carried out in the counties of Alba, Bacău, Brăila, Covasna, Harghita, Ialomița, Maramureș, Mureș, Neamț, Sibiu and Vâlcea and in three schools involved in Phare 2001 (Arad, Cluj and Dâmbovița). Field research was organised in two tours: the first in 15 September 2005–10 January 2006, and the second in April 2006–20 June 2006. The results of this research have been corroborated with experts' visits in schools, quarterly reports and monthly reports. The report was circulated to the PIU Project Implementation Unit and within the network of inspectorates involved in the Phare 2003 project. Most of the county project teams discussed the case studies findings with the schools' teams. The findings were also presented in the Steering committee meetings and national conferences.

<sup>236</sup> See MER, *The New National Curriculum and Subject Matter Syllabus*, Bucharest: MER, 2000, available in Romanian at <http://www.edu.ro/index.php/articles/c539/> (accessed on 28 February 2007).

<sup>237</sup> *FCNM Second Report*.

total of 535,140 Roma, (roughly 44 per cent).<sup>238</sup> UNDP research conducted in 2001 finds a significant difference, with 63 per cent of Romanian Roma speaking Romanes at home.<sup>239</sup> In this regard, the Inspector for Education in Romanes, Professor Gheorghe Sarau, has indicated that within traditional communities the children speak only Romanes.<sup>240</sup>

**Table 19: Enrolment in Romanes language programmes (2004–2005)**

Subject	Education level	Total number of children/students
Studying in Romanes	Pre-school	20
	Grades 1–4	40
Romanes (3–4 hours each week)	Primary level and above	19,812
History and traditions of Roma (1 hour/week)	Primary level and above	4,257
<b>Total</b>		<b>24,129</b>

Source: Electronic Newsletter for Roma (*Buletin Informativ rromi*).<sup>241</sup>

Romanes is of major importance from two points of view. First, teachers working in schools with a large number of Roma report that the knowledge of the majority language (Romanian in most cases) is a potential constraint to access to education.<sup>242</sup> Pre-school participation has strategic importance for educational opportunities, in which many Roma are unable to participate. Providing Roma children with additional opportunities to improve their command of the majority language is therefore a precondition for improving their access to education.

Second, the use of Romanes in teaching has a great impact on strengthening Roma identity, the sense of belonging and children's self-esteem. There are different opinions regarding this issue; reliance on Roma languages as educational instruments may be ineffective and could even contribute to the further isolation of Roma communities.<sup>243</sup> Many experts advocate bilingualism and integrated education as the most effective

<sup>238</sup> 2002 census.

<sup>239</sup> According to UNDP, *Avoiding the Dependency Trap*, p. 87.

<sup>240</sup> Information provided by Professor Gheorghe Sarau, 24 October 2006.

<sup>241</sup> Electronic Newsletter *Buletin Informativ rromi*, edited by Gheorghe Sarau, 2006, available at <http://www.Saraugroups/Bulet.%20inf.%20rromi%2C%2026-2027%2C%20Seminar%20mai%202006.doc>.

<sup>242</sup> Catalina Ulrich (2005) Case studies in 14 schools: first tour, WYG International. Ulrich, *Multiple Case Study Report*.

<sup>243</sup> See UNDP, *Avoiding the Dependency Trap*, Chapter 5 Education.

means of achieving equal educational opportunities in the long run. Research shows that having a good command of the mother tongue improves learning of the majority language. The Phare project “Access to Education for Disadvantaged Groups, with a Special Focus on Roma” (see section 3.2) encourages the use of Romanes in teaching, training of Roma teachers, training of Roma school mediators, teacher training on intercultural education, inclusion, and cultural diversity.

The *Roma Inclusion Barometer* presents relevant data on the perceived need for learning Romanes in school.<sup>244</sup> Approximately 37 per cent of both the “Romanianised Roma” and the rest of the Roma population do not consider it necessary to teach Romanes in school, while 51 per cent of the non-Roma population have the same opinion. The research concludes that Romanes is undervalued and stigmatised within the Romanian society, and the result of this process is a certain underuse of the language in social relationships.

Most children coming from traditional Romanes-speaking families do not attend pre-school, which means that at the age of seven they do not speak the formal teaching language. Although the law expresses the need to attend the zero class, this is not strictly respected in practice. Intensive “summer pre-school” has been introduced as a way to facilitate the preparedness for the first grade (see section 4.1).

The Ministry of Education has elaborated a large number of projects starting as early as 1992; many of these activities were co-funded by UNICEF or by EU funds.<sup>245</sup> Moreover, (as described in section 3.7), since 1998 the Ministry has also cooperated with more than 80 governmental, non-governmental or intergovernmental agencies on Romanes materials, culturally sensitive curriculum development, textbooks, teaching methodologies and teaching guides. Coherent policies, training provision, curriculum and curricular materials development, networking and a clear job description for the Inspectors for Roma Education represent a good basis for further positive developments.

<sup>244</sup> OSF-Romania, *Roma Inclusion Barometer*, p. 8.

<sup>245</sup> Gheorghe Sarau, inspector for Roma language in the Ministry of Education, provided a clear synopsis in the *Buletin Informativ rromi*, 26–27, Seminar rromi mai 2006 (Newsletter for Roma), available at <http://f1.grp.yahoofs.com/v1/oG-qRXAMhoapDcoh2e88G1JyuTQaZZKxQjRN7iQiImJLzU3PV9uMLgwcwA-iTWZmvD8mS61a8fDNX7ziBVwTgFEka9hFnIEbL8dMj3Zi/Bulet.inf.rromi%2C%2026-27%2C%20Seminar%20rromi%20mai%202006.doc>.

## 5. BARRIERS TO QUALITY EDUCATION

*Romania has made some important advances with regard to the quality of education available to Roma. Nevertheless, serious inequalities remain, and the Government must ensure that education reform takes the specific needs of Roma students into account.*

*Despite a number of reports highlighting the poor condition of schools with a high proportion of Roma students, little has been done to address the basic conditions of such schools – poor heating, inadequate sanitation, and overcrowding. As schools receive much of their funding from local revenue, specific action at the central Government level is needed to supplement funds in disadvantaged areas.*

*The school results of Roma pupils have been improving, although this is still measured in terms of declining failure rates. Decentralisation has had a positive impact on curricular development, as schools are encouraged to develop modules reflecting local culture and traditions. However, the Ministry of Education and Research should ensure that materials about Roma culture and contributions are part of all Romanian children's education.*

*A range of training opportunities related to Roma education are available to teachers, many offered by NGOs with specific experience in the field. This is a positive step towards more active techniques; however, after training, there is little support provided to teachers to help them to continue to innovate in their classrooms. In addition, more focused efforts are needed to involve Roma communities in schools; sustained outreach and communication from all parties are needed to bridge the enduring gap between Roma parents and schools. Low expectations and negative perceptions of Roma in the classroom are pervasive, and the Government must take steps to enhance tolerance in schools as a corollary to measures addressing physical segregation.*

*Romania's network of Roma school inspectors is a model in many regards; the Ministry of Education and Research should reinforce this system and ensure that it continues to work to enhance the inclusion of Roma throughout the country, and through all levels of education.*

### 5.1 School facilities and human resources

National research commissioned in 2001 by the Ministry of Education, “School at the Crossroads”, evaluated the impact of the national curriculum implementation in compulsory education and presented an assessment of the school environment. According to the study, especially in rural areas with low levels of school-age children, the school infrastructure is old and precarious, without decent facilities, with no resources for repairs, and using improvised spaces.<sup>246</sup> In only 12 per cent of the schools were there capital repairs in the last five years, and half of the schools did not have any repairs; only 15 per cent of the schools have a central heating system, 21 per cent have

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<sup>246</sup> Lazar Vlasceanu (coordinator), *Școala la răscruce. Schimbare și continuitate în curriculumul din învățământul obligatoriu*, (Curriculum Reform and Continuity within the Compulsory Education), MER/National Council for Curriculum. Bucharest: Polirom, CEDU, 2001 (hereafter, Vlasceanu, *Curriculum Reform and Continuity within Compulsory Education*), Chapter 5, “School environment”, page 5. there is also an English summary available at [www.see-educoop.net/education\\_in/pdf/school\\_at\\_cross-rom-rmn-t06.pdf](http://www.see-educoop.net/education_in/pdf/school_at_cross-rom-rmn-t06.pdf).



modern sanitary installations, 40 per cent have cold running water, 62 per cent have a fixed telephone and 95 per cent have electricity.<sup>247</sup>

According to a study of the Institute for Education Sciences published by UNICEF in 2003, 20 per cent of pre-school buildings are in bad condition and in need of urgent repair; over 25 per cent of these buildings are over 20 years old, and 38.3 per cent in rural areas (2.1 per cent in urban areas) do not have running water.<sup>248</sup> The REF *Needs Assessment* reports that almost 40 per cent of Roma-majority schools need major repairs, and in general schools with a higher percentage of Roma tend to be older.<sup>249</sup> Research from 2002 found that the likelihood of overcrowded classes increases proportionately to the percentage of Roma pupils in a school. The likelihood of overcrowded classes in primary schools in which Roma pupils prevail (over 70 per cent) was more than three times higher than for all rural schools. For secondary schools in which Roma pupils prevail, this likelihood was more than nine times higher than for the system as a whole.<sup>250</sup>

Compared to other schools, many predominantly Roma school buildings provide an inferior learning environment – conditions are unhealthy, unsanitary, unsafe, cold, overcrowded and poorly lit.<sup>251</sup>

Physical conditions in schools represent an issue highlighted in several recent studies. The reports provided by the technical assistance team of the Phare 2003 project, “Access to Education for Disadvantaged Groups, with a Special Focus on Roma”, emphasise the huge disparity of provision between different schools (around 100 schools) with regard to the condition of school buildings, adequate heating and sanitary facilities. This is in part related to the local authorities being responsible for school buildings; however, the ownership of many schools is in dispute according to decentralisation policies that are in the development stage.<sup>252</sup> Some schools were cold and ill-equipped, while there were others “which had been made as comfortable and attractive as possible with imaginative displays and an evident pride in clean rooms with lots of plants.”<sup>253</sup>

In many schools lack of space led to a shift system whereby half of students attended school in the morning and the others in the afternoon. Generally the younger children

<sup>247</sup> Vlasceanu, *Curriculum Reform and Continuity within Compulsory Education*, p. 6.

<sup>248</sup> See Jigau and Surdu, *School Participation of Roma Children*, p.65.

<sup>249</sup> REF, *Needs Assessment*, p. 19.

<sup>250</sup> M. Surdu, *Final research paper 2002, International Policy Fellowship*, p. 87, Annex 3, Table 3, available at <http://www.policy.hu/surdu/> (accessed 8 March 2007).

<sup>251</sup> Andruszkiewicz, Maria (2006) *School Desegregation*, p. 19.

<sup>252</sup> See MER website, “Decentralisation” page, available at <http://www.edu.ro>.

<sup>253</sup> Keith Prenton, *Expert Visits to Project Counties and Schools, Report on Tour 1, January–March 2006*, WYG International, EuropeAid/118970/D/SV/RO, unpublished, (henceforth, Prenton, *Expert Visits*), p. 38.

attend the morning sessions, although this is not always the case. While there was some form of heating in all classrooms, this was frequently only from wood-burning stoves, and both students and teachers were required to wear outdoor clothing at all times. In these schools, corridors and entrance halls were extremely cold, which caused a loss of heat from classrooms and prevented their use as comfortable display and meeting areas. There was clear evidence of poor attendance in these schools (down to 20 per cent of those enrolled in a class.) This situation was attributed to parents' unwillingness to expose their children to such conditions and the lack of adequate clothing in disadvantaged groups, which prevented children travelling to school.<sup>254</sup>

Research undertaken for this report in the Pustă Vale community of Sălaj County found that due to insufficient space, the local school must conduct simultaneous teaching, bringing together students of different grades in the same class.<sup>255</sup> The lack of space for the Roma students in the "small school" was also reported in the local newspaper. Like the rest of the community, the school has no drinking water, and no sewage system or toilets – it has outhouses in the school yard – and uses heating from wood-burning stoves, although the supply of wood is often inadequate. Due to lack of space in the school, the pre-school operates in an improvised space on the ground floor of the Baptist Church in the community.<sup>256</sup>

In the framework of the Phare 2003 "Access to Education for Disadvantaged Groups" project, an interview survey of school directors was undertaken to assess the level of physical conditions in their schools. Table 20 below shows the results collected from 70 schools:

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<sup>254</sup> Keith Prenton, *Second Tour Visits Report*, WYG International 2006 and Catalina Ulrich (2006) Multiple Case studies report, WYG International.

<sup>255</sup> Interview with a Romanes teacher on 15 October 2006, case study Șimleu Silvaniei.

<sup>256</sup> Case study Șimleu Silvaniei.

**Table 20: Results of a survey of school buildings – for 70 schools (2006)**

Questions on School Facilities	Response:			Total responses
	Yes	This is planned	No	
Adequate heating in classrooms and teaching spaces	47 (67%)	11 (16%)	12 (17%)	70
Adequate heating in corridors and entrance hall	19 (27%)	21 (30%)	30 (43%)	70
Central heating	15 (22%)	21 (30%)	33 (48%)	69
Adequate indoor toilets	20 (32%)	16 (26%)	26 (42%)	62
Adequate outdoor toilets	25 (42%)	7 (11%)	28 (47%)	60
Adequate washing facilities	33 (56%)	12 (20%)	14 (24%)	59
Modular furniture in all classrooms	36 (57%)	13 (21%)	14 (22%)	63
Modular furniture in all primary classrooms (1–4)	45 (68%)	9 (14%)	12 (18%)	66
Class sizes that are normally below 25	54 (82%)	1 (1%)	11 (17%)	66
How many shifts does the school have?	1	2	3 +	
	28 (42%)	39 (58%)	0	67

Source: WYG International<sup>257</sup>

Some schools, particularly in urban areas, had adequate central heating, which made temperature conditions in all parts of the school comfortable. In some other schools, corridors were used to display and observe students' work and create welcoming areas for parents and visitors. Referring to the same group of schools, an evaluator noted that some schools had modern toilet facilities, clean and well maintained. However, in rural areas most of the Phare project schools had outside toilets, often without running water. Some were in appalling conditions: "The extremely insecure, dirty, cold and unsanitary toilets observed in these schools will clearly be a source of discomfort to many children (as they are to teachers). They are also a potential health hazard."<sup>258</sup>

<sup>257</sup> Keith Prenton, *Second Tour Visits Report*, WYG International 2006, p. 15.

<sup>258</sup> Prenton, *Expert Visits*, 2005, p. 39.

They could clearly act as a disincentive for students to attend schools and a barrier to creating a comfortable and inclusive atmosphere in schools.

The evaluation report of the Phare 2003 “Access to Education for Disadvantaged Groups” project concluded the following:

In 57 per cent of schools (the sample in the Phare 2003 project) directors reported that modular furniture (separate tables and chairs) was available in all classrooms and 68 per cent of schools surveyed said they had modular furniture in all primary classes. [...] Because of their flexibility, it appears that the provision of modular furniture and additional teaching materials has a positive impact on the development of inclusive teaching approaches.<sup>259</sup>

At the national level, there is a deficit of qualified teachers in rural schools generally. The highest rates are for foreign languages, IT, and mathematics. The REF *Needs Assessment* reports that an even larger proportion of the teachers in predominantly Roma schools are unqualified – over 45 per cent of teachers in schools covering grades 1–8.<sup>260</sup> Data were provided by Roma activists and Inspectors for Roma Education. There are no centralised data regarding the number of unqualified teachers distributed in schools with a high number of Roma students. Although the number of teachers graduating would meet the needs at present, many graduates do not in fact go on to teach. Low salaries, as well as the costs and time spent commuting to a rural school, make teaching in such schools an undesirable career, especially for young people. However there is anecdotal evidence that there are also young, motivated and dedicated teachers.

As most statistical data are not disaggregated in order to identify schools with a majority body of Roma students, it is difficult to determine whether staff turnover is higher at such schools. However, some reports reflect a higher turnover rate in comparison with other schools.<sup>261</sup>

Data from a 2002 study highlight that staff turnover is greater in schools in which Roma pupils are the majority or predominate, as compared with the overall trend of staff turnover for the educational system. For example, there are six times more pre-schools reporting staff turnover in the case of predominantly Roma pre-schools (over 70 per cent Roma) as compared with pre-schools from the entire system. The study also reveals that there are three times more primary and lower secondary schools reporting staff turnover in the category of predominantly Roma schools as compared with the total school system.<sup>262</sup>

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<sup>259</sup> Keith Prenton, *Final Report on Experts’ Observations*, WYG International, 2006, unpublished, pp. 15–16, (hereafter, Prenton, *Final Report on Experts’ Observations*). Report prepared for the PHARE 2003 project Access to education for disadvantaged groups.

<sup>260</sup> REF, *Needs Assessment Study*, p. 20.

<sup>261</sup> Ulrich, *Multiple Case Study Report*.

<sup>262</sup> Jigau and Surdu, *School Participation of Roma Children*, p. 65.

## 5.2 School results

There are national tests in the eighth grade (*examen de capacitate*) and twelfth grade (*bacalaureat*). The results of the *capacitate* exams indicate whether students will pursue their studies at a vocational school or a general secondary school. Although there are no clear available data for the 2005–2006 school year regarding the results of Roma students at this critical point of the system, interviews reflect lower results in the case of Roma students.<sup>263</sup> The results should also be corroborated with the high drop-out rate of Roma students at the secondary level. However, older data show that in rural schools the percentage of Roma pupils graduating *examen de capacitate* is much lower than that for all the pupils enrolled in these schools.

Research conducted for this report revealed that in some localities, teachers believe that the main reason for school failure is the students' poor attendance. Roma children are absent from school for varying lengths of time when they accompany their parents, who travel for business reasons. One teacher reported as follows: "They come today [to school], and tomorrow they are off to other villages, and they cannot make up for what they miss out on."<sup>264</sup>

In the framework of the Phare 2003 project, progress data were recorded on 31,205 students in 111 schools within the 12 participating counties.<sup>265</sup> Two thirds of the schools, and about 56 per cent of the students, were located in rural areas. About 42 per cent of the students were identified as being Roma. Progress reports conclusions indicate the following:

- The proportion of Roma students awarded an "I" (insufficient) fell from 12.2 per cent in semester 1 to 9.7 per cent in semester 2. In semester 1, 12.2 per cent of Roma students designated as having special educational needs received 'I' qualifications, which dropped to only 5.6 per cent in the second semester.
- The proportion of Roma students dropped significantly between grade 1 and grade 8, from about 50 per cent at the primary level, to 36 per cent at the secondary.
- By the beginning of grade 8, only 29 per cent were Roma, showing significant drop-out over the eight years of schooling.
- In the mathematics discipline, the proportion of Roma students awarded failing grades dropped from 15.2 per cent in semester 1 to 12.2 per cent in semester 2.
- There was little change in the proportion of Roma students awarded 7 or above.

<sup>263</sup> Interview with Gheorghe Sarau, Bucharest, 24 October 2006, at the Ministry of Education and Research.

<sup>264</sup> Case study Șimleu Silvaniei.

<sup>265</sup> See Nigel Simister, *Progress Report*.

- The proportion of non-Roma students awarded failing grades fell in both disciplines.
- The proportion of Roma boys awarded failing grades fell from 15.4 per cent to 12.9 per cent, while the proportion of Roma girls awarded failing grades fell from 10.2 per cent to 7.7 per cent.
- There was a significant decrease in the proportion of Roma children with special educational needs awarded grades of 5 or less (in secondary level), falling from 16.3 per cent in semester 1 to 11.1 per cent in semester 2.<sup>266</sup>

School results from the previous school year are unavailable for comparisons. However, the schools reported improvements of students' academic performance. The quarterly reviews and schools' self-assessment indicate correlation between remedial education and after-school support programmes and the improvement of students' academic results. The progress report for the end of the second semester showed the following:

- In Romanian Language, the failure rate for Roma students dropped from 12.2 per cent in semester I to 9.8 per cent in semester II. This is a decline of about 20 per cent.
- In mathematics, the failure rate for Roma students dropped from 11.3 per cent in semester I to 9.7 per cent in semester II. This is a decline of about 14 per cent.
- In Romanian language, the percentage of Roma students awarded the 'FB' (*foarte bine*, very good) or 'B' (*bine*, good) grades rose from 33.9 per cent to 34.5 per cent.
- In mathematics, the percentage of Roma students awarded the 'FB' or 'B' qualification fell slightly, but the percentage awarded the highest 'FB' qualification rose from 10.8 per cent to 11.1 per cent.
- For the secondary level, in Romanian Language, the failure rate for Roma students dropped from 12.8 per cent in semester I to 10.2 per cent in semester II. This is a decline of about 20 per cent.
- In mathematics, the failure rate for Roma students dropped from 15.2 per cent in semester I to 12.2 per cent in semester II. This is also a decline of about 20 per cent.
- In Romanian language, the percentage of Roma students awarded the 'FB' or 'B' grades fell slightly.
- In mathematics, the percentage of Roma students awarded the 'FB' or 'B' qualifications rose slightly, but the difference is insignificant.<sup>267</sup>

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<sup>266</sup> See Simister, *Progress Report*, p. 23.

Data on the percentage of students who repeat a grade are not available at the national level. A new database established in the 2005–2006 school year will provide such data starting in the 2006–2007 school year.<sup>268</sup>

As in the case of other indicators, there are no available data on Roma performance in national academic competitions, as results are not disaggregated by ethnicity. There are available data for the participants in the national competition (*olimpiada*) for Romani language only. Data on functional illiteracy in grade four are not available for Roma or non-Roma students. There is no known national average.

There is information, however, regarding the illiteracy rates for age groups within the overall Roma population:

**Table 21: Illiteracy rates for the Roma population, by age group (2002)**

Age (years)	Reading level (per cent)			Total
	Good	Difficult or not capable	Don't know / not answered	
10–16	57.0	37.5	4.6	100
17–45	64.5	31.4	3.6	100
Over 45	38.4	45.3	16.3	100
<b>Total population (over age 10)</b>	<b>57.6</b>	<b>35.8</b>	<b>6.5</b>	<b>100</b>

Source: ISE, ICCV, MEC<sup>269</sup>

Another source provides the following data on literacy rates, rather than illiteracy rates:

<sup>267</sup> Information provided by the technical assistance team WYG International to the PIU-MER. See *Final Report*, on the Phare 2003 project Access to education for disadvantaged groups October 2006, available at <http://www.imconsulting.ro>, unpublished.

<sup>268</sup> The software and database have been developed in the framework of the Phare “Access to Education” project.

<sup>269</sup> MER, ISE, UNICEF, ICCV, *School Participation of Roma Children: Problems, Solutions, Actors*, p. 48.

**Table 22: Overall literacy rates – for Roma and non-Roma (2005)**

Total (aged 15 and over)	Proportion of the population who are literate (per cent)		
	Majority population in close proximity to Roma	Roma	National average
	96	69	97.30
15–24	95	72	97.76
25–34	97	70	–
35–44	97	75	–
>=45	95	63	–

Source: UNDP, *Vulnerable Groups*

### 5.3 Curricular standards

The National Curriculum document states that “the curricular standards of achievement are national standards that are absolutely necessary when a diversified educational offer is being introduced”.<sup>270</sup> Standards represent for all the students a common and equivalent reference system at the end of a school level; they are performance specifications referring to the knowledge, skills and attitudes set forth by the curriculum. It is expected that the standards (which are student-centred) be relevant from the point of view of the students’ motivation for learning.

The curricular standards of achievement are also criteria for assessing the quality of the teaching process. As many Roma students stop attending secondary school, do not participate or are not successful at the *capacitate* exams at the end of the eighth grade, this reflects poorly on their teachers and may affect these teachers’ level of job satisfaction.

All mainstream schools use the same national curriculum. However, schools are encouraged to develop school-based curricula (*curriculum la decizia scolii*) to reflect the characteristics of the local community and to meet the employment needs and opportunities of the region.<sup>271</sup> When launched by the Ministry of Education in 1997 the school-based curriculum was designed to represent up to 30 per cent of the school curriculum. Since then, the average percentage decreased gradually (depending on local facilities of school and human resources it varies from 20 per cent to none at all) and showed that despite the innovative character, a good policy could fail because of the difficulties in implementation: teachers need to cover the teaching load and extra hours

<sup>270</sup> Planul Cadru pentru Învățământ, National Curriculum Framework Bucharest: 2002, available at <http://cnc.ise.ro/>.

<sup>271</sup> Ministerial Order nr. 3638 of 11 April on School-based Curricula provided in the National Curriculum Guidelines, available at <http://www.cnc.ro>.



for the regular subjects added to the core curriculum, there are not funds available for teachers, and the resources of the school do not allow the implementation of such a large number of optional courses.<sup>272</sup>

The decentralisation project (see section 3.1) focuses very much on the school responsibility and initiative on developing school-based curriculum tailored to the student's and local community needs (labour force market tendencies). The Phare 2003 project encouraged the development of a school-based curriculum related to Roma history, traditions and culture. A guidebook for teachers on the subject of the school-based curriculum was prepared for use in training and dissemination to schools; this was published as "School-Based Curriculum in an Inclusive Environment."<sup>273</sup> Additional modules for the "Second Chance" Curriculum on Romani Language and Culture have been developed.<sup>274</sup>

In mainstream schools, national standards provide that at the end of the second grade students should read and write at a basic level. There are no specific reading and writing standards for students who follow the special schools curriculum. The main principle is to follow the individual rhythm and provide optimal learning opportunities and support for students with special needs. The students cannot fail a class "*repeteni*", repetition is not allowed for students with special educational needs. Students with disabilities integrated into mainstream classes are assessed individually, based on individualised intervention plans (*plan de invatare individualizat*) designed and followed by both visiting or support teachers and the regular teacher of the class.

The Phare 2003 project supported the establishment of resource centres for inclusive education, where support materials and guidance are provided for regular or support or itinerant teachers in order to meet students' needs. For the project, 82 courses were outlined. Different curricula were developed on topics related to Roma education, Roma language and culture, anti-bias education and intercultural education. About one third of the courses use the civic education and other core curriculum subject matters or optional subjects (such as geography or history) to insert topics related to cultural and ethnic diversity, multicultural composition of the county, town or village.

In order to meet curricular standards, schools involved in the Phare 2003 project initiated after-school remedial education programmes. A total number of 6,521 children were reported as beneficiaries. However, in most of the cases the total number refers to groups of children targeted for different types of activities (such as after-school programmes or summer pre-school). 344 children received additional help from itinerant or support teachers or participated in resource centres' activities. Data

<sup>272</sup> Information collected in 2006 during the field research for 14 case studies developed in the framework of the Phare 2003 project. See Ulrich, *Multiple Case Study Report*.

<sup>273</sup> Maria Kovacs, *School-Based Curriculum in an Inclusive Environment*, "Step-by-Step" Centre, Bucharest, 2006.

<sup>274</sup> Five separate students' or teachers' books were printed. Textbooks can be downloaded for free from the MER portal at <http://www.edu.ro>.

provided rely on different sources, such as the remedial education register, individual working contracts (support teachers), teachers' portfolios, students' portfolios, intervention activity plans, personalised intervention plans, observation records, handouts, children's products, minutes of the evaluation commission, check sheets, and monitoring forms.<sup>275</sup>

#### 5.4 Classroom practice and pedagogy

At the beginning of the 1990s, research regarding Roma students in schools in Romania revealed that classroom and school practice were marked by bias, teacher-centred instruction, stereotypes, lack of motivation for individualised instruction, irrelevant curriculum, a lack of remedial teaching, poor self-esteem for Roma students and parents.<sup>276</sup>

Due to the different projects and NGO training courses that have taken place in Romania over the past ten years, there are different approaches dealing with classroom and pedagogy. Some of the approaches include an alternative methodology of reading, writing and lecturing focusing on individual cultural respect as the basis for cooperative education and individualisation.<sup>277</sup> Another approach underlines the central web of mutual representations among Roma and non-Roma, and focuses on Roma children's self-esteem as a crucial factor to be taken into consideration by the educators.<sup>278</sup>

The Intercultural Institute, Timișoara, has developed several projects in the area of classroom pedagogy and practice, with a focus on a constructivist approach and distance education opportunities for in-service teacher training.<sup>279</sup> Training courses provided by the NGO Save the Children, Romania, have approached both the issue of *Romanipen* (Roma cultural identification) and that of the teaching and learning strategies at the classroom level. A large number of materials and teachers' guides have

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<sup>275</sup> Information provided by the Final report for Phare 2003 project Access to education for disadvantaged groups, report circulated in the project framework, not published, 2006, WYG International.

<sup>276</sup> Adela Rogojinaru, in English "School Development and Individualised Education" *Roma Education Resource Book Educational Issues, Methods and Practice, Language and Culture*, Budapest: OSI, 1997 (hereafter, Rogojinaru, "School Development").

<sup>277</sup> Rogojinaru, "School Development".

<sup>278</sup> Catalina Ulrich *et al.*, "Romii: construirea strategiilor de rezistență la frustrare" (Roma Strategies to Overcome Frustration), in *RROMATHAN: Studii despre romi* (ROMATHAN: Studies about Roma), No. 2, 1997.

<sup>279</sup> See their website at <http://www.intercultural.ro>.

been developed in the framework of another project, the CEDU/MATRA “Equal Opportunities for Roma Children through School Development”.<sup>280</sup>

A teachers’ guide series addresses various aspects, such as intercultural education, classroom management, cooperative learning and family involvement. Further publications have been developed based on the initial project, also addressing issues including “Reading and Writing in Bilingual Cultural Environments”, and “Project-Based Learning.” Training courses provided in the framework of the MATRA project followed important principles: to be practical, to inspire teachers, to use the available published materials (teachers’ guides), to stimulate communication among teachers and schools, and to be cross-curricular (topics covered by the training sessions to be related to different components, such as family involvement and intercultural education). Romanian experts have developed research projects, training programmes and support materials for teachers in order to better respond to educational, emotional and social needs of the children in multicultural settings.<sup>281</sup>

Other important training input (with national coverage) was provided by the “Step-by-Step” methodology, implemented by the Centre for Education and Professional Development. This focuses on child-centredness, democratic practices in the classroom, learning through play, parental involvement, and cooperative learning.

Most of these training courses use a constructivist approach (knowledge is built by the participants, and is not something imported from outside) and experiential learning philosophy for teacher training. Interactive methods, critical thinking, group work and positive relations between trainees represent some of the key features of the teacher training activities. There are many other examples of training provision for teachers working in a multicultural setting. Despite the variety and number, the impact at the school and especially at the classroom level is not well documented.

While it is difficult to track teachers trained in specific areas, and the research on this topic is rather an exception, pedagogical improvement is a long process. Although there are notable initiatives (like those mentioned above) that make a difference at the classroom level, there are a few difficulties related to the teacher training in the framework of such projects. For example, in schools with a large number of Roma students the turnover rate is higher compared to other schools. Some of the teachers are not “titular” and starting with a new school year will work in another school. It is likely that at the beginning of the school year the teachers trained during the previous school year will move to another school. Participation in training courses leads to

<sup>280</sup> Both projects have been implemented by the Netherlands Institute for Curriculum and Center Education 2000+ and focused on institutional exchange stimulation and full support for actions taken in adapting the school configuration so as to fit parents and children needs. For more information, see <http://www.cedu.ro> and <http://www.egale.ro>. Projects were developed with support from MATRA financing scheme of the Dutch Ministry for Foreign Affairs.

<sup>281</sup> Gheorghe Sarau, Anca Nedelcu Butuca, Lucian Ciolan, Dakmara Georgescu, Mihaela Ionescu and Serban Iosifescu have all published work in this area.

better teaching skills, which leads to increased professional self-image. This makes it possible for a trained teacher to gain professional credits and to apply for a job in a “better school”.<sup>282</sup>

The experience built on different projects made it possible to refine institutional and teaching standards in recent years.<sup>283</sup> Since 2000, different training and teaching materials have been piloted, and positive experience gained in different projects is now being disseminated on a larger scale. More and more County Inspectorates have expressed the will to implement such standards in all schools. The Romanian Agency for Ensuring Quality in Pre-University Education (ARACIP) has developed standards with the goal of monitoring the respect of quality standards in all the schools. There are different categories of standards (which will be under public debate soon), regarding institutional, administrative and managerial structures, school facilities, human resources, curriculum, learning achievements, scientific activity and the financial activity of the institution.<sup>284</sup>

The comprehensive study regarding the impact of the new curriculum in compulsory education, *School at the Crossroads*<sup>285</sup> showed that most of the teachers in Romania see the result of knowledge transfer more as an output than as an outcome. Teaching consists mainly of lectures and memorisation, while knowledge as process is very little practised. Moreover, the concept that knowledge is valuable in and of itself, as well as having practical applications in real life, is not developed. This reflects the attitudes of most teachers towards change, and inhibits progress for student achievement.

More specifically, the impact of the training and use of materials strengthening Roma identity represent an important issue. Every project had its own monitoring and evaluation system and products. Besides the internal evaluation external evaluation is

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<sup>282</sup> Data compiled from different field research: Butuca Anca, Ulrich Catalina, Mardar Nicolai, Mariana Koseba, and Silvia Varbanova, in English, “Roma Children in Schools: Social Perceptions and Self-Esteem” (HESP contract 2000/263/2000), unpublished; Ulrich, *Multiple Case Studies Report* (2006, WG International, not published); Catalina Ulrich, Alexandru Crisan, Simona Moldovan, Nancy Green, Evaluation Report for the project “Equal Opportunities For Roma Children Through School Development Programs and Parents’ Involvement”, 28 April 2002, available at <http://www.osi.hu/esp/rei/Documents/EvaluationRomaniaFinalDraftcolumbiareport2002.doc> (hereafter, C. Ulrich et al., *Equal Opportunities Through School Development Programs*).

<sup>283</sup> For example, a managerial tool for self-evaluation was developed in the framework of the Equal Opportunities project 2001/2002. See: Serban Iosifescu, *Dezvoltarea instituțională în comunitățile cu romi ghid de autoevaluare, caiet de autoevaluare și modele de instrumente de autoevaluare* (School development in Roma communities). Bucharest: Humanitas CEDU Publishing House, 2003 available at <http://www.egale.ro> (accessed on 7 March 2007). The book has three parts: self-evaluation, school self-evaluation guide, self-evaluation workbook and self-evaluation tools. The Phare 2003 project provided checklists to be used by school management team and teachers (available at <http://www.imconsulting.ro>.) Both projects piloted standards and indicators regarding good quality education in schools with Roma students.

<sup>284</sup> Information provided by Serban Iosifescu, President of ARACIP.

<sup>285</sup> Vlasceanu, *School at the Crossroads. Continuity and Change in the Compulsory Curriculum*.

done after a period of time to assess the impact of the intervention. Evaluation reports referring to teaching and learning practices at the classroom level have been prepared in several cases:

The evaluation report on the CEDU/MATRA “Equal Opportunities for Roma Children through School Development” projects, implemented from 2001 to 2004, provides an assessment of the actual outcomes of the projects over that period:

- Increased capacity of schools to define, solve and evaluate issued specific to education of Roma children and youth;
- Replacement of the inert school administration with an active approach at all management level: the culture of total dependency on State resources was strongly challenged by the project approach and many schools have a different attitude concerning the assistance received and many skills acquired for taking initiatives;
- A more individualised approach to students;
- Positive results in changing the school and classroom ethos, made possible by addressing at the same time school factors, family factors and social-economic factors;
- Changing the classroom ethos: improvement of the level of the participation in classroom life of the Roma students (not the simple formal involvement).<sup>286</sup>

Another evaluation, carried out in the framework of the “Equal Opportunities for Roma Children through School Development” project,<sup>287</sup> focused mainly on the effect of the training on the classroom as a learning environment. The analysis targeted physical, emotional and social aspects of the classrooms. The evaluation report, prepared by an international research team in 2002, showed that over three quarters of teachers found a range of activities useful, including group work, cooperative learning activities, extra-curricular activities (reading clubs, exhibitions), intercultural activities and other activities promoting Roma culture. Teachers described these activities as leading to the following results: “better understanding of each other, mutual acceptance”, “respect for cultural values” and “diminished prejudices and stereotypes”. At the same time, extra school activities “improve student–student, student–teacher and student–teacher–parent relationships”.<sup>288</sup> An important detail is the fact that the “Equal Opportunities” project has two stages: the first stage started in 1998 and ended

<sup>286</sup> Catalina Ulrich, Alexandru Crisan, Simona Moldovan, Nancy Green, *Evaluation Report for the project “Equal Opportunities For Roma Children Through School Development Programs and Parents’ Involvement”*, 28 April 2002, available at <http://www.osi.hu/esp/rei/Documents/EvaluationRomaniaFinalDraftcolumbiareport2002.doc> (henceforth Ulrich et al., *Evaluation of the “Equal Opportunities” project*).

<sup>287</sup> Ulrich et al., *Evaluation of the “Equal Opportunities” project*.

<sup>288</sup> Ulrich, *Multiple Case Study Research*.

in 2000; the second stage, a follow-up project, started in 2000 and ended in 2003, with some activities carried out in 2004. Both stages were implemented by the same organisations – MATRA and CEDU (previously the Open Society Foundation), and some schools were involved for a longer period of time. The duration and the continuity of experience made it possible for some of these schools to become resource schools at the county level in the framework of other projects.

The Phare 2003 project evaluation reports are another example of assessment in this area. Different reports provided by the technical assistance team emphasise various effects of the projects' activities. For example, the evaluation report on the Phare 2003 "Access to Education for Disadvantaged Groups" project, (which covers a sample of 10 per cent of the schools involved in the project) documents the impact of teacher training on classroom practice and pedagogy. The research found that teachers have done the following:

- Increased awareness about inclusion and the characteristics of individual learners among most teachers participating.
- Increased personal professional development in the case of about half of the teachers: they applied for other training courses, gained more professional credits and upgraded their professional position, and became more active and visible in professional meetings and events.
- Achieved better communication and team building – in a majority of schools training helped the staff to know each other, to socialise. The shift system of the school programme, commuting (transport) conditions in rural areas and the lack of communication between primary and secondary level teachers offer little opportunity for team building in schools.
- Achieved deeper professional reflection – awareness of other projects aims and similarities; teachers made comparisons between training courses, materials and experience gained in different projects, such as Phare's "Equal Opportunities" and "Rural Education" projects.<sup>289</sup>

These conclusions are similar to those reached in the evaluation reports on the CEDU/MATRA "Equal Opportunities" projects. More specifically, the evaluation reports on the Phare 2003 project drew a number of valuable conclusions regarding teacher training. While teacher training has an effect on all teachers who take part – many participants praised sessions on active methods – they often returned to their traditional methods when they returned to their classrooms. In about half the cases studied, the reports found an improvement in the resources available to students in the classroom; in a smaller percentage of classes the reports noted a more pervasive impact, such as "active and interactive lessons, genuine group collaboration, differentiated tasks to suit group needs, displays of good recent work, friendly teacher–pupil

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<sup>289</sup> Ulrich, *Multiple Case Study Research*.

communication.<sup>290</sup> The training was least successful among secondary school teachers, where the reports concluded that teachers are already pressed to cover material and meet assessment requirements.<sup>291</sup>

Other important conclusions of all different pieces of research reflect correlations between the following:

- Teachers' teaching skills and "taking the risk" of using new methods;
- Teachers' exposure to different training courses;
- Support and guidance offered to teachers after the project's end, which increase the training's impact at the school level and at the teacher's level;
- Teachers' motivation to work in disadvantaged areas and improvement of their professional training and preparation;
- Residence of teacher, as commuting teachers have less time to spend in school and appear less interested in training and activities in school and communities;
- Teachers' use of imitation as a favourite strategy of innovation, as exchange visits and demonstrative lessons are considered to have a higher impact than the training courses.

There are no available data concerning the proportion of teachers using the skills that they studied in these training courses. Some teachers could be counted several times as training participants, because their school was involved in several projects. It is also possible that trained teachers are not working in the same school or in the educational system. Although difficult to evaluate, in most of the projects there was also little support provided to teachers after the end of the project. Those schools that benefit from different projects and, in this way, had a longer period of time to "digest" changes appear most successful. Phare 2001 and Phare 2003 schools benefit from CCD support and assistance provided by a "local implementation agent" as part of the Technical Assistance. Anecdotal comments reported the need for more consistent support and continuous training.

## 5.5 School–community relations

According to the Education Act, there are several structures in which parents are represented.<sup>292</sup>

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<sup>290</sup> Keith Prenton, *Final Report on Access to Education for Disadvantaged Groups*, WYG International, 2006; and Ulrich, *Multiple Case Study Research*.

<sup>291</sup> Ulrich, *Multiple Case Study Report*.

<sup>292</sup> Education Act, Art. 145.

The School Board (*Consiliul de Administratie*) functions at the school level. The board has a decision-making role in administration and in the organisation of school activities. The board is delegated by the Local Council to administer the infrastructure of the school, including buildings, land, equipments and materials. It is consulted on decisions regarding: annual school planning, staff allocation, the budget, the general report on the quality of education within the respective school, the overall school development plan and the promotion of improvement measures. The School Board consists of 9–15 members, including representatives of parents. The other members are the school director, school vice-director, local council representative, mayor's representative, up to five teachers and local companies' representatives.

There are also representatives of parents at the level of the Commission for Evaluation and Quality Assurance (*Comisia pentru evaluarea si asigurarea calitatii*) at the school level. The Commission members also include: one coordinator, up to three teachers elected by the Teachers' Council, a trade union representative, a local council representative, a representative of the pupils (in high schools) and representatives of ethnic minorities. The role of this structure the Commission is to evaluate and ensure the quality of education and functioning of the school unit according to the existing standards.

At the level of each class, parents are represented in the "Class Council", together with teaching staff and pupils' representatives. Parents are also expected to set up a Parents' Committee at the level of each class and to work closely with the class representative (*Diriginte*).

At the school level, a Parents' Representative Council (*Consiliul Reprezentativ al parintilor*) consisting of all the presidents of class parents' committees is set up and has as its main roles support for material resources development at school unit level. Criteria for monitoring quality of the school units emphasise the involvement of parents in decision-making as well as the parents' satisfaction with the quality of the education provided to students. There is no evidence that Roma parents have a high level of involvement in such committees.

The evaluation reports for both phases of the "Equal Opportunities" projects also emphasise the difficulties and challenges faced in the field of parental involvement.<sup>293</sup> Many projects report that parental involvement is difficult. Many parents lack a culture of PTAs or the sense of being involved in school matters, and historically have not been engaged in such activities. In addition, disadvantaged communities show a low level of trust in education and schools.<sup>294</sup>

In its conclusions, the evaluation made in the framework of the CEDU/MATRA "Equal Opportunities" project (at the school and national levels) found that "parental involvement represented both a key principle and a strategic goal to be achieved

<sup>293</sup> Ulrich et al., *Evaluation of the "Equal Opportunities" project*.

<sup>294</sup> Ulrich et al., *Evaluation of the "Equal Opportunities" project*.



through the project”.<sup>295</sup> The evaluation noted that regional parent–teacher meetings presented regular opportunities for concerns about Roma education to be discussed, as well as linking the school with the wider Roma community. Later stages of the project saw Roma families becoming more active in groups outside the school, such as political or regional associations.<sup>296</sup>

An evaluation report of the first phase of the Phare project “Access to education for disadvantaged groups” (2001), prepared in 2004, found that there is evidence that parents do participate in the children’s classes. They were invited either to assist the classes or to help the teacher in the learning process. They were also encouraged to help organising and preparing the school events.<sup>297</sup> Although Roma parents were represented in school decision-making bodies, they are not very much involved in the decision-making process regarding the school: “Their involvement is at the information and consultation level. The school’s door is more open to them, they are asked about their opinions regarding school activities and are asked to contribute with labour.”<sup>298</sup>

In the framework of the second phase of the Phare project “Access to education for disadvantaged groups” (2003), 7,268 community members were reported as participants in different activities initiated by schools. However, despite this, the final project evaluation report concluded that, with some notable exceptions, there was little evidence of real involvement of parents and communities in planning, managing or participating in project activities. The report also found little evidence that most project-steering committees were any more than an advisory body, to which project activities are reported.<sup>299</sup> Observations from meetings with steering committee members revealed that the level of community participation and multi-agency working varies greatly from county to county and school to school. For example, in Maramureş a high-level coordinating committee has been established. In the quarterly reports (November 1995–January 1996) some counties reported that partnerships with local authorities had become more effective, and that there is an increased level of involvement of local authorities in school life. Community police, priests and local mayors were often involved at the local level. They were often key figures in desegregation activities.<sup>300</sup>

<sup>295</sup> Ulrich et al., *Evaluation of the “Equal Opportunities” project*.

<sup>296</sup> Ulrich et al., *Evaluation of the “Equal Opportunities” project*.

<sup>297</sup> The evaluation was made in 21 schools, from each county, covering small ones (66 children in Dambovită, all Roma) to very large ones (1,268 children, 20 per cent Roma), schools with grades 1–8 or only pre-school, schools from traditional Roma communities (Calvini/Buzău), schools from small communities (rural) to very large ones (Bucharest). See Godfrey Claff, *Evaluation Report on Community Capacity Building*, Bucharest: IMC Consulting, 2004 unpublished report, (hereafter, Claff, *Evaluation Report 2004*).

<sup>298</sup> Claff, *Evaluation Report 2004*, p. 6.

<sup>299</sup> Prenton, *Final Report on Experts’ Observations*, p. 22.

<sup>300</sup> Prenton, *Final Report on Experts’ Observations*, p. 22.

Meetings with parents revealed that parental attitudes towards the project were largely concerned with material conditions, although many parents commented on the improved school environment and that their children appeared happier in school.<sup>301</sup> Interviews conducted with Roma parents as part of the case study research (see also Annex 2) indicated that parents had relatively low expectations of their children's educational career prospects. The first quarterly reports, prepared by the county project teams in all the participating counties, reported that many parents were not confident about the impact of the 2003 Phare project "Access to education for disadvantaged groups" and believed that "nothing will change". The attitudes of Roma and non-Roma parents were identified as barriers to change.

ARACIP is responsible for the elaboration of an evaluation system and instruments/tools for schools.<sup>302</sup> These include several indicators on school and community relations. In addition, ARACIP standards follow the Ministry of Education's *Decentralisation Strategy of the Pre-University Education*, which envisages important effects of the decentralisation process directly related to parents: from participation in decision-making, participation in the school life, and access to information to participation in the evaluation of the quality of the educational services offered by schools.<sup>303</sup>

## 5.6 Discriminatory attitudes

In the framework of the second phase of the 2003 project, "Access to education for disadvantaged groups project", experts reported that they did not observe any lessons where teachers deliberately discriminate against pupils, but were concerned by some prevalent behaviour that is unintentionally exclusive (although paradoxically the teachers probably intend the exact opposite). For example, some teachers proudly pointed out children in the class as being Roma or as having special needs, meaning to show that the class is inclusive but in fact drawing unwelcome attention to the children.<sup>304</sup> In many schools, children with disabilities were singled out and given inappropriate attention in front of visitors. For example, children were referred to as having "very severe deficiencies" in front of themselves and their classmates. Many mainstream teachers use the labels that are written on certificates of special educational needs to describe children.

The case studies carried out for this report (see also Annex 2) revealed that the teachers' expectations of Roma students vary considerably. Teachers' interest in training on

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<sup>301</sup> Prenton, *Final Report on Experts' Observations*, p. 22.

<sup>302</sup> OSI Roundtable, Bucharest, February 2007.

<sup>303</sup> See: Romanian Agency for Ensuring Quality in Pre-University Education (Agenția Română pentru Asigurarea Calității în Educație, ARACIP), *Decentralisation Strategy for Pre-University Education*, Annex no.3 Effects of decentralisation, p. 31, available at <http://www.aracip.edu.ro>.

<sup>304</sup> Prenton, *Final Report on Experts' Observations*, p. 23.

Roma issues tends to be higher at the primary school level. This matches observations that primary classrooms are more likely to be attractive learning environments and that primary teachers appear to use more varied and appropriate teaching methods. In the Pustă Vale neighbourhood of Şimleu Silvaniei, one parent noted, “[my child] is in the fifth grade [...] and he doesn’t even know to write his name correctly. What did he study for? Is that education? They treat children differently, children of our ethnic group, they simply did not learn, and they should have.”<sup>305</sup>

Roma children who attended the Cehei School near Şimleu Silvaniei (see section 3.3) experienced a range of differentiated treatment, starting with allocation of inappropriate space for study, and lack of access to school equipment, and ending with the Romanian colleagues’ hostility and the teachers’ lack of motivation. Some Roma parents interviewed for this report expressed the opinion that while the new school built in Pustă Vale is segregated, it may be a preferable option to the conditions in Cehei:

We did not choose this school but it is better [than the one in Cehei] and I hope [the children] will learn here. It is better because it is closer and the children do not get dirty in the rainy season in spring or in autumn.<sup>306</sup>

This school started in the autumn. They won’t be bullied here. They should study here in the community because here they insist on teaching them. Not with the Romanians, because they end up beaten.<sup>307</sup>

I am pleased because it is close and because they don’t get bullied, they were bullied there and it was a long walk and they were often late. They beat the children, and the children did not learn anything, they were in trouble because they were dirty, no one paid attention to them. A Protestant minister comes who teaches them religion, and they pray together. They love the school here, they always were afraid to go to the other one.<sup>308</sup>

With the Romanians they always insisted that they learn, and they would leave our kids alone without heating. God help us that they would indeed study here at this school.<sup>309</sup>

The NCCD found discriminatory treatment at the Cehei School, yet the measures taken to address this situation have in fact further entrenched segregation and possibly reinforced the view that integration is harmful to the children involved. However, according to the teachers, some Roma parents are aware that the complete segregation of the new school may not be a preferable solution.<sup>310</sup>

<sup>305</sup> Interview with a parent Pustă Vale, 15 October 2006, case study Şimleu Silvaniei.

<sup>306</sup> Interview with a Roma parent, Pustă Vale, 15 October 2006, case study Şimleu Silvaniei.

<sup>307</sup> Interview with a Roma parent, Pustă Vale, 15 October 2006, case study Şimleu Silvaniei.

<sup>308</sup> Interview with a Roma parent, Pustă Vale, 15 October 2006, case study Şimleu Silvaniei.

<sup>309</sup> Interview with a Roma parent, Pustă Vale, 15 October 2006, case study Şimleu Silvaniei.

<sup>310</sup> Interview with a Roma parent, Pustă Vale, 15 October 2006, case study Şimleu Silvaniei.

The report prepared on Roma schools as part of the Phare “Access to Education for Disadvantaged Groups, with a Special Focus on Roma” project reported that in Roma-majority schools, expectations for students were low: “If students achieved basic literacy and completed 8 grades, this was seen as a good achievement. Entry into an Arts and Trades College for vocational training was a very good achievement. University was an aspiration that was rarely, if ever, mentioned.”<sup>311</sup>

The study *The Education of Roma Children in Romania: Description, Difficulties, Solutions* discusses the manner in which the Romanian educational system deals with (or fails to deal with) the integration of Roma children in public education.<sup>312</sup> It is very difficult to assess the level of respect or the quality of the social relations or school climate within the entire educational system, with regard to Roma and non-Roma. Different field research reflects very different comments from both sides, Roma and non-Roma. The range of comments varies from respect and mutual understanding to rejection and discrimination. Research at a local school shows that there is much willingness on the part of Roma children to participate in mixed schools (Roma and non-Roma) but that there is much reluctance on the part of the majority children and their parents to accept the Roma as their equals.<sup>313</sup>

At the Inspectorate and teaching staff level it is noticeable that actors regularly use key concepts such as respect, diversity, intercultural, multiculturalism, inclusion, self-esteem, individualisation, individual needs, emotional support, and so on. New regulations on quality management are mirrored in managerial documents, where schools’ missions and development plans reflect students’ needs and community cultural diversity. Parents’ comments are less politically correct (compared to teachers’ comments) and express negative comments against Roma based on poverty and health issues. In the second phase of the Phare project “Access to education for disadvantaged groups”, in 2003, most of the negative comments against Roma were raised with regard to desegregation.<sup>314</sup>

Research conducted by the National Council for Combating Discrimination (NCCD), released in October 2004 (a representative sample at the national level), also gives some indication of popular attitudes towards Roma.<sup>315</sup> For example, for the question “How

<sup>311</sup> Andruszkiewicz, *School Desegregation*, p. 6.

<sup>312</sup> Teodor Cozma, Constantin Cucos and Mariana Momanu, [Educația romilor în România: dificultăți, soluții], *The Education of Roma Children in Romania: Description, Difficulties, Solutions*, [Polirom Publishing house], 2000, (hereafter, Cozma et al., *Education of Roma Children in Romania*).

<sup>313</sup> Cozma et al., *Education of Roma Children in Romania*, p. 20.

<sup>314</sup> Andruszkiewicz, *School Desegregation*, pp. 6–10; Ulrich, *Multiple Case Study Report*, p. 30.

<sup>315</sup> National Council for Combating Discrimination (Consiliul Național pentru Combaterea Discriminării, NCCD), *Barometrul de Opinie privind Discriminarea în România* (Public Opinion Barometer on Discrimination). Bucharest: NCCD, October 2004 (hereafter, NCCD, *Public Opinion Barometer*).

often do you think the following situation takes place in everyday life? A person suffers because he/she is Roma?" the answers often showed a significant level of discrimination in relation to employment, authorities and schools.

**Table 23: Popular attitudes towards Roma (2004)**

Responses to the question: <i>"How often do you think the following situation occurs in everyday life – "A person suffers because he/she is Roma."</i>	Proportion of respondents answering the question with: <b>"often"</b> or <b>"very often"</b> (per cent)
In finding a job	50
At the workplace	37
At school	35
In family	10
In relation to authorities	37
In justice	26
At hospital	28
In public places	25

Source: NCCD<sup>316</sup>

With regard to the social distance of the population towards Roma, findings from the same research indicate that contact between Roma and non-Roma in daily life is often limited.

<sup>316</sup> NCCD, *Public Opinion Barometer*.

**Table 24: Social distance (2004)**

The statements:	Share of respondents (per cent)	
	False	True
I avoid having anything to do with Roma	55	40
There are Roma that I know	21	75
I shop in a store where the seller is Roma	66	26
I have Roma neighbours that I greet	61	33
I have/had Roma colleagues	57	36
I visit Roma	79	14
It happens to me that I ask a Roma person for help	80	14
I have Roma relatives	88	5
In personal problems I often ask advice from a Roma	86	8

Source: NCCD<sup>317</sup>

There is a need for similar research on social distance to allow for a comparison over time and to assess Government measures to increase social inclusion.

A recent study by Laura Surdu and Mihai Surdu, *Broadening the Agenda: The Status of Romani Women in Romania*,<sup>318</sup> analyses the situation of Roma women. According to their research, almost a quarter of the women had no formal education, compared to Roma men, where only 15 per cent had no education. These data are highly relevant for children's educational career; the importance of parental expectations with regard to children's work and future is well documented. Low educational levels are likely to be reflected in pregnancy problems, poor provision of early childhood education, poor encouragement for intrinsic motivation (in school and daily life), emphasis on short-term goals, low self-esteem, low levels of autonomy, and dependence on social assistance support.

<sup>317</sup> NCCD, *Public Opinion Barometer*.

<sup>318</sup> Laura Surdu and Mihai Surdu, *Broadening the Agenda: The Status of Romani Women in Romania*, Open Society Institute, Budapest, March 2006, available at [http://www.soros.org/initiatives/roma/articles\\_publications/publications/broadening\\_20060313](http://www.soros.org/initiatives/roma/articles_publications/publications/broadening_20060313) (accessed on 28 February 2007) (hereafter, Surdu, *Broadening the Agenda*).

At the school level the “hidden curriculum” is significant, as well as visible interaction patterns and behaviours. In most cases teachers use politically correct language speaking about students. Negative comments refer mainly to adult unemployed Roma and reflect social distance documented in other social research studies.<sup>319</sup>

Research has also uncovered that poverty, which is often linked to the Roma minority, may also have a direct impact on discriminatory attitudes, and that children coming from extremely poor conditions are often rejected and teased by majority children. One teacher said “The other children would not accept the Roma kids. They would tease them, beat them, and completely ostracise them.”<sup>320</sup>

## 5.7 School inspections

Data on school inspections are imprecise; there are different types of inspection activities, according to the Inspectorate’s agenda and priorities, RODIS, MARODIS<sup>321</sup> criteria, and ARACIP’s new regulations.<sup>322</sup> The frequency of inspections is generally determined by the specific problems related to an individual school or community. Every county has an Inspector for Roma education.

Regarding the *Strategy for the Improvement of the Condition of the Roma* (see section 3.1), the Ministry of Education has continued programmes that had previously proved efficient, such as the establishment of the position of Inspector for Roma Education within the County School Inspectorates. They are responsible for issues of Roma education at the county level. Inspectors for Roma Education fall under the administrative structure of the County School Inspectorate. They are under the competence of the Inspector for Education in Romanes, Professor Gheorghe Sarau, who provided many opportunities for networking and professional development. At present, such inspectors are working within all 42 counties of Romania, and they include 20 inspectors of Roma origin and 22 non-Roma inspectors.

In practice most of the Inspectors for Roma Education spend half their working time on Roma issues and the other half on other issues, such as special education. All the inspectors have similar resources; Inspectors for Roma Education do not receive any additional support. Most training is provided by the Ministry (Professor Gheorghe Sarau organises regular national meetings with inspectors and Roma language teachers

<sup>319</sup> See different opinion poll reports: Public Opinion Barometer, (Barometrul de Opinie Publică) available at Open Society Foundation web site [http://www.osf.ro/ro/detalii\\_program.php?id\\_prog=18](http://www.osf.ro/ro/detalii_program.php?id_prog=18).

<sup>320</sup> McDonald, “Roma in the Romanian Education System.”

<sup>321</sup> RODIS and MARODIS represent acronyms for inspection models piloted in pre-university education system. Both models involve in-depth data collection process of qualitative information, highlight the importance of beneficiaries consultation and participation in school life, decision-making. Beneficiaries’ satisfaction is an important indicator for the quality of the education provision of a specific school unit.

<sup>322</sup> ARACIP activity is different from the Inspectorate’s activity.

and provides assistance by site visits, for example) or by the national multi-annual projects (such as the Phare project “Access to Education for Disadvantaged Groups”). The electronic newsletter and the virtual network and electronic forum keep the inspectors updated and make it possible for them to share experience and good practice.

Professor Sarau states that practice has shown that, besides the support offered by the Inspectors for Roma Education, the most effective way to assist teachers working with Roma children is to involve a mixed team, composed of a school mediator, a didactic specialist for schools with a large number of Roma, a Romanes teacher and a non-Roma teacher.<sup>323</sup>

However, most of the Inspectors for Roma Education are overwhelmed with work. The Phare project raised awareness about the number and types of problems schools face in very difficult situations. In most of the schools involved in the second stage of the Phare project “Access to education for disadvantaged groups” a “tutoring” system was developed, by which the schools benefit from continuous monitoring and assistance, provided by the inspectors, trainers or teachers from resource schools.<sup>324</sup> Still there are no available consistent data regarding the quality and impact of such a system.

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<sup>323</sup> Interview with Gheorghe Sarau, Bucharest, 28 October 2006.

<sup>324</sup> This was stated in the project application and county strategy, see the see MER Applicants’ guide (*Ghidul Aplicantului*), at <http://www.edu.ro/index.php/articles/c711/> (accessed 10 March 2007).



## ANNEX 1. ADMINISTRATIVE STRUCTURE

### A1.1 Structure and organisation

In Romania, education policies rely on a set of general principles, including the following:

- Education is lifelong, free of restrictions or discrimination;
- Education is a national priority;
- Education should not be subjected to the influence of various political ideologies;
- The Romanian education system is democratic, open to European and universal values;
- The education system must provide equal opportunities to all citizens;
- Public institutions must provide education free of charge for the pre-university level, as well as for the university level to the limit of the existing subsidised places;
- Ethnic minorities are entitled to pursue their studies in their respective mother tongues;
- The education network must be permanently adjusted to demographic developments and to vocational training requirements;
- The Ministry of Education and Research is the central public body defining and implementing policies in the field of education.<sup>325</sup>

At the pre-university level, the basic educational units are the pre-school, and the school for compulsory education. Schools are subdivided into “classes” (one or several, depending on the number of pupils enrolled). The teachers are grouped, according to their specialisation, in Chairs. Schools are led by the director, the deputy director, the managing board and the staff board. In rural areas there are also primary schools (only grades 1–4) where teaching can be carried out simultaneously if the number of pupils is very small. In the post-compulsory education, the basic units are the High School, organised into sections and profiles, with each section running from grade 9 to grade 12. Elite high schools with outstanding achievements are given the title of “National Colleges”.

Pre-primary education (ISCED level 0) is part of the educational system. This education level includes children aged 3–6 and is carried out in specialised institutions called pre-schools (*gradinita*), most of which are public. Children’s attendance of public pre-schools

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<sup>325</sup> Romanian Constitution.

is generally free of charge and optional, except for the compulsory preparatory class, which may be held in a pre-school or a primary school. Children from age five and up to age seven may attend such preparatory classes. Children should be enrolled in a primary school if they attain the age of six at the beginning of the school year, but there can be a postponement of up to one year in certain approved cases.

Compulsory schooling lasts for 10 years and includes three stages:

- Primary education (*Școala Generală Primară*) (level ISCED 1, for four years – grades 1–4)
- Upper primary education (*Școala Generală Gimnazială*) (level ISCED 2, for four years) carried out in schools for the fifth to eighth grades
- Secondary education (level ISCED 2, for four years – grades 9–12) provides general, specialised or vocational training and may be carried out within general or specialised high schools (*Scoala Profesională* or *Scoala de Ucenici*) or within the schools for arts and crafts (vocational training grades 9–10).
- Senior secondary education (level ISCED 3) includes the senior high-school cycle (two to three years) in academically oriented high schools (Liceu), preceded by a supplementary grade for graduates of schools for arts and crafts. The senior high-school cycle provides general and specialised courses leading to post-secondary education (post high-school level ISCED 4) or in the higher education system (level ISCED 5).

Besides the above mainstream schools, there are also special schools (*Școala Ajutătoare*) for children with intellectual disabilities. However, these schools are not intended for children with severe intellectual disabilities. In addition to special schools, a whole system of orphanages exist (*leagan 0–6; orfelinat; casa de copii*) for those children who have been abandoned or taken away from their families for various reasons.<sup>326</sup>

Within the Ministry of Education and Research there is a specialised structure called General Direction for Education in Minority Languages (*Directia Generala pentru Invatamant in Limbile Minoritatilor*), responsible for designing strategy and educational policies, and the organisation and content of education in minority languages. The General Direction for Education in Minority Languages has a mandate to organise, coordinate, collaborate, advise, approve, elaborate and analyse issues related to minority language education.

Within the General Direction for Education in Minority Languages there is a consultant position responsible for education for Roma, currently filled by Inspector for Education in Romanes, Professor Gheorghe Sarau, a well-known advocate and expert in Romanes.

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<sup>326</sup> McDonald, “Roma in the Romanian Education System.”

## A1.2 Legal roles and decision-making

The general management of education at the national level is provided by the Ministry of Education and Research. The management of education at all levels – national, regional (county) and local – is regulated by the Education Law.<sup>327</sup> According to the Education Law, the Ministry of Education and Research coordinates and oversees the national educational system, organises the public education network, approves the curricula, syllabuses and school textbooks for primary and secondary education, issues tenders for school textbooks and provides the financing for their publication, coordinates the activity of research, is in charge of the training of, and providing refresher courses to, the teaching staff. Some of the Ministry's activities are exerted through agencies, services and specialised offices under its authority.

At the county level, primary and secondary education are coordinated by the County Education Inspectorates, whose authority extends over all school units at the pre-university level. The County Education Inspectorates cooperate with local councils in financing the school units under their authority, monitoring the manner in which the pre-university educational network functions and organises school inspections, secures the application of law and the organisation, management and carrying out of the educational process. They submit the staffing ratio of the network under their authority to the Ministry of Education and Research for approval, coordinate the staffing of educational units, in accordance with the provisions of the Statute of the Teaching Staff, organise and advise the refresher courses for the teaching staff, their scientific research and other complementary activities, and coordinate the organisation of entrance examinations and of the graduation examinations in the educational units, as well as the school contests.

The inspectorates can set up pre-schools, primary schools, gymnasiums, vocational schools, and apprentice schools and research units of public education, with the endorsement of the Ministry of Education.

Within the Ministry of Education there is a General Directorate for Human Resources Management (*Direcția Generală Managementul Resurselor Umane*), consisting of two subordinated structures:

- The Directorate for Training and Development of Human Resources (*Direcția Formare și Dezvoltare Resurse Umane*), where there is a Service for Initial and Secondary Training (*Serviciul Formare Inițială și Perfecționare*);
- The Directorate for School Network and Personnel Policies (*Direcția Rețea Școlară și Politici de Personal*).

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<sup>327</sup> Education Law.

In 2004 eight counties were selected to implement regulations in a pilot project decentralising education.<sup>328</sup> Decentralisation is conceived as transferring the authority, responsibility and resources with regard to decision-making, general and financial management towards the school units and local community. The process started in 2005 and will take five years to reach the whole country. Curriculum, assessment and certification, school networks and student cohorts (*fluxuri de elevi*), management and administration, human resources and financing policies represent the field targeted for decentralisation. Anticipated effects in the pilot counties are improvements to public accountability, institutional autonomy, links between decision-making and education, decision-making transparency, human resources being better valued, subsidiarity, cultural and ethnic diversity, and an ethical approach on the part of the educational services.<sup>329</sup>

### A1.3 School funding

According to a report published by the Ministry of Education and Research in 2005, Romania's budget for education represented under 4 per cent of the GDP (see Table A1), which compares to 5–6 per cent in other EU countries.

**Table A1: Public spending for education as a share of GDP (2005)**

Year	Public spending on education as a share of GDP (per cent)
2000	3.4
2001	3.6
2002	3.6
2003	3.5
2004	3.5
2005	3.9
2006	Approx. 4

Source: MER<sup>330</sup>

Evaluations indicate that public spending is insufficient to meet financial needs, from the infrastructure to salaries.<sup>331</sup> New legislative proposals related to the decentralisation

<sup>328</sup> Law No. 354/2004 to Modify and Complete the Education Law No. 84/1995 and Law No. 349/2004 Regarding the Teaching Personnel Statute.

<sup>329</sup> MER, <http://www.edu.ro/index.php?module=uploads&func=download&fileId> (accessed on 27 February 2007).

<sup>330</sup> MER, *Report on the Situation of the National Education System 2005*, pp. 37–45, selected data.

<sup>331</sup> MER, *Report on the Situation of the National Education System 2005*, pp. 37–45, selected data.

of public administration will delegate more responsibilities to the local authorities in education spending. This will allow the increased participation of local resources in funding the public educational system and will also facilitate the establishment of private schools.

Education funds are collected first at the local level, mainly through VAT collection, and afterwards approved annually through the State Budget Law; they are then allocated to the local budgets and distributed afterwards, by the local authorities responsible, to the schools.

An estimate of the Ministry of Education and Research on the per-pupil cost in 2006 is around €340,<sup>332</sup> representing the total expenses incurred by the educational activities for one child. As shown below in Table A2, an estimation of the Ministry of Education and Research (2005) shows that nearly 97 per cent of the per-pupil costs come from the local administration budget (local councils).

**Table A2: Per pupil costs – breakdown by source of income (2001–2005)**

Income source	Share of per-pupil spending (per cent)				
	2001	2002	2003	2004	2005
Local budget	96.02	96.19	96.4	96.43	96.88
State budget	1.44	0.96	1.37	1.35	1.19
Other income	2.53	2.84	2.23	2.22	1.93

Source: MER<sup>333</sup>

Costs for personnel take up much of the budget, as is demonstrated in Table A3, which shows that the total spending on personnel is high, over 75 per cent of the total. The result of this is a low level of spending on school infrastructure and materials. Both indicate that the formula for financing is not followed properly, or that education in general is underfinanced.

<sup>332</sup> MER, *Draft Report on the situation of national education system 2006*, Bucharest, 2006, p. 14.

<sup>333</sup> MER, *Report on the Situation of the National Education System 2005*, pp. 37–45, selected data.

**Table A3: Estimated spending on education personnel as a percentage of total school spending, by level of education (2001–2005)**

	Spending on educational personnel, as a proportion of total spending (per cent)				
	2001	2002	2003	2004	2005
Pre-schools	82.12	78.70	75.66	77.78	73.95
Primary education (grades 1–4)	83.86	84.98	80.13	78.81	75.76
Secondary education (grades 5–8)	84.19	84.13	80.29	78.60	84.86
High school/post-high school	81.08	77.45	76.17	76.51	85.73
<b>Total (overall)</b>	<b>82.95</b>	<b>81.38</b>	<b>78.16</b>	<b>77.87</b>	<b>78.23</b>

Source: MER<sup>334</sup>**Table A4: Total education spending – breakdown by education level**

Education level	Proportion of education spending (per cent)			
	2001	2002	2003	2004
Pre-school	13.20	13.82	14.53	14.24
Primary (1–4)	19.71	19.72	20.72	52.04*
Secondary (5–8)	34.39	32.63	31.71	
High school/post-high school	32.32	32.95	32.94	27.23
<b>Total</b>	<b>99.62</b>	<b>99.12</b>	<b>99.9</b>	<b>93.51</b>

\*approximate figure for both categories

Source: MER<sup>335</sup>

The decentralisation process to be completed by 2010 will put the students, instead of the teachers, at the centre of the educational process, and is expected to allow a better administration of funds, and an increase in public spending on education to 5 per cent of GDP (16.4 million RON). The Ministry of Education received a supplemented budget of €1.126 million in 2006.

<sup>334</sup> MER, *Report on the Situation of the National Education System 2005*, pp. 37–45, selected data.

<sup>335</sup> MER, *Report on the Situation of the National Education System 2005*, pp. 37–45, selected data.

## ANNEX 2. CASE STUDIES

For each country report in this series of EUMAP reports on “Equal Access to Quality Education for Roma”, three case studies were carried out to supplement and corroborate data gathered from other sources. Information from the case studies are integrated throughout the body of each country report. Annex 2 includes additional details from each of the case study sites. In Romania the three sites are: Bobesti village (Ilfov County), Roman municipality (Neamţ county) and Şimleu Silvaniei city (Sălaj County).

### A2.1 Case Study: Bobesti village

#### A2.1.1 Administrative Unit

Glina Commune (a larger village unit) is in Ilfov County, approximately 3 kilometres from Bucharest (on the southern edge of the city). The villages that are included in the administrative structure of Glina commune are Glina, Catelu and Bobesti.

According to the 2002 census, Glina Commune had 7,147 inhabitants,<sup>336</sup> including 5,921 Romanians, 1,222 Roma, 2 Hungarians, and 2 Bulgarians. Roma therefore make up 17 per cent of the total population of Glina commune.

According to the mayor, the largest Roma community is in Bobesti village, where approximately 500 people declared Roma ethnicity on the census. The mayor estimates that there are, in fact, more Roma than shown by the census data, and that the actual number is approximately 1,000.<sup>337</sup> The Local Council includes six Roma councillors, who were included on the electoral lists of mainstream parliamentary parties.

According to the mayor, the budget allocation is made according to the most urgent needs, and not according to the ethnic composition of the settlement or streets of the commune. In 2006, for instance, Bobesti School was allocated 2.5 million ROL (Approximately 250 RON or €75) for infrastructure modernisation.<sup>338</sup>

#### A2.1.2 Roma and the Community

The Roma community of Bobesti consists of settled Roma, some of whom have preserved their traditional occupation as violinists. The infrastructure of the community is poorly developed: there are dirt roads which are impassable in rain or snow; there is no running water or sewage system in the community, nor is there a natural gas supply. The community of Bobesti is connected to the electricity network. Housing conditions are poor: most homes are improvised from all sorts of construction

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<sup>336</sup> 2002 census.

<sup>337</sup> Interview with Manole Marin, the mayor of Glina, 22 February 2007.

<sup>338</sup> Interview with Manole Marin, the mayor of Glina, 22 February 2007.

remnants collected from the garbage dump “Ochiul Boului”, near the settlement. It is visible that there is no garbage collection system in Bobesti, as household waste is dumped on the streets. In January 2007, an internationally funded project started to introduce water and construct a sewage system in Glina Commune, which is planned to finish in December 2009.<sup>339</sup>

Most of the Roma in Bobesti have low levels of education and hardly any qualifications that would allow them to obtain stable jobs. According to the estimates of the Roma school inspector, only about ten per cent of the Roma in the community work in Bucharest, while the rest live on social allowance, child benefit and on money made from recycling waste collected from the neighbouring dump site.<sup>340</sup> The Roma who are professional musicians are somewhat better off, because they have managed to get temporary jobs abroad. According to the mayor, the community is divided into two parts: half of the Roma live on the edge of poverty, while the other half have an income from abroad.<sup>341</sup> The mayor states that at present approximately 130 Roma families have social allowance files submitted to the town hall.<sup>342</sup> The Roma families who live on social allowance survive on approximately 300 RON (€85) a month.

According to the Roma school inspector, approximately 40 per cent of the Roma in Bobesti speak Romanes,<sup>343</sup> although the mayor indicated that all the Roma in Bobesti speak Romanes.<sup>344</sup> According to the school director, approximately two per cent of Roma have never been enrolled in school.<sup>345</sup>

The school-aged population of Glina commune and of Bobesti is declining, according to the mayor.<sup>346</sup>

### A2.1.3 Education

#### *The school and education network*

Bobesti school no. 3 was established in 1962. Until 1991, the school included grades one to ten, but at present only goes up to the eighth grade. The school also has two

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<sup>339</sup> Interview with Manole Marin, the mayor of Glina, 22 February 2007. Information about the project is available on the website of Bucharest municipal hall at [http://www1.pmb.ro/pmb/primar/proiecte/externa\\_nerambursabila.htm](http://www1.pmb.ro/pmb/primar/proiecte/externa_nerambursabila.htm) (accessed on 3 March 2007).

<sup>340</sup> Interview with the Roma school inspector, 22 February 2007.

<sup>341</sup> Interview with Manole Marin, the mayor of Glina, 22 February 2007.

<sup>342</sup> Interview with Manole Marin, the mayor of Glina, 22 February 2007.

<sup>343</sup> Interview with the Roma school inspector, 22 February 2007.

<sup>344</sup> Interview with Manole Marin, the mayor of Glina, 22 February 2007.

<sup>345</sup> Interview with the director of the Bobesti school no.3, 22 February 2007.

<sup>346</sup> Interview with Manole Marin, the mayor of Glina, 22 February 2007.



groups of students in the pre-school, totalling about 40 children. At present, a new pre-school is being built, within a town-hall-funded project.

There are currently a total of 170 students in Bobesti school no. 3 in primary and lower secondary cycles (grades one to eight). Except for one Romanian student who was transferred to this school for disciplinary reasons, all the other students are of Roma ethnicity.

### *Material conditions*

Several years ago, the school started a modernisation process, including the introduction of running water, central heating, indoor toilets, whitewashing the classrooms, and replacing the old windows and doors. This investment in infrastructure was made by the town hall. The old furniture was replaced with new furniture received from the Ministry of Education. However, there are still problems with the conditions at the school, according to the school director, “the school would need a sewage system, now we have the septic tank which is not enough [...]”<sup>347</sup>

The school has only one computer, which is used by the director and the school staff; the students have no access to computers or computer classes. There is no telephone line or fax machine.

The school received some equipment for the physics lab, posters and equipment for biology, as well as books for the library, which was set up a year ago. Many other teaching aids are out-of-date, however, and the chemistry laboratory is not yet functional, “we don’t have the substances, or microscopes, some of the posters are old and need to be changed”<sup>348</sup>

The school does not have a gymnasium or sports field, although the area of the school yard is large. The courtyard is somewhat neglected, the fence is broken and there is a lot of garbage around the school.

### *Human resources*

The school has had fluctuating staff, according to the principal. Out of the 13 teachers who make up the teaching staff, only 5 have tenure,<sup>349</sup> while seven are substitute teachers who teach at all the three schools in Glina Commune. This fluctuation is especially true for the primary school teachers “who obtain tenure and then they leave”.<sup>350</sup> Fluctuation affects tenured and substitute teachers alike. Some teachers

<sup>347</sup> Interview with the director of the Bobesti school no. 3, 22 February 2007.

<sup>348</sup> Interviews with teachers, Bobest, 22 February 2007.

<sup>349</sup> Tenured teachers have passed an examination and have a permanent contract to work in the school. The substitute teachers may have taken the examination and not passed it, so their employment is temporary, for the duration of one school year. At the beginning of every school year, substitute teachers fill the vacancies in the system. Substitute teachers may be qualified or unqualified.

<sup>350</sup> Interview with the director of the Bobesti school no. 3, 22 February 2007.

regard Bobesti school as a temporary job: “some stay for a couple of months, others stay for a year”,<sup>351</sup> a necessary stage to obtain transfer to schools with better student performance.

In the best cases, primary school teachers stay for two or three years. Turnover of the teaching staff is the major problem the school faces, according to the director, who noted “I would not hire them if I knew they were going to stay for a year and then leave”. Of the 13 teachers, only two live in Glina, while the other 11 commute.

The issue of turnover was even worse in previous years. According to the county school inspectorate, in the 2003–2004 school year, staff turnover in the primary school was 26.9 per cent, while in the secondary school it was over 50 per cent.<sup>352</sup> In the 2004–2005 school year, according to the county school inspectorate, out of the 19 teachers hired by the school, 14 were not qualified, and four were completing their training.<sup>353</sup>

The school has a Romanes teacher and plans to hire a second one. All the students in Bobesti study Romanes.

The school hires a counsellor who is available in the school for four hours a week. The counsellor’s role is to advise the students and the teachers, but so far, due to the reduced number of hours, the counsellor has only been working with the students.

The school does not have a school mediator, although the teachers interviewed stated that one is needed to help improve the relationship between the community and the school, and ultimately to better attendance.<sup>354</sup>

### *Patterns of segregation*

Teachers who have been teaching in this school for a long time revealed that when it was established and for a good while after that, the school was quite mixed ethnically, and at the very beginning, it was preponderantly Romanian.

About 15–20 years ago, this school had up to 80 per cent Romanian students. Up to the [1989] Revolution, that is. After that, each could choose which school to go to, in Bucharest, Glina, Catelu. Many people looked for schools in the city. After Glina school was built, which was modern, they returned. As the school is better when it is closer to where you stay, the parents chose to send their children to such schools.<sup>355</sup>

The segregation process unfolded in the transition period, after 1990, as Romanian children were taken out of this school. One of the primary school teachers, who has been working at the school for 12 years, reported that when she was hired, the school

<sup>351</sup> Interview with the director of the Bobesti school no. 3, 22 February 2007.

<sup>352</sup> Information from the Glina County School Inspectorate.

<sup>353</sup> Information from the Glina County School Inspectorate.

<sup>354</sup> Interviews with teachers, Bobesti, 22 February 2007.

<sup>355</sup> Interview with a teacher in Bobesti, 22 February 2007.

still had approximately 30–40 per cent Romanian students. The same teacher indicated that over time, parents preferred to send their children to school in Bucharest:

They started taking them to Ozana [a neighbourhood in Bucharest] once they bought cars: it is more trendy, it's in the city, it's in Bucharest. In addition, the children enjoy this daily trip to the city, it's a sort of fun for them. I don't think the schools in Bucharest are necessarily better. We have a student who was transferred here in the sixth grade from a school in Ozana, and he is a rather poor student.<sup>356</sup>

Segregation is not necessarily done on ethnic grounds, but rather on social grounds. Both Romanian and Roma students from Bobesti attend other schools in the commune or schools in Bucharest, but this is more common among ethnic Romanians. According to teachers' estimates, approximately two to three per cent of the Roma from Bobesti choose to send their children to other schools in the commune or in Bucharest.<sup>357</sup> One of the schools the Roma parents also choose is School no. 1 in Glina, which is only one kilometre away from the Bobesti school and currently where 10 to 15 per cent of the students come from Bobesti. Parents choose to send their children to School no. 1 Glina because the teaching staff is allegedly better, it has better equipment, and the children are safer there both within and around the school.<sup>358</sup>

In School no. 1 Glina, although there are two to three Roma children in every class, there is a segregated fourth grade (IV B) where Roma pupils far outnumber Romanians. According to the school inspector, no measures can be taken to sanction the schools for segregation, because the students there do not identify themselves as Roma, and moreover, the Notification issued by the Ministry of Education does not provide for sanctions in case of segregation.<sup>359</sup>

All the teachers interviewed indicated that it would be good for the school to also have Romanian students, saying:

we would like to attract more Romanian students, now the school, has been modernised [...] this is a school which – if popularised – it could attract Romanian students, too [...] I have been promoting it to people.<sup>360</sup>

Along with other schools from the county, the Bobesti school applied for funds in the Phare 2005 project "Access to education for Disadvantaged groups", hoping to become a "magnet" school for the Romanian children in the settlement, who at present commute to Bucharest schools or schools in the neighbourhood. The decision is still pending and will hinge on the quality of application submitted by the Ilfov County School Inspectorate.

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<sup>356</sup> Interview with a teacher in Bobesti, 22 February 2007.

<sup>357</sup> Interviews with teachers in Bobesti, 22 February 2007.

<sup>358</sup> Interview with parents, Bobesti, 22 February 2007.

<sup>359</sup> Interview with school inspector, 22 February 2007.

<sup>360</sup> Interviews with teachers in Bobesti, 22 February 2007.

### *Academic achievement*

From grades one to four the school results are rather poor, although according to the director, there have been no cases of functional illiteracy: “[at the end of the fourth grade] there are some who read with difficulty and some who read by syllables”.<sup>361</sup> However, according to another source, “two to three students in a class cannot read and write”<sup>362</sup> School performance is not better in the lower secondary school either. In 2006–2007, none of the pupils who completed grade eight managed to pass the national examination, which would have allowed them to continue their studies in the upper secondary school; previous years were no better:

Last year, out of the 15 students who were supposed to complete the eight grade, 14 had to repeat the year, and the only one who enrolled for the national examination did not manage to pass it.”

A teacher explained failure exclusively on the poverty that dominates the community, and on the lower secondary school students’ engagement in various jobs in the household or outside it:

The community is very poor. In the primary grades, the students keep coming, but as the boys grow up, the parents start using them for work, and if they come to school, they only do it now and then. Others simply don’t feel like coming to school.<sup>363</sup>

The director suggested that the poor school performance is due largely to absenteeism, a view confirmed by a report from the Ilfov County School Inspectorate that marks Bobesti School as one of the schools with the highest degree of school absenteeism.<sup>364</sup> Moreover, the same report points out that there are no actions that aim at improving attendance, and that the teachers believe the entire responsibility for this situation is of the students’ families.

In the schools where there are problems connected to attendance, there are no programs to remedy the situation, or if there are, they are ineffective, and it is customary to blame the families for absenteeism.<sup>365</sup>

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<sup>361</sup> Interview with the director of the Bobesti school, 22 February 2007.

<sup>362</sup> Interview with a teacher, Bobesti, 22 February 2007.

<sup>363</sup> Interview with a teacher, Bobesti,, 22 February 2007.

<sup>364</sup> Ilfov County School Inspectorate, *Raport priviind activitatea ISJ Ilfov, a conducerilor unitatilor de invatamant si a intregului personal din invatamant pe semestrul I, an scolar 2005–2006, pentru sustinerea unui invatamant de calitate in conditiile descentralizarii activitatii in invatamantul preuniversitar* (Report regarding activity of County School Inspectorate Ilfov, on the management of educational institutions and on the activities of the entire education staff in semester I, 2005–2006 school year, for supporting quality education in the circumstances of decentralization in the pre-university education), 2006, available at <http://www.isjilfov.edu.ro/images/stories/raportsemI.doc> (accessed 3 March 2007) (hereafter *Ilfov County School Inspectorate Report*).

<sup>365</sup> Ilfov County School Inspectorate Report, p. 14.

As concerns the criteria of completion, Bobesti School ranks 78<sup>th</sup> out of 80 schools included in the report.<sup>366</sup> School completion rates in Bobesti School were 61.4 per cent in the 2005–2006 academic year, as compared to the average of 82.2 per cent (including schools above lower secondary level, with ninth to twelfth grades). In primary education (first to fourth grades), its 82.4 per cent completion rate compared to the county average of 93.5 per cent, putting Bobesti School last among the county's primary schools.<sup>367</sup> Completion rates in the lower secondary level (fifth through eighth) were equally low; here the completion rate was only 32.8 per cent as compared to the average completion of 75.2 per cent for this level of schools.

Bobesti School furthermore ranks very low as concerns the percentage of students whose did not complete their grade at the end of the school year: 11.3 per cent of the students in Bobesti School, as compared to the average figure of just under five per cent for the entire school network of Ilfov County.<sup>368</sup> At the primary school level, Bobesti School has the worst results, as 8.8 per cent of the children do not have their school situation finalised at the end of the academic year, as compared to the county average figure of 1.3 per cent for primary schools. For lower secondary, the school ranks last but one, with 14.9 per cent of the students without a finalised school situation as compared to the county average of 3.3 per cent. The same report points out that in 2005–2006, there are no cases of non-enrolment in Bobesti School.<sup>369</sup>

According to the Inspector for Roma Education, if an assessment was made according to the curriculum, only 80 per cent of the primary school children would pass, and the real completion rate in lower secondary school would be closer to 50 per cent.<sup>370</sup> He reported that the teachers are not very strict, but this is not only in the preponderantly Roma schools, but also true in majority-Romanian schools as well, "If we consider standards, no student in the Romanian schools could get passing grades."<sup>371</sup>

Except for the participants in the Romanes language Olympiad, the students in Bobesti School have never participated in any school competitions for the lower secondary grades. In the Romanes Olympiad, there were 16 students from the primary grades, and 12 from the lower secondary. Two students will participate in the national level competition in the Romanes language Olympiad.

In the 2006–2007 academic year, there were two cases of repetition in grades one to four, although legally speaking these students in grades one and two cannot be made to repeat the grade. In the same school year, in the lower secondary level, the school recorded 5 cases of disruption of schooling: 4 students dropped out, and one repeated

<sup>366</sup> Ilfov County *School Inspectorate Report*, p. 39.

<sup>367</sup> Ilfov County *School Inspectorate Report*, pp. 42–43.

<sup>368</sup> Ilfov County *School Inspectorate Report*, p. 39.

<sup>369</sup> Ilfov County *School Inspectorate Report*, p. 42.

<sup>370</sup> Interview with the Roma school inspector, 22 February 2007.

<sup>371</sup> Interview with the Roma school inspector, 22 February 2007.

the grade. According to the data provided by the school inspectorate for the 2003–2004 school year, the school had 9 students who repeated the year in grades five to eight. In the same year, 35 students dropped out, the higher drop-out rates being recorded in grades six to eight (seven students from each grade level).

### *Costs*

Some families cannot afford the costs of school textbooks, materials and extracurricular activities.

The costs per school year for a family to buy 14–15 textbooks amount to 300 RON (approximately €85), and the cost of other school materials amount to another 300 RON.

Although the school organises extracurricular activities, children from poorer families cannot afford them. The last out-of-school activity was a trip to Bucharest, where the children were taken to the circus, but according to the director, “only some students went, some could not afford it, while some others were not allowed to go by their parents”<sup>372</sup>.

### *Relations with the community*

Collaboration with parents and the community is sporadic, occasioned by various school celebrations. The interviewed teachers believe that the responsibility for this poor collaboration is with the parents and the students, who are not aware of the school’s role, and they blame the social models who have not gained success as a result of doing well at school.

I believe most of them have the wrong examples to follow – footballers, popular music singers have money etc. – the French teacher has torn shoes, they don’t understand why their children should study.”<sup>373</sup>

The parents are not really involved. In the first through fourth grades they come to the school (to parents’ meetings), but as their children grow, in the fifth through eighth grades, they stop coming. They come to the end-of-year celebrations, and to the Christmas celebration, especially the parents of younger students, and the rest don’t. For instance, for the December 1 celebration (Romania’s National Day) no parent showed up. The reasons are the same why they fail to send them to school, too: what can a parent understand if they themselves went to school for two years, about what is taught in schools? Some of them collect metal waste from the dumping site [Ochiul Boului in the vicinity]<sup>374</sup>

There have been some verbal complaints from the parents as concerns the student’s enrolment in first grade. The complaints reflected the fact that parents were not happy

<sup>372</sup> Interview with the director of the Bobesti school, 22 February 2007.

<sup>373</sup> Interview with a teacher, Bobesti, 22 February 2007.

<sup>374</sup> Interview with a teacher, Bobest, 22 February 2007.

with the way the teachers were allocated because they did not have their children taught by one of the local teachers who is supposed to obtain good results with the children.<sup>375</sup> Other complaints related to the lack of security and protection for the children within the school, as the school has no warden. According to some parents, there have been cases of violence among the children in recess, and sometimes people from outside the school enter the school perimeter and disturb the educational process.<sup>376</sup> Some parents took out their children from Bobesti School and had them enrolled in Glina School due to the verbal and physical aggression which the parents say their children were exposed to from people from outside the school.<sup>377</sup>

### *Training programmes*

The director participated in two training programs within the Phare programme, on the topics of “Inclusive Education” and “Intercultural Education” (this latter was organised by Save the Children Romania), as well as a community development course organised by the Resource Center for Roma Communities. Two primary school teachers and two secondary school teachers participated in IT courses. Center Education 2000 + had a community development programme three years ago, which included the school and community of Bobesti.

There are no bilingual education programmes for the teachers who do not speak Romanes, although there are reportedly language barriers between the students and the teachers especially in the primary grades, and to a lesser extent in the secondary grades.<sup>378</sup> Bilingual education courses would be useful especially for primary school teachers.

Beginning this academic year, the school intends to hire a second Romames teacher, and to set up a position for a school mediator, if the county’s application within the Phare programme is approved. However, the school director expects it will be difficult to find a candidate meeting the requirements for the mediator post: “We cannot find people who have completed 12 grades, who are unemployed and willing to work for 3 million ROL [300 RON, €100]. And it’s an unreliable job – for 18 months of project duration.”<sup>379</sup>

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<sup>375</sup> Interviews with parents, Bobesti, 22 February 2007.

<sup>376</sup> Interviews with parents, Bobesti, 22 February 2007.

<sup>377</sup> Interviews with parents, Bobesti, 22 February 2007.

<sup>378</sup> Interview with a teacher, Bobesti, 22 February 2007.

<sup>379</sup> Interview with school director of Bobesti school no. 3, with grades one to seven, 22 February 2007.

## A2.2 Case Study: Şimleu Silvaniei city

### A2.2.1 Administrative Unit

Şimleu Silvaniei is a city situated in north-western Romania, in Sălaj County. The city of Şimleu Silvaniei includes in its administration the localities of Bic, Cehei and Pustă;<sup>380</sup> the last two districts are the subject of this case study.

The total population of Şimleu Silvaniei recorded in the 2002 census was 16,066 inhabitants. Census figures disaggregated by ethnicity put Roma as the third-largest group in the area: Romanians, 10,553 (or 65.68 per cent); Hungarians, 4,010 (or 4.95 per cent); Roma, 1,425 (or 8.86 per cent). The rest of the inhabitants declared another ethnic identity.<sup>381</sup> On the census 1,130 Romanes-speakers were recorded, making up 7.03 per cent of the total population of Şimleu Silvaniei.

### A2.2.2 Roma and the Community

The Pustă district is 7 kilometres from the city of Şimleu Silvaniei, and it is a neighbourhood predominantly inhabited by Romanians. On the edge of the Pustă district, in the periphery, is the Pustă Vale district – a residentially segregated Roma community separated from Pustă by a stretch of land approximately 500 metres wide. Although considered to be a district of Şimleu Silvaniei, both Pustă and its periphery bear the general aspect of a rural locality.

In 2002, the Roma community of Pustă Vale officially had 800 inhabitants. According to unofficial data provided by the Şanse Egale Association, in 2005 the Roma community of Pustă Vale had approximately 1,600 inhabitants. According to data provided by the office for urban management of the Şimleu I Silvaniei Town Hall to the Şanse Egale Association, there were 257 households in Pustă Vale. On the other hand, according to a Roma leader in the community itself, the *Bulibasha*, in Pustă Vale there are currently approximately 2,600 inhabitants (of whom 800 are 18 years old or under), living in 339 households. According to the *Bulibasha*, the community of Pustă Vale is the most populated neighbourhood of Şimleu I Silvaniei.

The lack of accurate census data on the population of Pustă Vale is also due to the fact that several families do not possess documents to prove ownership of their houses. Robert Vaszi, the executive director of Şanse Egale, estimates that only 20 per cent of the Roma people hold ownership documents, while the rest cannot prove that they own the land where their household stands, which prevents them from obtaining ownership documents for their houses as they cannot get construction authorisation either. In addition, according to the *Bulibasha's* estimate, approximately 250 people in the community do not have identity cards either, and of this group, over 50 are

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<sup>380</sup> According to Law 2/1968.

<sup>381</sup> 2002 census.



children without birth certificates. Roma who do not have ownership papers for their homes are unable to obtain identity cards, if they do not have them already.

The Roma community of Pustă Vale does not form a separate administrative unit but it is managed by the city council and is accounted for within the local budget of the city.

The deputy mayor of Şimleul Silvaniei states that they cannot set aside a separate budget for the community (although it is completely separated residentially), but that in theory there could be an investment policy that could target this community exclusively:

There is no separate budget file. We do not have a budget, or a chapter, or a subchapter in the budget for any of the neighbourhoods of the city separately. If there are investments, then yes, we can target one, but not as an area [...] In the area of Cehei we are replacing the drinking water supply network, an investment called SANCTIT, for small and medium-sized towns, and for the rehabilitation of infrastructure. But we do not have a separate one for Pustă Vale. Now we have built some roads, but this is not in a separate budget file.<sup>382</sup>

According to interviews with residents and the *Bulibasha* of Pustă Vale, there have been no investments in the infrastructure of the Roma community:

We went to see the mayor a couple of times to talk about the road. [...] Someone told me to look out because some money has been allocated and that they should also build us a road. I went to the mayor one morning and asked him if he would make the road in the near future. He said that the road to the school would be built because that's how much money they have, and when they get more, they would continue building [the road in the community]. When this will happen we don't know. [...] We had no one to complain to about the [lack of] water [supply]. No matter who we complain to, they don't really pay attention to you. Not only here, but in the country, overall. No one told us anything about the water. It would be good, because the children would be cleaner.<sup>383</sup>

The only costs covered by the Town Hall are the maintenance costs for the schools (heating and electricity). According to the executive director of Şanse Egale, the budget allocations for School No. 2, which is exclusively for the Roma children, are much smaller than those for schools for children with other ethnic backgrounds in the town. This was visible from the bad state of repair of the school when we visited it, and from the absence of any renovation work or investment in the building in the last years.

The Roma of Pustă Vale are represented in the Local Council of Şimleul Silvaniei by one villager, who has no right to vote, but only a consulting role within the institution.

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<sup>382</sup> Interview with Geza Hanis, deputy mayor of Şimleul, 16 October 2006.

<sup>383</sup> Interview with the *Bulibasha* on 14 October 2006.

The Roma community of Pustă Vale is a traditional one: all the members of the community speak Romanes, and they still wear their traditional costumes. The women and the girls have long braided hair; they wear long, flowery patterned skirts in bright colours, and headscarves. The men wear less traditional clothes. According to the Romani language teacher in the school, most of the inhabitants speak the *Calderash* dialect, although some speak the dialects of the *Ursars* and *Spoitors*.<sup>384</sup>

Pustă Vale is residentially segregated and totally isolated from the rest of Șimleul Silvaniei. The public institutions such as the Town Hall or the police station are over 7 kilometres away from the community, and the hospital is over 10 kilometres away. The community does not have the infrastructure that urban settlements usually have, and it does not even have the minimal infrastructure of a village. At present, there is no paved road to the Roma community of Pustă Vale; the existing dirt road is totally unusable for cars or people in rainy weather.

The isolation of the Roma community is a concern especially as concerns access to school and to health care services. According to the *Bulibasha*, in many cases the local ambulance refuses to go to the community, arguing that there are too few ambulances (two in all), the road is impossible to drive on, and the community is too far out.<sup>385</sup> The children have to walk to school for a distance of 6–14 kilometres.<sup>386</sup> There is no transport in the community, either public or private. The closest bus stop is 4 kilometres away from the community. For this reason, many of the teachers are also forced to walk this distance to the school.

The only institutions besides the school are two food stores (one on the edge of the community on the side of Pustă), and two churches. The churches – Baptist and Pentecostal – were built after 1990, and are attended by almost 80 per cent of the inhabitants.<sup>387</sup> In the community there is only one telephone booth, which is placed on the edge of the area. Access to this phone, in cases of emergency, is especially problematic for people living at the other end of the village, which stretches out for 4 kilometres, and means that they must walk a long distance.

The Pustă Vale community is not connected to the drinking water supply network or to the gas pipes, although this type of infrastructure was recently made available in Pustă, just a kilometre away. The inhabitants of Pustă Vale get their drinking water from the approximately ten wells in the community. According to the executive director of Șanse Egale, the quality of the drinking water in these wells was never examined in a laboratory. The lack of drinking water available from the supply system

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<sup>384</sup> Interview with the Romanes language teacher on 15 October 2006.

<sup>385</sup> Interview with the *Bulibasha* on 14 October 2006.

<sup>386</sup> Depending on the position in the community, which stretches out for 4 kilometres, and on the school that they attend. Prior to the visit, 94 children walked to the school in Cehei, which is 7 kilometres away.

<sup>387</sup> Reported by Robert Vaszi.

is the major problem that the people interviewed, including the *Bulibasha*, raised, and their major reason for being discontented. Limited and often difficult access to a source of drinking water leads to improper hygiene and can give rise to illnesses.

There is social stratification in the community according to occupational status. Most of them (60 per cent) are in commerce.<sup>388</sup> According to data provided by the *Bulibasha*, there are approximately 200 family businesses and other small businesses registered as acting in commerce. The commodities they trade in are feathers (ducks, hens and geese), and walnuts. The Roma who are active in commerce buy the commodities from the villages of the county, and resell them. Feathers are processed in the household. The other 40 per cent of the community members live on social allowances and do seasonal work in agriculture. Thanks to commerce, about 20 per cent of the households are “well off”, according to the *Bulibasha*.

Due to the absence of infrastructure, housing conditions of the Roma are poor, although almost 60 per cent of the houses are made of brick, and the rest of 40 per cent are made of earth or a mixture of earth and dried grass.<sup>389</sup> Over 80 per cent of the houses in the community are not connected to the electricity system, because, due to the lack of ownership documents for the houses, no contracts can be made with the electricity supplier. As they are not connected to the electricity network, some households connect to their neighbours’ network, and share the costs of electricity.<sup>390</sup> Heating is done with wood collected from the forest nearby and with waste.

According to the *Bulibasha*, the most important issues of the community are lack of drinking water, the current state of educational provision, the lack of a medical unit and of identity cards for some Roma people:

The water, which should be available in the community, because we are talking about hygiene, then education and a medical unit. The people go to town to see a doctor, seven kilometres away. If they call the ambulance, they are asked “Don’t you have cars?” There are two ambulances. And something else: people don’t have identity cards. There are about 250 who don’t have them.<sup>391</sup>

### A2.2.3 Education

#### *The school and education network*

At present, the vast majority of the children in Pustă Vale study in segregated schools. There are two primary schools and one pre-school in Pustă Vale. The older of the two schools, School No. 2 Pustă Vale, is on the edge of the community, which stretches out

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<sup>388</sup> As estimated by Robert Vaszi, executive director of “Şanse Egale”.

<sup>389</sup> As estimated by Robert Vaszi, executive director of “Şanse Egale”.

<sup>390</sup> Interview with Robert Vaszi, executive director of “Şanse Egale”.

<sup>391</sup> Interview with the *Bulibasha* on 14 October 2006.

for 4 kilometres. The area of the school is less than 100 square metres, and as judged from the outside, the building is in a very bad state of repair. The students' distribution by classes is as shown in Table A5:

**Table A5: Case study Şimleu Silvaniei: students in Pustă Vale primary school**

Grade	No. of students
1	53
2	52
3	71
4	65

Source: CSI Sălaj<sup>392</sup>

The new Pustă Vale school for children in grades one to eight was built in the community with governmental funds (6 billion ROL, 600,000 RON, €200,000). The school has two buildings, one for the primary grades, and the other for the lower secondary. Although it is a new construction, and apparently well built, in fact the land where it was built is improper for constructions because of the underground water infiltrations. The foundation of one of the buildings is visibly affected by water seepage.

As for the infrastructure, we have a problem; there is a spring that was not avoided. It should have been diverted, or a support dam should have been built to prevent the water from seeping in.<sup>393</sup>

When the researchers for this report visited the school, it did not have running water, because the supply system relies on a pump which often breaks down. Although the recent standards authorising the operation of a school stipulate that the old latrines must be pulled down, and water closets should be built in the schools, the blueprint of the building did not include toilets, and therefore Turkish-style toilets are provided in the school yard. The two buildings that make up the school have an electric heating system. When researchers visited the school, the headmistress, who was a newcomer, reported that when the building was officially taken into ownership, the builder did not test the heating system. In fact, the headmistress said that she had refused to sign the document passing ownership of the school building to the school, because in her opinion there was the risk of accidents or illness to the children. The school does not have a sports ground or playground for the children. As for the equipment, when the monitoring visit took place, there were no teaching materials, or a library or laboratory

<sup>392</sup> CSI Sălaj response to MER Notification No. 29323, sent on 17 August 2005. The cited data are from the annex of this answer.

<sup>393</sup> Interview with the school director, 15 October 2006.

equipment for the lower secondary grades (such as physics, chemistry, biology) and no computers.

According to the local paper, *Salajanul*, as a result of the notification by the Association Şanse Egale Zalău, submitted together with the Association Şanse Egale pentru Femei și Copii Zalău and ADOSER/S, the problems with infrastructure and some of the problems connected to equipment in the school could soon be resolved.

As for the equipment and teaching material provision for the school, the General School Inspector Ioan Abrudan assured the prefect that by the end of the year, the school would have the necessary equipment for the physics laboratory, and would be able to buy books for 3,200 RON. On this occasion, the prefect Andrei Todea personally donated a computer, and School No. 1 of Şimleu Silvaniei donated a computer and a printer. According to the same press release, measures will be taken to stabilise the land where the school building was raised, to build channels that would direct rainfall away from the building, and to build a playground:

As a result of the discussions, the Town Hall of Şimleu Silvaniei will provide the necessary materials for the channels, as well as the gravel to cover the school yard. Also, the Roma Community Initiative Group, together with the County Office for the Roma of the Prefect's Office and the "Şanse Egale" Association, will manage the levelling works in the school yard to prepare the space for a playground. As for drinking water, promises were made by the CSI of Sălaj County to provide a proper pump for the school.<sup>394</sup>

At present there are 371 Roma students enrolled in grades one to eight in the Pustă Vale School. The school has two classrooms, and according to a notification of the Sălaj County School Inspectorate,<sup>395</sup> 241 students attend this school in the primary grades, distributed in ten classes.

### *Enrolment and completion*

It is not clear how many children go to pre-school. According to a letter sent by the Sălaj County School Inspectorate (CSI)<sup>396</sup> the pre-school of Pustă Vale enrolls 30

<sup>394</sup> Article "Potrivit institutiei Prefectului, romii de la scoala din Pustă Vale nu sunt segregati" ("According to the Prefect's Office, the Roma in Pustă Vale are not segregated") published in *Salajanul*, issue 675 of 10.11.2006. The article is available at [http://www.salajejanul.ro/arhiva\\_b.php?act=view&numero=1088](http://www.salajejanul.ro/arhiva_b.php?act=view&numero=1088).

<sup>395</sup> Sălaj County School Inspectorate's reply to the Notification of the Ministry of Education and Research 29323 issued on 20 April 2004 regarding the prohibition of segregation. Statistical data are available in the annexes of the letter.

<sup>396</sup> Letter sent by Sălaj CSI to MER on 17 August 2005. The letter includes Sălaj CSI's reply to the ministry's request for a situation of Roma children's school segregation.

children, but on the website of the Sălaj CSI<sup>397</sup> the data show that there are 40 children enrolled. On the other hand, a report of Şanse Egale states that the number of children who go to pre-school is approximately 100.<sup>398</sup> It is very likely that a large number of pre-school aged children do not go to pre-school at all because the space available at the church is not enough for 100 children. According to the *Bulibasha*, there has been no census of school-age children that could have identified the Roma children who do not attend school (including the preparatory year for school, or “zero year”) due to the lack of birth certificates or other reasons.<sup>399</sup>

### *Academic achievement*

Parents and teachers alike agree that the school results of the Roma children at School No. 2 Pustă Vale are very poor. According to data provided by the teachers of Pustă Vale, in the 2005–2006 school year alone, 24 students did not pass the year. In addition to the formal recording of school failure (by repetition), the teachers admitted that some of the students cannot read fluently and write at the end of the fourth grade. None of the students from School No. 2 Pustă Vale ever participated in a school competition. In fact, the absence of literacy skills at the end of the fourth grade is the major source of discontent of the interviewed parents:

I was not pleased with what he had learnt before he was moved here. Now he is studying. He has begun to understand, to write his name. He is in the fifth grade.

Before the fifth grade he should have learnt to read and write. Now it's more difficult for him [in lower secondary school].<sup>400</sup>

The reasons for the substandard school results are explained differently by the teachers and the parents. Teachers cite the frequent travel of Roma families as a barrier to continuous education for the children. In addition, according to a teacher, the curriculum is too heavy for the Roma children in the community. Another teacher thinks that the Roma children's school failure is due to the “parents' mentality, that's where all starts from”.

On the other hand, the interviewed Roma parents think that the major reason for the children's poor results is the teachers' lack of interest, the discriminatory attitudes, the

<sup>397</sup> Sălaj County School Inspectorate's, *Rețea școlară, Anul școlar 2005–2006* (Data for the 2005–2006 school year), available at [http://www.isjsalaj.go.ro/index\\_files/inv\\_stat\\_urban.html](http://www.isjsalaj.go.ro/index_files/inv_stat_urban.html) (accessed on 1 March 2007).

<sup>398</sup> Study on the Situation of Housing in the Roma Communities of Pustă Vale, Dersida and Ileanda – Sălaj county, Romania 2005 (Cercetare privind situația locuințelor în comunitățile de romi din localitățile: Pustă Vale, Dersida, Ileanda – județul Sălaj, Romania 2005), unpublished report elaborated by the association “Şanse Egale”.

<sup>399</sup> At the time of writing, the Sălaj CSI had not provided statistical data upon request.

<sup>400</sup> Interviews with Roma parents from Pustă Vale, 15 October 2006.

lack of school materials and the absence of proper conditions for the educational process.

### *Patterns of segregation*

In early September, one month before the area was visited for this report, the new school for students in grades one to eight was inaugurated in the Pustă Vale community. Before analysing the situation that was created by the newly built school in the Roma community, the manner in which schooling was carried out in the lower secondary grades prior to the building of the new school must first be reviewed.

Up to the beginning of the 2006–2007 school year, lower secondary school-age Roma children (grades five to eight) were educated in the Cehei School, 7 kilometres away from the community. In the Cehei School there were 94 Roma children in grades five to eight, but they used a building that was separated from the school where the Romanian children went. According to a report of Romani CRISS, although the number of the Romanian and the Roma children was equal (188 students, of whom 94 were Roma), the building where the Roma children studied had only two classrooms, while the main building where the Romanian children studied had four.<sup>401</sup> According to the report, the adjacent building where the Roma children studied was improper for a school. In addition to insufficient space, the building was in an advanced state of deterioration, with broken windows and doors, unhygienic conditions, old furniture, a leaking roof, and so on. In addition, during the winter, there was not enough wood to heat the building. The Roma children did not have access to the equipment of the Cehei School (computers and laboratory equipment), and two of the teachers who taught the Roma children were not qualified.

The Romani CRISS report was sent to the National Council for Combating Discrimination (CNCD) in March 2003. Later, the CNCD decided<sup>402</sup> that the facts presented in detail in the report reflected discrimination, and as a consequence, Cehei School was given a warning. The Ministry of Education and Research made efforts to integrate the school, but the ultimate decision to build a new school and transfer Roma students there entirely violates the principle of desegregation.

The *Bulibasha* thinks that it would be good to have the Roma students go to school with the Romanian students. In his opinion, the presence of the Romanian students could lead to better teaching standards and an increased commitment of the teachers to support the children:

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<sup>401</sup> Romani CRISS, *Romani CRISS vs. Inspectoratul Scolar Judetean Sălaj si Scoala Cehei – Șimleul Silvaniei. Separarea copiilor romi in scoala romaneasca* (Romani Criss vs. the Sălaj County School Inspectorate and Cehei School – Șimleul Silvaniei. Segregation of Roma Children in the Romanian Education System), report, Romani Criss, unpublished.

<sup>402</sup> CNCD Decision No. 218 of 23 June 2003.

It would have been good to have Romanian students also, because I think that the teachers would have been more committed. It would have been a good thing. The subject matter that is taught to the Roma is also taught to the Romanians.

However, the newly created situation seems to be regarded by the *Bulibasha* with some optimism as compared to the previous educational provision at the school in Cehei and since access to the school in Pustă Vale was denied. The community leader even states that he would have preferred the new school to be for only Roma children, because in this way the discrimination so often encountered in the Cehei School would be avoided:

But because the situation is like this, that we do not have Romanians in the school, I think the teachers cannot discriminate. If this school is not attended, they said they would bus Romanian children from Cehei, so that the school would not be closed down. I think they don't need to bring them. But when it becomes necessary, we would not be able to oppose it. Until then the parents must send their children to school.<sup>403</sup>

As for the school results that the Roma children obtained in the lower secondary grades, it must be pointed out that in the 2005–2006 school year none of them sat for the national examination, which would have allowed them to go on to high school or vocational school. According to the information provided by the Romanes language teacher, none of the Roma students who completed lower secondary education went on to high school in the recent history of the school. Data about repetition of a grade or school drop-out of the Roma students in Cehei were not available.

## A2.3 Case Study: Roman Municipality

### A2.3.1 Administrative Unit

Roman Municipality is situated in north-eastern Romania, in Neamţ County, along the European road E 85, which crosses Romania to connect Ukraine with Bulgaria. The total population, according to the 2002 census, is 69,268 inhabitants, out of whom 1,594 (2.3 per cent) are Roma, the largest minority and the second-largest ethnic group after the Romanians (67,210 people or 97.02 per cent).<sup>404</sup>

The unofficially estimated number of the Roma inhabitants is approximately 14,000 people,<sup>405</sup> with the largest Roma community inhabiting Noua Street. The Roma of

<sup>403</sup> Interview with the *Bulibasha* on 14 October 2006.

<sup>404</sup> See 2002 census data available on the Resource Centre for Ethno Cultural Diversity website at [http://www.edrc.ro/recensamant.jsp?regiune\\_id=1&judet\\_id=253&localitate\\_id=255](http://www.edrc.ro/recensamant.jsp?regiune_id=1&judet_id=253&localitate_id=255) (accessed on 7 March 2007).

<sup>405</sup> Estimates of the total number of the population of Roman, as well as of the number of Roma inhabitants (officially identified or not), were provided by the mayor, Mr. Dan Ioan Carpusor.



Roman Municipality are represented in the local council by one Roma councillor, elected in the 2004 local elections.

A survey carried out by the Town Hall reveals the “presence of the Roma” as the third-biggest issue of the municipality, after water supply (the most severe issue), roads (the second most severe), and before dogs (the fourth most severe issue). The major problem of the Roma community, underscored by the mayor of the municipality, is lack of education, which leads to poverty and to behaviour issues in society.

### A2.3.2 Roma and the Community

#### *Background*

The Roma community is situated in the Olympic neighbourhood, which – according to the mayor – is within the perimeter of Roman, and appeared “as a necessity”. Until 2001, there was an old apartment building put up in the Communist regime, with 104 one-room apartments in the Mihai Eminescu neighbourhood downtown. Approximately 90 per cent of the people who lived in the building were Roma, and the rest were Romanians. By 2001, the building had been turned into a sort of ghetto at the heart of the town, with no utilities: no heating, no electricity and no sewage system. In 2001, the Roma from the centre of the town were moved to the Satul Olympic neighbourhood, so as to mitigate the tensions between the Roma and the Romanians, who threatened to set the building on fire.<sup>406</sup>

That was the building where the thieves of Moldova met, and exchanged tips. Most of the people there were being prosecuted. They had the entire neighbourhood living in fear and since 1989 the various mayors had tried to solve the issue by involving the police [...] In 2000, because there was such a lot of pressure from the population that we risked a major conflict between the Roma and the Romanians, which I had to mediate with the support of the police, we decided to develop a 12-billion-project with funds from the citizens [...] What did we do? We bought some stables from a company, which was within the building perimeter of the town<sup>407</sup> [...] and we hired a designer to do the technical project: we got all the authorisations that were needed and we created better living conditions for them than there [downtown] [...] they have a room, a heating stove which works, electricity, water, and outhouses [...]

[...] the moving out itself was recorded [on videotape] and we were praised for the way we handled the Roma issue. We moved them from there, where they lived like in the Stone Age [...] in a whitewashed room, with tarmac roads leading up to the building, with toilets, water, heating stove and wood, which we (the Town Hall) pay for [...] this is what the local authority was able to do. We collected 12 billion so as to mitigate the situation; they

<sup>406</sup> Interview with the mayor of Roman, 2 November 2006.

<sup>407</sup> According to the mayor, there is another neighbourhood there, where about 2,000 people live.

wanted to set them on fire. The DIAS (Special Intervention) troops from Piatra had to come out twice to prevent the conflict from getting worse.<sup>408</sup>

### *Present situation*

According to the leader of the local Roma community, Mr. Mircea Daraban, about 2,000 people live in the Olimpic neighbourhood, out of whom an estimated 40 per cent are men. The Roma live in 204 rooms, which had been stables before they were turned into rooms.

The mayor of the town pointed out that the Roma families who were moved out of the centre and into Olimpic (Fabricii Street) were given contracts:

This is what is happening – because this is their habit – they brought in other people too, relatives from the countryside. This phenomenon cannot be controlled; it is the job of the police. The police raid them periodically and check who has a contract and who doesn't, and they give them fines. In fact, they don't even do that because they are all on social support programmes.<sup>409</sup>

Later, with support from the Pacea Foundation, the Town Hall built a medical unit in Olimpic. The Town Hall also made agricultural land behind the houses in Olimpic available to the people there to use. Also, a coin-operated telephone booth was put in, but “two days after it had been put in the pole was taken down and burnt”.<sup>410</sup>

At present, the Roman Town Hall is preparing a project to bring gas for heating into the Roma community of Olimpic.

I have a project that I am working on to have gas pipes put in. But it may be in vain, because they won't have the money to pay the gas bill.<sup>411</sup>

The leader of the local “Romii Romascani” association, Liviu Daraban, points out that for the Roma inhabitants, access to public services in Olimpic is difficult given the distance between the community and the downtown area. For instance, the municipal hospital is approximately 4–5 kilometres away from the community, the police station 5–6 kilometres away, the public clinic approximately 5 kilometres away, the marketplace 3–4 kilometres away, and the Town Hall 4–5 kilometres away. When they go to town, the Roma people take a shortcut across the train tracks.<sup>412</sup>

The mayor states that the vast majority of the Roma community are beneficiaries of social allowances. Some 30–40 people have also been employed by the town cleaning

<sup>408</sup> Interview with the mayor of Roman, 2 November 2006.

<sup>409</sup> Interview with the mayor of Roman, 2 November 2006.

<sup>410</sup> Interview with the mayor of Roman, 2 November 2006.

<sup>411</sup> Interview with the mayor of Roman, 2 November 2006.

<sup>412</sup> There is another access road, too, which goes round the community first crossing Cordon, neighbouring on Roman. The distance along this is approximately 7 kilometres.

service. Roma people receive emergency funds from the Town Hall, either in the form of firewood, or as medical intervention.

The best Roma neighbourhood in Roman is in Noua Street; the people here have access to the sewage system, running water, electricity, public lighting and tarmac-covered roads. According to the mayor, the opposite of this case is Olimpic.

The Roma people's major sources of income are, according to Mayor Dan Ioan Carpusor, "thieving, social security and emergency aid",<sup>413</sup> and as for occupations, most Roma people are unqualified workers.

As for a Roma family's monthly budget, both the mayor and the local Roma leader<sup>414</sup> estimate that this is somewhere between 100 and 200 RON a month from social security benefits (approximately €30–60), except for the people who are employed in public cleaning (garbage collection), who have larger incomes (approximately 400 RON, €120).

According to the local leader, approximately 90 per cent of the Roma who live in Olimpic neighbourhood live under the poverty line. They have no relationship with the non-Roma members of the community.

### A2.3.3 Education

#### *School and education network*

After the Roma community was moved from the centre of the municipality to Olimpic, they set up classrooms for the Roma children's education in one of the stables. However, the County School Inspectorate stepped in and moved the children to another school, apparently in line with reforms taken as part of Romania's accession process to the European Union.

As for funding for the municipality's schools from the local budget, the mayor states that over half of it is passed on to the schools.<sup>415</sup> The Town Hall only withholds expenses for maintenance. For instance, for the operation of the schools (heating, telephone costs, Internet connection, electricity) they allocate annually 3.5 million RON (over €1 million). Also, for the maintenance costs (such as roof repairs, toilets, sports grounds) the Town Hall allocates 1.2 million RON (€360,400). In each school the Town Hall had central heating put in, so that at present heating is not an issue.

At present, approximately 100 Roma students go to school, in School No. 3 Roman for first- to eighth-graders (the former General School No. 3 Roman),<sup>416</sup> and 20 people

<sup>413</sup> According to information obtained from interviewing the mayor of Roman, Mr. Dan Ioan Carpusor, on 2 November 2006.

<sup>414</sup> Mr. Daraban Mircea.

<sup>415</sup> The total annual budget of Roma is 8 million RON (€2.4 million).

<sup>416</sup> At present, this is under the administration of the Sports School of Roman.

are enrolled in the remedial education class that is part of the national “Second Chance” programme (see section 3.2).<sup>417</sup>

In September 2006, School No. 3 merged with the Sports School Roman, and at present it is under the latter’s administration. The budget allocated for the previous period (April–September 2006) was, according to the chief accountant of the institution, 433,000 RON (€130,030) for personnel, utilities, scholarships, and other costs.

In the 2006–2007 school year, there were 19 classes in the school, of which two were for pre-primary education, ten for primary education (grades 1–4), and seven for grades 5–8. The total number of students is 320, of whom 231 are Romanians (72.19 per cent) and 89 Roma (27.81 per cent). From the Olimpic neighbourhood, only the students from grades 1–4 go to the Sports School, the others (grades 5–8) go to the Danubiana Technical College Roman. There are six special needs students who were included in the mainstream school.

The Neamţ County School Inspectorate declined to provide any information on the situation of Roma children in the Sports School. The distribution by years, according to an official reply sent by the Roma Sports School to Romani CRISS, is presented below:

**Table A6: Case study Roman Municipality: number of students at the Rom Sports School (school year 2006–2007)**

Grade	No. of groups / classes	Number of children		
		Total	Romanians	Roma
Pre-primary	2 groups	48	28	20
1	2 classes	34	17	17
2	2 classes	36	20	16
3	3 classes	40	20	14
4	3 classes	46	29	17
5	2 classes	32	30	2
6	1 classes	22	22	0
7	2 classes	33	31	3
8	2 classes	34	34	0
<b>Total</b>		<b>320</b>	<b>231</b>	<b>89</b>

Source: Romani CRISS<sup>418</sup>

<sup>417</sup> According to the Roma leader of the community, Mr. Daraban Mircea.

### *Human resources*

There is no Romanes language teacher in the school, but there is a Roma school mediator hired by the Pacea Foundation. There are 11 teachers (seven primary school teachers and four secondary teachers) who were trained to use active learning strategies in the Phare project.

### *Enrolment and retention*

According to the school mediator, there have been cases of Roma children dropping out of school, because the students “are sent to work and to beg”.<sup>419</sup> The mayor agreed that gradually there will be children who will start missing school, because of their social situation, as well as because the parents are illiterate, know how to “steal” or are in prison.<sup>420</sup>

### *Patterns of segregation*

According to the leader of the Association *Romii Romascani*, the Roma classes that were moved from the Olimpic neighbourhood study separately from the Romanians, on the first floor of the main building. On the other hand, the deputy director, Ms Ana Borcab, states that in the first grades the students are mixed, so that the Roma students share classes with majority students.

### *School–community relations*

Roma parents state that they are pleased with the way in which teaching is carried out at present, because the students are given homework, they are provided with a meal and there is an after-school programme that starts at noon and ends at four in the afternoon.

### *Education policies and programmes*

About the educational programmes implemented for the Roma community in Roman, especially the Phare “Access to Education for Disadvantaged Groups, with a Special Focus on Roma” especially problematic (see section 3.2.2) the mayor states that it has not helped the Roma at all.

Apart from a programme in School No. 7 Roman, the mayor does not know about any educational programmes for the Roma or about any NGO that may have implemented such a programme. However, he states that the mayor’s office submitted various projects that were not funded.

When asked about the implementation of the “Education” chapter from the Government’s *Strategy for the Improvement of the Condition of the Roma*, the mayor

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<sup>418</sup> Official reply sent by the Roma Sports School to Romani CRISS dated 17 January 2007.

<sup>419</sup> Interview with the school mediator, 1 November 2006.

<sup>420</sup> Interview with the mayor of Roman, 2 November 2006.

points out that the first step was taken for the integration of Roma by the previous Government. Also, according to him, the Roma are abandoned, because there are Roma communities who face very severe financial problems:

Unless there are programmes to integrate the Roma, things will be complicated. There will be tension as in other towns. If people have nothing to eat [...] you give so you live! Education is the key.<sup>421</sup>

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<sup>421</sup> Interview with the mayor of Roman, 2 November 2006.

## ANNEX 3. LEGISLATION CITED IN THE REPORT

### Constitution

Romanian Constitution (*Constituția României*), available in Romanian at <http://www.constitutia.ro> (accessed on 1 March 2007).

### Laws

Law no. 61 from 22 September 1993 referring to the Child Allowance Offered by the State (*Legea nr. 61 din 22 septembrie 1993 privind alocația de stat pentru copii*). Published in Monitorul Oficial (Official Monitor), no. 233 of 28 September. 1993. Available at [http://www.cdep.ro/pls/legis/legis\\_pck.htp\\_act\\_text?id=13808](http://www.cdep.ro/pls/legis/legis_pck.htp_act_text?id=13808) (accessed on 9 March 2007).

Law no.128 of 12 July 1997 regarding the Status of Teaching Personnel (*LEGE nr.128 din 12 iulie 1997 privind Statutul personalului didactic*). Available at <http://www.cs.ubbcluj.ro/files/legislatie/national/statutul.html> (accessed on 8 March 2007).

Education Law No. 84/1995 (*Legea nr. 84 din 24 iulie 1995, Legea învățământului*) available at [http://www.dreptonline.ro/legislatie/legea\\_invatamantului.php](http://www.dreptonline.ro/legislatie/legea_invatamantului.php) (accessed on 1 March 2007) and

Law No. 354/2004 to Modify and Complete the Education Act No. 84/1995 (*LEGE nr. 354 din 15 iulie 2004 pentru modificarea și completarea Legii învățământului nr. 84/1995*), available at [http://www.cdep.ro/pls/legis/legis\\_pck.htp\\_act?ida=51100](http://www.cdep.ro/pls/legis/legis_pck.htp_act?ida=51100) (accessed on 1 March 2007).

Law No. 677/2001 on Protection of Persons Concerning the Processing of Personal Data and the Free Circulation of Such Data (*Legea nr. 677/2001 pentru protecția persoanelor cu privire la prelucrarea datelor cu caracter personal și libera circulație a acestor date*)

Framework Law No. 339/2004 on Decentralisation (*LEGE-CADRU nr.339 din 12 iulie 2004 privind descentralizarea*) available at [http://www.cdep.ro/pls/legis/legis\\_pck.htp\\_act?ida=50949](http://www.cdep.ro/pls/legis/legis_pck.htp_act?ida=50949) (accessed on 1 March 2007).

Law No. 349/2004 regarding the Teaching Personnel Statute (*LEGE nr.128 din 12 iulie 1997 privind Statutul personalului didactic*), available at [http://www.cdep.ro/pls/legis/legis\\_pck.htp\\_act?ida=11432&pag=1](http://www.cdep.ro/pls/legis/legis_pck.htp_act?ida=11432&pag=1) (accessed on 1 March 2007).

Law no. 102/2005 on Setting up the National Authority for the Supervision of Personal Data Processing, entered into force 12 May 2005 (*Legea nr. 102/2005 privind înființarea, organizarea și funcționarea Autorității Naționale de Supraveghere a Prelucrării Datelor cu Caracter Personal*)

Framework Law No. 195/2006 on Decentralisation (*LEGEA-CADRU nr.195 din 22 mai 2006 a descentralizării*) available at

[http://www.cdep.ro/pls/legis/legis\\_pck.htp\\_act?nr=195&an=2006](http://www.cdep.ro/pls/legis/legis_pck.htp_act?nr=195&an=2006) (accessed on 1 March 2007).

## Decisions

Governmental Decision No. 218 of April 2002 regarding the Approval of the Methodology Regarding the Use of Child Expertise and Assessment Instruments' set for School Guidance (*Hotărârea de Guvern nr.218/2002 privind aprobarea Metodologiei pentru utilizarea setului de instrumente de expertizare și evaluare a copiilor/levelilor în vederea orientării școlare*, available at

<http://dgaspc.cchr.ro/UserFiles/File/rof%20DGASPC%202005.pdf> (accessed on 1 March 2007).

Government Decision no. 410 of 23 March 2004, regarding the Organisation and Functioning of the Ministry of Education and Research (*Hotărârea de Guvern nr. 410/20.03.2004 privind organizarea și funcționarea Ministerului Educației și Cercetării*)

Government Decision No. 1942/2004 Regarding the Nomination of the Eight Pilot Counties in which the Decentralisation of School Funding and Administration is Applied (*Hotărârea de Guvern nr. 1942–2004 privind desemnarea celor 8 județe pilot în care se aplica noul sistem de finanțare și administrare a unităților de învățământ preuniversitar de stat*)

Government Decision no. 1251/2005 regarding Some Measures for Improving Activities of Learning, Teaching, Compensatory, Catch-up and Special Protection of Children, Pupils and Young People with Special Educational Needs from the Special Education System and Integrated Special Education (*Hotărârea Guvernului nr.1251/2005 privind unele măsuri de îmbunătățire a activității de învățare, instruire, compensare, recuperare și protecție specială a copiilor/levelilor/tinerilor cu cerințe educative speciale din cadrul sistemului de învățământ special și special integrat*). Available in Romanian at

<http://www.cnrop.ise.ro/resurse/capp/reg2005.pdf> (accessed on 28 February 2007).

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Equal access to quality education for  
Roma

Serbia

## Table of Contents

1. Executive Summary and Recommendations .....	485
1.1 Executive Summary .....	485
1.2 Recommendations .....	489
1.2.1 Recommendations on monitoring and evaluation .....	489
1.2.2 Recommendations for improving access to education .....	490
1.2.3 Recommendations on improving quality of education .....	492
2. Basic Education Indicators .....	496
2.1 Data collection .....	496
2.2 Enrolment data and trends .....	497
2.2.1 Roma children in pre-school education .....	499
2.2.2 Roma children in primary education .....	501
2.3 Retention and completion .....	503
2.4 Types and extent of segregation .....	506
2.4.1 Segregation in pre-school institutions .....	506
2.4.2 Segregation in primary education .....	507
2.4.3 Segregation in special schools .....	511
2.4.4 Segregation in adult education .....	512
3. Government Educational Policies and Programmes .....	514
3.1 Government policy documents .....	515
3.2 Government education programmes .....	518
3.2.1 Minority language education .....	520
3.3 Desegregation .....	521
3.4 Roma teaching assistants / school mediators .....	523
3.5 Romanes teachers .....	525
3.6 Educational materials and curriculum policy .....	526
3.7 Teacher training and support .....	528
3.8 Discrimination monitoring mechanisms .....	531
4. Constraints on Access to Education .....	535
4.1 Structural constraints .....	535
4.2 Legal and administrative requirements .....	538
4.2.1 Pre-school education enrolment .....	538



4.2.2	Primary school enrolment .....	540
4.3	Costs .....	543
4.3.1	Pre-school education .....	543
4.3.2	Primary and secondary education .....	544
4.3.3	Financial support in education .....	545
4.4	Residential segregation/Geographical isolation .....	547
4.5	School and class placement procedures .....	549
4.5.1	Class placement in mainstream schools .....	549
4.5.2	Placement in segregated classes .....	550
4.5.3	Placement in “special schools” .....	551
4.6	Language .....	552
5.	Barriers to Quality Education .....	554
5.1	School facilities and human resources .....	554
5.1.1	The quality of school buildings .....	554
5.1.2	Teaching staff .....	556
5.2	School results .....	557
5.2.1	Completion of grades and passing to the next grade among Roma pupils .....	557
5.2.2	School marks of Roma and non-Roma pupils .....	558
5.2.3	The achievements of Roma and non-Roma pupils in the National Assessment standardised tests .....	561
5.2.4	Grade repetition rate among Roma and non-Roma pupils .....	563
5.2.5	Background versus education quality as cause for underachievement .....	563
5.3	Curricular standards .....	564
5.4	Classroom practice and pedagogy .....	567
5.5	School–community relations .....	569
5.6	Discriminatory attitudes .....	570
5.7	School inspections .....	572
ANNEX 1:	Administrative Structures .....	574
A1.1	Structure and organisation .....	574
A1.2	Legal roles and decision-making .....	575
A1.3	School funding .....	578
ANNEX 2:	Case Studies .....	582
A2.1	Case Study: Niš .....	582

A2.1.1	Administrative Unit .....	582
A2.1.2	Roma and the Community .....	583
A2.1.3	Education .....	584
A2.2	Case Study: Valjevo .....	591
A2.2.1	Administrative Unit .....	591
A2.2.2	Roma and the Community .....	592
A2.2.3	Education .....	595
A2.3	Case Study: Zemun .....	600
A2.3.1	Administrative Unit .....	600
A2.3.2	Roma and the Community .....	601
A2.3.3	Education .....	602
ANNEX 3:	Legislation cited in the report .....	611
ANNEX 4:	Bibliography .....	612
A4.1	Official documents .....	612
A4.2	Other documents .....	612
ANNEX 5:	Job Description for a Roma Teaching Assistant (RTA) .....	615

## Index of Tables

Table 1:	Official statistics on the population aged under 20 – for Roma and the national population (2002) .....	498
Table 2:	Estimates of the number of Roma children of pre-school and primary school age .....	499
Table 3:	Total number of Roma and non-Roma pupils in mainstream primary education – breakdown by grade (2002–2003 school year) .....	502
Table 4:	Number of Roma children covered by primary school education .....	503
Table 5:	Educational status of adult population (aged 25 and over) – for the national and Roma populations (1991, 2001) .....	504
Table 6:	Duration of schooling for Roma and non-Roma (2005) .....	505
Table 7:	Maximum number of children per pre-school group, by age group .....	536
Table 8:	Number of children enrolled in pre-schools, by age group (2004) .....	537
Table 9:	Financial support for socially vulnerable pupils available at the local level (2006) .....	546
Table 10:	Types of Roma settlements (2005) .....	547
Table 11:	Accessibility of pre-schools and primary schools from Roma settlements (2005) .....	548
Table 12:	Number of Roma pupils in an individual primary school – breakdown by grade (2002–2003 school year) .....	557
Table 13:	School marks (for mathematics) of Roma and non-Roma pupils in the first three grades of primary school (2005) .....	559
Table 14:	School marks (for Serbian language) of Roma and non-Roma pupils in the first three grades of primary school (2005) .....	560
Table 15:	Average school marks (for mathematics) for Roma and non-Roma boys and girls, in the first three grades of primary school (2005) .....	561
Table 16:	Average school marks (for Serbian language) for Roma and non-Roma boys and girls, in the first three grades of primary school (2005) .....	561
Table 17:	Results for Roma and non-Roma pupils, in the standardised tests for mathematics and Serbian language in Grade 3 .....	562
Table 18:	Scores in the standardised mathematics test correlated to school marks (for pass marks only) – for Roma and non-Roma pupils, at the end of the third grade of primary school (2004) .....	565
Table 19:	The quality of teaching in classes – for Roma and non-Roma pupils ....	566

Table A1.	Division of responsibilities in Serbian education .....	577
Table A2.	Decision-making bodies responsible for minority education policy .....	578
Table A3.	Zemun Case Study – Zemun district population figures .....	601
Fig A1.	The education system in Serbia .....	574

## List of abbreviations and acronyms

CIP	Centre for Interactive Pedagogy, Serbia ( <i>Centar za interaktivnu pedagogiju</i> )
EMIS	Education Management Information System, in the Ministry of Education and Sports of the Republic of Serbia ( <i>Jedinstveni informacioni sistem u obrazovanju</i> )
FOSS	Fund for an Open Society – Serbia
MES	Ministry of Education and Sports of the Republic of Serbia ( <i>Ministarstvo prosvete i sport</i> )
RCD	Roma Centre for Democracy (Valjevo) ( <i>Romski centar za demokratiju</i> )
REF	Roma Education Fund
REI	Roma Education Initiative
RTA	Roma Teacher Assistant
REC	Roma Education Centre (Niš) ( <i>Romski edukativni centar</i> )

# 1. EXECUTIVE SUMMARY AND RECOMMENDATIONS

## 1.1 Executive Summary

Serbia has gone through a period of dramatic change over the past seven years. The ongoing process of reform has acknowledged Roma children's unequal access to quality education, particularly through the country's participation in the "Decade of Roma Inclusion 2005–2015". In practice, however, progress remains uneven: as promising initiatives are developed, a host of obstacles are identified and not adequately addressed. Political changes have disrupted progress in this area, but the current Government should follow through on commitments made at the national and international levels, to ensure that Roma receive a quality education in an integrated setting. Basic data on Roma in education should be collected and maintained, both to tailor policy and to track progress. Serbia's active and experienced civil sector is a rich resource on which the Government can draw, able to offer a medium for more direct communication with Roma communities themselves.

As in most other countries, there is a lack of reliable data on Roma in the Serbian education system. The existing estimates should be treated with a degree of caution, but generally it is agreed by the Government and by NGOs that there are up to 500,000 Roma living in Serbia. Only about two per cent of children in the relevant age ranges are attending pre-school education, and fewer than 40 per cent are included in primary education. Between 70 and 90 per cent of Roma children who enrol in primary school drop out at some point. According to the official censuses, over 60 per cent of Roma have not completed even primary school. As the proportion of Roma children is increasing, immediate Government action is needed, to ensure that future generations receive a quality education that would give greater access to employment and enable them to actively participate in society.

Although there are no data on the extent of segregation of Roma children in Serbian education, evidence does point to its existence. The most frequent forms of segregation are as follows: segregation of children into separate classes; segregation of children in special schools for children with intellectual disabilities – often following improper placement procedures; segregation in adult education where Roma children under 15 are placed in schools for adult learners with an abridged curriculum. According to official information, there is only one physically segregated school in Serbia, the Vuk Karadžić Primary School in Niš. However, due to a lack of research and monitoring nationwide, the true extent of this problem is unknown. Although physical segregation may not be as common a phenomenon in Serbia as in other countries, the existence of other forms of segregation points to the failure of the mainstream system to appropriately educate diverse populations in Serbia, and reveals its overall weakness, as evidenced by the fact that Roma make up an estimated 50 to 80 per cent of children enrolled in special schools.

Roma education issues have entered the mainstream, being addressed in general policy documents, in addition to separate policy documents targeting Roma education specifically. Serbia has joined the “Decade for Roma Inclusion 2005–2015”, and has adopted action plans covering the Decade’s four priority areas, including one for education (*Decade Action Plan on Education*). Several Serbian municipalities have also adopted local strategies and/or action plans for improving Roma access to education. All national policy documents accept that the main obstacles for Roma access to education are as follows: exclusion from education and high drop-out rates; poor quality of education and overrepresentation in schools for underachievers; discrimination and segregation; lack of respect for Roma identity. However, there is a clear gap between declarations and practical implementation. A comprehensive, systematic approach to carrying out these policies is needed, as the isolated projects that have been established to date cannot effectively address the breadth of the problems identified.

Despite evidence of segregation across Serbia, formally the State does not recognise the existence of segregation, and desegregation has not so far been dealt with seriously as a matter of policy. However, in some strategic documents certain preventive measures have been proposed, and the Government should begin the research needed to gain a clear picture of the scope of segregation.

Policy documents envisage the introduction of Roma Teaching Assistants (RTAs) in pre-schools and primary schools. After piloting projects, the existing school practice has revealed serious obstacles to greater engagement of RTAs. RTAs were sometimes perceived as “intruders” by the teaching staff. Furthermore, since teaching is generally not based on interactive methodology, many RTAs had essentially nothing to do in the classroom. Importantly, the rigid required qualifications often become a barrier to RTA employment. When appropriately implemented, Roma teaching assistant programmes can be an important means to enhance participation of Roma in education. The true inclusion of RTAs in the teaching and education process in Serbia will require establishing the legal ground and financing mechanisms, working with teachers to change their practice, as well addressing practical obstacles.

Roma are officially recognised as a national minority, and Romanes as a mother tongue of a national minority. Yet, in practice, education in Romanes is only offered as an elective course in primary school – and currently only in the Autonomous Province of Vojvodina. The educational curriculum in Serbia is not very sensitive to the values of multiculturalism and identity of national minorities, and envisioned changes to the curriculum to include multiculturalism and elements of Roma culture and language have not as yet materialised. In schoolbooks, Roma are mentioned at best in the context of World War II and the Holocaust, but more often Roma are mentioned in a stereotyped and negative manner. Official teacher training programmes do not have courses on tolerance and multicultural education (including bilingual education), or a methodology for working with children from deprived backgrounds, nor other aspects of inclusive education. The Ministry of Education and Sports should work with these

training institutions to address the lack of an in-service teacher provision, and develop standards in this area to improve practice in the classroom.

Roma are often exposed to various forms of covert as well as open discrimination by members of school administrations, teachers, other children and non-Roma parents. However, there is no specific and comprehensive anti-discrimination law or anti-discrimination monitoring body in Serbia. Although the Law on Foundations of the Education System forbids discrimination, in practice there have been no cases of sanctions against alleged perpetrators of discriminatory acts in education. The European Union (EU) and other international bodies could be an important force to encourage the adoption of improved anti-discrimination mechanisms in Serbia.

There are serious structural constraints on Roma access to education. Roma children often lack pre-school preparation and as a result fare badly in schools or drop out completely. The physical capacities of existing pre-schools are not sufficient to meet the needs for pre-school-age children in general, and this particularly affects Roma children, who make up a higher proportion of this age group. In addition, the legal and administrative requirements, such as for birth and medical certificates and residence papers, as well as the practice of pre-schools defining their own (internal) criteria for admission, among other factors, pose serious obstacles to the access of Roma to pre-school education. The amended Law on the Foundations of the Education System envisions the introduction of a free and mandatory zero year to prepare all children for primary school. However, the existing infrastructure is clearly insufficient to ensure its effective implementation and the Government should allocate funds to ensure adequate places for all children to comply with such legislation.

Administrative and legal barriers, as well as hidden costs of education, are important barriers to the access of Roma to primary education. Even though children with incomplete paperwork may still be enrolled in a primary school, subject to the good will of the school's administration, expenses for school supplies, clothing, transport, and extracurricular activities become prohibitive for the majority of Roma families, who are often living in poverty. Many Roma parents agree to their children being sent to special schools, in part because these schools relieve the economic burdens of education (school supplies, transport, meals and even boarding). However, these schools deprive children of future educational and professional opportunities. The Government should make available financial assistance for disadvantaged children in mainstream education to remove these incentives.

The residential isolation of Roma settlements and bad housing conditions are also obstructing Roma access to education. In addition, insufficient knowledge of the official language of instruction and absence of bilingual education in Romanes, or of the use of bilingual techniques in early childhood education, coupled with insensitive or discriminatory assessment procedures, may often result in misplacement of Roma pupils in special schools for children with intellectual disabilities.

Roma are systematically exposed to a lower quality of education. Most schools in Serbia are run-down and in need of renovation and newer equipment. Given that many Roma live in impoverished settlements lacking adequate infrastructure and local tax investments, the quality of school buildings in Roma settlements could be even worse than average, although official information is not available.

While, formally, teachers in majority-Roma schools are equally qualified, the phenomenon of “white flight” affects both the student body and the teaching staff. This results in lowered expectations and lowered quality of instruction, and worse achievement of Roma pupils, as demonstrated by the results of standardised tests. Half of the Roma children tested in one study had not mastered elementary mathematical knowledge after the third grade, and an estimated 56 per cent have not mastered even basic knowledge of the Serbian language grammar after the third grade. In the absence of official curricular standards, Roma pupils are reportedly taught an abridged curriculum, and often automatically passed from grade to grade without acquiring basic literacy in the early grades of the primary school, precipitating their drop-out in the higher grades of the primary school. A set of clear and coherent criteria for grading, and a monitoring system to confirm that teachers respect these criteria, should be developed and put in place to address this issue.

Teachers’ prejudices play a significant role in lowering the quality of education for Roma pupils even when Roma are educated in the same classroom as non-Roma. Teachers allegedly disregard racist bullying and harassment of Roma pupils by non-Roma peers and their parents, and often themselves display discriminatory attitudes towards Roma, manifesting prejudices deeply entrenched in the local communities and society at large. Cooperation between schools and parents, if it exists at all, is superficial. Communication with Roma parents is allegedly limited to meetings at which teachers criticise Roma parents about their children.

The newly established Educational Supervision Service could, in theory, be a systematic tool for monitoring barriers and obstacles to the quality of Roma education, and also for supporting real pedagogical innovation and change on the school level. However, there is no indication that this really happens in practice, and on the local level some school inspectors appear unaware even of the existence of State educational policies to improve Roma access to education. The Ministry of Education and Sports should provide better training for inspectors, coupled with a clear mandate to identify and address cases of discrimination.



## 1.2 Recommendations

### 1.2.1 Recommendations on monitoring and evaluation

#### *Data Collection*

The Ministry of Education and Sports should do the following:

1. Ensure that the Electronic Management Information System (EMIS) contains full and reliable information, to enable systematic monitoring of the quality of education that Roma pupils receive, with a view to improving their quality of education.
2. Make regular annual reports containing information on the education of Roma children public and freely available to all relevant stakeholders.
3. Take steps to improve the overall collection of data disaggregated according to ethnic groups, including Roma and other ethnic minorities, with adequate safeguards for protecting sensitive information and identity and privacy of individuals.
4. Develop data collection procedures and mechanisms for education, to ensure that data on education disaggregated on the basis of ethnicity and gender are made publicly available.

#### *Monitoring and evaluation*

The Ministry of Education and Sports should do the following:

5. Regularly monitor and evaluate the implementation of the *Common Action Plan for Advancement of Roma Education in Serbia*<sup>1</sup> (hereafter, *Decade Action Plan for Education*), revising its priorities, measures and activities, in accordance with real achievements.
6. Develop clear indicators to monitor and evaluate the implementation of Roma-related education initiatives.
7. Evaluate the results of the implementation of the “zero year”, in cooperation with schools and kindergartens, as well as Roma stakeholders; on the basis of this evaluation, develop an action plan to improve the inclusion of Roma children.

The Education Inspectorate should do the following:

8. Establish a clear system of monitoring and sanctioning of discrimination in education.

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<sup>1</sup> *Jedinstveni akcioni plan za unapredjivanje obrazovanja Roma* (Common Action Plan for Advancement of Roma Education).

Civil society organisations should do the following:

9. Monitor and report the emergence of segregated classes and schools, and make their research available to the public and policy-makers.

### 1.2.2 Recommendations for improving access to education

#### *Structural Constraints, Legal and Administrative Requirements, Costs*

The Government of the Republic of Serbia should do the following:

10. Fulfil the measure detailed in the *Decade Action Plan for Education* on “Legal regulation of non-segregated inclusion and continued schooling” by passing an official regulation to enable the enrolment of children with incomplete personal documentation in pre-schools and schools, and to set legal criteria for the priority enrolment of disadvantaged children in pre-school.

The Ministry of Education and Sports should do the following:

11. Pending the adoption of binding legislation, send a recommendation to all schools to enrol children with incomplete personal documentation in pre-schools and primary schools.
12. Develop financial and other incentives for pre-schools to enrol children from disadvantaged families, to counteract the tendency for pre-schools to give priority to families with two working parents.
13. Fulfil the measure detailed in the *Decade Action Plan for Education*, on “Legal regulation of non-segregated inclusion and continued schooling” to ensure that all children have access to free full-day two-year pre-school, and to ensure that adequate space is available to accommodate all children.
14. Develop financial and other incentives for schools and local self-governments, with the active participation of Roma NGOs and organisations, to actively identify local Roma children left outside the school system and ensure their enrolment.
15. Ensure that mainstream primary schools can offer the same benefits to disadvantaged children as do special schools for children with intellectual disabilities (for example free school meals and school materials, including textbooks), such that these incentives do not encourage disadvantaged families to send their children to special schools rather than mainstream primary schools.
16. Introduce a national system to provide necessary educational materials (in particular textbooks and exercise books) free of charge to disadvantaged children in primary schools.

### *Residential Segregation/Geographical Isolation*

The Ministry of Education and Sports should do the following:

17. Fulfil the measure detailed in the *Decade Action Plan for Education* on legal regulation of non-segregated inclusion and continued schooling, that defines concrete measures for the prevention of segregation as well as desegregation mechanisms; in particular, provide support (via the local inspectorates) to pre-schools and schools with a tendency to have exclusively or majority Roma children, to develop desegregation programmes.
18. Redesign the local schools networks, such that pupils from residentially segregated Roma communities are equally distributed among schools in the locality.
19. Further revise the new Draft Law on Pre-School Education, to provide free transport to children coming from settlements that are one kilometre or more away from the nearest pre-school.
20. Establish a system for the ongoing monitoring of segregation in educational institutions.
21. Initiate professional and public debate about the issue of segregation.

### *School and Class Placement Procedures*

The Government of Serbia should do the following:

22. Make it legal to allow Romanes language translators to be present when Roma children with insufficient knowledge of Serbian are put before a medical commission (Commission for Categorisation of Children with Developmental Disabilities, or “Categorisation Commission”), to assess their abilities.
23. Enact official regulations that would prohibit the formation of special or segregated “Roma” classes in primary schools.

The Ministry of Education and Sports should do the following:

24. Abolish testing as a requisite for access to the first grade, and provide support within mainstream schools for educating children with learning difficulties.
25. Develop mechanisms for retesting children already committed to special schools and adult education schools, and provide them with adequate educational support to assist their return to mainstream schools.
26. Reevaluate the diagnostic and assessment tools/instruments used in the assessment of children with special educational needs, especially in terms of cultural bias.

27. Provide training to the medical commissions (the Commissions for Categorisation of Children with Developmental Disabilities, or “Categorisation Commissions”) and raise awareness of the reality of differences in language background and cultural context, which can affect a child’s performance on exams.
28. Create clear policy and procedures for transferring children from special to mainstream schools, or from segregated to mixed classes.
29. Prohibit the enrolment of Roma children of school age in schools for adult education, and transfer those pupils who are of school age from these schools to mainstream schools.

### *Language*

The Ministry of Education and Sports should do the following:

30. Develop pre-school programmes that strengthen readiness for school among Roma children, by placing particular emphasis on language acquisition and bilingual techniques.
31. Introduce an elective course on “Roma Language with Elements of National Culture” in primary schools, based on the model used in Vojvodina, and make the necessary provisions for its implementation for all of Serbia.
32. Support and foster in-service and pre-service teacher training courses covering language acquisition and methodologies for bilingual education.
33. Ensure that teacher training institutions have the proper curriculum and courses to prepare teachers of Romanes.

## 1.2.3 Recommendations on improving quality of education

### *School Facilities and Human Resources*

The Ministry of Education and Sports should do the following:

34. Allocate financial resources for school infrastructure reconstruction and maintenance, in order to bring up to par the quality of buildings in deprived areas and regions.
35. Counteract the process of “white flight” by improving the quality of education, through the provision of incentives to teachers working in schools showing a tendency to enrol higher numbers of Roma children; such incentives should be linked with assuring a better quality of education for Roma children.
36. Ensure formal conditions for the immediate implementation of the measure on legal regulation of non-segregated inclusion and continued schooling of

employing Roma Teacher Assistants (RTAs) in pre-school and primary school institutions.

37. Define recruitment criteria, procedures, job description and secured financing for Roma Teacher Assistants (RTAs), and ensure their continuous education and support through mentorship by experienced RTAs.

### *Curricular Standards*

The Ministry of Education and Sports should do the following:

38. Prioritise the development of national level curricular standards and standards of textbook quality.
39. Issue criteria for teachers to assess and grade student achievement, to prevent the subjective lowering of expectations and the inflating of grades for underachieving students.
40. Introduce standardised testing, for an independent assessment of student achievement.
41. Review the educational curricula for all schooling in pre-tertiary education with regard to diversity and multiculturalism, and make amendments to the curricula as necessary.
42. Ensure that the criteria for textbook development, creation and selection include ethnic diversity issues for all school levels, and that elements of national cultures (including Roma) are included in mandatory teaching materials
43. Accredite and support training and good quality learning materials developed by Roma NGOs, which take into account Roma history, culture and values, and support their distribution to schools in Serbia.
44. Train a national-level expert team that would provide leadership in developing multicultural education materials, taking into consideration the experience of university centres with longstanding experience in the field of Romology.

### *Classroom Practice and Pedagogy*

The Ministry of Education and Sports should do the following:

45. Urgently create a system of in-service teacher preparation, with clear criteria for the accreditation of training and services, and allow for the provision of those services by NGOs and university faculties as well as State institutions.
46. Create a system to ensure the continuous training of teachers, education advisors/inspectors, and school managers in pre-service and in-service training, in the following: child-centred pedagogy, interactive teaching methodology, individualised approach, anti-bias education, methodologies for second

language learning, multi-cultural education, and effective ways of involving parents and communities.

47. Accredite in-service teacher training providers to offer new models and practices of school-based leadership and management, student-centred instruction and parent and community involvement.
48. Clarify immediately the distinction in roles and responsibilities between the Education Inspectorates and School Supervision Services of the regional ministries of education.

The School Supervision Service should do the following:

49. Support and assist school management and teaching staff so that they can respond to the needs of Roma pupils, by developing annual working plans, adjusting curricula and introducing extracurricular activities.
50. Provide opportunities for future teachers and educators to receive experience in real educational settings (schools and pre-schools), especially with children from disadvantaged communities.
51. Conduct in-service training for school management and teaching staff on the specificities of problems encountered by the Roma community in education.
52. Encourage school management and teachers to use training resources developed by other providers.
53. Enforce equality regulations and sanction instances of providing lower quality education to children from deprived backgrounds.

Pre-service teacher training institutions should do the following:

54. Sensitise university professors to the educational needs of Roma and the importance of bilingual education, with a view to amending the curriculum of the teacher training institutions and introducing new courses that would help to educate competent human resources, to work with children from deprived surroundings.
55. Include school improvement theory and practice into the official curriculum of the teacher training institutions.

### *School–Community Relations*

The Ministry of Education and Sports should do the following:

56. Encourage and better utilise civil society experience and expertise in improving access and quality of education for Roma children, in cooperation with relevant stakeholders on the community level.

The School Supervision Services should do the following:

57. Support schools to find create ways to involve parents and communities in school life and the learning process.

### *Discriminatory Attitudes*

The Government of the Republic of Serbia should do the following:

58. Pass without delay comprehensive anti-discrimination legislation, including in the field of education, and ensure its effective implementation.

The Ministry of Education and Sports should do the following:

59. Translate the anti-discriminatory provisions of the Law on the Protection of National Minorities and the Law on the Foundations of the Education System into practical mechanisms and procedures, to ensure their effective implementation.
60. Educate teaching staff, pupils and parents on their rights in education and against discrimination.

### *School Inspections*

The Ministry of Education and Sports should do the following:

61. Give appropriate authority and support to the newly formed school supervisors to act as mentors and support to schools and teachers, and to monitor the barriers and obstacles to quality of education for Roma.

The Education Inspectorate should do the following:

62. Provide information to school inspectors on the Roma-related educational initiatives that form part of the official educational policies, with a view to inspecting their implementation.
63. Instruct school inspectors to better identify and sanction instances of discrimination against minority pupils.

## 2. BASIC EDUCATION INDICATORS

*As in most other countries, there is a lack of reliable data on Roma in the Serbian education system. The existing estimates should be treated with a degree of caution, but generally it is agreed by the Government and by NGOs that there are up to 500,000 Roma living in Serbia. Only about two per cent of children in the relevant age ranges are attending pre-school education, and fewer than 40 per cent are included in primary education. Between 70 and 90 per cent of Roma children who enrol in primary school drop out at some point. According to the official censuses, over 60 per cent of Roma have not completed even primary school. As the proportion of Roma children is increasing, immediate Government action is needed, to ensure that future generations receive a quality education that would give greater access to employment and enable them to actively participate in society.*

*Although there are no data on the extent of segregation of Roma children in Serbian education, evidence does point to its existence. The most frequent forms of segregation are as follows: segregation of children into separate classes; segregation of children in special schools for children with intellectual disabilities – often following improper placement procedures; segregation in adult education where Roma children under 15 are placed in schools for adult learners with an abridged curriculum. According to official information, there is only one physically segregated school in Serbia, the Vuk Karadžić Primary School in Niš. However, due to a lack of research and monitoring nationwide, the true extent of this problem is unknown. Although physical segregation may not be as common a phenomenon in Serbia as in other countries, the existence of other forms of segregation points to the failure of the mainstream system to appropriately educate diverse populations in Serbia, and reveals its overall weakness, as evidenced by the fact that Roma make up an estimated 50 to 80 per cent of children enrolled in special schools.*

### 2.1 Data collection

As in most other countries, there is a lack of reliable data on Roma in the Serbian education system. Among the principal reasons behind the insufficient data are the following: lack of personal documentation and/or registration of Roma, mobility of many families in search of seasonal work, and widespread unwillingness of Roma to declare themselves as such in order to avoid persistent prejudices and stereotypes.<sup>2</sup>

The deficit of disaggregated statistics is also caused by the somewhat arbitrary interpretation of the provisions of the Law on the Foundations of the Education System,<sup>3</sup> as precluding ethnic data collection. But there is no legal regulation that would expressly forbid data collection on ethnic background in Serbia.

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<sup>2</sup> Petar Lađević, secretary of the Republic Council for Minorities, meeting to present the working strategy of the Roma Education Fund (REF) for Serbia, held at the Ministry of Human and Minority Rights, Belgrade 20 April 2006.

<sup>3</sup> Law on the Foundations of the Education System, *The Official Gazette of the Republic of Serbia* (hereafter, *Official Gazette*) No. 62/03 (in force since 25 May 2003), 64/03, and Law on Amendments and Supplements to the Law on the Foundations of the Education System, 58/04 and 62/04 (in force since 5 June 2004) (hereafter, Law on the Foundations of the Education System).



The Education Management Information System (EMIS)<sup>4</sup> is currently in the process of development, in the framework of the World Bank “Education Improvement Project (2002–2006).” EMIS is a database containing information on all students, teachers, and other staff in schools; it also contains financial indicators, such as school budgets. EMIS is supposed to be updated regularly in order to ensure reliable data on all important aspects of education system at any moment. If implemented properly, this system could potentially provide the basis for monitoring the improvement of educational achievements of Roma students.

## 2.2 Enrolment data and trends

According to the latest population census of 2002 (hereafter, 2002 census), the population of Serbia is 7,498,001, of which Roma constitute 1.44 per cent (108,193).<sup>5</sup> However, both Government and NGOs admit that the number of Roma is underestimated in the census.<sup>6</sup>

There are various unofficial estimates of the Roma population, but their accuracy is also affected by the presence of large numbers of unregistered persons, particularly those who came to Serbia in the 1990s as refugees or internally displaced persons (IDPs) from other countries of the former Yugoslavia and the territory of Kosovo. In addition, from 2000 onwards, repatriation of Roma from the European Union (EU) countries began, resulting in tens of thousands of new arrivals, often also without papers.<sup>7</sup> Some estimate that the total number of Roma in Serbia may be as high as 800,000. However, the consolidated estimate is 450,000 to 500,000,<sup>8</sup> or over 6 per cent of the overall population.

According to official statistics (2002 census), 15.4 per cent of the Roma population (total 108,000) is of pre-school age, aged up to six years old (see Table 1). Taking into account the unofficial estimates of a total Roma population of between 250,000

<sup>4</sup> Further detailson the Education Management Information System (EMIS) available in Serbian on the Ministry of Education and Sports website at <http://www.mps.sr.gov.yu/code/navigate.php?Id=441> (accessed on 1 March 2007).

<sup>5</sup> Statistical Office of the Republic of Serbia, information available in Serbian at <http://webzrzs.statserb.sr.gov.yu/axd/index.php> (accessed on 7 March 2007) (hereafter, 2002 census)

<sup>6</sup> Federal Ministry of National and Ethnic Minorities, *Nacionalne manjina u SR Jugoslaviji* (National Minorities in FR Yugoslavia), Belgrade, 2001 (hereafter, Federal Ministry of National and Ethnic Minorities, *National Minorities*).

<sup>7</sup> An NGO report suggests that about 11,000 Roma have been repatriated to Serbia just from Germany (in the period 2000–2004), with no data for other EU countries. See Save the Children and the Centre for Children’s Rights, *Više od nezvanične procene – položaj romske dece u Srbiji* (Beyond an Unofficial Estimate – the Position of Roma Children in Serbia), Belgrade, Save the Children, Serbia 2006 (hereafter, Save the Children and the Centre for Children’s Rights, *Beyond an Unofficial Estimate*), p. 8.

<sup>8</sup> Federal Ministry of National and Ethnic Communities, *National Minorities*.

(estimate I) and 500,000 (estimate II), the corresponding number of Roma children of pre-school age would be between 38,500 and 77,000,<sup>9</sup> of whom 22,000 to 44,000 are aged between three and six (see Table 2).

According to the 2002 census, Roma children of primary school age (between the ages of seven and 14) constitute 16.4 per cent of the total Roma population (see Table 1). Again, taking into account the unofficial estimates of a total Roma population of 250,000 to 500,000, there may in fact be between 41,000 and 82,000 Roma children who are supposed to be covered by primary education; of these, between 5,125 and 10,250 children could be seven years old, and therefore eligible to enrol in the first grade of the primary school every school year (see Table 2).

**Table 1: Official statistics on the population aged under 20 – for Roma and the national population (2002)**

Age group (years)	National level		Roma	
	Total	per cent	Total	per cent
0–4	342,344	4.6	12,287	11.4
5–9	394,596	5.3	11,545	10.7
10–14	439,830	5.9	10,573	9.8
15–19	495,651	6.6	10,099	9.3
Total (under 20)	1,672,421	22.3	44,504	41.1
0–6 (estimate)	515,858	6.9	16,682	15.4
3–6 (estimate)	294,776	3.9	9,533	8.8
7–14 (estimate)	667,540	8.9	17,694	16.4

Source: 2002 census

<sup>9</sup> If 15.4 per cent of Roma are in the 0–6 age range, then an estimate of the number of Roma children in that age group is obtained by applying this percentage to 250,000 and 500,000, respectively (the two unofficial estimates of the Roma population).

**Table 2. Estimates of the number of Roma children of pre-school and primary school age**

Age group (years)	Official statistics (2002 census)	Unofficial estimate I (minimum)	Unofficial estimate II (maximum)
0–6	16,682	38,500	77,000
3–6	9,533	22,000	44,000
7–14	17,694	41,000	82,000
7	2,309	5,125	10,250
<b>Total Roma population</b>	<b>108,000</b>	<b>250,000</b>	<b>500,000</b>

Source: 2002 census; the Federal Ministry of National and Ethnic Communities.<sup>10</sup>

A comparison of the data from the population censuses of 1991<sup>11</sup> and 2002 reveals that the number of non-Roma children has decreased by about 2 per cent per year, while the number of Roma children has increased by about 1.5 per cent per year. Any educational policy planning aimed at increasing the net enrolment of Roma children should take into account this increase, as well as the possibility that in the coming years there may be a considerable influx of children of school age, following the mass readmission of Roma from the EU countries.

### 2.2.1 Roma children in pre-school education

According to an analysis by UNICEF, 11.8 per cent of all children aged under three, and 44.4 per cent of children aged between three and six, are covered by pre-school education; in total, therefore, around 30 per cent of the total population aged under seven in Serbia is covered by pre-school education.<sup>12</sup> These data are corroborated by information obtained by the Serbian Statistics Institute.<sup>13</sup>

There are no official data concerning pre-school education (for children aged under seven) of Roma children specifically. However, according to a representative of the

<sup>10</sup> Federal Ministry of National and Ethnic and National Communities, *National Minorities*.

<sup>11</sup> Statistical Office of the Republic of Serbia, information available in Serbian at <http://webzrzs.statserb.sr.gov.yu/axd/index.php> (accessed on 7 March 2007) (hereafter, 1992 census)

<sup>12</sup> UNICEF, *Comprehensive Analysis of Primary Education in the Federal Republic of Yugoslavia*, Belgrade, UNICEF, 2001, available at [http://www.unicef.org/serbia/resources\\_868.html](http://www.unicef.org/serbia/resources_868.html) (accessed on 2 March 2007) (hereafter, UNICEF, *Comprehensive Analysis of Primary Education*).

<sup>13</sup> For example, in 2003, there were approximately 160,000 children covered by pre-school facilities, which is around 30 per cent of children under seven. Statistical Office of the Republic of Serbia, information available in Serbian at <http://webzrzs.statserb.sr.gov.yu/axd/index.php> (accessed on 8 March 2007).

Roma National Council,<sup>14</sup> no Roma children enrol in pre-school institutions before the age of six, and even among six-year olds only a very small number are covered by pre-school education.<sup>15</sup>

The study *Roma and Education* found that around seven per cent of Roma children of pre-school age attend pre-schools.<sup>16</sup> This proportion is much lower than that for the population as a whole (27 per cent).<sup>17</sup> However, even this figure of seven per cent appears to be an overestimate, as the research sample was not sufficiently representative (respondents were all from the four major cities). The *Needs Assessment* prepared by the Roma Education Fund (REF), as part of the preparations for the “Decade of Roma Inclusion 2005–2015”,<sup>18</sup> stated that around 1,000 Roma children attend the pre-school programmes designed and carried out by NGOs; this represents around 1.3 to 2.6 per cent of Roma children aged up to six years old (Table 2).<sup>19</sup> Yet NGO projects are not a systematic solution, and there is no guarantee that these 1,000 Roma children will in future still be covered by pre-school education. For example, in Belgrade two pre-schools that had been set up in Roma settlements, and that applied the “Step-by-Step”<sup>20</sup> methodology within the framework of the Open Society Institute (OSI) programme “Kindergarten as family centre in Roma communities”, were closed when this programme ended.<sup>21</sup>

There are expectations that the situation with regard to Roma enrolment in pre-schools will improve with the introduction, from 2006, of a compulsory and free of charge

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<sup>14</sup> According to Article 19 of the Law on the Protection of Rights and Freedoms of National Minorities, “The persons belonging to national minorities may elect national councils [...] with the purpose of exercising rights of self-government regarding the use of language and script, education, information and culture.” The first Roma National Council was elected in May 2003.

<sup>15</sup> Interview with Mr. Ljuran Koka, president of the Executive Committee of the Roma National Council, Belgrade, 12 March 2006.

<sup>16</sup> N. Kočić-Rakočević and A. Miljević, *Roma and Education*, Belgrade, Roma Children’s Centre, 2003 (hereafter, Kočić-Rakočević and Miljević, *Roma and Education*).

<sup>17</sup> Kočić-Rakočević and Miljević, *Roma and Education*.

<sup>18</sup> The “Decade of Roma Inclusion 2005–2015”, an initiative supported by the Open Society Institute (OSI) and the World Bank, is an unprecedented international effort to combat discrimination and ensure that Roma have equal access to education, housing, employment and health care. Launched in February 2005 and endorsed by nine Central and Eastern European countries, the Decade is also supported by the European Commission, the Council of Europe, the Council of Europe Development Bank, and the United Nations Development Program. For further details, see the Decade website ([www.romadecade.org](http://www.romadecade.org)).

<sup>19</sup> M. Mihajlović, *Needs Assessment Study for the Roma Education Fund – Serbia (without Kosovo)*. Budapest, REF, 2004 (hereafter, REF, *Needs Assessment Serbia*).

<sup>20</sup> “Step-by-Step” is a child-centred educational programme based on interactive methods of teaching and individualised educational process.

<sup>21</sup> Interviews with Ms. Milena Mihajlović, director of the Centre for Interactive Pedagogy (CIP), Belgrade, 28 November 2006.

“zero grade” in pre-schools.<sup>22</sup> However, due to the limited capacities of pre-schools, and the fact that in many cases the pre-schools are not geographically accessible to all communities, coverage of children of pre-school age could end up benefiting mostly non-Roma children, owing to the less favourable social status of Roma. In other words, these new opportunities may only deepen the inequalities of the Roma children of pre-school age.

### 2.2.2 Roma children in primary education

Some data are available on Roma children in primary education, but these are not systematic. For example, there are figures for the 2002–2003 school year<sup>23</sup> for the number of Roma pupils in the individual grades of primary school (see Table 3). Overall, 16,337 Roma pupils were in primary education that year (including 2,105 Roma pupils in special schools),<sup>24</sup> representing 2.0 to 2.4 per cent of Roma pupils of the entire population of primary school pupils in Serbia. However, there is no similar information for other school years, so it is not possible to draw any conclusions on enrolment trends.

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<sup>22</sup> Under Article 85 of the Law on the Foundations of the Education System, the primary school preparation programme (at least six months, four hours a day) is part of pre-school education. The preparatory pre-school programme becomes compulsory starting in the 2006–2007 school year, and will cover all children born between 1 March 2000 and 1 March 2001.

<sup>23</sup> At that time Tunde Kovač, senior education advisor at the Roma Education Fund, was Deputy Minister of Education, and she initiated the data collection. The data are cited from an internal document.

<sup>24</sup> REF *Needs Assessment Serbia*, p. 19.

**Table 3: Total number of Roma and non-Roma pupils in mainstream primary education – breakdown by grade (2002–2003 school year)**

Grade	Non-Roma	Roma	
	Total	Total	per cent
1	84,096	3,206	3.81
2	82,804	2,348	2.84
3	83,120	1,882	2.26
4	82,710	1,747	2.11
5	87,408	1,732	1.98
6	85,686	1,355	1.58
7	85,841	1,018	1.19
8	88,795	944	1.06
<b>Total</b>	<b>680,460</b>	<b>14,232</b>	<b>2.09</b>

Source: Republic Institute for Statistics; and Ministry of Education and Sports<sup>25</sup>

It is not clear what proportion of the eligible Roma children (aged seven to 14) are actually covered by primary school education. According to official statistical data (Table 4), there are a total of 17,694 Roma children of primary school age in Serbia, of whom a high proportion are covered by primary education. However, based on the unofficial estimates of the Roma population (between 41,000 and 82,000 Roma children aged seven to 14), more than half may be outside the school system. Therefore, assuming that the Roma population in Serbia is at least 250,000, the most probable enrolment rate estimate does not exceed 40 per cent, according to research conducted by the Ministry Human and Minority Rights.<sup>26</sup>

<sup>25</sup> Ministry of Human and Minority Rights and the Centre for the Study of Ethnicity, *Romska naselja, uslovi života i mogućnosti integracije Roma u Srbiji* (Roma Settlements, Living Conditions and Possibilities for Roma Integration in Serbia), Belgrade, 2002 (hereafter, Ministry of Human and Minority Rights and the Centre for the Study of Ethnicity, *Roma Settlements*).

<sup>26</sup> Ministry of Human and Minority Rights and the Centre for the Study of Ethnicity, *Roma Settlements*.

**Table 4: Number of Roma children covered by primary school education**

Population estimate	Total Roma population	Roma population aged 7 to 14	Proportion of Roma children covered by primary education (per cent)
Official statistical data (2002 census)	108,193	17,694	92.3
Unofficial estimate I (minimum)	250,000	41,000	39.8
Unofficial estimate II (maximum)	500,000	82,000	19.9

Source: 2002 census; also, the Ministry of Human and Minority Rights<sup>27</sup>

However, like all information concerning Roma, the estimates of net enrolment should be viewed in a broader context. Thus, a possible explanation for high net enrolment figures in the official statistics (around 92 per cent) may be the fact that they only take into account those Roma who are integrated and are covered by the population census. A considerable part of the Roma population remains outside the census (and society at large), and thus does not feature in the official educational data. Hence, with regard to the number of Roma children not covered by primary school education, there is a significant discrepancy between unofficial estimates (between 23,000 and 64,000) and the official statistics (1,300). This discrepancy reflects the unreliability of statistics on Roma in general for Serbia, which leaves policy-makers guessing at reality.

### 2.3 Retention and completion

Table 5 illustrates the educational status of the adult Roma community in Serbia, according to the 1991 and 2002 censuses. Over this eleven-year period there has been a marked improvement in the proportion of Roma who have enrolled in (but not completed) primary school (from 26.1 per cent to 34.7 per cent). However, overall the situation has not changed; according to both censuses, about 62 or 63 per cent of Roma have not even completed primary school.

<sup>27</sup> Ministry of Human and Minority Rights and the Centre for the Study of Ethnicity, *Roma Settlements*.

**Table 5: Educational status of adult population (aged 25 and over) – for the national and Roma populations (1991, 2001)**

Educational status	Proportion of the population (per cent)		
	Roma population		Total population
Educational status	1991	2002	2002
No education	36.6	27.4	12.5
Primary school not completed	26.1	34.7	20.5
Primary school completed (eight grades)	27.1	28.2	25
Secondary school completed	8.1	9.2	32.2
College and university degree	0.9	0.4	8.9
No information	1.2	0.1	0.9
<b>Total</b>	<b>100</b>	<b>100</b>	<b>100</b>

Source: 1991 census and 2001 census

The 2005 UNDP survey *Vulnerable Groups in Central and Southeastern Europe*<sup>28</sup> found that Roma in Serbia spend half as much time in education as non-Roma who live in the same settlements – 5.5 years as opposed to 11 years (Table 6). Thus, on average, Roma in Serbia do not even complete primary school, which indicates that the State does not manage to ensure that Roma children obtain the level of education guaranteed under the Constitution.<sup>29</sup>

<sup>28</sup> UNDP, *Vulnerable Groups in Central and Southeastern Europe*, 2005, available at <http://vulnerability.undp.sk/> (accessed on 1 March 2007) (hereafter, UNDP, *Vulnerable Groups*).

<sup>29</sup> Constitution of the Republic of Serbia, 1990 (hereafter, Constitution), Section II Freedoms, Rights and Duties of Man and Citizen, Art. 32, “Education shall be accessible to everyone under equal conditions. Primary education shall be obligatory. Citizens do not pay tuition for regular education financed from public fund. Members of other nations and national minorities have the right to education in their own language in accordance with law”.



**Table 6: Duration of schooling for Roma and non-Roma (2005)**

Duration of schooling (years)	Population (aged 6+)			
	Majority population living in close proximity to Roma		Roma	
	Total	per cent	Total	per cent
None	35	3	288	18
up to 5	113	9	435	28
5–8	145	12	598	38
9–12	590	49	235	15
13–15	185	15	24	2
16+	134	11	0	0
Total	1,202	100	1,580	100
Average duration	11		5.5	

Source: UNDP<sup>30</sup>

It is also estimated that Roma children on average enrol in primary school at an older age than non-Roma; an estimated 70 per cent enrol at the age of seven, around 20 per cent at the age of seven and a half, and around ten per cent at the age of eight.<sup>31</sup>

According to the Roma National Council, not all Roma children actually enrol in the first grade of the primary school.<sup>32</sup> Of those who do enrol, a considerable number drop out already in the first grade, but the most dramatic drop-out begins in the second and third grades, when about half of Roma children enrolling in primary school are believed to terminate their schooling. The next phase of massive drop-out is between the fourth and the fifth grade of primary school, coinciding with a change from classroom teaching (having one teacher for most subjects) to subject teaching (having a different teacher in each subject). It seems that, for a considerable number of Roma children, this turning point is actually an exit point. Of those who continue their schooling after the fourth grade, some drop out after the sixth grade, and only an estimated ten per cent enrol in the seventh grade. In other words, if ten Roma children

<sup>30</sup> UNDP, *Vulnerable Groups*.

<sup>31</sup> Interview with Mr. Ljuan Koka, president of the Executive Committee of the National Council of Roma National Minority in Serbia and Montenegro, 12 March 2006.

<sup>32</sup> Interview with Mr. Ljuan Koka, president of the Executive Committee of the National Council of Roma National Minority in Serbia and Montenegro, 12 March 2006.

enrol in the primary school, five of them will enrol in the fifth grade, but only one will enrol in the seventh grade and possibly complete primary education.

Table 3 (above) illustrates the drop-out rates among Roma children in the different grades. In the 2002–2003 school year, 3,206 Roma pupils enrolled in the first grade, but only 944 enrolled in the seventh grade, implying that only 29.4 per cent of Roma children who enrolled in the primary school reached the final grade of the primary school. It should be noted that there is some discrepancy in these numbers, caused by using different sources. No one source can be treated as entirely accurate. But the compound estimate is that between 70 and 90 per cent of the Roma children who enrol in primary school drop out at some point, compared to the national average of an estimated at 4.4 per cent.<sup>33</sup>

This drastic gap suggests that mechanisms to ensure universal completion of compulsory primary education are far from effective in Serbia. (For details on the Serbian education system, including the ages for compulsory education, see Annex 1). There is a need for a broad range of policy measures targeting various social, family, and educational factors contributing to the high drop-out rate of Roma pupils.

## 2.4 Types and extent of segregation

There are no comprehensive data about the extent of segregation in education in Serbia. The lack of data, however, is not an indication that the phenomenon of segregation of Roma is not a significant problem in Serbia. Rather, more thorough and comprehensive research is needed on the types and extent of segregation.

### 2.4.1 Segregation in pre-school institutions

No information is available about the segregation of Roma children in pre-schools. The proportion of Roma children covered by pre-school education hardly exceeds one per cent. However, there are no data on whether the children are placed in mixed groups or Roma-only groups in pre-school. Also, Roma NGOs do not have information on groups where Roma children are a majority, or groups that completely consist of Roma children.

In the past ten years, the non-governmental sector has conducted various pre-school programmes, in particular under the “Step-by-Step” programme of the Fund for an Open Society – Serbia (FOSS). These programmes were organised in the Roma settlements. This was in order to make accessibility real, and the trust between the families and sending their children to pre-school in a trusted local institution made attendance more regular as well. Community pre-schools have been opened with the

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<sup>33</sup> Data are for the 1999–2000 school year. UNESCO Institute for Statistics, *Education for All – Global Monitoring Report*, UNESCO, 2007, available at <http://gmr.uis.unesco.org/> (accessed on 1 March 2007).

aim of ensuring equal access to pre-school education to Roma children, to prepare children for school using adequate methodology, and thus to prevent their unjustified enrolment in special schools. According to the Centre for Interactive Pedagogy (CIP), under whose expert guidance these programmes have been carried out, all children from these groups have enrolled in mainstream schools and been placed in non-segregated classes.

In addition, in the past three years efforts have been made to integrate community-based pre-schools into the mainstream pre-school system. The transference of pre-school groups into mainstream pre-schools has helped to change the mono-ethnic makeup of these groups (except in the case of a pre-school group in the above-mentioned Vuk Karadžić Primary School).<sup>34</sup>

#### 2.4.2 Segregation in primary education

On the basis of information available through civil society organisations,<sup>35</sup> as well as through the Roma National Council and the Federal Ministry of Human and Minority Rights,<sup>36</sup> between the 2002–2003 school year and now, only a handful of cases of segregation have been recorded in primary education:

- Segregated classes in three primary schools: in Subotica (Sečenji Ištvan primary school), Belgrade (Vlada Obradović-Kameni primary school – one class), and Bujanovac (Branko Radičević primary school – six classes from the first to the sixth grade).
- A segregated primary school in Niš (Vuk Karadžić, where over 80 per cent of pupils are Roma children).

The Minority Rights Centre reported that the school representatives and teachers gave the following reasons for forming the so-called “Roma classes” in mainstream schools: the children’s insufficient knowledge of the Serbian or Hungarian<sup>37</sup> language; the older

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<sup>34</sup> Centre for Interactive Pedagogy, *Reports of the Roma “Step by Step” Project “Kindergarten as a Family Centre 1998–2005*,” Belgrade, 2005.

<sup>35</sup> For example, the Minority Rights Centre (MRC/CPM), the Centre for Interactive Pedagogy (CIP), the Roma Education Centre (REC) and the Roma Children’s Centre (RCC/DRC).

<sup>36</sup> After the State Union of Serbia and Montenegro ceased to exist, no ministry with corresponding jurisdiction has been set up at the level of the Republic of Serbia. One of the acts passed to ensure that Serbia should continue to exercise jurisdiction as the State successor of the State Union and enacted by the Government of the Republic of Serbia at its meeting on 8 June 2006 was the Act Setting Up the Office for Human and Minority Rights, which has partially taken over areas of jurisdiction of the Ministry of Human and Minority Rights. Regulation on the Establishment of the Department for human and Minority Rights, *Official Gazette* No.49/2006.

<sup>37</sup> This problem exists in certain areas in Vojvodina, where Roma attend schools with classes taught in the Hungarian language.

age of children enrolling in the first grade;<sup>38</sup> and the protests of non-Roma parents who request that the Roma children be put into separate classes.<sup>39</sup>

Sometimes segregation is a consequence of the belated enrolment of Roma children in school (in late September) when all classes have already been formed. According to the Ministry of Human and Minority Rights and the Roma Children's Centre, this was the case with schools in Belgrade and Subotica.<sup>40</sup> The Ministry of Education and Sports sent a communiqué to all schools about the dangers of forming segregated classes.<sup>41</sup>

Educational policy in Serbia (which is analysed in more detail in section 3), is explicit in its requirement that the principle of non-segregation be observed in forming classes. If segregated classes were already formed, introduction of desegregation programmes has been envisaged. There is no legislation that explicitly treats this issue. However, until desegregation policy has been fully implemented, the problem of segregated classes is dealt with on a case-by-case basis.

It is claimed that there are no other segregated classes in Subotica and Belgrade.<sup>42</sup> However, a sprouting of new schools with segregated classes in junior grades of primary schools in Senta and Horgoš has been recorded, which again points out to the lack of information concerning segregation in Serbia.<sup>43</sup>

Although it has been insufficiently researched, the existence of segregated classes in village schools has been noted. This is illustrated by research at the local level carried out in the framework of this report in 2006.<sup>44</sup> Thus, a subsidiary of the Andra Savčić

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<sup>38</sup> In some instances, due to interventions of NGOs, schools have accepted older Roma children (aged eight to ten) to the first grade of the primary school.

<sup>39</sup> Interview with Mr. Petar Antić, director of the Minority Rights Centre in Belgrade, 17 March 2006.

<sup>40</sup> Interview with Ms. Anne-Maria Cuković of the Secretariat for Roma Education Strategy, Ministry of Human and Minority Rights, Belgrade, 23 March 2006; interview with Ms. Milica Simić coordinator of the Roma Children Centre, Belgrade, 13 March 2006.

<sup>41</sup> REF, *Draft Strategy for Serbia*, by Tunde Kovač Cerović, presented at the roundtable meeting at the Ministry for Human and Minority Rights, 20 April 2006.

<sup>42</sup> Interview with Ms. Anne-Maria Cuković of the Secretariat for Roma Education Strategy, Ministry of Human and Minority Rights, Belgrade, 23 March 2006; interview with Ms. Milica Simić coordinator of the Roma Children Centre, Belgrade, 13 March 2006.

<sup>43</sup> OSI Roundtable meeting, Belgrade, 31 October 2006. Explanatory note: the OSI held a roundtable meeting in Belgrade in October 2006 to invite critiques of the present report in draft form. Experts present included representatives of the Government, parents and non-governmental organisations.

<sup>44</sup> For each country report in this series of EUMAP reports on "Equal Access to Quality Education for Roma", three case studies were carried out to supplement and corroborate data gathered from other sources. Information from the case studies are integrated throughout the body of each country report. Annex 2 includes additional details from each of the case study sites. In Serbia the three sites are Niš, Valjevo and Zemun.

Primary School, located in the village of Grabovici near the town of Valjevo, contains a segregated class with 95 per cent of Roma children from the first to the fourth grades. From the fifth grade onwards, the children commute to attend classes in the parent primary school, at which point they are placed in ethnically mixed classes. In interviews, however, parents stressed the point that they would like their children to continue attending the school in the village subsidiary of the school, primarily because it is nearby, but also because “everyone is the same there.”<sup>45</sup> This may indicate the existence of discriminatory treatment that makes Roma pupils feel uncomfortable in the school where they are a minority (see also section 3.8).

Generally, rural schools in Serbia face complex problems due to the dwindling population, and this example of the segregated class is just one in a series of problems that are difficult to solve. Another recorded case is about two Roma settlements near Brankovina, in Valjevo Municipality. Children living in the settlements have to travel five kilometres each way to reach the nearest school. As a consequence, especially in bad weather, children skip school.<sup>46</sup>

However, according to official information, there is only one segregated school in Serbia: the Vuk Karadžić Primary School in Niš. The school is in the vicinity of a large Roma settlement comprising 4,500 inhabitants. The second-nearest school is more than two kilometres away from the settlement, and the road there is full of heavy traffic. The population gravitating towards this school is mostly of Roma origin. The process of segregation of this school has been gradual, over a period of ten years. Over this time, not only Serbian children, but also Roma children whose parents are more educated and better-off, started to avoid this school, due to poorer quality of teaching and lowered educational criteria (see sections 5.3 and 5.4).

The following assessment of school segregation has been made by the NGO Roma Education Centre *Romski edukativni centar*, hereafter REC) in Niš:

One of the key reasons is that Roma live isolated in their settlements, in ghettos. As soon as a certain number of Roma children enrol in a school, this school gets a reputation of being bad, a “Gypsy school.” As a rule, the quality of teaching diminishes in classes in which the number of Roma children is sizeable, because of lowered expectations from both sides. Parents always want to send their children to better schools. What impact do these facts have on segregation? Discrimination on the part of non-Roma parents; the pressure that “respectable” (non-Roma) parents exert on a school’s administration; a climate which is generally unhealthy, social distance, stereotypes on both sides, self-segregation of Roma; the rising tendency

<sup>45</sup> Interviews conducted in Valjevo in the period May–June 2006 by researcher Slavica Vasić. See Annex A2.2: Valjevo Case Study.

<sup>46</sup> Interviews conducted in Valjevo in the period May–June 2006 by researcher Slavica Vasić. See Annex A2.2: Valjevo Case Study.

among non-Roma children to withdraw from “Gypsy schools”, the so-called “white flight.”<sup>47</sup>

The Vuk Karadžić Primary School was included in the Roma Education Initiative (REI) project in Serbia, “Equal Chances – Integration of Roma Children and Youth into the Education System” (hereafter, the “Equal Chances” project).<sup>48</sup> For three years, a desegregation programme has been implemented in cooperation with the local NGOs, the REC and the Centre for Interactive Pedagogy (CIP), implementing partners, the Ministry of Education and Sports and the local self-government. Resources have been invested by city government in reconstruction and redecoration of the school. Quality education programmes for children have been introduced under the OSI’s “Step-by-Step” programme, and management and teaching staff have been continually trained. Roma teaching assistants (RTAs) have been engaged. Nevertheless, the progress made has not solved the problem of segregation in this school, as can be seen from the last project report:

The biggest challenge was, and still is, the primary school “Vuk Karadžić” in Niš. The school remains marginalised, in spite of actions taken in its immediate environment, with a poor turn-out of local authorities at the events organised. There are evident changes in the school environment and increase of enthusiasm among the staff, but there is still a lack of real motivation to preserve what had been achieved and to move forward. The future of the school is not clear, which affects its planning. Even the relationship with RTAs is changing due to the prevailing atmosphere in the school. In 2004/2005 academic year there were 13 non-Roma children in the first grade, this academic year (2005/2006) there are only three. This confused and discouraged them, and again cast doubts whether this project was good for the school. The survey done by the school’s social worker has

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<sup>47</sup> Interview with Ms. Refika Mustafić, director of the Roma Education Centre, Niš, 22 March 2006.

<sup>48</sup> The “Equal Chances – Integration of Roma Children and Youth into the Education System” (hereafter, “Equal Chances” project) of the Fund for an Open Society – Serbia (FOSS) was implemented from the 2002–2003 to the 2004–2005 school year, within the framework of the OSI’s Roma Education Initiative (REI), with the financial support from various donors. The main implementing partner was the Centre for Interactive Pedagogy (CIP), and the primary Roma local partners were the Roma Education Centre (REC) in Niš and the Roma Information Centre (RIC) in Kragujevac. The Project implementers created and tested, in practice, a comprehensive model for the quality education and integration of Roma children by operating at the local and national levels, including working with educational institutions, and by involving all stakeholders and supporters of the educational process (including the Ministry of Education and Sports, regional departments of the Ministry of Education and Sports, local governments, schools, Roma NGOs, pupils and their families). Project activities were implemented at the local level in Niš and Kragujevac, at the pre-school, primary and secondary school levels.

shown that non-Roma families are moving from that part of the town, so objectively the number of non-Roma children is rapidly decreasing.<sup>49</sup>

### 2.4.3 Segregation in special schools

In Serbia, there are 80 special schools in total (there are different types of special school, including those for children with different types of disabilities). According to an OECD study these are regularly attended by a total of 8,829 pupils – 7,560 at the primary level and 1,269 at the secondary level.<sup>50</sup> Within mainstream education, for children with special needs it is possible to form developmental groups in pre-schools, as well as special classes in primary schools; however, these classes form a part of the special education system, rather than mainstream education.<sup>51</sup> An analysis is underway, conducted by the Institute for Advancement of Education of the Republic of Serbia, which is expected to provide more accurate information on special schools in Serbia.<sup>52</sup>

There is no consistent information about the number of Roma children in special education. According to some estimates, Roma make up 50–80 per cent of children in special schools for children with intellectual disabilities (hereafter, “special schools”) and in special classes of mainstream schools; in Belgrade, the proportion is as high as 80–85 per cent.<sup>53</sup> Allegedly, most of these children have been wrongly assigned.<sup>54</sup>

Research conducted by Save the Children – using as a sample of eight special primary schools and four special secondary schools – found that Roma children make up 37.07 per cent of the pupils in special primary schools, and 39.34 per cent of those in special secondary schools.<sup>55</sup> A study conducted on behalf of the Roma Education Fund (REF) found that 2,000 Roma children are placed in special schools.<sup>56</sup> Combining these two data sources, it appears that about 25 per cent of Roma children are educated in special

<sup>49</sup> Fund for an Open Society – Serbia (FOSS), *Report on the Project “Equal Chances – Integration of Roma Children and Youth in the Education System”*, 2002–2005, FOSS, 2005, an internal document. The project information is available on the organisation’s website <http://www.fosserbia.org/programs/project.php?id=411> (accessed on 1 March 2007) (hereafter, FOSS, *Report on the “Equal Chances” Project*).

<sup>50</sup> Organisation for Economic Cooperation and Development (OECD), *Educational Policies for Students at Risk and those with Disabilities in South Eastern Europe*, OECD, Paris, 2006, available at [https://www.oecd.org/document/34/0,2340,en\\_2649\\_34531\\_36507298\\_1\\_1\\_1\\_1,00.htmlpp](https://www.oecd.org/document/34/0,2340,en_2649_34531_36507298_1_1_1_1,00.htmlpp) (accessed on 2 March 2007), 347–348 (hereafter, OECD, *Educational Policies*).

<sup>51</sup> Law on the Foundations of the Education System.

<sup>52</sup> The Institute for the Advancement of Education of the Republic of Serbia is a public and professional institution established by the Government of Serbia to work on improvement of the quality of education in Serbia.

<sup>53</sup> REF, *Needs Assessment Serbia*, p. 23.

<sup>54</sup> REF, *Needs Assessment Serbia*, p. 23.

<sup>55</sup> Save the Children and the Centre for Children’s Rights, *Beyond an Unofficial Estimate*.

<sup>56</sup> REF, *Needs Assessment Serbia*, p. 23.

schools. Assuming that this is a reliable estimate, this indicates a lower figure than the Save the Children estimate, but nevertheless, it cannot be considered good news that Roma children make up a quarter of the student body in Serbian special schools.

The ramifications for Roma children who have been placed in special education are negative and long-lasting. Compared to mainstream schools, the curricula of special schools are reduced, their educational standards are lower, and as a consequence, progression to higher levels of education is limited. Schooling can be continued mostly in secondary special schools training children for various trades. Needless to say, their job prospects are also very limited.

#### 2.4.4 Segregation in adult education

Another important phenomenon is the significant presence of Roma children under the age of 15 in adult education. Adult education is a formal system of education, financed through the same channels as elementary education. Adult education schools exist in all major towns in Serbia, organised either through lessons organised on a consultative basis or through regular daily classes. Such schools were originally meant to equip (adult) pupils merely with basic literacy. However, currently these schools are mostly used by those pupils who are late in enrolling in primary school, or who gave up schooling at some point, but after several years decided to return to school. The curriculum of an adult education primary school normally consists of only two subjects, mathematics and Serbian language, in addition to technical education. Once they finish the school, the graduates' diploma is, in theory, valid for enrolment in any secondary school. But in practice, based on the accelerated schedule (for example, students can complete two grades in one school year), which reflects on the decreased criteria and lack of systematic scholarship, opportunities for secondary education are usually very limited.

The research conducted by the Roma Children's Centre, *Roma and Education*, suggests that Roma, including children of school age, constitute over 90 per cent of the student body in these schools. Allegedly, Roma children attend adult education schools because they have failed to enrol in mainstream primary schools on time, or have dropped out.<sup>57</sup> The latest data provided by Save the Children indicate that the situation is even worse. Research conducted in three schools for primary adult education in the 2005–2006 school year shows that as many as 98 per cent of the children attending the schools for adult education are Roma.<sup>58</sup>

According to the teaching staff in adult education schools, the prospects for Roma children educated in adult education schools are grim. The curriculum of an adult education primary school, containing only two academic subjects, is meant to equip pupils merely with basic literacy. Once they finish the school, their opportunities are

<sup>57</sup> Kočić-Rakočević and Miljević, *Roma and Education*.

<sup>58</sup> Save the Children and the Centre for Children's Rights, *Beyond an Unofficial Estimate*.



limited to the possibility of enrolling in a trade apprenticeship lasting several months at best, and with resulting limited employment options.

Faced with the problem that the curriculum in adult education is ill-suited to the increasingly younger population of children who attend these schools (aged 10 to 15) in 2003 the school boards requested, and were granted, the approval of the Ministry of Education and Sports to make their curriculum more comprehensive. However, in 2006 the Ministry revoked this approval, allegedly because the new staff disagreed with certain decisions of the previous Ministry. However, all the schools, across all of Serbia, agreed to continue working in accordance with the more comprehensive curriculum, despite the Ministry's decision.<sup>59</sup>

It appears that the Ministry of Education and Sports has not taken any steps to solve the problem. The inclusion of children in adult education schools is not in compliance with the existing legal regulations. Under the Law on the Foundations of the System of Education, the age limit for children to enrol in primary school is nine (see also Annex A1.1). The Law on Primary Education of Adults regulates enrolment in the adult education schools from the age of 15. It has been noted that for a certain number of Roma children, this type of schooling has become the only opportunity for them to acquire any education. Although these schools are not adequate for educating children, the staff in these schools are making efforts to adjust the school curriculum and the teaching process to their pupils as much as possible.<sup>60</sup>

Although the physical segregation of Roma children and the existence of "Roma schools" may not be as common a phenomenon in Serbia as it is in other countries of the region, nevertheless segregation does exist in other forms, as is demonstrated by the data presented here. As long as a desegregation education policy is clearly mandated, and educators are informed of the consequences of segregating into separate classes – and with proper supports in place – perhaps such a type of segregation in Serbia can be rectified before it becomes too deeply engrained in the system. For the other types of segregation, appropriate measures will have to be taken. The mere existence of such types of segregation, however, points to the failure of the mainstream system to appropriately educate diverse populations in Serbia, and reveals its overall weakness.

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<sup>59</sup> OSI Roundtable, Belgrade, 31 October 2006.

<sup>60</sup> OSI Roundtable, Belgrade, 31 October 2006.

### 3. GOVERNMENT EDUCATIONAL POLICIES AND PROGRAMMES

*Roma education issues have entered the mainstream, being addressed in general policy documents, in addition to separate policy documents targeting Roma education specifically. Serbia has joined the “Decade for Roma Inclusion 2005–2015”, and has adopted action plans covering the Decade’s four priority areas, including one for education (Decade Action Plan for Education). Several Serbian municipalities have also adopted local strategies and/or action plans for improving Roma access to education. All national policy documents accept that the main obstacles for Roma access to education are as follows: exclusion from education and high drop-out rates; poor quality of education and overrepresentation in schools for underachievers; discrimination and segregation; lack of respect for Roma identity. However, there is a clear gap between declarations and practical implementation. A comprehensive, systematic approach to carrying out these policies is needed, as the isolated projects that have been established to date cannot effectively address the breadth of the problems identified.*

*Despite evidence of segregation across Serbia, formally the State does not recognise the existence of segregation, and desegregation has not so far been dealt with seriously as a matter of policy. However, in some strategic documents certain preventive measures have been proposed, and the Government should begin the research needed to gain a clear picture of the scope of segregation.*

*Policy documents envisage the introduction of Roma Teaching Assistants (RTAs) in pre-schools and primary schools. After piloting projects, the existing school practice has revealed serious obstacles to greater engagement of RTAs. RTAs were sometimes perceived as intruders by the teaching staff. Furthermore, since teaching is generally not based on interactive methodology, many RTAs had essentially nothing to do in the classroom. Importantly, the rigid required qualifications often become a barrier to RTA employment. When appropriately implemented, Roma teaching assistant programmes can be an important means to enhance participation of Roma in education. The true inclusion of RTAs in the teaching and education process in Serbia will require establishing the legal ground and financing mechanisms, working with teachers to change their practice, as well addressing practical obstacles.*

*Roma are officially recognised as a national minority, and Romanes as a mother tongue of a national minority. Yet, in practice, education in Romanes is only offered as an elective course in primary school – and currently only in the Autonomous Province of Vojvodina. The educational curriculum in Serbia is not very sensitive to the values of multiculturalism and identity of national minorities, and envisioned changes to the curriculum to include multiculturalism and elements of Roma culture and language have not as yet materialised. In schoolbooks, Roma are mentioned at best in the context of World War II and the Holocaust, but more often Roma are mentioned in a stereotyped and negative manner. Official teacher training programmes do not have courses on tolerance and multicultural education (including bilingual education), or a methodology for working with children from deprived backgrounds, nor other aspects of inclusive education. The Ministry of Education and Sports should work with these training institutions to address the lack of an in-service teacher provision, and develop standards in this area to improve practice in the classroom.*

*Roma are often exposed to various forms of covert as well as open discrimination by members of school administrations, teachers, other children and non-Roma parents. However, there is no specific and comprehensive anti-discrimination law or anti-discrimination monitoring body in Serbia. Although the Law on Foundations of the Education System forbids discrimination, in practice there have been no cases of sanctions against alleged perpetrators of discriminatory acts in education. The European*

*Union (EU) and other international bodies could be an important force to encourage the adoption of improved anti-discrimination mechanisms in Serbia.*

### 3.1 Government policy documents

Since 2000, following democratic changes in the country, Roma issues have been placed on the social and political agenda of Serbia, and have been addressed in general policy documents, as well as being featured in entirely separate policy documents.

In the period from 2002 to 2005, several strategic documents were developed, dealing with the problems of the Roma community, including education. The Ministry of Human and Minority Rights has prepared the *Strategy for the Integration and Empowerment of Roma*,<sup>61</sup> and the Ministry of Education and Sports has prepared the *Strategy for the Improvement of Roma Education in the Republic of Serbia*.<sup>62</sup> Although these strategies have not yet been formally adopted,<sup>63</sup> they articulate the strategic objectives and provide the basis for taking a targeted action.

Some Roma education issues have also been integrated into the general policy of development of Serbia, such as in the Poverty Reduction Strategy Paper (PRSP),<sup>64</sup> the National Strategy of Serbia for the Accession of Serbia and Montenegro to the European Union,<sup>65</sup> the Serbian Plan of Action for Children, or at minimum have been made a priority goal of the general educational policy – the Ministry of Education and Sports' Strategy of Education 2005–2010.<sup>66</sup> Importantly, the Strategy of Serbia for the

<sup>61</sup> Ministry of Human and Minority Rights, *Nacrt strategije za osnaživanje i davanje većih ovlašćenja Romima* (draft Strategy for the Integration and Empowerment of Roma), not formally adopted.

<sup>62</sup> Ministry of Education and Sports, *Strategija za unapređivanje obrazovanja Roma u Srbiji* (Strategy for the Improvement of Roma Education in Serbia), 2003, available at [http://www.see-educoop.net/education\\_in/pdf/str-improv-roma-educ-rep-ser-yug-srb-enl-t02.pdf](http://www.see-educoop.net/education_in/pdf/str-improv-roma-educ-rep-ser-yug-srb-enl-t02.pdf) (accessed 16 March 2007) (hereafter, *Strategy for the Improvement of Roma Education in Serbia*). The Strategy was developed by the Ministry of Education and Sports, on the initiative of the Fund for an Open Society Serbia (FOSS), as part of the Roma Education Initiative (REI) project “Equal Chances – Integration of Roma Children and Youth in the Education System” (hereafter “Equal Chances” project). The project’s team members have taken an active part in drafting the Strategy.

<sup>63</sup> The drafts were prepared by the former Federal Ministry of Human and Minority Rights, but since then Serbia and Montenegro have split up, and the documents are awaiting approval by the Serbian Government, when it is formed in 2007.

<sup>64</sup> Government of the Republic of Serbia, *Poverty Reduction Strategy Paper (PRSP)*, Belgrade, May 2004 available in English at <http://www.imf.org/external/pubs/ft/scr/2004/cr04120.pdf> (accessed on 7 March 2007).

<sup>65</sup> Government of the Republic of Serbia, *Strategija Srbije za pridruživanje Srbije i Crne Gore Evropskoj uniji* (Strategy of Serbia for the Accession of Serbia and Montenegro to the European Union), 2005, (hereafter, *Strategy of Serbia for the Accession of Serbia and Montenegro to the European Union*).

<sup>66</sup> Ministry of Education and Sports, *Strategija obrazovanja 2010-2015* (Strategy of Education, 2005–2010), Belgrade, 2005 (hereafter, *Strategy of Education, 2005–2010*).

Accession of Serbia and Montenegro to the European Union, in its chapter on education, makes a brief but significant point: “The Strategy for the Improvement of Roma Education is undergoing a stage of adoption as a priority area. From the point of view of equality, education of this national minority is the greatest challenge for the education system of Serbia.”<sup>67</sup>

Serbia-Montenegro<sup>68</sup> has joined the multilateral regional initiative, “The Decade for Roma Inclusion 2005–2015”.<sup>69</sup> In accordance with its commitments under the Decade, in 2005, Serbia adopted action plans on the Decade’s priority areas, including employment, housing and health, as well as one on education – the *Common Action Plan for the Decade of Roma Inclusion* (hereafter, *Decade Action Plan on Education*).<sup>70</sup>

The *Decade Action Plan for Education* is focused on the following four areas:

- Access to compulsory education;
- Enhancement of the quality of education;
- Implementation of integration and desegregation;
- Increasing access to pre-school, primary, secondary and adult education.

Within the framework of the Decade, projects developed by NGOs have facilitated the development of local level educational strategies and action plans in some municipalities (such as in Niš, Kragujevac,<sup>71</sup> Valjevo<sup>72</sup> and Subotica<sup>73</sup>). In these towns,

<sup>67</sup> *Strategy of Serbia for the Accession of Serbia and Montenegro to the European Union*, p. 87.

<sup>68</sup> At the start of this monitoring project, the Union of Serbia-Montenegro was still one country; however, following a referendum on independence, in May 2006 Montenegro became an independent State. Even before the dissolution of the Union, Serbia and Montenegro had developed separate Decade Action Plans.

<sup>69</sup> The “Decade of Roma Inclusion 2005–2015”, an initiative supported by the Open Society Institute (OSI) and the World Bank, is an unprecedented international effort to combat discrimination and ensure that Roma have equal access to education, housing, employment and health care. Launched in February 2005 and endorsed by nine Central and Eastern European countries, the Decade is also supported by the European Commission, the Council of Europe, the Council of Europe Development Bank, and the United Nations Development Program. For further details, see the Decade website ([www.romadecade.org](http://www.romadecade.org)).

<sup>70</sup> Government of the Republic of Serbia, *Jedinstveni akcioni plan za unapredjivanje obrazovanja Roma* (The Common Action Plan for the Advancement of Education), adopted on 27 January 2005, Belgrade, available at <http://www.romadecade.org/Action%20Plans/ap-education-serbia.doc> (accessed 16 March 2007) (hereafter, *Decade Action Plan on Education*).

<sup>71</sup> Local educational strategies were developed within the REI’s “Equal Chances” project, in 2004.

<sup>72</sup> The Roma programme of the Civic Initiatives, financed by NOVIB, supported the project of the Roma Centre for Democracy in Valjevo to make a local educational strategy (2005).

<sup>73</sup> Roma Cultural Club (Subotica), *Akcioni plan za obrazovanje Roma u Subotici* (Action Plan for Education of Roma in Subotica), 2006. The Plan was drafted within the framework of a Save the Children project.

strategic documents have been made in partnership with local self-governments, school boards and Roma civil society. The positive experiences from these towns facilitated initiatives to make local strategies and action plans in a further 12 new localities, also in the context of the Decade, so as to improve the position of Roma in the four priority areas of the Decade, including education.<sup>74</sup>

In all national policy documents, there is a more or less uniform view about the obstacles that Roma face in access to education. These problems have been analysed most systematically in the *Strategy for the Improvement of Roma Education in Serbia*, which formed the basis for the *Decade Action Plan for Education*. These problems can be categorised as follows:

- Exclusion from the education system and early drop-out (for example, due to language barrier, costs);
- Poor-quality education (for example, overrepresentation in schools for underachievers);
- Discrimination and segregation;
- Lack of respect for Roma identity.

The *Strategy of Education in Serbia (2005–2010)* was adopted in 2005 after the *Decade Action Plan for Education* had been prepared. The Strategy has integrated 35 planned activities for advancing Roma education. In addition, portions of the *Decade Action Plan for Education*, on availability and quality of education, have been directly copied into the Strategy.<sup>75</sup>

The *Decade Action Plan for Education* provides such measures as the following: inclusion of Roma children in pre-schools; assistance to pupils who underachieve in school (supplementary classes and preparation for final exams); preparation for taking the exam to enrol in a secondary school; campaigns aiming to support enrolment in secondary schools and universities, and to ensure accommodation in pupils' and student's dormitories.

The basic problem is the fact that, although policies concerning Roma education are very thorough and have been integrated in general policies, they typically remain on paper. There is an evident gap between declarations and practical implementation of policies. The implementation of educational policies is still taking the form of isolated

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<sup>74</sup> Local strategies are made as part of the project "Introduction of Local Roma Coordinators – Commissioners in Local Self-Governments" carried out jointly by the Ministry of Human and Minority Rights, the OSCE Mission and the European Centre for Minority Issues (ECMI).

<sup>75</sup> *Strategy of Education (2005–2010)*.

projects or affirmative action measures<sup>76</sup> (see section 3.2), rather than pursued in a comprehensive, systematic manner.<sup>77</sup>

### 3.2 Government education programmes

In February 2002, the Law on the Protection of Rights and Freedoms of National Minorities was adopted, which granted Roma the status of a national minority.<sup>78</sup> In accordance with this Law, as well as the Constitution<sup>79</sup> and the Charter on Human Rights, Minority Rights and Civil Rights,<sup>80</sup> Roma have the right to education in their own language in pre-school, elementary and secondary education, and the State is under an obligation to ensure that “pre-school nurses, as well as teachers and language teachers in elementary and secondary schools, will receive education in the language of national minorities or bilingual education.”<sup>81</sup>

Starting in the 2006–2007 school year, the Law on the Foundations of the Education System, which regulates all educational activities in Serbia, has introduced free and compulsory “zero grade” for all pre-school-age children.<sup>82</sup> It is expected that this measure, which is consistent with the priorities of the *Decade Action Plan for Education*, will prepare Roma children for enrolment in mainstream schools. Currently, Roma enrolment is complicated due to language problems and lack of pre-school preparation, which often results in the referral of Roma pupils to special schools (see section 4.1). However, there is no information as to how many children have benefited from the new Law. At present, the pre-school capacities are clearly insufficient to accommodate all children, and thus the Law’s implementation needs to be carefully monitored, in order to ensure that Roma pupils genuinely benefit from this measure (see section 4.5).

The Ministry of Education and Sports and the Roma National Council have the initiative and responsibility for most of the measures implementing the policy of inclusion of Roma in the education system and ensuring continuity in their education. Projects by NGOs are also underway, deriving directly from the adopted policies and carried out in cooperation with the Ministry.

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<sup>76</sup> Law on the Protection of Rights and Freedoms of National Minorities, *Official Gazette* No. 11/2002. This Law affords special opportunities to implement separate support measures for the Roma national minority. Neither the Law nor other documents define these measures, but they most frequently appear in practice in the form of favoured enrolment in secondary schools and faculties.

<sup>77</sup> OSI Roundtable, Belgrade, 31 October 2006.

<sup>78</sup> Law on the Protection of Rights and Freedoms of National Minorities, Art. 13.

<sup>79</sup> Constitution, arts. 75 and 79.

<sup>80</sup> Charter on Human Rights, Minority Rights and Civil Rights art 52, available at [http://www.mfa.gov.yu/Facts/charter\\_min.pdf](http://www.mfa.gov.yu/Facts/charter_min.pdf) (accessed 15 March 2007).

<sup>81</sup> Law on the Protection of Rights and Freedoms of National Minorities, Art. 14.

<sup>82</sup> Law on the Foundations of the Education System.

For example, the project on “Increasing Access to Pre-School Education for Roma Children”, which is supported by the Roma Education Fund (REF), has been carried out since 2005 in 30 pre-schools in Serbia. Up to 600 Roma children aged six and seven have been included in the pre-school programme in ethnically mixed groups. Participating educational institutions were guaranteed small grants and pre-school teacher training. 30 local Roma coordinators have been engaged. Their role primarily concerns facilitating cooperation between family and institutions.<sup>83</sup>

Furthermore, the Institute for Pedagogy and Adult Education of the Philosophy Faculty in Belgrade has been carrying out a project since 2005 with the aim of enabling young people aged 15–30 to complete primary school education and finish secondary vocational schools.<sup>84</sup> The project covers 250 young people from ten regions from all over Serbia. The project also engages employment agencies, which provide an overview of professions that are in demand in these localities. Knowledge about qualifications in demand on the labour market is supposed to enable young people to make a more informed decision about adequate vocational education and better employment prospects in the future. The project is expected to result in the elaboration of programmes and models of functional education, which would possibly become disseminated in practice.

The REF also supports research conducted in ten municipalities. It aims to identify barriers to Roma education, with an overview of the work of local self-governments, schools and centres for social work. The should provide answers as to in what way local self-governments,<sup>85</sup> schools and centres for social work can reduce or eliminate identified barriers and advance their programmes and activities in order to improve the educational status of Roma. The results of the project will serve as a basis for the *Strategy and Action Plan for the Improvement of Roma Education in Vojvodina*.<sup>86</sup>

The obstacles and hurdles that stand in the way of successful policy implementation are formidable. The education reform process has not been as swift and comprehensive as anticipated, reflecting on the implementation of educational policies concerning Roma. Instead of being integrated into the overall reform, Roma policies are carried out only partially and on an *ad hoc* basis. Inclusive education in practice requires serious

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<sup>83</sup> The project is carried out in cooperation between the Roma National Council and the Ministry of Education and Sports, and is supported by the Roma Education Fund from Budapest. Interview with Mr. Ljuan Koka, president of the Executive Committee of the National Council of Roma National Minority in Serbia and Montenegro, 12 March 2006.

<sup>84</sup> The project is carried out in cooperation between the Ministry of Education and Sports and the Roma National Council, and is funded by the REF. See the REF website at [http://www.romaeducationfund.hu/documents/Annex\\_2.doc](http://www.romaeducationfund.hu/documents/Annex_2.doc) (accessed 16 March 2007), p. 21.

<sup>85</sup> In cooperation with the Novi Sad Humanitarian Centre, the Union of Roma Students, the Secretariat for Education and the Secretariat for Regulations, Administration and Minorities of AP Vojvodina.

<sup>86</sup> OSI Roundtable, Belgrade, 31 October 2006.

transformation of the education system, as well as sizeable financial investments, which at this moment the system cannot sustain.

Serbia is in the process of setting up mechanisms for the implementation of State policies.<sup>87</sup> However, this process is also slower than expected, and is not sufficiently coordinated. For example, while the Ministry of Human and Minority Rights, which was an important initiator and agent of change, existed, it did not have jurisdiction at the level of the Republic of Serbia. Likewise, the Office for Human and Minority Rights, which took over its jurisdiction to advance the position of Roma in Serbia, does not have the formal power and authority to implement policies.

### 3.2.1 Minority language education

There are a number of laws regulating minority language education, from pre-school to university level:

- The Law on the Foundations of the Education System;<sup>88</sup>
- The Law on Primary School;<sup>89</sup>
- The Law on Secondary School;<sup>90</sup>
- The Law on Social Child Care;<sup>91</sup>
- The Law on Pre-School Education;<sup>92</sup>

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<sup>87</sup> A Secretariat for the Roma National Strategy was set up as an affiliate of the Ministry of Human and Minority Rights of the State Union of Serbia and Montenegro, as a joint project of this Ministry and the OSCE Mission. After transference of some areas of jurisdiction of this Ministry to the level of the Republic of Serbia, the Secretariat was officially declared an affiliate of the Office for Human and Minority Rights. The Office for Roma Inclusion has been set up as an affiliate of the Executive Council of Vojvodina in 2005 with the support of the FOSS. The Coordinating Centre for Integration of Roma has been set up by the Belgrade City Assembly.

<sup>88</sup> Supplements are available in Serbian on the Government of the Republic of Serbia website, available at <http://www.parlament.sr.gov.yu>.

<sup>89</sup> Law on Primary School, *Official Gazette* No. 50/92, 53/92, 67/93, 48/94, 66/94. Law on Amendments and Supplements to the Law on Primary School, *Official Gazette* No. 22/2002, available in Serbian on the Government of the Republic of Serbia website (<http://www.parlament.sr.gov.yu>)

<sup>90</sup> Law on Secondary School, *Official Gazette* No. 50/92, 53/93, 67/93, 48/94, 24/96, 23/2002, 62/2003, 64/2003.

<sup>91</sup> Law on Social Child Care, *Official Gazette* No. 49/92, 29/93, 53/93, 67/93, 28/94, 47/94, 48/94, 25/96, 29/01, available in Serbian on the Government of the Republic of Serbia website (<http://www.parlament.sr.gov.yu>).

<sup>92</sup> Ministry of Education and Sports, Draft Law on Pre-School Education, adopted by the Government of the Republic of Serbia on 18 May 2006 and referred to the Serbian Parliament for adoption (hereafter, *Draft Law on Pre-School Education*).



- The Law on Textbooks and Other Teaching Aids;<sup>93</sup>
- The Law on Higher Education;<sup>94</sup>
- The Law on Activities of Public Interest in the Field of Culture;<sup>95</sup>
- The Law on Defining of Competences of an Autonomous Province;<sup>96</sup>
- The Law on the Protection of Rights and Freedoms of National Minorities in Federal Republic of Yugoslavia.<sup>97</sup>

By law, the State must provide education in the languages of national minorities, or bilingually, if 15 (or fewer, with Ministry of Education and Sports permission) pupils in a school request it. Textbooks and teaching aids will be also provided in languages of national minorities, in accordance with the Law on Textbooks and Other Teaching Aids, or, pending Ministry of Education and Sports approval, minority pupils may use textbooks from their “kin” state (for example, Hungary).

Romanes has been officially recognised as a mother tongue of a national minority. In the 2002 population census, 76 per cent of citizens who declared themselves as Roma stated that their mother tongue was Romanes. Serbia has ratified the European Charter for Regional or Minority Languages, making a declaration that it concurred that the provisions of that Charter would apply in the Republic of Serbia in connection with Romanes in education.<sup>98</sup>

However, so far, education in Romanes (or bilingual education including Romanes) has not been offered in any school in Serbia, although some elective courses are available (see sections 3.5 and 3.6).

### 3.3 Desegregation

Formally, the State does not recognise the existence of segregation, and desegregation has not so far been dealt with seriously as a matter of policy.<sup>99</sup> However, in some strategic documents certain preventive measures have been envisaged.

The draft *Strategy for the Improvement of Roma Education* contains one part dealing with the problem of discrimination and segregation in education.<sup>100</sup>

<sup>93</sup> Law on Textbooks and Other Teaching Aids, Draft Law on Textbooks and Other Teaching Aids available in Serbian on the Ministry of Education and Sports website (<http://www.mps.sr.gov.yu>).

<sup>94</sup> Law on Higher Education, Ministry of Education and Sports, *Official Gazette* No. 76/2005, 30 August 2005.

<sup>95</sup> Law on Activities of Public Interest in the Field of Culture, *Official Gazette* No. 49/92.

<sup>96</sup> Law on Defining of Competences of an Autonomous Province, *Official Gazette* No. 6/2002.

<sup>97</sup> Law on Rights and Freedoms of National Minorities in FRY, *Official Gazette* No. 11, 2002.

<sup>98</sup> Law on Ratification of the European Charter for Regional and Minority Languages, Art. 3.

<sup>99</sup> FOSS, *Report on the “Equal Chances” Project*.

The *Decade Action Plan for Education* defines in more detail concrete measures for prevention of segregation as well as desegregation mechanisms. The Plan's anti-segregation measures include the following:<sup>101</sup>

- Ensuring legal regulation for non-segregated inclusion and continual schooling and setting criteria for enrolment policy based on desegregation principles;
- Research (by the Ministry of Education and Sports) into the conditions, causes and modalities of segregation in the education system;
- Developing a desegregation programme for schools and pre-school institutions with a tendency to have exclusively or majority Roma children;
- Monitoring of segregation in education on the basis of previously made indicators.

There is no information whether the implementation of any of these measures has in fact begun as of 2006, nor any information about funding.<sup>102</sup> According to the Minority Rights Centre, there have been merely *ad hoc* responses to warnings by NGOs about the appearance of segregation in some schools and local communities.<sup>103</sup>

Concerning the segregation of Roma children into special schools, strategically it has been envisaged that a special enrolment policy for Roma children and young people will be elaborated, to prevent their unjustifiable enrolment in special schools.<sup>104</sup> For children already attending special schools, it has been envisaged that they will be transferred to mainstream schools after retesting; adequate transitory programmes should be provided facilitating their enrolment in a corresponding grade of a mainstream school.<sup>105</sup> However, in practice, these measures have not yet begun to be carried out, ostensibly because they require elaboration and implementation of a complex set of activities of which the system is not yet capable. The resistance of experts and practitioners in the field of special education has been noted, deriving from their fear that introduction of inclusion in mainstream system of education would make their job redundant.<sup>106</sup>

Even though experts and civil sector representatives agree that segregation of children in education is not acceptable, there are dissenting opinions, arguing that Roma children sometimes feel better in separate classes. In mixed classes their exposure to

<sup>100</sup> *Draft Strategy for the Improvement of Roma Education*, section 4.3, p. 14.

<sup>101</sup> *Decade Action Plan for Education*, pp. 14–15.

<sup>102</sup> REF Strategy for Serbia – presented and analysed at the meeting of Education Committee of the League for the Decade of Roma on April 22, 2006 in Belgrade.

<sup>103</sup> Interview with Mr. Petar Antić, director of the Minority Rights Centre in Belgrade, 17 March 2006.

<sup>104</sup> *Decade Action Plan for Education*.

<sup>105</sup> *The Strategy for Improvement of Roma Education in Serbia*,

<sup>106</sup> OSI Roundtable, Belgrade, 31 October 2006.

discrimination is greater, and it is claimed that this is a high price to pay.<sup>107</sup> Some Roma parents share the same concern (see section 2.4.1).

Many concur that segregation is not just a political but also a professional issue, since often the professionals are the ones in favour of keeping segregation. For example, the psychologist at the 14. Oktobar Special School, Miša Mladenović says that the staff of special schools fear that inclusion would mean closing their schools and dismissing employees.<sup>108</sup> Accordingly, this phenomenon should be urgently and thoroughly analysed, and desegregation measures ought to be implemented cautiously, bearing in mind the possible negative consequences that they can produce.<sup>109</sup> The experience of organisations dealing with this issue is that each case ought to be solved in the context and in direct communication with all stakeholders.<sup>110</sup>

### 3.4 Roma teaching assistants / school mediators

Strategic policy documents for Roma education envisage the introduction of RTAs in pre-schools and primary schools, as well as the employment of mediators to work with families in institutions with a large number of Roma children.<sup>111</sup> However, there are currently no legal regulations in force to employ RTAs in schools and/or pre-school establishments, although the Draft Law on Pre-School Education<sup>112</sup> provides for engaging RTAs.

In the second half of 2006, the Ministry of Education and Sports, in cooperation with the OSCE Mission, initiated the project “Support to the Ministry of Human and Minority Rights for Coordination Programmes for Roma.” One of its components specifically aims to introduce RTAs in the process of primary school education. The project implementation is based on experiences of the civil sector in this area, and is a good example of a policy that was implemented based directly on NGO experience. In this project, the education of assistants is conducted by the Centre for Interactive

<sup>107</sup> OSI Roundtable, Belgrade, 31 October 2006.

<sup>108</sup> Case study Niš, conducted in May–June 2006, researcher Ljiljana Simić. see Annex A2.1: Niš Case Study.

<sup>109</sup> OSI Roundtable, Belgrade, 31 October 2006.

<sup>110</sup> Interview with Mr. Petar Antić, director of the Minority Rights Centre in Belgrade, 17 March 2006.

<sup>111</sup> *The Strategy for the Improvement of Roma Education in Serbia, and Decade Action Plan for Education.*

<sup>112</sup> *Draft Law on Pre-School Education.* Public debate of the proposed Law has been completed and it is soon to enter the decision-making procedure.

Pedagogy (CIP),<sup>113</sup> while teaching assistants who have been included in the teaching process within NGO projects have been engaged for mentor work. Starting from 2005, the Roma National Council and the Ministry of Education and Sports have engaged 30 Roma coordinators for cooperation with the family within a pre-school education project financed by the REF.<sup>114</sup>

From 1996 until now 44 assistants (24 in pre-schools and 20 in primary schools) have participated in projects of the FOSS and its partners (CIP, REC and RIC), introducing the “Step-by-Step” methodology. Presently, ten RTAs are engaged: eight in pre-schools and two in schools.<sup>115</sup> The Roma Children’s Centre similarly engages assistants through its educational project of supplementary classes entitled “Education of Roma Children in Serbia”, carried out in five primary schools in Belgrade for 1,700 children. 30 coordinators have been engaged for cooperation with parents and schools.<sup>116</sup> These projects have been approved by the Ministry of Education and Sports and funded by various donors.<sup>117</sup>

The Ministry of Education and Sports expects RTA posts to become employment positions regulated by a law.<sup>118</sup> There is no formal description of the RTAs’ job, however, thus far. An unofficial job description was elaborated within the framework of the REI “Equal Chances” project (see Annex 5).<sup>119</sup> It is expected that this job description will be used by the Ministry of Education and Sports for their final version of such a description in the process of legal regulation of this employment position.<sup>120</sup>

In practice, RTAs take part in all curricular and extracurricular activities in which teachers take part, including work meetings, meetings of teaching staff and homeroom meetings discussing education of Roma children. The working week consists of 30 hours. Also envisaged is regular training for RTAs lasting 18 to 30 hours annually. The training is based on the “Step-by-Step” programme methodology, in addition to

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<sup>113</sup> The Centre for Interactive Pedagogy from Belgrade provided expert guidance to the project Kindergarten as a Family Centre from 1997 to 2005. That project was using the methodology of the OSI “Step-by-Step” programme, which includes Roma assistants in the process of education and upbringing. The Centre also worked as a partner of the FOSS on the project “Equal Chances” project, from 2002 to 2005, introducing Roma assistants in the teaching process in junior grades of primary school.

<sup>114</sup> OSI Roundtable, Belgrade, 31 October 2006.

<sup>115</sup> Interview with Ms. Milena Mihajlović, director of the Centre for Interactive Pedagogy, 5 March 2006.

<sup>116</sup> Interview with Ms. Milica Simić, Coordinator of the Roma Children’s Centre from Belgrade, 13 March 2006.

<sup>117</sup> FOSS, OSI, Novib, Norwegian People’s Aid, SDC.

<sup>118</sup> Vesna Fila, Education Minister Assistant, Meeting Concerning Implementation of Decade Action Plans, September 24, 2006.

<sup>119</sup> FOSS, *Report on the “Equal Chances” Project*.

<sup>120</sup> OSI Roundtable, Belgrade, 31 October 2006.

content related to Roma emancipation, their right to education (and other human rights), and integration in the life of the broader community.

According to the same unofficial description, the basic criteria for hiring an RTA are as follows: completing at least four-year secondary school; fluency in the Serbian language and spoken level in the Romani language; readiness to accept professional responsibilities stated in the job description; predisposition and ability to work with children. College education and work experience are assets. Hiring decisions are made by school principals, school teachers, a representative of the partner NGO (Roma NGO obligatory) and a project financier. Supervision and monitoring of the RTAs' work is done by project carriers and donors.<sup>121</sup>

Initial NGO experience engaging RTAs in primary schools has not been as favourable as it has been at the pre-school level. In the first year of the pilot REI project (2002–2003), the RTAs faced resistance from the teaching staff, they mostly participated in supplementary classes, rather than in the teaching process proper. However, by 2005, teachers had come to recognise the RTAs' role as one of the most important aspects of the project. Their engagement has been praised highly by pupils, teachers, and both Roma and non-Roma parents.<sup>122</sup> Thus the key factor for changing the attitudes towards RTAs was the introduction of the “Step-by-Step” programme methodology. This methodology, which is based on interactive teaching practice and individualisation of the learning process, has ensured conditions for engaging RTAs. (In the classical *ex cathedra* style of teaching at the early onset of the project an assistant was redundant.)

Generally speaking, the existing school practice leads to the conclusion that there are serious obstacles to greater engagement of RTAs. For instance, RTAs were sometimes perceived as a form of outside control, or even intruders, and some teachers were inclined either to modify their normal behaviour or to resent the presence of RTAs. Furthermore, since teaching is generally not based on interactive methodology but rather is in the form of lectures, many RTAs had essentially nothing to do in the classroom. Last but not least, since the required profile of an assistant involves at least a secondary school degree, there have been towns where this condition was not met, and no RTAs were hired. The true inclusion of RTAs in the teaching and education process in Serbia will require not only that the legal ground and financing mechanisms are in place for their employment, but that these obstacles are addressed as well.

### 3.5 Romanes teachers

There is no official information about pre-school or school teachers who speak Romanes and use it for instruction. NGOs claim that if such teachers exist, they are rare. The

<sup>121</sup> OSI Roundtable, Belgrade, 31 October 2006.

<sup>122</sup> Centre for Testing, *Evaluation and Research, Reports of the External Evaluation of the Project “Equal Chances – Integration of Roma Children and Youth in the Education System,”* Centre for Testing, Evaluation and Research, Belgrade, 2004–2005.

“Step-by-Step” pre-school programme cooperated with four pre-school teachers who spoke Romanes, two of whom were not ethnic Roma. The programme also included 17 assistants, two of whom were not Roma but spoke Romanes. They provided for the presence of Romanes in the classroom, and facilitated bridging the language gap. Such approach has made a significant impact and helped children to master the official language more quickly, and has given a boost to the self-respect and confidence of Roma children, since Romanes has been given equal recognition by their teachers.<sup>123</sup>

In the process of education, Roma are able to use their mother tongue only if they take the elective primary school subject “Roma Language with Elements of National Culture”, but even this is currently possible only in the territory of the Autonomous Province of Vojvodina.<sup>124</sup> So far, 21 Roma teachers of this subject have been trained in NGO projects. However, their education is still not officially a part of the system of education and has not been systematically developed. Educational policies envision the nourishing of Roma ethnic identity in the process of mainstream education, but it would seem that capacities are still lacking to more fully implement envisaged measures.<sup>125</sup>

### 3.6 Educational materials and curriculum policy

So far, the educational curriculum in Serbia has not been very sensitive to the values of multiculturalism and identity of national minorities. Strategic documents envisage changes to the curriculum so as to include multiculturalism and elements of Roma culture. In the long term, a curricular reform, as well as the new Draft Law on Textbooks and Other Teaching Aids, are expected to bring positive changes, but it is not certain when they will occur in practice. At this moment, there are neither curricular standards nor standards of textbook quality. The commissions in charge of approving textbooks for publication have been set up so far in an *ad hoc* manner.<sup>126</sup> In the meantime, the Centre for Textbooks<sup>127</sup> was set up in 2004. In other words, presently only an institutional framework for this area has been put in place. In the last few years, several publishing houses developed their textbook sections, and progress in quality has been noted, but contents stressing multiculturalism, appreciation of differences, and cultural values of other nationalities are still rare.

<sup>123</sup> Interview with Ms. Milena Mihajlović, director of the Centre for Interactive Pedagogy, Belgrade, 5 March 2006.

<sup>124</sup> Law on Defining of Competences of an Autonomous Province, *Official Gazette* No. 6, 2002.

<sup>125</sup> Interview with Mr. Ranko Jovanović, coordinator of the Association of Roma Teachers, 15 October, 2006.

<sup>126</sup> Commissions are set up outside the Ministry of Education and Sports and are made up of various experts, including from Universities and the Institute for Psychology. A commission’s makeup is not permanent.

<sup>127</sup> The Centre for Textbooks has been set up as an affiliate of the Institute for Advancement of Education and will be tasked with the quality of textbooks.

In Serbia there are no bilingual classes or bilingual curricula, although members of national minorities may have education in their languages. In these schools minority history and literature are taught in greater detail, but the curriculum is not based on educational content of other cultures and ethnicities. Even though the law provides for the right to be taught in Romanes, there are rather few materials in Romanes, most were created by NGOs rather than State structures, and they are used mainly in optional language classes.

The school subject “Roma Language with Elements of National Culture” is taught only in Vojvodina, which has a tradition of minority education. Elective classes are carried out in cooperation between the Roma National Council and the Ministry of Education and Sports. The programme for the first four grades of primary school has been developed and implemented in 42 schools with 1,266 children. The pupils have four Roma languages lectures per week.<sup>128</sup> However, this welcome initiative has not been replicated elsewhere. Still, the bigger problem is the fact that the curriculum in general does not accommodate this kind of educational needs. Introduction of elements of national cultures, including Roma, in education could help to make education much more appealing to Roma children, because it would reflect their life milieu and contribute to a better acceptance of Roma children by other pupils and teachers, and help to develop educational environment based on mutual appreciation and tolerance.

Teacher training for bilingual education techniques has been carried out so far only through the REI “Equal Chances” project and has not been further extended.

In schoolbooks, Roma are mentioned at best in the context of the World War II holocaust (history textbook for the eighth grade of the primary school). Roma are also mentioned in junior grades in texts such as “The Gypsy Praises His Horse” (literature reader for the third grade), or “A Gypsy Nightingale” (literature reader for the fourth grade). However, in literary texts, Roma are usually presented in a stereotyped and ridiculed manner, as carriers of negative characteristics.

A rare positive example is a textbook for the third grade of primary school issued by the publisher Kreativni Centar, in which all national minorities living in Serbia are mentioned in the lesson “Population of Our Land.” The overview is accompanied by relevant photographs, illustrations and information (such as see how a particular term is translated into in a language of a national minority). This textbook has been approved by the Government, and is approved for textbook selection. However, it depends on teachers to select what textbooks to use, and it appears that so far this textbook has not been widely used.

There are currently no teaching materials in the Serbian language about Roma history and culture, although some initiatives are underway. The REI “Equal Chances” project

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<sup>128</sup> Interview with Mr. Ranko Jovanović, coordinator of the Association of Roma Teachers, 15 October 2006.

prepared a teachers' manual ("*Ciganeska* – Introduction to Roma History, Language and Culture"<sup>129</sup>) containing materials that teachers can use in the classroom. FOSS supported a trilingual edition (Romanes, Serbian and English) of Roma fairy tales, which also could be used in classrooms.<sup>130</sup> The Institute for Textbooks and Educational Materials pioneered a picture book in Romanes entitled "Let's Live Together". The Ministry of Education and Sports, in cooperation with the OSCE Mission and councils of national minorities, has prepared a manual "Ethno-historical Guide to National Minorities", involving an expert proposed by the Roma National Council. It is planned that this book will become supplementary teaching material in schools.<sup>131</sup> A conclusion can be drawn that all initiatives to introduce Roma culture in education come primarily from the civil sector, as well as from Roma artists and experts.

### 3.7 Teacher training and support

Officially, teacher training faculties and institutes do not have courses dealing with tolerance, multicultural education and training against prejudice, nor methodology of work with children from deprived surroundings, or other aspects of inclusive education.

The formal education of pre-school and school teachers is largely focused on scientific disciplines/subjects that they are going to teach. It contains some psychological and pedagogical disciplines, as well as teaching methodology for various school subjects. However, future teachers mostly acquire theoretical knowledge, with no instructions as to how to implement it in practice, and have little opportunity to acquire practical experience in classrooms working with children. They are trained as though the school were a mono-ethnic institution with homogeneous classroom makeup. The consequence is the fact that many end up not knowing how to work with real children from different backgrounds.<sup>132</sup>

According to the Ministry of Human and Minority Rights, there are initiatives at certain faculties that can contribute to attaining the objective of educational integration of Roma, envisaged under the *Decade Action Plan for Education*.<sup>133</sup>

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<sup>129</sup> Roma Education Centre, *Ciganeska – uvod u romsku istoriju, jezik i kulturu* (*Ciganeska – Introduction to Roma History, Language and Culture*, Niš, 2006).

<sup>130</sup> A. Krasnići, *Bože, pretvori me u mrava- romske bajke sa Kosova i Metohije* (Please God, Turn Me into an Ant – Roma Fairy Tales from Kosovo and Metohija), Belgrade, Centre for Youth Creativity, 2001.

<sup>131</sup> Interview with Ms. Anne-Maria Cuković of the Secretariat for Roma Education Strategy of the Ministry of Human and Minority Rights, Belgrade, 23 March 2006.

<sup>132</sup> OSI Roundtable, Belgrade, 31 October 2006.

<sup>133</sup> Interview with Ms. Anne-Maria Cuković of the Secretariat for Roma Education Strategy of the Ministry of Human and Minority Rights, Belgrade, 23 March 2006.



- “Open Classroom – Inclusive Programme Intended for Roma Children”, volunteer work of students and teachers at the Teacher Training Faculty in Belgrade.
- Seminar papers dealing with prejudice against Roma prepared by students of psychology of the Philosophy Faculty in Belgrade.
- “Romology Studies”, a specialist course at the Philosophy Faculty in Novi Sad, with the support of FOSS, to be integrated in the regular postgraduate programme.

However, such initiatives are largely a result of the personal efforts of a handful of university experts in Serbia concerned with Roma issues. They often lack institutional foundation, and thus risk disappearing. For example, in 2000, the Alternative Education Network (AAOM) organised a series of postgraduate lectures on the religion of Roma “Religion – Point of Cultural Merging or Separation?”<sup>134</sup> As a result, the University of Niš offered an elective course “Sociology of Roma Identity” in the 2001–2002 school year.<sup>135</sup> It was not repeated, however.

In Serbia at present there are no standards of professional training and advancement of teachers (in-service), no required compulsory contents or frequency of such training. The previous staff of the Ministry of Education and Sports (2001–2003) attempted to develop a policy for teacher training, inviting all interested organisations to apply for accreditation of their teacher training seminars. Criteria for evaluation and accreditation were defined and published in advance, and subsequently an extensive catalogue was published with the list of accredited teaching training seminars, the *Catalogue of Teacher Training Programmes for the School Year 2003/2004* (hereafter, the “Catalogue”).<sup>136</sup> The then policy was that teachers needed 100 hours of in-service training (from the Catalogue) in the course of five years. However, after the change of Government the policy was discontinued. Teachers received their licence regardless of participation in teacher training seminars, and their career development was not tied to further training. Even though the Catalogue was not officially cancelled, in practice it was not used.

Currently, schools can undertake training and pay for it from funds that are ensured through local sources. This practice is becoming more and more frequent, especially since the course of the education reform changed in 2004, and the cycle of seminars accompanying it was stopped.<sup>137</sup> The Institute for the Advancement of Education

<sup>134</sup> FOSS, *Report for 2001*, an internal document.

<sup>135</sup> D. Djordjević and M. Filipović, *Sociologija romskog identiteta- dva izborna kursa* (Sociology of Roma Identity – Two Elective Courses), Romology Library Komren, Niš, 2002.

<sup>136</sup> Ministry of Education and Sports, *Katalnog programa stručnog usavršavanja zaposlenih u obrazovanju* (The Catalogue of Teacher Training Programmes for Education Employees), Belgrade, 2003.

<sup>137</sup> OSI Roundtable, Belgrade, 31 October 2006.

reportedly prepared several seminars in 2004 for in-service teacher training that are supposed to be paid from the State budget, but in practice there seems to be confusion and varying interpretations of this.

In the Catalogue, five seminars and training courses dealing with Roma education and intended for the education of primary school teachers were accredited. All of them were developed by the civic sector. They tackled various educational aspects:

- Education for social justice; education for overcoming prejudices; development of tolerance and appreciation of diversities;<sup>138</sup>
- Advancement of educational practice based on child-centred methodology and on interactive teaching methods and individualisation of teaching;<sup>139</sup>
- Educational support to Roma children in school – methodology of remedial classes as a form of compensatory education.<sup>140</sup>

All these programmes were developed through projects involving direct work with children, and were externally evaluated by competent experts of the Centre for Evaluation, Testing and Research (CETI).<sup>141</sup> The resulting teacher seminars were accredited by the previous makeup of the Ministry of Education and Sports.

The Institute for Advancement of Education conducted a repeated accreditation of teaching training seminars in the course of 2006, and at the end of that year a new catalogue of teacher training seminars was published. This time, there was not any advance public invitation to submit seminars for accreditation and the selection of the accredited programmes appears rather arbitrary. The majority of programmes from the 2003/2004 Catalogue were not accredited – including those concerning Roma education, mostly seminars carried out by NGOs. However, the Ministry of Education and Sports nevertheless continues to cooperate with NGOs for some of these courses, despite the Institute’s decision. This situation suggests that the accreditation criteria, as well as procedures, the decision-making process, and the application of decisions in practice, are insufficiently clear.<sup>142</sup> In the meantime, more unaccredited training

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<sup>138</sup> The OSI Rome Education Initiative (REI) programme, and the “Neither Black Nor White” programme of the Centre for Interactive Pedagogy from Belgrade.

<sup>139</sup> Series of training courses designed by the Centre for Interactive Pedagogy. The training courses are based on the OSI “Step-by-Step” programme.

<sup>140</sup> Teacher training developed within the project of the Society for the Advancement of Roma Settlements “Developmental Education Centres in Southern Serbia” (2001–2004), carried out by UNICEF, the Swiss Agency for Development and Cooperation (SDC), and FOSS.

<sup>141</sup> This is an NGO specialising in educational research and evaluation of educational policies, programmes and projects.

<sup>142</sup> OSI Roundtable, Belgrade, 31 October 2006.

programmes have been designed; for example, the seminar by Roma Education Centre “*Ciganeska – Workshop for Teachers on Roma History and Culture.*”<sup>143</sup>

Educational policies envisage measures to train expert practitioners for the specificities of Roma education. In practice, it often happens that the field of Roma education is still very much an individual, personal effort or a project activity. Professional know-how and experience is there, which, if integrated into the system framework and/or made to be a foundation for development of university courses and continual education of professional staff, could contribute to better quality education for Roma children and youth.

### 3.8 Discrimination monitoring mechanisms

Policy documents treat the problem of discrimination as one of the key obstacles to equal access to education for Roma, since Roma are often exposed to various forms of covert, as well as open, discrimination by members of school administration, teachers, other children and non-Roma parents.<sup>144</sup>

Prevention of discrimination in education is one of the specific objectives in the *Decade Action Plan for Education*.<sup>145</sup> Measures for its implementation entail establishing the mechanisms for monitoring and sanctioning discrimination in educational institutions, and educating Roma parents on human rights and possibilities for their protection.

The Law on the Foundations of the Education System defines and bans all forms of discrimination in education, including that based on race, religion, ethnic, social or cultural identity. The Law defines grave violations of work obligations including the following: undermining or violating the physical or psychological integrity of a pupil (physical punishment, moral, sexual or other abuse); insulting children, pupils and employees repeatedly or in a way that affects the education process; and expression of national or religious intolerance.<sup>146</sup>

A complaint concerning a discriminatory behaviour can be submitted by a pupil or his parent/guardian to the principal or the school board. Employees of the educational institution are also obliged to report a violation of pupils’ rights.<sup>147</sup>

The same Law envisages sanctions for pupils, employees and educational institutions:

- A reprimand or a strong reprimand against a pupil, for expressing national and religious intolerance;<sup>148</sup>

<sup>143</sup> Workshops designed by the Roma Education Centre (REC), in the framework of the REI “Equal Chances” project.

<sup>144</sup> *The Strategy for Improvement of Roma Education in Serbia*, p. 10.

<sup>145</sup> *Decade Action Plan for Education*, Preventing discrimination in education.

<sup>146</sup> Law on the Foundations of the Education System, art. 131.

<sup>147</sup> Law on the Foundations of the Education System, Art. 46.

- For a grave violation, the dismissal of a staff member until disciplinary proceedings have been completed;<sup>149</sup>
- A fine of 30,000 to 100,000 dinars (€320–1,120), for an institution if it, “jeopardises, depreciates or discriminates against groups and individuals on grounds of racial, national, linguistic, religious or gender identity, mental or physical constitution, social or cultural origin, that is, political orientation, or if it encourages such actions.”<sup>150</sup>

An institution can be punished on the basis of a decision brought by an inspection. The inspection can be conducted at the local level (by a municipal, i.e. city, inspection) or at the national level (by a Republic-level inspection). The Republic-level inspection and the Ministry conduct a direct inspection, if the municipal authorities fail to do so. The Ministry is to decide on an appeal to a first-instance decision of a municipal inspection.

There is, however, no specific anti-discrimination body in Serbia.

In practice, cases of discrimination appear very rarely. This is corroborated by the example of a school inspector in Valjevo who said that he was not aware that there has ever been discrimination against Roma children in school, that is, that the school inspection has never received a complaint of this kind.<sup>151</sup> Even if reported, cases of discrimination are insufficiently visible and rarely have a positive outcome. According to the Fund for Humanitarian Law report, *Roma in Serbia*, in a case concerning two brothers who had been continually abused by their peers in school, their mother addressed the school principal, but the situation has not changed despite his promises. The children dropped out of school, and the case was forgotten.<sup>152</sup>

The Minority Rights Centre in the past three years has filed over 30 complaints to primary schools concerning alleged discrimination. A number of the Centre’s complaints concerning segregated classes in primary schools in Subotica have been solved positively: the segregated classes were dismantled and children placed in mixed classes. The decisions have been reached through dialogue and communication between the Centre and the schools, which is a good model for addressing the problem.<sup>153</sup>

There is no information whether any cases of alleged discrimination in education have actually reached the court. The Roma Children’s Centre claims that most of their cases have been settled at meetings of school boards or through communication with

<sup>148</sup> Law on the Foundations of the Education System, Art. 135.

<sup>149</sup> Law on the Foundations of the Education System, Art. 128.

<sup>150</sup> Law on the Foundations of the Education System, Art. 145.

<sup>151</sup> Case study Valjevo.

<sup>152</sup> Fund for Humanitarian Law *Roma in Serbia*, “Under the Magnifying Glass” edition, Fund for Humanitarian Law, Belgrade, 2003.

<sup>153</sup> Interview with Mr. Petar Antić, director of the Minority Rights Centre in Belgrade, 17 March 2006.

principals. No case has ever ended in a courtroom. In their opinion, judicial proceedings would only expose Roma pupils to even graver problems.<sup>154</sup>

Within the study, *The Art of Survival – Where and How Roma in Serbia Live*,<sup>155</sup> a survey of discrimination has been conducted. The respondents were asked where they experienced discrimination the most: in public places, in a courtroom, in a police station, when visiting social services, at a doctor's, in school, or when they were getting a job. The available information indicates that Roma have experienced discrimination the most when getting a job (24.9 per cent) and the least in a courtroom (7.1 per cent). In schools 16.6 per cent of Roma have been exposed to such acts. However, in the opinion of the authors of the study, discrimination in Serbia may be much greater than the perception of Roma themselves would suggest:

Many acts which the majority population perceives as discriminatory, Roma do not experience as such. The sensitivity to discrimination against other and different people manifests itself in different ways in the culture of the majority population and in the culture of Roma. It is possible that Roma have become “insensitive” to thousands of various forms of discrimination and petty provocations.<sup>156</sup>

It can be concluded that discrimination in education is still a topic that is not sufficiently discussed in Serbia. The fact that, in practice, cases of discrimination are rarely reported indicates several things: that Roma themselves do not have enough knowledge about their rights and opportunities of protection if these rights are violated, that they fear possible negative consequences if they file a complaint, that they do not trust that official institutions are willing and able to solve this kind of problem, that they do not recognise certain discriminatory acts as discrimination or violation of their rights, or perhaps that the system itself is not very effective.

Discrimination has found its place in policies and legislation, but for the state of affairs in the field to change it would be necessary to do much more in order to establish efficient sanctioning mechanisms. In the light of this, the Minority Rights Centre initiated, in cooperation with the Ministry of Education and Sports, the project “Preventing Discrimination in Education against Roma Children”, which was funded by REF. Within the framework of this project, training has been organised for 22 Republic-level and ten municipal-level inspectors, to enable them to identify discrimination and respond adequately. The training of 25 NGO representatives for monitoring and reporting on discrimination in the education system has been organised, ten of whom will acquire the status of monitors and will cooperate with a

<sup>154</sup> Interview with Ms. Milica Simić, coordinator of the Children's Roma Centre, Belgrade, 13 March 2006.

<sup>155</sup> B. Jakšić and G. Bašić, *Umetnost preživljavanja – Gde i kako žive Romi u Srbiji* (The Art of Survival – Where and How Roma in Serbia Live), Disput Library, Institute for Philosophy and Social Theory, Belgrade, 2005 (hereafter, Jakšić and Bašić, *The Art of Survival*).

<sup>156</sup> Jakšić and Bašić, *The Art of Survival*, p. 130.

solicitor who will provide legal assistance. Under these projects, instructions for institutions will be made enabling them to identify, monitor and respond to cases of discrimination, along with an informative bulletin for children, young people and parents about human rights and how to protect them.<sup>157</sup>

The Council for Roma Integration, established as an affiliate of the Executive Council of the Autonomous Province of Vojvodina, will, in cooperation with the Ministry of the Interior, set up operating teams to permanently work on issues of discrimination. It plans to launch a similar activity involving school inspectors.<sup>158</sup>

It is expected that an anti-discrimination law, supposed to be enacted in the course of 2007, will more specifically define the issue of discrimination and provide conditions for more effective action in this area.<sup>159</sup>

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<sup>157</sup> OSI Roundtable, Belgrade, 31 October 2006.

<sup>158</sup> OSI Roundtable, Belgrade, 31 October 2006.

<sup>159</sup> OSI Roundtable, Belgrade, 31 October 2006.

## 4. CONSTRAINTS ON ACCESS TO EDUCATION

*There are serious structural constraints on Roma access to education. Roma children often lack pre-school preparation and as a result fare badly in schools or drop out completely. The physical capacities of existing pre-schools are not sufficient to meet the needs for pre-school-age children in general, and this particularly affects Roma children, who make up a higher proportion of this age group. In addition, the legal and administrative requirements, such as the need for birth and medical certificates and residence papers, as well as the practice of pre-schools defining their own (internal) criteria for admission, among other factors, pose serious obstacles to the access of Roma to pre-school education. The amended Law on the Foundations of the Education System envisions the introduction of a free and mandatory zero year to prepare all children for primary school. However, the existing infrastructure is clearly insufficient to ensure its effective implementation and the Government should allocate funds to ensure adequate places for all children to comply with such legislation.*

*Administrative and legal barriers, as well as hidden costs of education, are important barriers to the access of Roma to primary education. Even though children with incomplete paperwork may still be enrolled in a primary school, subject to the good will of the school's administration, expenses for school supplies, clothing, transport, and extracurricular activities become prohibitive for the majority of Roma families, who are often living in poverty. Many Roma parents agree to their children being sent to special schools, in part because these schools relieve the economic burdens of education (school supplies, transport, meals and even boarding). However, these schools deprive children of future educational and professional opportunities. The Government should make available financial assistance for disadvantaged children in mainstream education to remove these incentives.*

*The residential isolation of Roma settlements and bad housing conditions are also obstructing Roma access to education. In addition, insufficient knowledge of the official language of instruction and absence of bilingual education in Romanes, or of the use of bilingual techniques in early childhood education, coupled with insensitive or discriminatory assessment procedures, may often result in misplacement of Roma pupils in special schools for children with intellectual disabilities.*

### 4.1 Structural constraints

According to the data from 2004, in Serbia there are 160 pre-school management institutions, managing a total of 1,840 pre-schools.<sup>160</sup>

The number of children who are able to enrol in any pre-school depends on its size. The new Draft Law on Pre-School Education<sup>161</sup> provides for the maximum number of

<sup>160</sup> One pre-school management institution can manage several kindergartens, located in several buildings. Source: Serbian Statistics Institute (Republički zavod za statistiku), information in Serbian from the Institute's website, available at <http://webrzs.statserb.sr.gov.yu> (accessed on 2 March 2007).

<sup>161</sup> *Draft Law on Pre-School Education.* The Draft Law is now in urgent procedure in the Serbian Parliament, and is expected to be adopted before the 2006–2007 school year. This issue has a complicated history. Pre-school education was part of social care and was under the jurisdiction of the Ministry of Social Affairs until 2003. Pre-school education (including the number of children per group) was regulated by the Law on Social Child Care. Since the Law on the Foundations of the Education System was first adopted, in 2003, pre-school education became part of the education system, under the jurisdiction of the Ministry of Education and Sports. Presently, the Law on Social Child Care has expired. Hence the draft of the new Law on Pre-School Education needs to be approved urgently.

children, in the different age categories, that can be included in one pre-school group (see Table 7). The number of groups in any pre-school is not regulated by the law, but depends on the physical capacity of the pre-school (namely, one group per room).

**Table 7: Maximum number of children per pre-school group, by age group**

Age groups	Number of children per group
From six months to one year	7
From one to two years	12
From two to three years	16
From three to four years	20
From four to five and a half years	22
From five and a half (school preparation group)	26

Source: draft new Law on Pre-School Education

As shown below in Table 8, as of 2004, overall only 27 per cent of children in Serbia are covered by pre-school education. For the 3–7 age range, 40 per cent of children are enrolled in pre-school education, while for the 5–7 age range, the corresponding proportion is 48 per cent (see Table 8). This information is corroborated by the Ministry of Education and Sports, which estimates that up to 80 per cent of children in pre-school education are aged between five and seven.<sup>162</sup> Taking into consideration the fact that existing pre-school institutions are full, these data show that the physical capacities of pre-schools are not sufficient to meet the needs for pre-school education in general, which has consequences for the access of Roma children to pre-school education.

<sup>162</sup> Interview with Ms. Ljiljana Merlot, advisor on pre-school education at the Ministry of Education and Sports of the Republic of Serbia, Belgrade, 6 April 2006.



**Table 8: Number of children enrolled in pre-schools, by age group (2004)**

Age range	Single age range groups		Mixed groups (3–7 years)	Total (inc. mixed groups)	
	Number of children	Enrolment rate (Proportion of all children in the age group)	Number of children	Enrolment rate (Proportion of all children in the age group)	Number of children
Up to 18 months	4,211	3.3	–	–	–
18 months–2 years	7,202	16.7	–	–	–
2–3 years	13,079	15.2	–	–	–
<i>Total: 3–7 years</i>	<i>24,492</i>	–	–	–	–
3–4 years	20,145	23.4	–	28.2	–
4–5 years	22,812	26.5	–	31.3	–
5–7 years	78,426	45.6	–	48.0	–
<i>Total: 3–7 years</i>	<i>121,383</i>	–	<i>16,381</i>	–	<i>137,764</i>
<i>Total: 0–7 years</i>	<i>145,875</i>	<i>27.0</i>	<i>16,381</i>	–	<i>162,256</i>
Number of institutions	1,840	40.0	–	–	–

Source: Serbian Statistics Institute<sup>163</sup>

There are no nationwide data on pre-school education capacities. The available data pertaining to Belgrade indicate that capacities of pre-schools are far below needs. According to the Secretariat for Social and Child Care of Belgrade, each year over 8,000 children in Belgrade who apply to local pre-schools are turned down; between 30 and 40 new units are needed in order to provide pre-school education to all children who require it.<sup>164</sup> The situation in Belgrade could be also indicative of the scale of the kindergarten places shortage in other Serbian cities.

<sup>163</sup> Serbian Statistics Institute (Republički zavod za statistiku) information from the institute's website available at <http://webzrs.statserb.sr.gov.yu/axd/en/index.php> (accessed on 3 March 2007).

<sup>164</sup> V. Nedeljković, *Upis u vrtić samo preko veze* (Access to Kindergarten Only for the Well-Connected), *Blic* daily newspaper, 10 May 2006.

Private pre-schools have capacities to accommodate more children, but costs are prohibitive. Thus, in Belgrade the cost is between €150 and €200 a month,<sup>165</sup> which practically equals or exceeds an average monthly salary in Serbia, and is effectively out of reach for poor families.

The new legal provisions envision the introduction of a free and mandatory “zero grade” for all pre-school-age children, starting in the 2006–2007 school year. However, the Ministry of Education and Sports and the educational institutions have performed this task establishing the zero grade without a complete analysis of their capacities, and with insufficient cooperation with the Roma community. According to information gained from the NGOs, this programme includes far fewer children than the real demand. As in other educational areas, there is neither a system for monitoring the effects of applied measures, nor consequences arising from the lack of implementation.<sup>166</sup>

The limited capacities of pre-schools are a major obstacle to accessibility of pre-school education. However, there are also additional constraints. Apart from legal and administrative prerequisites for pre-school enrolment, the pre-schools have themselves developed selection criteria, ostensibly to facilitate access for families whose children need it most (see section 4.2). Accordingly, preference in enrolment is given to children both of whose parents are employed, which is a criterion that most impoverished Roma families cannot fulfil. However, such a policy has produced a situation where kindergartens have the main role in taking care of children, especially at a younger age, when their parents are working.

## 4.2 Legal and administrative requirements

### 4.2.1 Pre-school education enrolment

The Draft Law on Pre-School Education specifies that the enrolment of children in pre-schools shall be conducted in accordance with the Law and instructs pre-schools to make detailed regulations in their statutes concerning the method and procedure for enrolment.<sup>167</sup>

Although detailed enrolment procedures are issued by individual pre-school establishments,<sup>168</sup> the following is a more or less typical set of documents required in order to enrol a child in the kindergarten:

- Application letter;
- Photocopy of employment card (proof of employment);

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<sup>165</sup> Interview with Ms. Ruzica Popovic Trbusković, director of the private kindergarten “Lala i Lili”, Belgrade, 29 March 2006.

<sup>166</sup> OSI Roundtable, Belgrade, 31 October 2006.

<sup>167</sup> *Draft Law on Pre-School Education*, Art. 12.

<sup>168</sup> Law on the Foundations of the Education System.

- Average income certificate (or unemployment certificate from the National Employment Bureau) – this document entitles low-income families to pay a lower fee for the pre-school;
- Recent birth certificate (obtained within the past six months).<sup>169</sup>

In addition, upon a confirmation from the pre-school that a place is available, parents obtain forms and instructions regarding a compulsory medical check-up (free of charge); the medical certificate is to be submitted along with the above documents. Information about the child's health status is important, in case there is a need for specific care.

Although there are no data on families unable to furnish the necessary documents, these requirements evidently pose a problem for those Roma parents who do not have residence registration or/and a birth certificate. This problem mostly affects internally displaced persons (IDPs) from Kosovo and returnees from Western European countries, but also domiciled Roma. According to the Centre for Interactive Pedagogy, which was running community-based pre-schools within the project "Kindergarten as a Family Centre",<sup>170</sup> up to 70 per cent of children with whom they worked lacked proof of residence and about 20 per cent lacked a birth certificate.<sup>171</sup>

The absence of personal documents is also a barrier to registering with the National Employment Bureau,<sup>172</sup> which issues additional documents required for pre-school enrolment. The lack of a health insurance card makes persons unable to exercise their right to health care and consequently to obtain a medical check-up certificate and to enrol in the pre-school.

While the capacities of pre-schools are limited, no legal regulation sets criteria for priority enrolment of certain categories of children. Instead, each institution defines its own (internal) criteria. According to the Ministry of Human and Minority Rights, which communicated with some pre-schools in Belgrade, the following categories usually enjoy priority enrolment for their children:

- Disabled war veterans;
- Single mothers;

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<sup>169</sup> Copies of birth certificates for different administrative purposes can be obtained from the civil registry offices, which keep all the official records of births, deaths, marriages, and other civil status.

<sup>170</sup> CIP has carried out a project in cooperation with Roma NGOs from all of Serbia and with the support of the FOSS. Around 600 Roma children at the annual level have been included in the project.

<sup>171</sup> Interview with Ms. Milena Mihajlović, director of the Centre for Interactive Pedagogy, Belgrade, 5 March 2006.

<sup>172</sup> Interview with Ms. Anne-Maria Cuković of the Secretariat for Roma Education Strategy, Ministry of Human and Minority Rights, Belgrade, 23 March 2006.

- Low-income families;
- Families in which both parents are unemployed;
- Student parents.<sup>173</sup>

In practice, Roma parents are usually unable to meet the conditions. Roma unemployment presents a particularly serious obstacle. Since the existing network of pre-schools cannot accommodate all the children who need them, there are long waiting lists, and parents' employment (especially of both parents) is often the decisive factor for admission of the children. There are few Roma who fulfil this requirement: only an estimated 18.4 per cent are officially employed.<sup>174</sup> This situation, seemingly contradictory (since unemployed people fulfil the low-income criterion), goes back to the socialist period, when pre-schools were seen as an instrument to support working parents rather than to development of children. In addition, research conducted by the World Bank indicates that the unemployment rate among Roma in Serbia is four times higher than that among the majority population,<sup>175</sup> which according to the most recent data (October 2005) stands at 20.8 per cent.<sup>176</sup>

#### 4.2.2 Primary school enrolment

The enrolment in the first grade of the primary school is regulated by the Law on the Foundations of the Education System. The following documents are required:

- Birth certificate;
- Proof of residence;
- Medical documentation that a child has undergone a medical check-up;
- Test of preparedness.<sup>177</sup>

Under the law, the local self-government (a municipality) must keep track and inform schools and parents on enrolment when the children in the locality reach school age.<sup>178</sup> Obviously, lack of registered residence results in a situation where the local self-government is not aware of families with school-age children, and fails to inform the primary school and parents about enrolment.

<sup>173</sup> Interview with Ms. Anne-Maria Cuković of the Secretariat for Roma Education Strategy, Ministry of Human and Minority Rights, Belgrade, 23 March 2006.

<sup>174</sup> Jakšić and Bašić, *The Art of Survival*.

<sup>175</sup> *REF Needs Assessment Serbia*, p. 11.

<sup>176</sup> Serbian Statistics Institute (Republički zavod za statistiku), Labor Force Survey/Tables, available at <http://webzrzs.statserb.sr.gov.yu/axd/en/drugastrana.php?Sifra=0018&izbor=odel&tab=152>, (accessed 16 March 2007).

<sup>177</sup> Law on the Foundations of the Education System, Art. 90, para. 3.

<sup>178</sup> Law on the Foundations of the Education System, Art. 90, para. 11.

Again, there are no official data on the number of children of school age who lack birth certificates or residence papers. According to the Research and Analytical Centre, “Argument” and the Minority Rights Centre, in 2005, in Belgrade, out of the total of 4,584 children surveyed, 13.7 per cent were not registered. 74 per cent of unregistered children were from internally displaced Roma families, and 55 per cent from slums. The lack of documents as a reason for not enrolling their children in school was cited by 20.2 per cent.<sup>179</sup>

In recent years, the situation was aggravated by readmissions from Western Europe. According to the Roma National Council, between 3,000 and 4,000 Roma were returned to Serbia this way in the past three years.<sup>180</sup> Although there is no information about the number of returned children of school age, their integration in the education system has proved a massive problem. Most do not have formal evidence of their previous schooling, and while waiting for years for their documents to be transferred, they drop out of the education system. And under the existing legislation,<sup>181</sup> a child upon turning 17 loses the right to continue (mainstream) primary education and is directed to adult education.

Unfortunately, this problem has not been addressed systematically. It has been left to schools to deal with it on a case-by-case basis, which has led to a situation in which the same legal regulations have been interpreted differently by the staff of the Ministry of Education and Sports and by local secretariats for education, whose interpretation is normally cited by schools in dealing with such cases.

Primary schools, unlike pre-schools, are not excessively strict as regards the required documents. Many schools reportedly would enrol children even if some documents are missing. Whenever possible, the missing documents could be submitted later in the course of the school year, but there are children who in fact have never supplied all the papers.<sup>182</sup> However, NGOs working with Roma stressed the point that such practice is a result of good will on the part of some school administrations and their good cooperation with NGOs, rather than a binding rule.

At the request of the Education Committee of the League for the Roma Decade,<sup>183</sup> the Ministry of Education and Sports sent a communiqué to school authorities in the

<sup>179</sup> P. Antic, *Romi i pravo na na pravni subjektivitet u Srbiji*, (Roma and Right to Legal Subjectivity in Serbia) Belgrade, Minority Rights Centre, 2006.

<sup>180</sup> Interview with Mr. Ljuan Koka, president of the Executive Committee of the Roma National Council, Belgrade, 12 March 2006.

<sup>181</sup> Law on the Foundations of the Education System.

<sup>182</sup> Interview with Ms. Milica Simić, coordinator of the Roma Children’s Centre, Belgrade, 13 March 2006, and Ms. Refika Mustafić, director of the Roma Education Centre, Niš, 22 March 2006.

<sup>183</sup> The League for the Roma Decade is the coalition of (mainly Roma) NGOs established to monitor the implementation of the *Decade Action Plans*.

2004–2005 school year instructing them to enrol children with incomplete documentation.<sup>184</sup> There is no information as to how many schools complied.

Another condition for enrolment of children in primary school used to be permanent residence in the municipality where the school is located. This requirement was a huge obstacle for the enrolment of many Roma children, because their parents moving in search of seasonal jobs were forced to change their residence and often did not possess documents about permanent residence. The rule would be misused by some principals of primary schools who did not want to enrol Roma children in their schools, directing them instead to other nearby schools that did not discriminate. The rule has since changed, and parents are free to enrol their children in whichever school they want, but children registered at the territory to which the school belongs are still given precedence. When all interested children from that territory enrol in the school, children from other areas can apply and will be admitted if there are places. However, some principals allegedly still refuse to enrol Roma children, offering as an excuse the explanation that there are no free places. This leads to a situation in which Roma children often fail to enrol in the first grade at age seven, instead enrolling at a much later age (frequently when they are nine or ten). These children are then late in finishing primary school and cannot continue their schooling because they have “outgrown” the enrolment age for secondary school. Roma aged between 17 and 18 can neither find legal jobs nor continue their schooling, and some end up in the schools for adult education.<sup>185</sup>

When the required documents are submitted, children take a readiness test. The test results are an integral part of the documents required for the primary school enrolment. School psychologists can choose which test they will use for assessment from the list of standardised instruments (such as Bine-Simon, WISC or TIP-1).<sup>186</sup> However, most school psychologists use TIP-1, which allows a quick assessment of children’s preparedness for primary school. The TIP-1 is standardised at the national level (it means there are norms defining what score the child needs to achieve in order to be deemed prepared for the primary school). It comprises norms for urban and rural settlements. It is constructed and standardised for the whole population, and there are no data on whether it is culturally fair or biased. However, the test appears to present another major obstacle for the inclusion of Roma children in mainstream education, as attested by overrepresentation of Roma in special schools (see section 2.4 and below).

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<sup>184</sup> Ministry of Education and Sports, communiqué to school authorities, 2004–2005. Interview with Ms. Angelina Skarep, educational advisor to the Ministry of Education and Sports of the Republic of Serbia, Belgrade, 10 April 2006.

<sup>185</sup> Case study Zemun, conducted in May–June 2006, researcher Nataša Kočić-Rakočević; see Annex A2.3: Zemun Case Study.

<sup>186</sup> The Bine-Simon scale and the WISC (Wechsler Intelligence Scale for Children) tests are internationally recognised assessment instruments for children. TIP-1 is a test developed in Serbia by the Institute of Psychology at the University of Belgrade; its main purpose is to assess a child’s preparedness for Grade 1 of the primary education.

It is estimated that between 25 and 80 per cent of the total number of children in special schools are ethnic Roma (see section 2.4.3).<sup>187</sup>

## 4.3 Costs

### 4.3.1 Pre-school education

There are both free and fee-based pre-school education programmes. All-day programmes are fee-based, although most costs are covered from the national or municipal budget. Parents pay the remaining amount, about 20 per cent, as specified by the pre-school institution's steering committee and subject to approval by the local self-government.<sup>188</sup> The costs to be paid range from €18 to €58 a month, although poorer families could be partially reimbursed and thus could pay between €7 and €44 a month.<sup>189</sup> In addition, parents also bear the costs of extracurricular activities, such as theatre shows and outings for children, up to €45 a year.<sup>190</sup> Altogether, pre-school education costs can come up to 25 per cent of an average net monthly salary (€240).<sup>191</sup>

The law<sup>192</sup> stipulates that children from the following categories of families can receive pre-school education free of charge:

- Refugees and displaced persons;
- Children with developmental disabilities;
- Orphans;
- Recipients of social welfare.

Unfortunately, even though some Roma could in principle exercise the right to free all-day pre-school education, since they belong to the category of refugees or displaced persons, in practice it happens very rarely, or not at all. Due to the limited physical capacities of pre-schools, priority is given, as has already been explained, to children both of whose parents are employed, and many Roma do not fulfil that condition.

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<sup>187</sup> *REF Needs Assessment Serbia.*

<sup>188</sup> *Draft Law on Pre-School Education.*

<sup>189</sup> Interview with Ms. Ljiljana Merlot, advisor on pre-school education at the Ministry of Education and Sports of the Republic of Serbia, Belgrade, 6 April 2006.

<sup>190</sup> Interview with Ms. Ruzica Popović Trbusković, director of the kindergarten "Lala i Lili", Belgrade, 29 March 2006.

<sup>191</sup> Institute for Statistics of the Republic of Serbia, information about the average net monthly salary for April 2006, available in Serbian at <http://webzrzs.statserb.sr.gov.yu> (accessed on 1 December 2006).

<sup>192</sup> *Draft Law on Pre-School Education; Law on Financial Support to Families with Children and Law on Amendments and Supplements to the Law on Financial Support to Families with Children, Official Gazette No. 16/2002. Law on the Foundations of the Education System.*

Part-time pre-school programmes (four hours a day), one year prior to school enrolment, are free of charge. This form of pre-school education was previously not compulsory, and its provision depended on pre-school capacities. Under the Law on the Foundations of the Education System, starting in the 2006–2007 school year, pre-school education becomes compulsory and free of charge for children aged between five and a half to six and a half.<sup>193</sup> However, parents are still responsible for the costs of extracurricular activities.

#### 4.3.2 Primary and secondary education

Even though primary and secondary education is free, families need to set aside about €35 per child each month for textbooks, school supplies and snacks (or more, if additional extracurricular activities are included).<sup>194</sup> Transport costs, which are in most cases necessary at the level of secondary education, may add at least €15 a month to this sum.<sup>195</sup>

School costs can come up to 15 per cent of the average net monthly salary (€240). Some information, which probably includes extracurricular activities, has it that the costs of schooling may even make up as much as 30 to 50 per cent of the average net monthly salary.<sup>196</sup> Considering that only 18.4 per cent of Roma have salaried employment, and that the average number of children per family is 2.41,<sup>197</sup> the hidden costs are a significant barrier to education.

One Roma woman from the village of Balačko related the following:

I was a very good pupil, but my parents were very poor, and because of that I had to give up schooling when I finished the third grade. I don't want my daughter to have same destiny as me. The teacher told me that she is very good; she is now in the second grade; but I am also very poor, and I don't know till when I will have an opportunity to educate her.<sup>198</sup>

Another Roma woman from the village of Vis village in Valjevo summed this up:

It is true that most of us are uneducated, but what can we do! My parents were poor, and could not send me to school. I am also poor, and my husband is sick; we are living on social welfare; it is not enough for living

<sup>193</sup> Law on the Foundations of the Education System.

<sup>194</sup> Information about prices has been obtained from bookstores and the publishing houses Kreativni Centar and Institute for Textbooks and Teaching Aids of the Republic of Serbia.

<sup>195</sup> It is difficult to obtain information on average for all of Serbia, because the costs of local transport vary. According to the information of the City Transport, a monthly ticket for transport in Belgrade is around €15.

<sup>196</sup> Case study Valjevo.

<sup>197</sup> Jakšić and Bašić, *The Art of Survival*, p. 130.

<sup>198</sup> Interview with a Roma woman from the village of Balačko, Valjevo, 13 June 2006.



[...] I have a daughter of eight years, and a son of four years. My daughter is now in the second grade, and the school gives her books, but I cannot help her to do homework, because I am illiterate, so she has to do everything alone.<sup>199</sup>

Difficult economic circumstances are also a crucial reason why so many Roma parents agree, or even ask, that their children are sent to special schools. In addition to being freed from paying for school supplies and other supplementary costs, poor families who enrol their children in special schools are entitled to social welfare on more favourable conditions.<sup>200</sup> Social welfare for a five-member family is between €60 and €90 a month, which is a sufficient subsistence amount.<sup>201</sup> Also, some special schools are actually boarding schools and besides accommodation provide free meals, textbooks, clothing and shoes.<sup>202</sup> For parents, costs of schooling children in special schools can be six to seven times lower than costs in mainstream schools, because of the benefits that special schools provide.<sup>203</sup>

### 4.3.3 Financial support in education

The accessibility of education, as well as school results, largely depends on whether the family can afford supplementary costs. There is no established practice to award free textbooks to pupils from low-income families. The only available relief is the possibility of paying for the textbooks in instalments, if ordered through the school for the next school year.

Free textbooks are occasionally distributed by jurisdictional ministries, publishing houses, or NGOs. Considering that no permanent funds are earmarked for this purpose, this type of support depends on the possibilities of donors.

In the 2003–2004 school year, the Ministry of Human and Minority Rights, the Ministry of Education and Sports, the then Ministry of Social Affairs and the Roma National Council, with the financial support from local and foreign donors, ensured

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<sup>199</sup> Interview with a Roma woman from the village of Vis, 13 June 2006.

<sup>200</sup> Interview with Ms. Anne-Maria Cuković of the Secretariat for Roma Education Strategy, Ministry of Human and Minority Rights of the State Union of Serbia and Montenegro, Belgrade, 23 March 2006.

<sup>201</sup> Interview with Ms. Anne-Maria Cuković of the Secretariat for Roma Education Strategy, Ministry of Human and Minority Rights of the State Union of Serbia and Montenegro, Belgrade, 23 March 2006.

<sup>202</sup> Interview with Ms. Anne-Maria Cuković of the Secretariat for Roma Education Strategy, Ministry of Human and Minority Rights of the State Union of Serbia and Montenegro, Belgrade, 23 March 2006.

<sup>203</sup> Case study Zemun.

free textbooks for 6,000 Roma primary school pupils (a total of 51,263 book items).<sup>204</sup> The Roma Children’s Centre, in the period from 2001 to 2003, handed out 1,600 textbook sets for all children covered by their project, and in the past two years 900 sets of textbooks and 1200 school supply sets for the poorest children attending the primary school.<sup>205</sup> According to the Centre for Children’s Rights and Save the Children, some schools also ensure free textbooks for the poorest pupils in the locality, of whom an estimated 60 per cent are Roma.

According to research conducted by the Centre for Children’s Rights and Save the Children, conducted in five towns, certain measures of financial support to socially vulnerable pupils including Roma are being implemented at the local level (Table 9).<sup>206</sup> This financial support is provided through centres for social work. Through these centres socially vulnerable families can receive a family allowance, child’s allowance, parental allowance, and occasional financial compensation. Support is not given in accordance with any law or State programme, but is rather a matter of local charity.

**Table 9: Financial support for socially vulnerable pupils available at the local level (2006)**

Beneficiaries	Type of social support:				
	Free textbooks	Free school supplies	Free snacks	Free recreation	Free winter / Summer vacations
Total number of pupils	291	1,102	1,909	109	5
Number of Roma children	174	252	509	11	1
Proportion of Roma children (per cent)	59.79	22.87	26.66	10.09	20

Source: Save the Children UK and the Centre for Children’s Rights<sup>207</sup>

The proportion of Roma children among the total number of children receiving financial support is between 53.7 per cent (Vranje) and 72 per cent (Subotica), which does indicate that there is awareness that the Roma population is economically more vulnerable than others.

<sup>204</sup> Interview with Ms. Anne-Maria Cuković of the Secretariat for Roma Education Strategy, Ministry of Human and Minority Rights of the State Union of Serbia and Montenegro, Belgrade, 23 March 2006.

<sup>205</sup> Interview with Ms. Milica Simić, Coordinator of the Roma Children’s Centre, Belgrade, 13 March 2006.

<sup>206</sup> Save the Children and the Centre for Children’s Rights, *Beyond an Unofficial Estimate*, p. 38.

<sup>207</sup> Save the Children and the Centre for Children’s Rights, *Beyond an Unofficial Assessment*, p. 38.

Schools themselves sometimes ensure some kind of financial assistance to poor pupils. For example, all schools encompassed by the case study in Valjevo Municipality provide free textbooks and snacks to all children from poor families, most of whom are Roma.<sup>208</sup>

The policy documents on Roma education envisage support measures to poor pupils through the distribution of free textbooks and school supplies. However, the implementation presupposes cross-sector cooperation of several ministries (Ministry of Education and Sports, Ministry of Labour, Employment and Social Policy), and elaboration of support eligibility criteria. This has not happened as yet.

#### 4.4 Residential segregation/Geographical isolation

Residential isolation of Roma settlements, bad housing conditions, lack of an adequate infrastructure, and remoteness from educational and other institutions are important obstacles to accessibility of education on the part of the Roma community.

According to the latest available data (Table 10), there are 593 Roma settlements in Serbia, in which 201,353 indigenous Roma and 46,238 Roma displaced from Kosovo live. These data show that 52.7 per cent of Roma settlements are in urban and suburban areas, as opposed to 44.8 per cent in rural areas.

**Table 10: Types of Roma settlements (2005)**

Type of settlement	Proportion (per cent)
Suburban settlement	31.0
Settlements in villages	23.1
Settlements in towns	21.7
Village	21.7
The rest	2.5

Source: Jakšić and Bašić<sup>209</sup>

Many Roma settlements are situated on the fringes of towns and villages, without paved roads and/or with bad or no transport connection with other populated zones in which pre-schools and schools are situated. According to a UNICEF study, as many as 20 per cent of Roma settlements do not have decent roads, and public transport is not

<sup>208</sup> Case study Valjevo.

<sup>209</sup> Jakšić and Bašić, *The Art of Survival*.

available on a regular basis.<sup>210</sup> The geographical distance of such settlements significantly decreases the chances of Roma children to attend school regularly. Under the new draft Law on Pre-School Education, if a settlement is more than 4 kilometres away from an educational institution, transport for children will be provided.<sup>211</sup> However, it appears unrealistic that children of pre-school age could walk the distance of up to 4 kilometres to the nearest school – a clear omission in the draft law.

As shown below in Table 11, only 37.6 per cent of Roma settlements have a preschool in or near (within 1 kilometre) the settlement, while pre-schools are inaccessible for 41 per cent of Roma settlements. There is a school in or near the settlement (within 1 kilometre) in 55.1 per cent of settlements, while for 20 per cent of settlements even a primary school is inaccessible.

**Table 11: Accessibility of pre-schools and primary schools from Roma settlements (2005)**

Accessibility or distance of the nearest school or pre-school away from the Roma settlement (questionnaire choices)	Proportion of Roma settlements (per cent)	
	Pre-school institution	Primary school
“Accessible”	15.9	21.5
Up to 1 kilometre away	21.7	30.0
More than 1 kilometre away	20.0	27.3
“Not accessible”	41.0	20.0
“The rest”	1.4	1.2

Source: Jakšić and Bašić<sup>212</sup>

The data show that 15.9 per cent of Roma settlements have a pre-school, and 21.5 per cent have a primary school. Given their location in predominantly Roma-populated settlements, such educational establishments are bound to be all- or predominantly Roma, contrary to the officially available data that segregation is a sporadic rather than widespread phenomenon in Serbia (see section 2.4). However, there is no information about the extent of segregation in Serbia, even based on the place of residence.

According to the official admission, only a handful of segregated schools exist in Serbia, such as the Vuk Karadžić Primary School in Niš. It is situated near a large Roma

<sup>210</sup> UNICEF, *Reproduction of Social Isolation through Education – Roma Children and Education in South East Europe*, forthcoming. The study examines the exercise of the right to education by Roma in seven countries of South-East Europe in 2005.

<sup>211</sup> *Draft Law on Pre-School Education*.

<sup>212</sup> Jakšić and Bašić, *The Art of Survival*.

settlement, the Beograd Mala slum, with approximately 4,500 inhabitants, and has all the characteristics of a segregated school (namely 80 per cent are Roma children).<sup>213</sup> Even better-off and more educated Roma tend to take their children away from this school, in a desire to ensure better quality education. However, the poorest parents usually cannot afford to take their children to the more remote school. Furthermore, schools allegedly do not want to admit children from the so-called “Gypsy addresses”, and often turn them away under the pretext that there are no more places.<sup>214</sup>

In the case of the Jovan Cvijić Primary School in Belgrade, 20 to 30 Roma children were enrolled following a pre-school programme in the Deponija settlement, carried out in 2002–2003 by the Society for the Improvement of Local Roma Communities (DURN). The transfer of Roma children provoked a strong opposition from the parents of non-Roma children. The Ministry of Education and Sports tried to mediate in the situation, but in the end Roma pupils were just transferred to nearby schools, without any consequences for the non-Roma parents who manifested racist attitudes.<sup>215</sup>

It is probable that there are many more segregated classes and schools than is publicly admitted.<sup>216</sup> In order to assess the extent and scope of the problem of segregation, there is a pressing need for more research and data mapping out segregated schools in Serbia.

## 4.5 School and class placement procedures

### 4.5.1 Class placement in mainstream schools

There are no officially formulated school and class placement procedures. Schools enjoy discretion in developing internal criteria, which are usually set by the schools’ psychologists and/or pedagogues<sup>217</sup> on the basis of tests administered prior to the enrolment.<sup>218</sup> Sometimes these criteria are included as instructions in schools’ annual programmes, but this is rather an exception than a rule.

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<sup>213</sup> FOSS, *Report on the “Equal Chances” Project*.

<sup>214</sup> Interview with Ms. Refika Mustafić, director of the Roma Education Centre, Niš, 22 March 2006.

<sup>215</sup> Interview with Ms. Anne-Maria Cuković of the Secretariat for Roma Education Strategy, Ministry of Human and Minority Rights of the State Union of Serbia and Montenegro, Belgrade, 23 March 2006.

<sup>216</sup> Interview with Mr. Petar Antić, director of the Minority Rights Centre in Belgrade, 17 March 2006.

<sup>217</sup> A school pedagogue is an educational specialist employed full-time to support teachers and students to improve quality of teaching and learning process. He or she is not a teacher in the school, but a staff person whose function is to support teachers in their work. Pedagogues are educated at the Education Departments at Universities.

<sup>218</sup> Interview with Ms. Angelina Skarep, educational advisor to the Ministry of Education and Sports of the Republic of Serbia, Belgrade, 10 April 2006.

Classes are often formed on the basis of gender, test results, developmental and physical (dis)abilities, socio-economic standing of the family, and so on. Consideration is given to balanced distribution of children in classes along these parameters, maintaining diversity. When a child has any sort of a learning problem, he or she may be placed in a class led by a teacher with some experience or skills dealing with this specific problem. The wishes of parents can also be taken into account, but are not decisive. In fact, children can be placed in a special class even without the parents' consent.<sup>219</sup>

#### 4.5.2 Placement in segregated classes

Occasionally, segregated Roma classes in mainstream schools are formed. This is usually done on the basis of internal (unwritten) school criteria. According to representatives of various NGOs and schools, placement in "special classes" within mainstream schools is most commonly justified by insufficient knowledge of the language of instruction (Serbian, or Hungarian in some localities in Vojvodina). Sometimes, Roma children "outgrow" the enrolment age (i.e. are older than seven or eight). In cases of parents travelling for seasonal work, the school year may have already started and all classes formed, and these children are placed in separate ("special") classes.

According to NGOs, sometimes there are "good intentions" behind forming such classes.<sup>220</sup> This is because, in the opinion of some school psychologists/pedagogues, in uniform conditions (i.e. in a class where children have more or less the same knowledge, the same degree of fluency in a language, and so on), Roma children are able to make faster progress, as in that case teachers most readily adjust their methodology and educational contents to the pupils' level.<sup>221</sup> This illustrates a typical approach of the education system in Serbia: lowering expectations and standards, and using a programme- or teacher-centred methodology, rather than an individualised (child-centred) approach. Roma children usually do not have the same level of "expected" knowledge at the beginning of schooling as other children who have been through pre-school training. But teachers are not ready or willing to adjust their methods to the actual needs of these children. Thus, even when there is no overt racist intent, the outcome is racially biased, depriving both Roma and non-Roma children of a diverse learning environment.

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<sup>219</sup> Interview with Ms. Angelina Skarep, educational advisor to the Ministry of Education and Sports of the Republic of Serbia, Belgrade, 10 April 2006.

<sup>220</sup> Interview with Ms. Milena Mihajlović, director of the Centre for Interactive Pedagogy, Belgrade, 5 March 2006.

<sup>221</sup> Interview with Ms. Milena Mihajlović, director of the Centre for Interactive Pedagogy, Belgrade, 5 March 2006.

### 4.5.3 Placement in “special schools”

Referral to special schools takes place on the basis of a recommendation of a medical commission – the Commission for Categorisation of Children with Developmental Disabilities (or “Categorisation Commission”). Referral to the medical commission is made in accordance with a recommendation of a psychologist/pedagogue who conducts regular pre-school testing in a primary school. The makeup of the medical commission is determined depending on a child’s suspected disabilities or learning problems and consists of a paediatrician from a medical institution, a representative of the health care institution in which the child is treated, an expert working with children with developmental disabilities, the psychologist/pedagogue, a special education teacher, and a social worker of a kindergarten or a school. The medical commission cannot take a final decision determining the type and extent of the developmental handicap, which is a prerogative of the municipal or city authorities. However, in practice, the final decision is almost always made according to the recommendation of the medical commission. Parents can appeal against this decision to a competent ministry.<sup>222</sup>

There is no official Romanes interpreter in the commission. When the commission notices that the child has a problem with understanding, non-verbal tests can be included. Lack of understanding and the child’s inability to answer due to the language barrier are often interpreted as a developmental disability (“pseudo-retardation”). There is no regulation enabling parents to be present at the testing, even if they were experts. NGOs claim that what had been achieved in the past ten years is to have Roma assistants accompany children to tests, to translate questions and help children to understand the task. This to a certain extent helps to prevent unwarranted referrals to a medical commission and subsequent placement in the special school. However, in the absence of the legal right, even such assistance depends on the good will of the school psychologist/pedagogue.<sup>223</sup>

If the commission’s decision does not satisfy the child’s parents, they can make an appeal to a second-order commission. In reality, Roma parents rarely appeal against the referral of their children to special schools. The primary reason is probably ignorance of legal possibilities. The Minority Rights Centre’s experience is that in most cases, psychologists try to persuade Roma parents that the special school is best for their children because of the advantages that it offers: free school supplies, free meals, and so on.<sup>224</sup> Special school education is often a faster and cheaper way to get a diploma and

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<sup>222</sup> The Law on the Foundations of the Education System.

<sup>223</sup> Interview with Ms. Milena Mihajlović, director of the Centre for Interactive Pedagogy, Belgrade, 5 March 2006.

<sup>224</sup> Interview with Mr. Petar Antić, director of the Minority Rights Centre in Belgrade, 17.March 2006.

job qualifications for many of the poorest families,<sup>225</sup> even though afterwards they cannot go on to higher education, or hold more than low-skilled jobs. The Roma Children's Centre knows of only one case when Roma parents refused to let their child go to a special school, and won their appeal.<sup>226</sup>

Under the Law on the Foundations of the Education System, it is possible to reassess the extent of the diagnosed developmental disability.<sup>227</sup> However, there is no clear procedure for transferring children from special to mainstream schools, or from segregated to mixed classes. Nor is there any information as to how often this measure is actually used in practice.

According to the Minority Rights Centre, Roma children are more often transferred from mainstream to special schools, than vice versa.<sup>228</sup> If there are cases of return to mainstream schools, there are usually no records.<sup>229</sup>

#### 4.6 Language

There is no information about the levels of proficiency of Roma children in the majority language, in which the most of them study. NGOs estimate that the majority of Roma children do not speak Serbian at home, and that they have only very little knowledge of Serbian at the pre-school age. Even at school age, many Roma children from Romanes-speaking families are not proficient in Serbian or Hungarian, the official languages of instruction. The Centre for Interactive Pedagogy, which has been carrying out the OSI "Step-by-Step" pre-school programme, reported that around 20 per cent of children had had this problem, and stressed the invaluable importance of Roma teaching assistants for faster overcoming of the language barrier.<sup>230</sup>

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<sup>225</sup> Strategy for the Improvement of Education of Roma in Serbia, Ministry of Education and Sports, 2003.

<sup>226</sup> Interview with Ms. Milica Simić, coordinator of the Roma Children's Centre, Belgrade, 13 March 2006.

<sup>227</sup> "A reassessment of the extent or the type and the extent of a developmental handicap of a pupil can be made in the course of his or her primary education. The proposal to reassess the extent or the type and the extent of a developmental handicap can be made either by parents or by the school i.e. the medical institution." The Law on the Foundations of the Education System, Art. 86.

<sup>228</sup> Interview with Mr. Petar Antić, director of the Minority Rights Centre in Belgrade, 17 March 2006.

<sup>229</sup> Interview with Ms. Angelina Skarep, educational advisor to the Ministry of Education and Sports of the Republic of Serbia, Belgrade, 10 April 2006.

<sup>230</sup> Interview with Ms. Milena Mihajlović, director of the Centre for Interactive Pedagogy, Belgrade, 5 March 2006. All children attending their programme have reportedly shown excellent mastery of the Serbian language and have less difficulty doing school assignments than children who have not benefited from the programme.



A psychologist from a primary school in Niš has made the following analysis of factors having an impact on the degree to which children master the language and subsequent ramifications on school achievements:

Those children who attended pre-school groups regularly, or have had an opportunity to socialise with children of non-Roma nationalities, or spoke Serbian at home with family members, have had excellent school achievements. The number of those children is significantly lower than the number of children whose mastery of Serbian language is poor.<sup>231</sup>

The language barrier is particularly prominent among children who have been readmitted to Serbia from Western European countries. They may be completely or partially ignorant of Serbian and/or Romanes, not knowing the Cyrillic alphabet, inserting foreign words in speech, and making various grammatical mistakes. Owing to the lack of, or poor proficiency in, the Serbian language, such children, who may be old enough to go to the third grade, often enrol just in the first grade of the primary school.<sup>232</sup> There has been no systematic solution to the problem, aside from several NGO projects.<sup>233</sup>

According to Roma NGOs, in Liciki alone (the biggest Roma settlement in Kragujevac), up to ten families returned with a total of 30 children and are experiencing these problems. A third of the children managed to become included in the education system (schools) or to continue schooling in some other form (alternative workshops) after they had been included in the REI “Equal Chances” project. Most children, however, are outside the education system.<sup>234</sup>

Policy documents on Roma education recognise the language barrier as a factor responsible for the underachievement of Roma children. NGO experiences, in addition, suggest that this is one of the decisive factors for referring Roma children to special schools.<sup>235</sup>

However, there is no information that the Ministry of Education and Sports is conducting special programmes that would help to remove the language barrier.

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<sup>231</sup> Case study Niš.

<sup>232</sup> Interview with Ms. Refika Mustafić, director of the Roma Education Centre, Niš, 22 March 2006.

<sup>233</sup> FOSS, *Report on the “Equal Chances” Project*.

<sup>234</sup> FOSS, *Report on the “Equal Chances” Project*

<sup>235</sup> Strategy for the Improvement of Roma Education in Serbia, Ministry of Education and Sports of the Republic of Serbia, 2003.

## 5. BARRIERS TO QUALITY EDUCATION

*Roma are systematically exposed to a lower quality of education. Most schools in Serbia are run-down and in need of renovation and newer equipment. Given that many Roma live in impoverished settlements lacking adequate infrastructure and local tax investments, the quality of school buildings in Roma settlements could be even worse than average, although official information is not available.*

*While, formally, teachers in majority-Roma schools are equally qualified, the phenomenon of “white flight” affects both the student body and the teaching staff. This results in lowered expectations and lowered quality of instruction, and worse achievement of Roma pupils, as demonstrated by the results of standardised tests. Half of the Roma children tested have not mastered elementary mathematical knowledge after the third grade, and an estimated 56 per cent have not mastered even basic knowledge of the Serbian language grammar after the third grade. In the absence of official curricular standards, Roma pupils are reportedly taught an abridged curriculum, and often automatically passed from grade to grade without acquiring basic literacy in the early grades of the primary school, precipitating their drop-out in the higher grades of the primary school. A set of clear and coherent criteria for grading, and a monitoring system to confirm that teachers respect these criteria, should be developed and put in place to address this issue.*

*Teachers’ prejudices play a significant role in lowering the quality of education for Roma pupils even when Roma are educated in the same classroom as non-Roma. Teachers allegedly disregard racist bullying and harassment of Roma pupils by non-Roma peers and their parents, and often themselves display discriminatory attitudes towards Roma, manifesting prejudices deeply entrenched in the local communities and society at large. Cooperation between schools and parents, if it exists at all, is superficial. Communication with Roma parents is allegedly limited to meetings at which teachers criticise Roma parents about their children.*

*The newly established Educational Supervision Service could, in theory, be a systematic tool for monitoring barriers and obstacles to the quality of Roma education, and also for supporting real pedagogical innovation and change on the school level. However, there is no indication that this really happens in practice, and on the local level some school inspectors appear unaware even of the existence of State educational policies to improve Roma access to education. The Ministry of Education and Sports should provide better training for inspectors, coupled with a clear mandate to identify and address cases of discrimination.*

### 5.1 School facilities and human resources

#### 5.1.1 The quality of school buildings

There is no official information on the quality of schools where Roma study. The *Strategy for Improvement of Roma Education* does not mention the quality of school buildings among the main barriers for proper education of Roma students. Furthermore, a recent OECD report on students at risk (who are in most cases enrolled in special schools) does not mention the quality of school buildings among

issues and barriers.<sup>236</sup> However, according to NGO representatives,<sup>237</sup> school buildings in which these NGOs carried out their projects were dilapidated, their condition far worse than the condition of an average school in Serbia.<sup>238</sup>

At the same time, the average school quality in Serbia leaves much to be desired. UNICEF's 2001 *Comprehensive Analysis of Primary Education in FR Yugoslavia*, (hereafter, *UNICEF Comprehensive Analysis*) found that there is a total of 4,681 school buildings in Serbia; special schools are housed in 53 buildings, and adult education schools in 19 buildings.<sup>239</sup> Only 40 per cent of all school buildings are in a condition that does not require some repairs; the condition of rural schools is generally worse than of urban schools.<sup>240</sup> Although almost all school buildings have electricity, only around 75 per cent have running water, and around 60 per cent have a sewage line. From the pupils' perspective, the situation is somewhat better: around 88 per cent of pupils attend schools with running water and 82 per cent attend schools with sewage lines.<sup>241</sup> In as much as 65 per cent of school buildings, the legal minimum of three square metres per pupil is not met; around 76 per cent of pupils attend such schools. 12 per cent of rural schools and around 17 per cent of urban schools have only one square metre per pupil. Around 40 per cent of buildings do not have any teaching aids, although 62 per cent of schools have libraries. An average number of books per pupil is 17. A very small number of schools have specialised classrooms (laboratories, and so on), but in most schools some regular classrooms are equipped with a piece or two of special equipment necessary for chemistry, physics and biology lessons.

There is lack of information on the quality of school buildings with proportionally higher number of Roma students. However, it appears that the quality of such buildings could be worse than normal, given lack of infrastructure in Roma settlements, lack of local tax investments in schools, lack of parental contributions due to poverty prevalent in Roma communities, and other factors determining quality of life.

<sup>236</sup> G. Nikolić, B. Jablan, S. Marković, V. Radoman, S. Hrnjca and Z. Djurić, "Educational Policies for Students at Risk and those with Disabilities in Serbia," in OECD, *Educational Policies*.

<sup>237</sup> For example, the Centre for Interactive Pedagogy (CIP), the Roma Children's Centre (CRC/DRC), Society for the Improvement of Roma Settlements (SIRS/DURN), among others.

<sup>238</sup> Interviews with Ms. Milena Mihajlović, director of the Centre for Interactive Pedagogy (CIP), Belgrade, 5 March 2006.

<sup>239</sup> UNICEF, *Comprehensive Analysis of Primary Education*, p. 61.

<sup>240</sup> A. Bogojević, I. Ivić and R. Karapandža, *Optimisation of the Network of Schools in Serbia*, Belgrade, UNICEF, 2002.

<sup>241</sup> UNICEF, *Comprehensive Analysis of Primary Education*, p. 35.

### 5.1.2 Teaching staff

There are no official data on teachers working in classes and schools with majority Roma pupils. NGOs provide some information about this important aspect of the quality of education of Roma.

The 2004 *National Assessment Study*, conducted among the pupils of the third grade of primary schools by the Institute for Evaluation of the Quality of Education, a public institution set up by the Government of the Republic of Serbia, provides reliable information about the quality of educational achievements of pupils.<sup>242</sup> The study encompassed a representative sample of pupils in Serbia, excluding Kosovo (a total of 268 classes and homeroom teachers). It found that teachers who work in classes with majority Roma pupils do not differ from other teachers as regards gender, age, formal educational qualifications, teaching experience, and the like. Thus, seemingly, there should be no essential difference with regard to basic socio-demographic and professional characteristics of teachers who work with classes incorporating Roma pupils and teachers who do not. It should be noted that this information concerns the lower grades of the primary school (first to fourth) and that it cannot be applied automatically to the upper grades (fifth to eighth). However, these results provide a generalised picture, camouflaging individual cases where the situation is different.

According to representatives of the CIP NGO, which carried out the REI “Equal Chances” project in the predominantly Roma school of Vuk Karadžić in Niš, there is an apparent tendency among teachers, especially highly qualified ones, to leave this school for work in other schools.<sup>243</sup> One of the crucial reasons cited is the fact that non-Roma community often treats non-Roma teachers from this school as if they were Roma. This experience suggests that at the local level (i.e. at the level of individual schools), there are mechanisms at work that result in schools with a large number of Roma pupils having weaker teaching staff, who cannot easily find work elsewhere, or even insufficient staff. Considering that the overall number of schools in which Roma pupils are in the majority is rather small, these cases cannot affect the global picture. However, such cases indicate that deeply rooted negative stereotypes about Roma, which prompt non-Roma teachers leave such as soon as they have an opportunity to do so, result in a poorer quality of teaching staff in Roma schools.<sup>244</sup>

Although the authorities usually claim that the Vuk Karadžić Primary School is one of very few segregated schools in Serbia, negative stereotypes about Roma are widespread.

<sup>242</sup> A. Baucal, D. Pavlović-Babić, D. Plut and U. Gvozden, *Nacionalno testiranje učenika III razreda osnovne škole. Zavod za vrednovanje kvaliteta obrazovanja i vaspitanja* (National Assessment of Pupils of the Third Grade of Primary School. Institute for the Evaluation of the Quality of Education and Upbringing), Belgrade, 2005 (hereafter, Baucal *et al.*, *National Assessment of Pupils*).

<sup>243</sup> Interviews with Ms. Milena Mihajlović, director of the Centre for Interactive Pedagogy (CIP), Belgrade, 5 March 2006.

<sup>244</sup> Interviews with Ms. Milena Mihajlović, 5 March 2006.

Therefore, the scenario when better qualified staff might leave “Gypsy schools” (along with non-Roma pupils) in search of “whiter” schools is quite possible in any school with a sizeable percentage of Roma pupils.

## 5.2 School results

This section analyses school results/achievements of Roma pupils, based on four main indicators: completion rates and passing to the next grade; school marks; results of standardised testing; and grade repetition.

### 5.2.1 Completion of grades and passing to the next grade among Roma pupils

One possible indicator of the success of Roma in compulsory education is the number of Roma pupils in the individual primary school grades. This indicator provides an insight into the scope of the problem, especially since many Roma students who repeat the first few grades are also those who then drop out. As shown below in Table 12, the REF’s *Needs Assessment* report for Serbia provides information about the number of Roma pupils in the primary school grades, for the 2002–2003 school year.

**Table 12: Number of Roma pupils in an individual primary school – breakdown by grade (2002–2003 school year)**

Grade	Number of Roma pupils	Proportion of Roma students* (per cent)
1	3,206	100.00
2	2,348	73.24
3	1,882	58.70
4	1,747	54.49
5	1,732	54.02
6	1,355	42.26
7	1,018	31.75
8	944	29.44

\*as compared to the number of Roma pupils enrolled in the first grade

Source: REF, *Needs Assessment Serbia*<sup>245</sup>

<sup>245</sup> REF, *Needs Assessment Serbia*, p. 20.

These data indicate that a large number of Roma pupils enrolled in the first grade do not pass to the second and third grades. It seems that already in the first two grades around 40 per cent of Roma pupils drop out of school. Between 50 and 60 per cent of those enrolled in the first grade actually go to the third, fourth and fifth grades, while the sixth grade is attended by about 40 per cent of the initially enrolled Roma pupils. This number decreases to merely 30 per cent of pupils who pass to the seventh and eighth grades of the primary school. Thus, merely 30 per cent of Roma pupils who enrol in the first grade actually finish the primary school.

This information should be read in the light of the fact that since the 2001–2002 school year, a comprehensive education reform has been carried out in Serbia.<sup>246</sup> At the very beginning of the reform process, priority was given to systematic changes, although the Ministry of Education and Sports encouraged schools to improve the enrolment of Roma pupils taking into consideration many barriers that they face in access to education.<sup>247</sup> This was an internal communication, not followed with grants, teacher training courses, monitoring, or other technical or practical assistance. There has been indeed a certain increase in the number of Roma students enrolled in the early grades of primary education, compared to previous school years, although it is not known to what extent this policy was effective in the 2002–2003 school year.

However, it should be borne in mind that the number of Roma pupils who repeat grades is greater than the number of non-Roma pupils (see 5.2.4 below).<sup>248</sup> This might be a reason why the number of Roma pupils in junior grades of the primary school appears greater than their number in senior grades. This factor may also indicate that the number of Roma pupils who drop out of school by the third grade could be higher than 40 per cent.

### 5.2.2 School marks of Roma and non-Roma pupils

The second possible indicator of school results of Roma pupils is that of *school marks*. School marks are graded from 1 to 5 (1 is the lowest mark and 5 is the highest; grades 3–5 are pass marks). When comparing *school marks*, however, it should be noted that these are given to students by their teachers, rather than being based on standardised national tests.

<sup>246</sup> See details about conception of the comprehensive reform in T. Kovač-Cerović and L. Levkov (eds.), *Kvalitetno obrazovanje za sve – put ka razvijenom društvu* (Quality Education for All – Path to a Developed Society), Belgrade: Ministry of Education and Sports, 2002.

<sup>247</sup> Based on the open invitation, 74 school projects aimed at improving the quality of Roma education were supported financially in the 2002–2003 school year. Further information in Serbian available on the website of the Ministry of Human Rights at <http://www.humanrights.gov.yu/srpski/sektori/manjinska/roma/mere/1-obrazovanje/dosadasnje-mere/1-dosadasnje-mere.htm> (accessed on 2 March 2007).

<sup>248</sup> A. Baucal, “Development of Mathematical and Language Literacy among Roma Students,” *Psibologija*, Vol. 39 No. 2, 2006, pp. 207–227.

Through a one-off testing in a representative sample of schools – *National Assessment of Third Grade Pupils in Primary Schools*<sup>249</sup> (hereafter, the *National Assessment*) – information was collected about the school marks of Roma and non-Roma pupils in the first three grades of primary school in mathematics (Tables 13) and Serbian language (Table 14).

**Table 13: School marks (for mathematics) of Roma and non-Roma pupils in the first three grades of primary school (2005)**

School mark		Grade 1		Grade 2		Grade 3		Total No.
		Roma	Non-Roma	Roma	Non-Roma	Roma	Non-Roma	
1	No.	22	27	28	26	32	36	171
	per cent	9.7	0.6	12.1	0.5	14.0	0.7	–
2	No.	106	367	123	482	122	586	1,786
	per cent	46.9	7.6	53.2	10.0	53.3	12.1	–
3	No.	48	644	35	805	41	914	2,487
	per cent	21.2	13.4	15.2	16.7	17.9	18.9	–
4	No.	28	1,311	28	1,303	23	1,320	4,013
	per cent	12.4	27.2	12.1	27.0	10.0	27.4	–
5	No.	22	2,464	17	2,203	11	1,969	6,686
	per cent	9.7	51.2	7.4	45.7	4.8	40.8	–
<b>Total (1–5)</b>	<b>No.</b>	<b>226</b>	<b>4,813</b>	<b>231</b>	<b>4,819</b>	<b>229</b>	<b>4,825</b>	<b>15,143</b>

Source: Baucal et al., *National Assessment of Pupils*<sup>250</sup>

<sup>249</sup> Baucal et al., *National Assessment of Pupils*.

<sup>250</sup> Baucal et al., *National Assessment of Pupils*.

**Table 14: School marks (for Serbian language) of Roma and non-Roma pupils in the first three grades of primary school (2005)**

School mark		Grade 1		Grade 2		Grade 3		Total (No.)
		Roma	Non-Roma	Roma	Non-Roma	Roma	Non-Roma	
1	No.	16	20	23	16	25	20	120
	per cent	7.1	0.4	10.0	0.3	10.9	0.4	–
2	No.	102	262	110	351	111	407	1,343
	per cent	45.1	5.4	47.6	7.3	48.5	8.4	–
3	No.	52	600	47	660	50	817	2,226
	per cent	23.0	12.5	20.3	13.7	21.8	16.9	–
4	No.	33	1,215	29	1,275	27	1,330	3,909
	per cent	14.6	25.2	12.6	26.5	11.8	27.6	–
5	No.	23	2,716	22	2,516	16	2,251	7,544
	per cent	10.2	56.4	9.5	52.2	7.0	46.7	–
Total (1–5)	No.	226	4,813	231	4,818	229	4,825	15,142

F= frequency

Source: Baucal et al., *National Assessment of Pupils*<sup>251</sup>

These data indicate a very significant difference in school achievement between Roma and non-Roma pupils in mathematics and Serbian language. The majority of Roma pupils (45–55 per cent) have the lowest passing mark (2) at the end of the school year. Only between 5 and 10 per cent of Roma pupils get the highest mark (5), while over 40 per cent of non-Roma pupils receive this mark in all three grades and for both subjects. The difference in school achievements is also apparent from the number of pupils who got the failing mark (1) at the end of the school year. Among Roma pupils, it is between 7 and 11 per cent in Serbian, and between 10 and 14 per cent in mathematics, while among non-Roma it is less than 1 per cent.

Gender is an important factor in school achievement of Roma and non-Roma. Both Roma and non-Roma girls tend to outperform boys, although the progress of Roma

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<sup>251</sup> Baucal et al., *National Assessment of Pupils*.



girls towards the third grade also coincides with the time when so many of them drop out. Tables 15 and 16, below, demonstrate more clearly these tendencies.

**Table 15: Average school marks (for mathematics) for Roma and non-Roma boys and girls, in the first three grades of primary school (2005)**

School grade	Average school mark			
	Non-Roma		Roma	
	Male	Female	Male	Female
1	4.15	4.29	2.74	2.59
2	4.01	4.18	2.55	2.47
3	3.85	4.09	2.33	2.44

Source: Baucal et al., *National Assessment of Pupils*<sup>252</sup>

**Table 16: Average school marks (for Serbian language) for Roma and non-Roma boys and girls, in the first three grades of primary school (2005)**

School grade	Average school mark			
	Non-Roma		Roma	
	Male	Female	Male	Female
1	4.20	4.47	2.73	2.78
2	4.08	4.42	2.57	2.70
3	3.92	4.35	2.42	2.67

Source: Baucal et al., *National Assessment of Pupils*<sup>253</sup>

### 5.2.3 The achievements of Roma and non-Roma pupils in the National Assessment standardised tests

The third possible indicator of school achievement of Roma pupils is their *scores* in the standardised tests used in the *National Assessment*.<sup>254</sup> Here, pupils' achievements are expressed on a scale where the national average is 500 points, and the standard

<sup>252</sup> Baucal et al., *National Assessment of Pupils*.

<sup>253</sup> Baucal et al., *National Assessment of Pupils*.

<sup>254</sup> Baucal et al., *National Assessment of Pupils*.

deviation is 100 points (i.e. approximately two thirds of pupils have a score between 400 and 600 points). The levels are based on the student scores.

The average achievement of Roma pupils in the mathematics test is 366 points, 134 points below the national average, while their average achievement in the Serbian language is 346 points, 154 points below the national average. International studies (such as TIMSS and PISA) found that one year of schooling results in pupils’ progress of 60 points on average, using the scale used to express the achievement on the National Assessment.<sup>255</sup> If this is also the case in Serbia, then it would mean Roma pupils lag behind other pupils by 2.2 school years in mathematics and 2.6 school years in Serbian language (and these are pupils who on average spend in school three years in total).

The standardised tests in mathematics and Serbian language, used for the National Assessment of Pupils of the Third Grade of Primary School, differentiates between five quality levels for pupils’ achievements (A to E, where E is the lowest level). Each level is defined on the basis of what pupils at this level of achievement know or can do in mathematics and Serbian language, respectively.

**Table 17: Results for Roma and non-Roma pupils, in the standardised tests for mathematics and Serbian language in Grade 3**

Level	Proportion of pupils (per cent)							
	Serbian language				Mathematics			
	National level	Roma	Roma boys	Roma girls	National level	Roma	Roma boys	Roma girls
A	7	0.8	1.3	1.1	7	0.8	-	1.1
B	12	1.6	1.3	2.3	10	1.6	-	2.3
C	23	7.8	5.2	6.9	27	5.5	5.2	5.7
D	28	17.8	13	16.1	27	15.7	14.3	12.6
E	16	16.3	20.8	18.4	18	26	29.9	24
Below E	14	55.8	58.4	55.2	11	50.4	50.6	54
Total (per cent)	100	100	100	100	100	100	100	99.7

Source: Baucal et al., *National Assessment of Pupils*<sup>256</sup>

<sup>255</sup> Personal communication with Mr. Douglas Willms, Professor and Director of the Canadian Research Institute for Social Policy at the University of New Brunswick (UNB) who served on the technical advisory board for the OECD’s PISA study, and is known for the training of new scholars in the analysis of large and complex data sets, on file with the authors.

<sup>256</sup> Baucal et al., *National Assessment of Pupils*.

As shown above in Table 17, after three years of schooling, an estimated 50 per cent of Roma pupils have not mastered basic knowledge and basic terms and are not capable of applying mathematical knowledge in simple situations (below Level E). For the sake of comparison, at the national level, only 11 per cent of pupils have not managed to master level E. In addition to this 50 per cent, a further 26 per cent of Roma pupils have managed to master merely basic mathematical skills and understand the simplest terms after three years of schooling (Level E). At the national level, around 29 per cent of pupils are at level E or below, while among the Roma pupils the corresponding proportion is 76 per cent.

Analysis of the achievements of Roma pupils at the National Assessment in the Serbian language shows similarities with the assessment of mathematical skills. Even after three years of schooling, around 56 per cent of Roma pupils have not mastered fundamental knowledge and skills in the Serbian language (below Level E), while at the national level this is the case with 14 per cent.

For both the mathematics test and the Serbian language test, the results of Roma boys and girls essentially do not differ.

A UNICEF study from 2001<sup>257</sup> found that around 80 per cent of the Roma population in Serbia is functionally illiterate.

#### 5.2.4 Grade repetition rate among Roma and non-Roma pupils

The fourth indicator of school achievements of Roma pupils is the number of pupils repeating a grade. The available data show that at the national level, the repetition rate is 1 per cent, while among Roma pupils in the first three grades of the primary school it is 11 per cent.<sup>258</sup>

#### 5.2.5 Background versus education quality as cause for underachievement

The four indicators of school achievement of Roma pupils in Serbia point to considerable underachievement in school among Roma pupils in the first three grades of the primary school. It is highly probable that the gap widens exponentially in the senior grades of the school.

A possible explanation for Roma pupils' underachievement is their social background: they come from poorer families and have parents whose educational qualifications are lower. According to this explanation, it would be almost unrealistic to expect Roma pupils to perform any better. If the disadvantaged background of Roma pupils were

<sup>257</sup> UNICEF, *Comprehensive Analysis of Primary Education*.

<sup>258</sup> Baucal et al., *National Assessment of Pupils*.

solely responsible for their underachievement, then non-Roma pupils with the same background should have the same level of achievement as Roma pupils. It would also mean that schools were providing the same quality of education and incentive for advancement to both Roma and non-Roma pupils, and not contributing to the existing gap in achievements.

However, an analysis of achievements in mathematics of Roma and non-Roma pupils with similar socio-economic backgrounds indicates that there is still a difference in achievements, although in this case the difference is not 134 points but around 80 points. Thus, 40 per cent of the difference in school achievements between Roma and non-Roma pupils can indeed be attributed to the socio-economic disadvantage. However, about 60 per cent of the gap cannot be explained by socio-economic factors alone. Rather, it seems that the gap in achievements stems from the school itself: Roma pupils are probably not provided with the same quality of education as non-Roma pupils are.<sup>259</sup> It is important to stress here the point that these data concern Roma and non-Roma in the same classes (not physically separate, or segregated classes). The difference in results occurs evidently because teachers deliver a lower quality of education to Roma.<sup>260</sup>

Accordingly, the gap in school achievements between Roma and non-Roma students can be decreased significantly by improving the quality of education for Roma pupils, without waiting for an improvement of the general socio-economic status of the Roma population in Serbia. Furthermore, such a dramatic gap warrants urgent development and implementation of policy measures that would help to improve the quality of education and decrease this gap.

### 5.3 Curricular standards

There are no national-level curricular standards as yet in Serbia. While the standards are in the process of development, they do not seem to be among the priorities of the Ministry of Education and Sports. In practice, while teachers use the same (official) curriculum in classes with Roma pupils as in classes without Roma pupils, it appears that some teachers might have different attitudes towards Roma than non-Roma pupils, such as for example lowering expectations for Roma pupils. This evidently results in less encouragement for Roma pupils to advance, and accordingly less achievement.<sup>261</sup>

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<sup>259</sup> Baucal, "Development of Mathematical and Language Literacy among Roma Students," pp. 211–235.

<sup>260</sup> Baucal, "Development of Mathematical and Language Literacy among Roma Students," pp. 211–235.

<sup>261</sup> *The Strategy for Improvement of Roma Education in Serbia*, p. 13; interview with Ms. Milena Mihajlović, director of the Centre for Interactive Pedagogy (CIP), Belgrade, 5 March 2006.

A good illustration of this is the discrepancy in the results between Roma and non-Roma pupils on the National Assessment achievements, as compared to the school marks given by teachers (Table 18). If teachers had the same expectations for Roma and non-Roma pupils, and judged them on the basis of the same criteria, then Roma and non-Roma pupils with the same school mark should have the same average score on the standardised test. However, in reality, Roma pupils fare worse on the standardised test than non-Roma pupils with the same school mark (the difference is around 54 points, or almost the whole mark), which means that Roma pupils probably needed to show less knowledge to get the school mark.<sup>262</sup>

**Table 18: Scores in the standardised mathematics test correlated to school marks (for pass marks only) – for Roma and non-Roma pupils, at the end of the third grade of primary school (2004)**

School Grade	Standardised mathematics test score	
	Non-Roma	Roma
2	382.3	338.4
3	443.4	402.1
4	492.1	458.9
5	558.3	495.4

Source: Baucal et al., *National Assessment of Pupils*<sup>263</sup>

These findings are corroborated by the experiences of NGOs, which claim that there is a considerable difference in school curriculum used by Roma and non-Roma pupils, even though formally the curriculum is uniform across the country. The representatives of CIP, for example, allege that teachers actually abridge the curriculum for Roma pupils, selecting only some parts of it, which they require their Roma pupils to learn. Teachers reportedly justify this practice by the frequent absenteeism of Roma pupils.<sup>264</sup>

Further to the trend of teachers lowering the standards for Roma, it appears that Roma pupils are also more frequently placed in classes with a lower quality of instruction (see Table 19). Data from the National Assessment of Pupils of the Third Grade of Primary School reveal that over 40 per cent of Roma pupils are in classes with the lowest quality of teaching, while only around 20 per cent of non-Roma pupils are in such classes. The “quality of teaching” is here assessed based on an estimation of student achievements in

<sup>262</sup> This comparison was made only for those classes in which there are both Roma and non-Roma pupils.

<sup>263</sup> Baucal et al., *National Assessment of Pupils*.

<sup>264</sup> Interview with Ms. Milena Mihajlović, director of the Centre for Interactive Pedagogy (CIP), Belgrade, 5 March 2006.

each class, while applying a control to the data for socio-economic status. The sample included 5,000 students from 212 classes, within 113 schools. The situation is reversed in classes with the highest quality of instruction; around 39 per cent of non-Roma pupils are taught in such classes, as opposed to just above 20 per cent of Roma pupils.

**Table 19: The quality of teaching in classes – for Roma and non-Roma pupils**

Quality of teaching in the class – for the 20 per cent of classes in which the quality of teaching is:		Proportion (per cent)	
		Non-Roma	Roma
1	highest	17.6	12.6
2	higher than average	21.0	10.9
3	average	21.2	17.6
4	lower than average	20.1	18.4
5	lowest	20.2	40.6

Source: Baucal et al., *National Assessment of Pupils*<sup>265</sup>

There have been some positive examples, even though in a perhaps “wrong” environment, when teachers extended the curriculum for Roma pupils. Thus, the Belgrade-based Branko Pešić School for Adult Primary Education, where Roma children make up the majority of the student body (see also section 2.4.4), works according to the adult curriculum modified by the school itself. So, instead of just two subjects supposed to be taught, the pupils in the first grade have music, physical education, art and English, in addition to Serbian and mathematics. The Ministry of Education and Sports in 2003 approved such curriculum modification, but has since then retracted the approval. The school has been instructed to work according to the official curriculum, which the staff are refusing to do. They feel that they would damage the children’s interests in this manner by depriving them of knowledge to which they are entitled. At the moment, the outcome of this matter seems unclear.<sup>266</sup>

The *Strategy for the Improvement of Roma Education in Serbia*, produced by expert groups engaged by the Ministry of Education and Sports, also stresses the point that Roma children from mainstream schools receive some shortened version of the National Curriculum. According to the Strategy, the main reasons for such malpractice are as follows: (a) at the systemic level, there is no instruction/support for teachers as to

<sup>265</sup> Baucal et al., *National Assessment of Pupils*.

<sup>266</sup> Interview with Ms. Jovanka Stojić, principal of the Branko Pešić School for Adult Primary Education, Belgrade, 15 July 2006; interviews with teachers and parents of children attending this school, Belgrade, 17 June 2006.

how to meet the educational needs of Roma children; (b) teachers are not sufficiently trained to find ways to meet educational needs of Roma children; (c) Roma children attend classes irregularly, they might have troubles with understanding the Serbian language (which is the language of instruction), and so on.<sup>267</sup>

If the objectives of the *Strategy for the Improvement of Roma Education in Serbia* are to be taken seriously, this by no means should serve to justify the continuous provision of low quality education to Roma. At the very minimum, instruction and support for teachers should be improved, as well as measures carried out to support Roma children to attain the necessary language proficiency and other preparation to be able to attend a normal school programme.

#### 5.4 Classroom practice and pedagogy

Although there does not seem to be difference in general characteristics of teachers working with classes with Roma pupils (see above), it appears that some teachers might have different attitudes towards Roma and non-Roma pupils. One of the most important differences in this regard can be different expectations from Roma and non-Roma pupils, and it is often claimed that teachers have lower educational expectations of Roma pupils, which results in less encouragement to advance and less achievement.<sup>268</sup>

At the National Assessment, Roma and non-Roma pupils were asked to fill out a questionnaire about their relationship with teachers and the method of teaching. Analysis of the responses yields the following tendencies:

- Teachers assess homework more often in the case of non-Roma pupils;
- Teachers give explanations about what is correct and what is wrong in pupils' work in the case of non-Roma pupils
- Roma pupils give a positive assessment of their relationship with teachers more frequently than non-Roma pupils
- Non-Roma pupils think that teachers are strict with them more often than Roma pupils do
- Non-Roma pupils are more prone to say that teachers scold them when they show ignorance
- Non-Roma pupils more often than Roma pupils think that their teachers expect them to have good knowledge of mathematics.

<sup>267</sup> *The Strategy for Improvement of Roma Education in Serbia*, p. 13.

<sup>268</sup> *The Strategy for Improvement of Roma Education in Serbia*, p. 13; interview with Ms. Milena Mihajlović, director of the Centre for Interactive Pedagogy (CIP), Belgrade, 5 March 2006.

Thus, there is evidence to indicate that Roma pupils consistently get different – some would say “excessively tolerant” – treatment than other pupils from their teachers. The practice of, and tendency to, lower expectations for students from a ‘weaker’ group is known as ‘didactic fit,’ which effectively leads to lower schooling outcomes for students.<sup>269</sup> For example, it has been reported that teachers automatically pass Roma children to the next grade, even if the children had not fully assimilated the required curriculum for the grade. Thus, formally, only ten to 15 per cent of Roma pupils repeat a grade in the Vuk Karadžić Primary School in Niš.<sup>270</sup> As a consequence, many Roma children complete the fourth grade without properly learning to read and write, and are functionally illiterate. They may acquire these skills later, in the sixth or seventh grade, although by then for many it is too late and they drop out. Unfortunately, this practice is only too common across Serbia.

The practice that was piloted through the REI’s “Equal Chances” project. This includes the following approaches, among others:

- Child-centred pedagogy;
- Attention to language and bilingual techniques in the case of children coming from different language backgrounds – including working with Roma Teaching Assistants;
- Inclusion of Roma culture in the classroom and school environment;
- Family inclusion in the teaching and learning process.

However, these approaches represent the exception, rather than the norm, with regard to pedagogical practice in Serbian schools. Often, there is resistance on the part of the teachers themselves to any innovative practice or curriculum. For example, there was much resistance on the part of teachers when, at the beginning of the REI project, teachers were faced with changing their practice, to accommodate the involvement of RTAs in the learning process (see section 3.4). In addition, responding to a written questionnaire given to teachers in two primary schools in Niš, 85 per cent of teachers gave a negative answer when asked whether they would attend training for bilingual education or bilingual techniques; among the reasons that they cited were that they are underpaid, and that mandatory education should be in the official (Serbian) language.<sup>271</sup>

The existing school practice permits the conclusion that in the majority of schools in Serbia, practices are entrenched in an older paradigm for instruction, the frontal, teacher-oriented approach, focusing on lecturing rather than on interactive

<sup>269</sup> Y. Dar and N. Resh, “Separating and Mixing Students for Learning: Concepts and Research,” *Pedagogisch Tijdschrift*, 19, 1994, pp. 109–126.

<sup>270</sup> According to the school principal, there had been no National Assessment, the test for entry/exit of pupils at crucial points of education (usually, grades 5, 8 and 12).

<sup>271</sup> Case study Niš.



methodology. Such an approach to the teaching and learning process is rather the norm in Serbia, and consequently, most Roma students do not benefit from quality education or equal chances along with their peers. The core of the stagnancy of the practice rests in the pre-service teacher training institutions, where the formal education of kindergarten and school teachers is largely focused on scientific disciplines/subjects, rather than on pedagogical techniques (see section 3.7). As there is practically no standardised system for in-service teacher training, there is little way, other than NGO and individual initiatives, to systematically change teacher practice in Serbia at this time.

## 5.5 School–community relations

Under the Law on the Foundations of the Education System, the school board is a governance body of the primary school.<sup>272</sup> The school board consists of nine members: three representatives of teachers, three representatives of the local government and the representatives of parents. The board members are appointed and dismissed by the local assembly, and the chairperson is elected by the school board.

The Law also regulates competences of the school board.<sup>273</sup> The board enacts its statute and other general acts, decides on the school curriculum, development plan, and annual programme, drafts and enacts financial plans, appoints the school principal, takes measures to improve working conditions and education, and performs other tasks in accordance with the law, the founding act and the statute. Thus, the Law envisages a considerable role for the local government in school management, in accordance with a general tendency of decentralisation of education.

However, since the education system in Serbia has been very centralised in the past 15 years (nearly everything had to be decided at the level of the Ministry of Education and Sports), the application of the new Law varies greatly in local communities. In practice, the new powers conferred on the local community with regard to school management were not used for the purpose of advancing the quality of education.

The majority of interviewed collocutors could not cite one example of a school in Serbia in which a Roma parent would be elected to a school board; some claim that even if there are such cases, they are extremely rare and are by chance rather than as a result of a policy.<sup>274</sup>

As to cooperation between schools and parents, even when such cooperation exists, it appears superficial. NGOs conducting projects aimed at advancing the quality of Roma education claim that schools involve parents only to make them finance new

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<sup>272</sup> Law on the Foundations of the Education System.

<sup>273</sup> Law on the Foundations of the Education System, Art. 56.

<sup>274</sup> Ministry of Human and Minority Rights, the Roma National Council, the Roma Children's Centre, the Minority Rights Centre, CIP and REC.

equipment or meet other school needs. Teachers are reportedly not trained or willing to include parents in a more serious way. The situation with Roma parents is allegedly far worse. Even when communication between teachers and Roma parents exists, it is allegedly limited to meetings at which teachers criticise or lecture Roma parents about their children.<sup>275</sup>

The experience with Roma assistants included in the work of schools within the “Equal Chances” project is very telling. In some cases teachers supported inclusion of Roma assistants because they allegedly thought that the assistants would take on themselves all the work with Roma parents. The NGO CIP assesses that during this project some changes in real parental involvement took place through mini-projects which the schools designed for advancing their cooperation with parents (especially Roma parents). The mini-projects were financially supported by the “Equal Chances” project, but when financing stopped things quickly went back to the way they were.

## 5.6 Discriminatory attitudes

Discrimination is named by the State policy documents as one of the key obstacles to equal access to education for Roma.<sup>276</sup> Roma are often exposed to various forms of discrimination by members of school administration, teachers, other children and non-Roma parents. Discrimination does not always take overt forms, but it is ubiquitous.

For example, while claiming to have good community relations with their non-Roma neighbours, interviewed Roma in Valjevo Municipality, regardless of their economic status, appear unwilling to identify themselves (the data on Roma in the municipality are very underestimated, reflecting the trend across the entire country). Few Roma would admit to speaking Romanes, and those Roma children who have light complexions apparently do not wish to confess that they are Roma. Even though often dismissed as mere children’s “squabbles”, conflicts with peers make the school environment unwelcoming for Roma pupils. Thus, interviewed Roma pupils of the Andra Savčić Primary School in Valjevo, who finished the first four grades in the segregated class of this school in Grabovica, and then moved on to continue schooling in the main building located in the town centre, claim that they have problems both with their non-Roma peers and with the teachers, who are allegedly unsupportive. Allegedly, non-Roma children often call them “gypsy”, “dirty”, and “stinky”, but when Roma children report this behaviour to the teachers, they are allegedly told by the teachers that the Roma children are themselves probably to blame for that kind of behaviour (of the peers):

Whenever something bad happens in class, like a fight, squabbles, or something like that, the teacher always first asks us if we are guilty of that.<sup>277</sup>

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<sup>275</sup> Interview with Ms. Milena Mihajlović, director of the Centre for Interactive Pedagogy (CIP), Belgrade, 5 March 2006.

<sup>276</sup> *The Strategy for Improvement of Roma Education in Serbia*, p. 10.

<sup>277</sup> Interview with a Roma girl from the Andra Savčić Primary School, Valjevo, 13 June 2006.

So, I am not telling anymore to the teacher what they (non-Roma children) are doing and telling me, because she is always on the side of the Serbs. She would say, you provoked him, for sure. Because of that, when they bother me I fight with them (non-Roma children), I know that I will be punished for that by the teacher, but it doesn't matter, I will be punished anyway.<sup>278</sup>

The children also expressed a wish that they could go back to the school in Grabovica, because “they were all the same” there.<sup>279</sup>

The “white flight” from the Vuk Karadžić Primary School is yet another example of discriminatory attitudes towards Roma by non-Roma parents who do not wish their children to share the school with Roma. There have been also instances of racist graffiti on the walls of the predominantly Roma Vuk Karadžić Primary School, and even more aggressive forms of racist abuse, when the police had to be involved because a group of skinheads would often wait for the Roma children after school and terrorise them.<sup>280</sup>

Discriminatory attitudes towards Roma pupils by teachers in practice may often translate in having lower expectations of Roma pupils and providing lower quality education to them, even when teachers may themselves think they are doing good, or that it is for the benefit of the child. For example, among the main reasons for poorer achievement of the Roma children at school, some Valjevo teachers named “way of life”; “habit”; different “mental and physical abilities” and even “weaker memory compared to other children.”<sup>281</sup> A psychologist in Niš commented that Roma culture is marked by “dominance of the right brain hemisphere”: it is, allegedly, turned towards movement, rhythm and the body, and not symbolic verbal expression, and this, allegedly, affects the school achievement of Roma children.<sup>282</sup>

Allegedly, teachers also often express their prejudices towards Roma openly, even in front of the class, saying that Roma children are “not intelligent enough”, that they “do not need anything else but to learn how to read and write”, that Roma girls should get married as soon as possible “because Roma women are made for giving birth”, and so on. At the same time, there have been hardly any legal or administrative cases against discrimination in education in Serbia. This prompts conclusions that either there is no clear understanding among Roma and non-Roma alike as to what constitutes discrimination, or that Roma have become so accustomed to discrimination that they seem almost insensitive to its manifestation, including racist bullying in school, or most importantly, that the existing anti-discrimination mechanisms are clearly ineffective in

<sup>278</sup> Interview with a Roma boy from the Andra Savčić Primary School, Valjevo, 13 June 2006.

<sup>279</sup> Case study Valjevo.

<sup>280</sup> Interview with Ms. Dragica Krstić, principal of the Vuk Karadžić Primary School, Niš, 5 June 2006.

<sup>281</sup> Case study Valjevo.

<sup>282</sup> Case study Niš.

countering racial harassment. Concealing Roma identity then appears a natural defence mechanism in the face of pervasive negative stereotyping.

## 5.7 School inspections

Until 2003, school inspections were organised according to school subjects (the so-called “subject inspectors”). By definition, they were concerned primarily with controlling the full implementation of the national curriculum (plan and programme), which used to be rigid, detailed and content-oriented. In that context, it was difficult to expect school inspectors to contribute to the improvement of the quality of Roma education. Hence, there is no record of the involvement of school inspections in the prevention of issues and practices outside their mandate. Nor is there any record of Roma ever being appointed to the position of school inspector.<sup>283</sup>

According to the Law on the Foundations of the Education System,<sup>284</sup> school inspection was transformed into two separate entities. There is still school inspection, but it is now concerned solely with the legal aspects of a school’s functions (not its educational aspects), and it has been transferred to the municipal level.

In addition to the school inspection, there is the School Supervision Services, under the authority of regional departments of the Ministry of Education and Sports.<sup>285</sup> It has a more supervisory and supporting role in educational matters: monitoring the school and teaching/learning process; proposing measures to modify noted malpractices; advice and support to school and teachers, and so on.<sup>286</sup>

To qualify as an education supervisor, the following criteria are set: at least six years of previous experience in education, a record of excellent results, and professional publications (such as articles, books, teachers’ manuals, and so on).<sup>287</sup> In theory, educational supervision service could be a systematic tool for monitoring barriers and obstacles to quality of Roma education, and also for supporting real pedagogical innovation and change on the school level, but there is no indication that it really happens in practice today.

For example, interviewed school inspectors<sup>288</sup> in Valjevo Municipality claim not to know anything about the local Action Plan, adopted within the framework of the “Decade of Roma Inclusion.” They claim not to have any communications with other

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<sup>283</sup> Interview with Mr. Ljuan Koka, president of the Executive Committee of the Roma National Council, Belgrade, 12 March 2006; interview with Mr. Petar Antić, director of the Minority Rights Centre in Belgrade, 17 March 2006.

<sup>284</sup> Law on the Foundations of the Education System, Art. 53.

<sup>285</sup> Law on the Foundations of the Education System, Art. 28.

<sup>286</sup> Law on the Foundations of the Education System, Art. 138.

<sup>287</sup> Law on the Foundations of the Education System, Art. 139.

<sup>288</sup> Case study Valjevo.

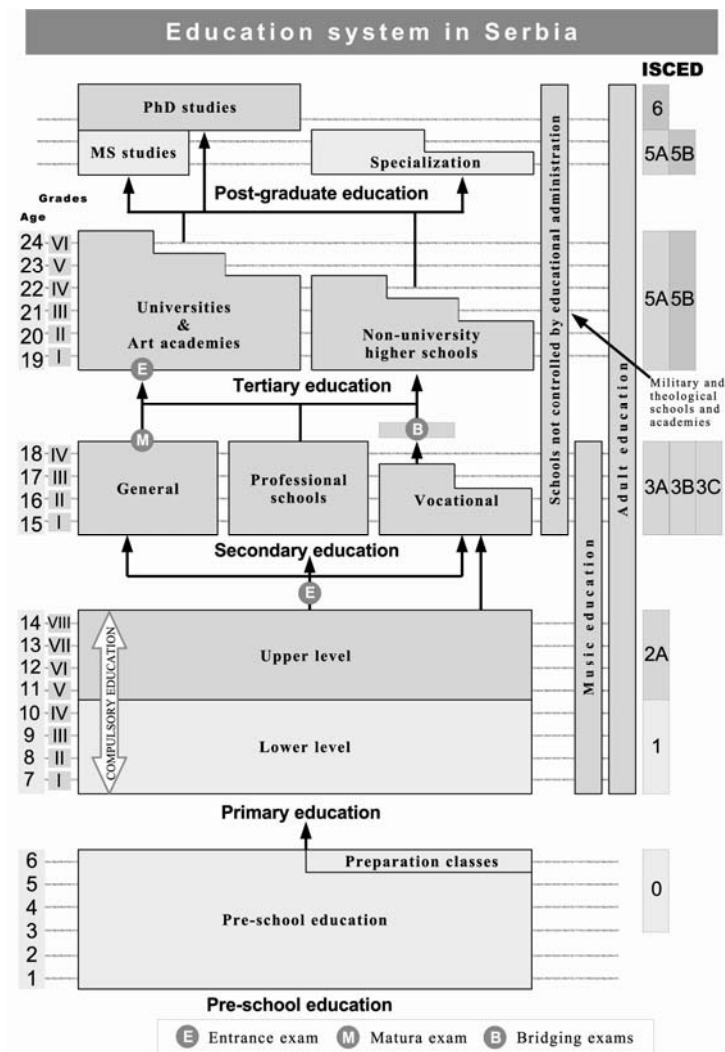
municipal sectors, even though the office of the school inspectorate is located in the same building as the Valjevo municipal authorities. The inspectors state that their job is merely to verify that the programmes of the Ministry of Education and Sports are being executed, even though the Roma educational programmes also form part of the Ministry's programmes.

## ANNEX 1: ADMINISTRATIVE STRUCTURES

### A1.1 Structure and organisation

The education system in Serbia consists of four levels: pre-school, primary, secondary and higher education (see Fig. A1).

Fig A1. The education system in Serbia



Source: UNICEF, *Comprehensive Analysis of Primary Education*, p. 17.

Pre-school education caters to children under seven. It has not been compulsory, but starting from 2006, the so-called “zero grade” is introduced as part of pre-school education compulsory for each child.<sup>289</sup>

Primary school consists of eight years (grades), and is free of charge and compulsory. A child can enrol in the first grade not earlier than at age six, and not later than age nine. The first four grades have home-room, teacher-based instruction (one teacher for most subjects), while from the fifth to the eighth grade children attend subject-based instruction (different teachers for different subjects). After completing the fourth grade, children automatically, without exams, enrol in the fifth grade. In most cases children remain in the same school.

In small rural areas, where schools sometimes have only the initial four grades, children continue their schooling in a neighbouring village where there is an eight-year primary school. At the end of the primary school, pupils obtain a degree confirming that they have acquired primary education. Since by law primary education is mandatory (and free) up to the age of 17, a student reaching that age but not completing primary education (due to late enrolment or grade repetition, for example) loses his or right to free education.

Secondary education is not uniform; there are several options which pupils have at their disposal: academic four-year programmes; professional and arts four-year programmes (e.g. economic school); a series of two- and three-year vocational programmes (e.g. economic three-year programme). Pupils who intend to continue their education beyond the secondary school have to enrol in a four-year programme. Three-year programmes gear pupils towards labour. The enrolment procedures differ. Enrolment in a four-year programme is subject to a qualification exam and primary school marks, whereas for a two- or three-year programme primary school marks suffice.

## A1.2 Legal roles and decision-making

Education governance takes place on three levels: national, regional and local. The national level of education governance is represented by the Parliament and the Ministry of Education and Sports (i.e. the highest legislative and executive authorities, respectively). At the national level, there is also the National Educational Council, responsible for all levels of pre-university education; it consists of stakeholders and experts, and has a key consultative role in education policy.

At the regional level there are Regional Educational Offices (Školska Uprava). Since the territorial regional units (districts) are not elected bodies by the Constitution, they exist only as displaced “long arms” of the Ministry of Education and Sports. They are not legal bodies, they do not have separate accounts, and their fiscal autonomy is

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<sup>289</sup> Law on the Foundations of the Education System, art. 89.

significantly limited. The number of regional offices fluctuates. At present, there are 15 regional offices, most of them in middle-sized towns and large cities (responsible for 30 districts).

The local level of governance in education has gradually been reestablished from 2003 onwards. According to the Education Law, the responsibilities for pre-school and primary education of municipalities are as follows:

- establishing the school and pre-school network;
- legal inspection;
- appointing school boards and principals;
- providing financial means for human resource development, capital investment, operating costs, maintenance and equipment, transport costs of pupils and employees, capital investment, current expenditures (shared responsibility), protection and safety of children, and subsidising 80 per cent of the average cost per child in pre-school education.



**Table A1. Division of responsibilities in Serbian education**

	National	Regional	Municipal	School
Curriculum	General and specific curriculum framework	Support	Can add school-based courses and/or extracurricular activities	Can add school-based courses and/or extracurricular activities; implementation
Textbooks	Approval based on the recommendations of external commissions	Province of Vojvodina – approval of textbooks for minorities		Selection
Examination	Regulation Monitoring	Coordination Support Implementation		Implementation
Quality assurance	Regulation Monitoring Second-instance legal supervision	Coordination Support Implementation	First-instance legal supervision	Self-evaluation
Human resource policy	Accreditation Licensing Financing	Coordination Support	Financing of HR development	Employment
Information system	Development	Implementation	Implementation	Implementation
Financing	Regulation Financing salaries and preparatory pre-school education		HR development Capital investment Operating costs Maintenance Equipment Transport Pre-school education (80 per cent)	Indirect beneficiary Fundraising
Network of schools	Regulation for pre-school and primary school network Establishing the secondary schools network		Establishing the pre-school and primary school network	
School buildings, equipment	Ownership		Maintenance Equipment Capital investment	

**Table A2. Decision-making bodies responsible for minority education policy**

	Body	Responsibilities
Government of Serbia	Office for Human and Minority Rights	developing legal regulations on, and advocating, human and minority rights monitoring national laws for compliance with international instruments proposing changes to national legislation on human and minority rights
Ministry of Education and Sports	Sector for Development and International Cooperation in Education <sup>290</sup>	monitoring and improvement of minority language education planning and development of education according to international commitments and submitting reports on implementation support to developmental initiatives at regional, local and school levels coordination of activities with other sectors and departments
	Sectors for: Pre-school and Primary Education; Secondary Education; Higher Education; Student Welfare and Investments	dealing with minority/Roma education policy issues related to specific sectors and issues (e.g. admission policy; measures of affirmative action; human resource capacity building for work with marginalised groups)
National Communities' Electoral Assemblies	(currently 11 assemblies, including the 18-member Roma Electoral Assembly)	electing national councils for the "purpose of exercising the right to self-governance in the fields of the use of language and alphabet, education, media and culture" participating in education policy-making alongside other bodies
National Educational Council	(among its 42 members, each minority has one representative, elected from the National Communities' Electoral Assemblies <sup>291</sup> )	development and improvement of quality of pre-school, primary and secondary education

### A1.3 School funding

From 2001, the investment in education has been progressively increasing.<sup>292</sup> Over the last five years (2001–2006), there has been an incremental increase in the proportion of GDP invested in the education system, from 2.7 per cent of GDP in 2001 to 3.4 per cent in 2003. The data also correspond to the increase of budgetary expenditures

<sup>290</sup> It includes one position for education of minorities. Ministry of Education and Sports, *Pravilnik o unutrašnjoj organizaciji i sistematizaciji radnih mesta u ministarstvu prosvete i sporta* (The Organisational Chart of the Ministry), Belgrade.

<sup>291</sup> Law on the Foundations of the Education System.

<sup>292</sup> Ministry of Education and Sports, *Quality Education for All: Challenges of Education Reform in Serbia*, Belgrade: Ministry of Education and Sports, 2004.

earmarked for the education sector until 2004 (around 12 per cent of the State budget). The proportion of the GDP spent on education is expected to reach 4 per cent in 2007.<sup>293</sup>

Formally, schools are supposed to get funding for salaries from the central Government, and for other expenses from the local government. Between 80 and 90 per cent of school expenditures are allocated directly to schools from the central Government, (Treasury) to cover costs such as net salaries, contributions, and taxes. The school management has to receive the remaining 10–20 per cent for the operational costs and capital investments from the municipalities.<sup>294</sup> Other funding may come from parents' contributions and donations. Although formally based on the rigid and unrealistic Rule Books<sup>295</sup> (currently under revision), in practice, financing of other school expenditures is highly arbitrary and negotiable.

For example, the formal levels of financing for both types of expenditures are calculated for each school on the basis of the number and type of classes (although the number of students can vary from ten to 30), the size or type of school premises, and staff qualifications (since salaries are determined by the level of teachers' education, schools with more trained/skilled teachers can get more money). Thus, the real amount of financial resources given to each individual school is open to negotiations between principals and government officials.<sup>296</sup> This "flexibility" in turn leaves much room for arbitrary decisions.

At the moment,<sup>297</sup> municipalities perform delegated tasks, and for these purposes they receive "limited assigned revenues" (i.e. transfer payments from the central Government) according to the following criteria: size of the municipal territory, number of registered residents, number of classes in elementary and secondary schools and number of schools, number of children included in social child care, municipality

<sup>293</sup> Ministry of Finance, *Memorandum o budzetu i ekonomskoj fiskalnoj politici za 2005. godinu sa projekcijama za 2006. i 2007. Godinu* (Memorandum on budget and fiscal policy for the year 2005 with projections for years 2006 and 2007), Belgrade, 2005, available on the Ministry of Finance website (<http://www.mfin.sr.gov.yu>).

<sup>294</sup> Municipalities themselves receive monies partly from the central Government, and partly from tax.

<sup>295</sup> Rule books are an old directive by the Ministry of Education and Sports, which prescribes resources that a school must have in order to work as an educational institution. It has not changed in over 20 years. This means that, if the Rule books are interpreted literally, almost all schools in Serbia must be closed down, since they probably do not have certain equipment that existed two decades ago and since then has been discarded (e.g. the Rule books order that a school must have a magnetic tape-recorder, and so on).

<sup>296</sup> T. Levitas, *Summary of the Findings to Date on School Finance and Management in Serbia*, Internal document of the Ministry of Education and Sports, 2003 (hereafter, Levitas, *Summary of the Findings to Date*).

<sup>297</sup> Government of the Republic of Serbia, *Strategija reforme javne uprave u Srbiji* (Strategy of Public Administration Reform in the Republic of Serbia), Belgrade, 2004.

development level, and the environment.<sup>298</sup> The formula refers to some educational indicators, but it applies only to the normative level. Local governments are not obliged to spend the received money on specific functions, such as education, social protection, and so on.<sup>299</sup> Furthermore, these transfer payments are usually not sufficient for all the school expenses that municipalities are obliged to cover (i.e. approximately half of the expenses for operational costs).

The actual proportion of funding from municipalities is on average 15–20 per cent (varying across municipalities), representing about 0.9 per cent of the GDP of local administrations, and it corresponds to level of devolved responsibilities (operational costs, professional development, and so on).<sup>300</sup> Their authority is limited because they are denied the right to hire/fire teaching staff, and they do not own school buildings. As a consequence, municipalities hesitate to invest in school buildings (which they do not own), even though by law they are obliged to finance school buildings' maintenance, and share costs associated with closing schools.

The structure of costs does not strictly correspond to the responsibilities of the governing levels. Some responsibilities are shared between two layers of governance (see above), which makes money flows and the accountability chain difficult to track. While salaries of school staff are provided from the central budget directly allocated to schools, municipalities are obliged to finance the professional development of the staff (teachers, principals, and the support staff). Municipalities also must provide resources for capital investment, operational costs, maintenance and equipment of schools, and also the limited transport costs (in primary schools). In practice, the situation is quite different. For example, most teacher training courses are delivered from the central level, by the Institute for Advancement of Education, which has a catalogue of teacher training programmes (see section 3.7).

The financing system is not based on a per-pupil formula. Therefore, there are no reliable and exact indicators of costs of the education system. The undeveloped database of school revenues/expenditures is another obstacle to assessment of financial flows in public education.<sup>301</sup> Only an approximate measure of cost per student could be provided.

According to UNICEF analysis, in 1999 the average yearly spending per student in primary education was \$263 (about €200), and according to the InfoStat unit of the Ministry of Education and Sports it reached approximately €650 in 2005.<sup>302</sup> For comparison, in 1999, expenditures per student for the member countries of the

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<sup>298</sup> Amendments to the Law on Local Self-Government, *Official Gazette* No. 135/04.

<sup>299</sup> Levitas, *Summary of the Findings to Date*.

<sup>300</sup> Levitas, *Summary of the Findings to Date*.

<sup>301</sup> Ministry of Education and Sports, *Decentralisation of Education in Serbia. Expert Group for Decentralisation*, Belgrade: Ministry of Education and Sports, 2001.

<sup>302</sup> UNICEF, *Comprehensive Analysis of the Primary Education*.

Organization for Economic Cooperation and Development (OECD) averaged \$4,850 (€3,670) at the combined primary and secondary level. These expenditures varied widely across these countries, ranging from \$1,240 (€938) in Mexico to \$8,194 (€6,195) in Switzerland at the combined primary and secondary level.<sup>303</sup>

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<sup>303</sup> Organisation for Economic Cooperation and Development (OECD), Centre for Educational Research and Innovation, *Education at a Glance: OECD Indicators 2002*, 2002, tables B1.1, B2.1c, B6.2, and X2.1, data from the OECD Education Database, unpublished data (December 2002).

## ANNEX 2: CASE STUDIES

For each country report in this series of EUMAP reports on “Equal Access to Quality Education for Roma”, three case studies were carried out to supplement and corroborate data gathered from other sources. Information from the case studies is integrated throughout the body of each country report. Annex 2 includes additional details from each of the case study sites. In Serbia the three sites are Niš, Valjevo and Zemun.

### A2.1 Case Study: Niš<sup>304</sup>

#### A2.1.1 Administrative Unit

The city of Niš is Serbia’s second-largest city. It is made up of five municipalities: Medijana, Palilula, Crveni Krst, Pantelej and Niška Banja. The largest Roma settlement in Niš is Stočni Trg, and the second-largest is Beograd Mala.

According to the last official census (2002), the population of Niš includes 200,000 Serbs, 5,700 Roma, and 2,600 Bulgarians. However, as elsewhere, the actual Roma population of Niš appears to be much higher. According to estimates of the local Roma representatives, there are 15,000–20,000 Roma living in Niš, or up to 10 per cent of the total population.<sup>305</sup>

Niš is one of the few local communities in Serbia that have initiated activities implementing the *Strategy for the Improvement of Roma Education in Serbia*.<sup>306</sup> This is mostly thanks to projects of the NGOs, some of which have managed to successfully carry out several educational programmes for the Roma pupils. These projects, supported by the Fund for Open Society – Serbia (FOSS) and UNICEF, present positive examples of what can be done to improve the education of Roma, and how. Also, a project to increase Roma access to pre-school education, funded by REF and

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<sup>304</sup> Case study Niš, conducted in May–June 2006, researcher Ljiljana Simić.

<sup>305</sup> Interviews with Ms. Sanja Tošić, representative of the Roma Educational Centre, and Mr. Osman Balić, the Roma representative of the local government, Niš, 7 June 2006.

<sup>306</sup> *Strategy for the Improvement of Roma Education in Serbia*. (See also section 3.1).

partly by the Ministry of Education and Sports, was conducted from 1 March 2006 until August 2006, and is expected to be continued.<sup>307</sup>

Importantly, Niš has a single Roma representative in the local self-government. However, there are no effective mechanisms to enable bigger participation of Roma in local government.

### A2.1.2 Roma and the Community

The Niš Roma reside in the settlements of Beograd Mala, Crvena Zvezda, Čair Mala and Stočni Trg, which are an integrated part of the urban area. The Beograd Mala settlement is located inside the city, while the rest are on the periphery. The largest Roma settlement in Niš is Stočni Trg, while Beograd Mala is the second-largest.

The main characteristic of urban Roma settlements is their resemblance to a ghetto. “They are very old-fashioned, conspicuous and recognisable. The houses are run-down and dilapidated, with poor hygiene, lack of sewage lines, and few new buildings.”<sup>308</sup> Only 50 per cent of Roma and their homes are legally registered, which makes half of the Roma population living in Niš illegal. Most Roma are also poor. Considering that Roma receive nothing from the local budget, they are essentially left to their own devices in resolving numerous and complex issues. There was one investment in the infrastructure of Roma settlements: a sewage system was constructed in Mramorska St. in the Stočni Trg settlement. However, it was an NGO project, implemented by the YUROM Centre, a Roma organisation in Niš, rather than by the authorities.

One of the biggest problems Roma face is unemployment. Most Roma households make their living by working in the “grey” economy, for example, trading on the markets or working as musicians. The average budget of a typical Roma family with five to six members is estimated at 20,000 dinars (€254).<sup>309</sup> The families trading on the flea market may have a slightly higher income, while others may earn even less. The Niš Roma rarely travel for seasonal work, instead working in recycling, particularly collecting cardboard. Recycling has become a principal means of earning income for

<sup>307</sup> The project was managed by the Ministry of Education and Sports and the Roma National Council. A total of 24 educational institutions in Serbia have so far taken part in the project: one primary school and 23 pre-schools. The number of beneficiaries was 600 children, aged five to eight. As an important achievement, local Roma coordinators were engaged to establish better cooperation between families and pre-school institutions. The Centre for Evaluation, Assessment and Research has carried an evaluation of this project, finding that children acquired useful skills and knowledge for successful enrolment in the primary school. The implementation of this project is expected to continue during the 2006–2007 school year, subject to the approval of the REF.

<sup>308</sup> A. Mitrović and G. Zajić, *Romi u Srbiji*, (The Roma in Serbia), Anti-War Action Centre, Institute for Criminology and Sociology Research, Belgrade, 1998, p. 54.

<sup>309</sup> Interview with Mr. Osman Balić, the Roma representative of the local government, Niš, 7 June 2006.

many of the local Roma. The Niš Roma share the fate of Roma across Serbia: according to the local Roma representatives, poverty affects as many as 90 per cent of the Roma population.

The situation of Roma is also affected by the attitudes of the majority population towards them. Roma are stigmatised in two ways. As Roma, or “gypsies”, they are stereotyped as “foreign” and “lazy”. In addition, Roma are stigmatised as the poorest members of society, and while their relations with non-Roma may be on surface “satisfactory and neighbourly”, non-Roma prefer to maintain those relations “at a distance.”<sup>310</sup> There are also cases when non-Roma neighbours show open signs of intolerance. For example, residents living in Vinaverova St. in the Beograd Mala settlement, where the Roma Educational Centre (REC) is located, tried to prevent the Centre’s opening by signing a petition.<sup>311</sup> Also, there have been instances of racist graffiti on the walls of the predominantly Roma Vuk Karadžić Primary School, and even more aggressive forms of racist abuse, when the police had to be involved because a group of skinheads would often wait for the Roma children after school and terrorise them.<sup>312</sup>

Members of the Roma minority have preserved their language, and an estimated 85 per cent of the Roma youth in Niš speak Romanes as their first language. However, this becomes a barrier to access to education when the Roma children start school, and often during the better part of it, because schools are simply unprepared to offer supplementary courses in the language of instruction (Serbian), or pre-school bilingual education.

### A2.1.3 Education

There are five pre-schools, 22 primary schools, and 21 secondary schools in Niš. The Vuk Karadžić Primary School, located outside the Beograd Mala settlement (about 300 metres), is the only Roma school in Niš.

#### *Enrolment and completion*

There are no official data on Roma children attending pre-school and primary school institutions in Niš. According to the data of the REC, among 539 interviewed families in the 2004–2005 school year, the recorded number of Roma children enrolled in primary schools was 567, out of whom 99 dropped out of school; 97 Roma children were of secondary school age, but only 50 of them were actually enrolled in a secondary school after having completed a primary school.

<sup>310</sup> Interview with Mr. Osman Balić, the Roma representative of the local government, Niš, 7 June 2006.

<sup>311</sup> Interview with Ms. Sanja Tošić, representative of the Roma Education Centre, Niš, 7 June 2006.

<sup>312</sup> Interview with Ms. Dragica Krstić, principal of the Vuk Karadžić Primary School, Niš, 5 June 2006.



The REC also estimates that in the past few years, as many as 25 per cent of Roma children in Niš have never been enrolled in a school, while only 25 per cent of those enrolled actually complete the school. Usually, 50 per cent drop out of school in the fourth and fifth grades.

Even though enrolment procedures for pre-schools are relatively simple, involving only the child's birth certificate, the number of Roma children enrolled is small. The reason lies in the small number of pre-schools in the whole of Serbia, including the city of Niš, and obligatory payment for this service; these two factors place pre-school education effectively out of the reach of the local Roma.

The completion rates among the surveyed Roma pupils in Niš are estimated as follows:<sup>313</sup>

- Average number of years spent in a pre-school: one to two years;
- Average age when enrolling in a pre-school: six years;
- Average number of years spent in a school: five to six years;
- Age when enrolling in the first grade of the primary school: 463 children enrolled at age seven; 38 at age eight to 12.

Niš is home to the most infamous segregated school in Serbia: the Vuk Karadžić Primary School (with attached pre-school), located near the Beograd Mala Roma settlement. The total number of pupils enrolled in Vuk Karadžić is 507, out of which 384 pupils, or 76 per cent, are Roma.

In the Vuk Karadžić Primary School, segregation has been a long process, over the course of ten years. Non-Roma parents have been transferring their children and enrolling them in different schools, despite the fact that this school is closer to their homes, because the majority of pupils there are Roma, and because the law permits free choice of school. This tendency has recently started even with the Roma, at least those who are better-off. It seems that the school has "lowered its educational criteria", which made them move their children to other schools.<sup>314</sup> The school principal, Dragica Krstić, claims that there are no local measures for dispersing schools and classes with a higher percentage of Roma pupils. The school issued several appeals to the authorities, but to no avail. The opinion of the majority of teachers and the school principal is that the Roma pupils should attend classes together with non-Roma, to promote integration. The REC's Sanja Tošić claims that the State offers no help for desegregation, and that there are no plans for transferring children to different schools.<sup>315</sup>

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<sup>313</sup> Interview with Ms. Sanja Tošić, representative of the Roma Education Centre, Niš, 7 June 2006.

<sup>314</sup> Interview with Ms. Tatjana Pejčić, school administration representative, Niš, 6 June 2006.

<sup>315</sup> Interview with Ms. Sanja Tošić, representative of the Roma Education Centre, Niš, 7 June 2006.

Another local segregated school in Niš is the 14. Oktobar Special School. It has 18.5 per cent Roma pupils in primary education and 13.3 per cent Roma pupils in secondary education.

The 14. Oktobar Special School does not participate in the inclusive education programme, run by local NGOs, for integration of children from special schools or adult schools into mainstream schools. The school's psychologist, Miša Ljubenović, says that the special school staff fear that inclusion would mean closing their schools and dismissing employees.

### *School and class placement procedures*

Mainstream schools form their classes according to the following criteria: number of pupils, gender, nationality, intellectual and other skills and specific characteristics (sensory and motor functions, and so on). The wishes of parents concerning class placement are also taken into consideration, but are accepted only when it is possible.

In order to enrol in a school, each child needs to pass a test, or a medical commission (the Commission for Categorisation of Children with Developmental Disabilities (or "Categorisation Commission"), which gives an assessment based on which the child is referred to either a mainstream or special school. The procedure includes an assessment of the child by different health care specialists, and a referral made by the school research assistants and the Social Welfare Centre. The parents are also an important factor in the procedure. The child can be placed in a special school based on a decision of the medical decision. Since an estimated 30 per cent of the Roma children in Niš have poor or almost no knowledge of the language in which the tests are given,<sup>316</sup> this causes problems in comprehending and responding to the questions during the test.

However, there is no official Roma language interpreter in the Categorisation Commission. When the Commission notices that the child has a problem with understanding, non-verbal tests can be included. Lack of understanding and the child's inability to answer due to the language barrier are often interpreted as a developmental disability ("pseudo-retardation"). According to the local member of the medical commission for diagnostics in Niš, Olga Milojković, the Commission should use more adaptable tests, allow more adequate communication, and allow an interpreter to be present in some cases, in order to avoid inaccurate diagnostics. If the Commission's decision does not satisfy the child's parents, they can make an appeal to a second-order Commission, but in practice this does not happen in the case of Roma parents.

### *School results*

The school results of Roma pupils need to be viewed separately for mainstream and special schools. The mainstream school results tend to show that Roma pupils lag behind non-Roma pupils. This can be explained by the fact that the Roma children

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<sup>316</sup> There are many refugees from Kosovo who had lived for years in Western Europe, and were then forcibly returned; their children came to Serbia without a good knowledge of Serbian language.

start school less prepared for classes, which is a decisive factor in children's school achievement. Very few Roma are eligible to participate in academic excellence competitions (such as for mathematics, literature and chemistry).<sup>317</sup>

Furthermore, teachers appear excessively "tolerant" towards Roma pupils, automatically passing them to the next grade, even if the children had not fully assimilated the required curriculum for the grade. Thus, formally, only 10 to 15 per cent of Roma pupils repeat a grade.<sup>318</sup> As a consequence, many Roma children complete the fourth grade without properly learning to read and write. They may acquire these skills later, in the sixth or seventh grade, although by then for many it is too late and they drop out.

The Roma pupils in the 14. Oktobar Special School appear to have only a basic level of literacy. By the end of primary schooling, most of the children have acquired an elementary level of literacy, while a larger number are functionally literate (knowing how to use these skills in everyday life). The grade in which they acquire these skills depends on their age when starting school. Since most of them are transferred to a special school in the third or fourth grade, they become literate by grade six and seven at the latest. If they are transferred earlier (second grade), they adopt the skills successfully in the fifth and sixth grade. The Roma children have well-developed practical skills: motor skills and non-verbal intelligence. Their knowledge base is usually much poorer than that of other pupils, while their level of social functioning is quite high. They are excellent in sports competitions and music performances. They are poor at tests, and studying at home is infrequent.<sup>319</sup> However, the obvious underachievement of Roma pupils is only partially explained by the lack of school preparation. Obviously, if Roma children attended a preparatory class, at minimum for one year, but ideally for two years, the school achievement of the Roma pupils could be expected to improve, as their language skills could be expected to improve. But the schools do not have preparatory classes, and they use a uniform curriculum that does not accommodate children speaking a minority language. Being a State institution, the school has rigid regulations. The teachers are not in a position to change the curriculum, and nor are they motivated to work with these children.

Thus, the school reforms, which are still at an initial stage, have not yet reached the curriculum.

Discrimination also plays a big role: if the school staff regards Roma as inferior to other pupils, this is bound to be reflected in education. According to Miša Ljubenic, the psychologist working at the 14. Oktobar Special School in Niš, the reasons why Roma

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<sup>317</sup> Interviews with teachers at the Vuk Karadžić Primary School, Niš, 5 June 2006.

<sup>318</sup> According to the school principal, there had been no National Assessment, the test for entry/exit of pupils at crucial points of education (usually, grades 5, 8, and 12).

<sup>319</sup> Interview with Mr. Miša Ljubenić, psychologist at the 14. Oktobar Special School, Niš, 8 June 2006.

pupils often have much lower achievement due to cultural differences, and their families do not see education as a priority in a society that discriminates; instead, Roma culture is more dominated by the "right brain hemisphere" and inclines towards music and dance."<sup>320</sup>

### *Language and curriculum policy*

There are no curricular differences between schools/classes with a high percentage of Roma, and other schools in the education system. There are no free textbooks, although there are donors who sometimes give out a small number of necessary textbooks. The school library has very few books on Roma culture and history.

The knowledge of the language used in schools was, as discussed earlier, a constraining factor for enrolling in a pre-schools or school and achieving good results. The school psychologist at the Vuk Karadžić Primary School, Dragana Mitrović, says that, "Those children who had a chance of attending a pre-school and socialising with non-Roma children, or used Serbian language in their homes with their family members, managed the language quite well and have had excellent school results (this concerns a very small number of children)."

Even though they know that the language is a barrier to Roma pupils, the teachers of mainstream and special schools are not motivated to resolve this problem. In a written questionnaire, 85 per cent of teachers interviewed as part of this study gave a negative answer when asked whether they would attend training for bilingual education or bilingual techniques.<sup>321</sup>

### *Roma teaching assistants/school mediators*

The Vuk Karadžić Primary School has engaged Roma teaching assistants. The "Equal Chances" project included three assistants, who worked in the school during the three years of the project. The school's assistants attended classes, both mainstream and remedial, and worked with Roma parents, but the resistance of teachers was great, according to the words of the principal. Until 30 June 2006, there was one assistant in the second grade, and two in pre-school education. They were financed by the Fund for Open Society – Serbia (FOSS), hired with the assistance of the REC, and trained by the Centre for Interactive Pedagogy (CIP). The school was monitored by CIP representatives, while supervision was not planned, says the principal. It should be noted that this project greatly enhanced cooperation between Roma parents and teachers, claims the principal, Dragica Krstić. However, currently there are no RTAs at the school.

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<sup>320</sup> Interview with Mr. Miša Ljubenović, psychologist at the 14. Oktobar Special School, Niš, 8 June 2006.

<sup>321</sup> A total of 21 teachers were interviewed and answered the written questionnaire: six are from the 14. Oktobar Special School, and 15 from the Vuk Karadžić Primary School.

### *Decision-making, school infrastructure, and human resources*

Primary schools have only limited autonomy in developing educational policy and decision-making in the area of education. More specifically, the school is an institution financed by the State. The curriculum is made by the highest State institutions (Ministry of Education and Sports), which makes the school autonomy limited as far as human resources are concerned. According to the local school administration, “the school autonomy is meagre or even non-existent.”<sup>322</sup>

According to the principal of the Vuk Karadžić Primary School, in 2005 the local council had assigned 4,399,000 dinars (€55,882) to the school, which is less than 20 per cent of the school’s total budget (the rest coming from the State budget).<sup>323</sup>

The main criterion for budget assignment is the number of enrolled pupils. The criteria for assigning funds for special schools is somewhat different, because these children have disabilities; these schools finance their pupils’ transport, lunches, day trips, medical treatment, and boarding for out-of-town pupils.<sup>324</sup> All these benefits given by the State are not given to children in mainstream schools.

The infrastructure of the Vuk Karadžić Primary School is in good condition because of renovations carried out three years ago, although the building itself is 46 years old. The school area is 2,145 square metres and has 507 pupils. The building interior, classes, and hallways were painted a few years ago, and are in a relatively good state. In 2003, the sewage system was renovated. The building has central heating, while 30–50 per cent of furniture and teaching accessories (the microscope, physics and chemistry instruments, and so on) are not in good shape. The computer room has 14 PCs, and children are organised into groups in shifts, when working in the computer room. The same room is also equipped with an LCD projector. The library is reasonably well-equipped. The school is made up of a sufficient number of qualified staff.

### *Teacher training and support*

According to teachers of the Vuk Karadžić Primary School, they have had numerous training courses organised mostly by NGOs (including the Roma Information Centre). There is no information on the exact number of training programmes, but the Roma Information Centre has been carrying out similar programmes for years. The Vuk

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<sup>322</sup> Interview with Ms. Dragica Krstić, principal of the Vuk Karadžić Primary School, Niš, 5 June 2006.

<sup>323</sup> Interview with Ms. Dragica Krstić, principal of the Vuk Karadžić Primary School, Niš, 5 June 2006.

<sup>324</sup> Interview with Mr. Miša Ljubenović, psychologist at the 14. Oktobar Special School, Niš, 8 June 2006.

Karadžić Primary School participated in the REI “Equal Chances” project in 2002–2005, and was involved in all aspects of teacher training within that project.<sup>325</sup>

During the last three years, the NGO Society for the Advancement of Roma Settlements (ARS) from Belgrade, together with UNICEF, carried out a school programme for 100 children in Niš. This included programmes, seminars on the tradition and culture of Roma, teamwork and partner communication, education reform, literacy for children educated in a language that is not their mother tongue, and so on.

However, 85 per cent of teachers interviewed as part of this study gave a negative response concerning participation in bilingual education training courses, saying that they saw no reason for it, since the Serbian language is in use in schools. Also, they pointed out that they were poorly paid and had no motivation for more training.

The teachers of the 14. Oktobar Special School also were active in different programmes, such as “Education for citizenship”, “Creation of development plans”, “Project writing”, “Descriptive marking” and “Building partnership for inclusion.” The training was delivered by the Ministry of Education and Sports, and it was a training programme within compulsory school activities. The majority of teachers there also showed no interest in bilingual education training, stating that education should be carried out in the official language, and that Romanes language education could be provided through supplementary classes.

### *School–community relations*

Every school’s governance body consists of the school board and the school principal. The decisions made are most frequently concerned with the work of the teachers’ council. Parents also have a role at school. The Vuk Karadžić Primary School is one of few schools where Roma parents appear to be rather involved in the school activities (without being paid):<sup>326</sup>

- Parents’ council – the majority of parents are Roma.
- Parents’ meetings – parents of children who have lower school results or tend to fail in school usually do not attend the meetings.
- Parents’ workshops – poorly attended by parents.
- Joint actions of parents, children and schools – this turned out to be the most successful form of cooperation. The “Cooperation with the family” mini-project

<sup>325</sup> *Report on the Project “Equal Chances – Integration of Roma Children and Youth in the Education System,”* 2002–2005, FOSS, 2005, an internal document. The project information is available on the organisation’s website: <http://www.fosserbia.org/programs/project.php?id=411> (accessed on 7 March 2007).

<sup>326</sup> Interview with Ms. Dragana Mitrović, school psychologist at the Vuk Karadžić Primary School, Niš, 5 June 2006.

as part of the “Equal Chances” project had a good response from the Roma parents and brought results: better cooperation between school and the parents; higher quality of cooperation; motivation for work and for the child; motivation for achieving results and reaching a joint goal.

According to the head of discrimination monitoring for the city of Niš, Mr. Petar Gavrilović, during the last year, there were no major complaints made by Roma parents or their children. There was a complaint concerning the right to a free meal. The Roma parent complained that his eighth-grader child did not receive free snacks in September, or at the beginning of the school year. This occurred due to a “technical mistake” and was resolved at the institutional level as well as by temporary school measures.<sup>327</sup>

Only regular school inspections can determine whether any elements of discrimination towards the Roma exist, or if there is any violation of Roma pupils’ rights in schools. Besides that, there are no effective mechanisms to file a complaint. Affected parents and individuals are left on their own in making an appeal concerning irregularities. However, this problem deserves separate and detailed research.

## A2.2 Case Study: Valjevo<sup>328</sup>

### A2.2.1 Administrative Unit

According to the official 2002 census, Valjevo Municipality has a population of 96,761 people, of whom 1,314 are Roma. However, according to the local NGO Roma Centre for Democracy (*Romski centar za demokratiju*, hereafter, RCD), there are about 5,000 Roma living in Valjevo, that is, 4.5 times more than the official figures.<sup>329</sup> The majority of Roma evidently do not wish to identify themselves as such, which, in the words of the local Roma representatives, betrays the little faith that Roma have in the system to protect them against negative stereotyping and discrimination.<sup>330</sup> The lack of reliable information on the Roma population is also a serious impediment to the implementation of policies and programmes aimed at Roma.

In 2005, within the framework of the “Decade for Roma Inclusion”, Valjevo was among the first communities in Serbia to adopt the local *Action Plan for Roma Education*, developed in collaboration with the Roma NGOs, and representatives of the Ministry of Education and Sports, as well as the local self-government. The budget

<sup>327</sup> Interview with Mr. Petar Gavrilović, head of Discrimination Monitoring for the city of Niš, 5 June 2006.

<sup>328</sup> Case study Valjevo, conducted in May–June 2006, researcher Slavica Vasić

<sup>329</sup> Interview with Ms. Danijela Petrović, coordinator of the Roma Centre for Democracy (*Romski centar za demokratiju*, RCD), Valjevo, 12 June 2006.

<sup>330</sup> Interview with Mr. Dragan Stojanović, member of the Town Hall Council, Valjevo, 12 June 2006.

envisioned for the implementation of the *Action Plan's* activities amounts to 500,000 dinars (€6,350), or 1.92 per cent of the overall municipality budget for 2006. The most important activities financed from this budget, from September 2006, were as follows:

- Transport of pre-school-age Roma children: from the village of Grabovica to a pre-school in Valjevo, and from the villages of Balačko and Vis to the pre-school in the Prota Mateja Nenadović School in the village of Brankovina;
- Transport for Roma pupils (grades 1–4): from the villages of Balačko and Vis to the Prota Mateja Nenadović School;
- School kits (with school supplies, and so on): for all Roma first-graders in Valjevo;
- Preparatory classes: for 20 Roma children in the eighth grade of the primary school for the entrance examination for the secondary school.

Despite fairly good publicising of the local *Action Plan* (all local schools have received it), in hardly any school do the interviewed authorities have a clear idea of what the *Action Plan* entails. Furthermore, the local school inspectors claim not to know about it and did not have any communications with other municipal sectors, even though the office of the school inspectorate is located in the same building as the Valjevo municipal authorities. The inspectors state that their job is to verify that the programmes of the Ministry of Education and Sports are being executed, even though the Roma educational programmes also form part of the Ministry of Education and Sports' programmes. There is an apparent lack of interest on the part of the education professionals, as well as poor communication between the local self-government and the schools, neither of which is conducive to the effective implementation of the Roma-related educational initiatives in the community.

Valjevo Municipality has one Roma representative in the town hall, who was engaged in 2005, within the framework of the project to involve Roma representatives in local municipalities in Serbia.<sup>331</sup> The Roma representative does not have real power, and his mandate has not been sufficiently defined, making this post more of symbolic than practical significance.

### A2.2.2 Roma and the Community

Most Roma in Valjevo Municipality live in rural areas: the village of Grabovica near the town of Valjevo, the Roma neighbourhood of Vis in the village of Brankovina, and the village of Balačko outside Valjevo. Some Roma also live mingled with the majority

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<sup>331</sup> The project was initiated by the Ministry for Human and Minority Rights with support from the OSCE Mission in Serbia, in 2004 in 12 Serbian municipalities, including Valjevo. The main tasks of the Roma representatives are assisting with the development of local action plans for Roma and mediation between the Roma communities and local authorities.



(Serbian) population in the town of Valjevo. Since the official figures on Roma in the Valjevo area appear to involve an underestimation, it is not possible to provide an accurate breakdown of the Roma population in specific districts of the municipality. The social and financial standing of the Roma families varies, depending on the levels of education, and whether or not they have jobs, which directly determines their status. The place of residence is also a factor that can limit the choice of educational opportunities for the children, because they are physically distant from the nearest pre-school and school.

There are about 300 Roma residents living in the village of Grabovica, who mostly work as musicians for hire, or trade wares in the local markets. They own their houses, built during the “Tito times.” The people of this area consider themselves “in the middle”, compared to, as they say, the overall social-economic situation in the country. The Roma children from Grabovica attend a separate school branch located in the village, and constitute 95 per cent of the student body in that school branch; the school to which the branch belongs is located in the town centre, which requires commuting, and its student body is predominantly Serbian.

Furthermore, there are an estimated 70 Roma families living in the Balačko and Vis area,<sup>332</sup> with an average of four children in each household (or 280–300 persons in total).

However, the situation of the Roma there is abysmal. They live in conditions lacking in the elementary infrastructure, such as running water, with the resulting poor hygiene and health implications. Most are unemployed, and their basic means of income is welfare, which is deemed insufficient for sustaining an entire family. They claim that their unemployment is due to discrimination on the labour market, because allegedly “nobody will hire Roma.” At the same time, they recognise that insufficient education and poverty perpetuate each other, claiming that their parents could not educate them due to extreme poverty, and this goes on for their children.

Due to the remote situation of Balačko and Vis and bad roads, the residents are virtually cut off from the outside world. Children have to commute 5 kilometres each way to the nearest school, which in winter becomes a particular problem: they cannot even get to the bus stop in order to be driven to school, and as a consequence are frequently absent from classes. The closest school, the Prota Mateja Nenadović Primary School in Brankovina, in addition itself does not have drinking water.

What is common for Roma living in different areas of Valjevo Municipality and in different economic situations is the fact that for the most part they believe that they have good community relations with their non-Roma neighbours. This is because, they claim, they live in a small place where everyone knows everyone else, and all nurture good neighbourly relations. They also seem pleased with the attitudes that the teachers

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<sup>332</sup> Interviews with parents of the Roma children who attend the Prota Mateja Nenadović Primary School, Valjevo, 13 June 2006.

show towards their children, and claim that there is no discrimination on the part of the school staff. The allegedly intolerant attitudes occasionally expressed by non-Roma children towards the Roma are seen not as a real problem, but rather as mere children's "squabbles."

What seems to contradict this idyllic picture, though, is the fact that few Roma would admit to speaking Romanes, and the Roma children who have light complexions apparently do not wish to confess that they are Roma. However, living in a small place where everyone knows everyone else means that it is not always possible to hide one's origin, especially when one lives in Grabovica, Balačko, and Vis, where most residents are Roma.

Interviewed Roma pupils of the Andra Savčić Primary School in Valjevo had finished the first four grades in the segregated 'satellite' school in Grabovica, and then moved on to continue their schooling in the main school building located in the town centre (see below). There, the children claim that they have problems both with their non-Roma peers and with the teachers, who are allegedly unsupportive. Allegedly, non-Roma children often call them "gypsy", "dirty", and "stinky", but when Roma children report this behaviour to the teachers, they are allegedly told by the teachers that the Roma children are themselves probably to blame for that kind of behaviour (of the peers): "Whenever something bad happens in class, like a fight, squabbles, or something like that, the teacher always first asks us if we are guilty of that."<sup>333</sup>

So, I am not telling anymore to the teacher what they (non-Roma children) are doing and telling me, because she is always on the side of the Serbs. She would say, you provoked him, for sure. Because of that, when they bother me I fight with them (non-Roma children), I know that I will be punished for that by the teacher, but it doesn't matter, I will be punished anyway.<sup>334</sup>

The Roma children also express a wish that they could go back to the school in Grabovica, because "they were all the same" there.

This prompts conclusions that either there is no clear understanding among Roma and non-Roma alike as to what constitutes discrimination, or that Roma have become so accustomed to discrimination that they seem almost insensitive to its manifestation, including racist bullying in school, or most importantly, that the existing anti-discrimination mechanisms are clearly ineffective in countering racial harassment. Concealing Roma identity then appears a natural defence mechanism in the face of pervasive negative stereotyping.

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<sup>333</sup> Interview with a Roma girl from the Andra Savčić Primary School, Valjevo, 13 June 2006.

<sup>334</sup> Interview with a Roma boy from the Andra Savčić Primary School, Valjevo, 13 June 2006.

### A2.2.3 Education

#### *School network, costs, administration and curriculum*

Valjevo Municipality has 15 primary schools, with 7,500 students in attendance. There are no special schools, but there is a special class formed within the Nada Purić Primary School located in the village of Brankovina, and there is also a majority Roma class in the ‘satellite’ school of the Andra Savčić Primary School located in the village of Grabovica.

All local primary schools (including the special class) receive financial aid from the local self-government budget, the only criterion for allocation being the number of newly enrolled pupils. For the 2005–2006 school year, the funding for the Andra Savčić Primary School located in the centre of Valjevo was \$72,241.34 (€54,820);<sup>335</sup> the funding for the Prota Mateja Nenadović Primary School in Brankovina was \$26,129.85 (€19,830).<sup>336</sup>

Data on the expenses per child in pre-schools are not available. In primary education, according to the local teachers and parents, schooling expenses per child amount to 30 per cent of the average salary when a child is in a younger grade, and up to 50 per cent when a child is in an older grade. This is regardless of whether the child goes to a mainstream or a special class, because the only material benefit provided to special class pupils is free transport, so there is no strong incentive for poor families to send their children to special classes.<sup>337</sup> Obviously, for families that are unemployed or receive less than the average salary, which is the situation of many Roma families in Valjevo, school expenses are prohibitive.

As a way to alleviate the costs, all primary schools supply free textbooks to children from poor families (most of whom tend to be Roma). The local government pays for some books, but it is usually not enough for all children who need this kind of help, so sometimes the school organises collections of second-hand books from the pupils who finished the grade and do not need the books. Also, children from families who live on social welfare receive a free lunch as well, paid for by the municipality.

School principals appear to have complete autonomy over hiring process of new teachers or associates; during the past two years not a single new job was created, because reportedly there was “no need for it.” Thus, no Roma teaching assistants exist in any of the visited schools (and no instruction in Romanes is held). Furthermore, the interviewed school principals in the Valjevo area appear not to have heard of such an option, even though admitting this might help Roma pupils. There are no school books on the Roma language or culture within the scope of the school curricula, nor

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<sup>335</sup> Interview with Mr. Zoran Simić, school principal, Valjevo, 13 June 2006.

<sup>336</sup> Interview with Mrs. Vesna Simović, school principal, Valjevo, 13 June 2006.

<sup>337</sup> Interviews with teachers at the Nada Purić School, which has a special class, Valjevo, 13 June 2006.

any available in school libraries. There is no bilingual curriculum in any of the visited schools. According to some school principals, they have no knowledge of such literature, but they say that if it were proscribed by the curriculum and available to schools, then the schools would be happy to use them. Taken in the context, this may be just another indicator that schools on the local level either have no knowledge of the “Decade of Roma Inclusion” or the National Strategies, or have very little interest in taking practical steps for improving Roma education.

### *Enrolment and completion*

There are no data on the number of Roma children of pre-school and school age, even from NGOs. According to the local school authorities, there have never been problems enrolling any children in schools, and no parents have been unable to comply with the enrolment requirements. Obviously, families living in rural areas are automatically more limited in school choice for their children, sending them to the nearest available school. According to the local government, as well as the local Roma NGO, there are no illegal Roma districts in Valjevo, and nor are there Roma without personal documents. However, the estimated vast discrepancy between the official number of Roma living in Valjevo and unofficial estimates may point to the presence of a number of undocumented Roma, as well as a reluctance to identify oneself as Roma.

Although the data on enrolment and completion are not available, the local school authorities (principals, school inspectors, pedagogues, and so on) claim that the main problem of Roma education in Valjevo Municipality is not drop-out rates of the Roma students, but rather their attendance, especially after the completion of the fourth grade of the primary school. They also seem to believe that this problem can be solved by sanctioning the parents; for example, by imposing high fines on parents whose children skip classes.<sup>338</sup> The members of the Roma NGO, however, estimate that the Roma children in this municipality tend to spend on average a year in pre-schools, enrolling in the first grade of the primary school at the age of eight, and then spending three to five years in school.<sup>339</sup> In other words, Roma children tend to drop out after the fourth grade of the primary school.

### *Segregation and discrimination*

The local school authorities are quick to dismiss the existence of any form of discrimination towards the Roma children in the municipality. Thus, the interviewed inspector, stating that the educational inspection service can act solely upon complaints, claimed that up until now there have been no complaints about the school

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<sup>338</sup> Interview with the principal of the Andra Savčić Primary School, Valjevo, 13 June 2006.

<sup>339</sup> Pursuant to the Law on Obligatory Pre-School Education (in force as of the 2006–2007 school year), a preparatory class for the 23 Roma children of pre-school age was formed at the Grabovica segregated class of the Andra Savčić Primary School. This was a pilot project of the Roma Centre for Democracy and the local self-government, backed by the Roma Educational Fund. Interview with Ms. Danijela Petrović, coordinator of the Roma Centre for Democracy, 12 June 2006.

authorities or the teachers by Roma or non-Roma parents.<sup>340</sup> In other words, the absence of specific complaints about discrimination during school inspection is regarded as evidence that discrimination does not occur.

The existence of segregation is also denied, and accordingly there are no measures against it. However, among the training courses organised by NGOs and local government that the local teachers have undergone, including computer training, non-violent communication and educational planning, there has been a training course “The Roma Child and School.” This training was organised specifically for the teachers of the segregated class in Grabovica, which may indicate that the authorities are aware of the existence of specific problems there. There has been no evaluation of any training programmes.

### *Class and school placement*

According to the school psychologists and pedagogues, classes are formed in accordance with the results of the preparedness test, and the social and educational background of the parents, but never based on the ethnic origin. A balance is said to be sought, such as with respect to the number of parents who are divorced and children whose families are on social welfare, or the number of children with the highest and lowest test results. The school also claims to support children from the poorer families, by supplying them with free books,<sup>341</sup> providing free bus tickets for commuters,<sup>342</sup> giving money for excursions,<sup>343</sup> and so on.

The Grabovica Primary School is clearly a segregated school, even though it has a handful of local non-Roma children (5 per cent of the total number of pupils). The Andra Savčić Primary School, of which the school in Grabovica is a ‘satellite’, has 1,185 pupils, of whom 35 (just over 3 per cent) are Roma. In the Prota Mateja Nenadović School in Brankovina, the classes are ethnically mixed, with all children mostly belonging to the same (poorer) economic background.

The special class established within the mainstream primary school of Nada Purić has five Roma children out of a total of 35 in the class, or 14 per cent of the student body. They are diagnosed as having a mild developmental delay. The children are referred to special schools/classes according to a set procedure: if the child does not pass the first grade preparedness test, he or she is automatically sent for “categorisation.” If the child passes but shows weaker achievement over the school year, he or she is proposed for referral to the special class by the pedagogue and the teacher, and with the parents’ consent. According to the interviewed school authorities, so far there have been no

<sup>340</sup> Interview with Mrs. Gordana Matić, school inspector in Valjevo Municipality, 12 June 2006.

<sup>341</sup> Teachers organise used book drives among the pupils in higher grades, in order to distribute the collected books to poor children in younger grades, as a matter of charity.

<sup>342</sup> Tickets are paid for by the local government.

<sup>343</sup> Teachers ask for parental contributions for poor children at the parents’ meetings (i.e. as a matter of charity).

cases in Valjevo Municipality when the Roma children were sent to the special class without “objective reason”, but there have been instances when the Roma parents placed their children in the special class on their own initiative, because they allegedly hoped to obtain certain benefits (social assistance, and so on). The school authorities also deny that any referral to the special school may have been linked to the language problem, because, as the interviewees claim, the local Roma children are all fluent in Serbian. Nevertheless, insufficient knowledge of the Serbian language was identified by some teachers among the reasons for the poorer achievement of the Roma pupils in school (see below).

### *School results*

According to the teachers and school principals, the Roma children achieve worse results than other children in the local schools. Thus, they are highly unlikely to be among outstanding students who are sent to represent the school in academic subject competitions.<sup>344</sup> Roma pupils reportedly show better results in music and arts subjects, and often play at school concerts, while their success in other subjects is rare. The interviewed school authorities claim that there are very few cases of functional illiteracy among children up to the fourth grade of the primary school, but these are said not to be limited to the Roma children. By the eighth grade, it is claimed, there are no functionally illiterate pupils. Coincidentally, many Roma do not go on studying school up until the eighth grade.

Among the main reasons for poorer achievement of the Roma children at school, the teachers name “weak motivation.” Overall, the reasons identified by teachers betray the presence of negative stereotypes about Roma:<sup>345</sup>

- Lack of interest in children’s education on the part of the parents;
- Insufficient knowledge of the Serbian language;
- Low importance attached to education, because money can be accumulated by easier means (trade, smuggling, and so on);
- Not doing homework;
- Way of life;
- “Habit”;
- Mental and physical abilities;
- Family background;
- Weaker memory compared to other children.

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<sup>344</sup> Interview with Mr. Zoran Simić, Valjevo, 13 June 2006.

<sup>345</sup> This information is from questionnaires that the interviewed teachers were requested to fill in as part of research for this case study.

The teachers' responses present a different picture, compared with the responses of the Roma children attending the Andra Savčić Primary School (main building). The children there say that they feel bad in school because of constant conflicts with their peers and because they get no support from the teachers, alongside little or no support from their parents, who often lack schooling themselves. One Roma woman from the village of Balačko related the following:

I was a very good pupil, but my parents were very poor, and because of that I had to give up schooling when I finished the third grade. I don't want my daughter to have same destiny as me. The teacher told me that she is very good; she is now in the second grade; but I am also very poor, and I don't know till when I will have an opportunity to educate her.<sup>346</sup>

Another Roma woman from Vis said the following:

It is true that most of us are uneducated, but what can we do! My parents were poor, and could not send me to school. I am also poor, and my husband is sick; we are living on social welfare; it is not enough for living [...] I have a daughter of eight years, and a son of four years. My daughter is now in the second grade, and the school gives her books, but I cannot help her to do homework, because I am illiterate, so she has to do everything alone.<sup>347</sup>

It appears clear that better academic performance of the Roma children will require not only additional work with the children, but also continued work with the teachers and parents, Roma as well as non-Roma, including elements of the Roma culture and language and non-discrimination education.

### *School–parents relations*

No Roma are present among the school board members or the parents' council members. According to the school authorities and teachers, this is because the Roma parents do not attend parents' meetings where the parents' council members are elected. Interestingly, in the interviews, school principals admitted that the motivated parents of good non-Roma pupils are not necessarily represented on the parents' council or the school board, either.

In August 2006, the RCD, in cooperation with the school management and Valjevo Municipality initiated a project entitled "Roma Education – Solution for the Future." Five primary schools, Andra Savčić, Prota Mateja Nenadović, Nada Purić, Sveti Sava, and Sestre Ilić, are involved in this project. The schools were chosen because of a large percentage of Roma students. The project is supported by the Roma Education Fund (REF) and the international NGO Oxfam-Novib from the Netherlands. The goal of the project is to include the Roma parents in the parents' councils and school boards through the creation of a legitimate representative office of the Roma parents, and

<sup>346</sup> Interview with a Roma woman from the village of Balačko, Valjevo, 13 June 2006.

<sup>347</sup> Interview with a Roma woman from the village of Vis, 13 June 2006.

increasing awareness about the educational and other needs and problems of the Roma children. From September until November 2006 the Roma parents were provided with training organised by NGOs and local government, and in January 2007, five Roma parents (one in every participating school) have been involved as the parents' council members.

### **A2.3 Case Study: Zemun<sup>348</sup>**

#### **A2.3.1 Administrative Unit**

Zemun is a major suburb of Belgrade with a population of 152,950 (according to the 2002 census), of whom 145,751 are living in the urban Zemun, with the rest living in its rural part. Zemun Municipality comprises four settlements: Zemun, Zemun Polje, Batajnica and Ugrinovici. Ugrinovici is part of the rural area, while the rest are part of the urban Zemun.

Zemun is not an independent municipality but rather a district of Belgrade Municipality, with implications for its administrative and financial standing. Zemun was absorbed by the city of Belgrade back in 1934, when its municipality services were united with those of Belgrade.

Even according to the official census, Roma (whose number is seriously underestimated, see below) are the second-largest ethnic group in Zemun (see Table A3). Yet there are no local measures specifically for Roma, even any with regard to improving Roma access to education, and Zemun's local authorities have not earmarked any resources for the needs of the Roma community. Local desegregation measures do not exist, and no activities are carried out to reduce or eliminate segregation. There are no special principles for Roma participation in the local government in Belgrade, and no quota for the representation of ethnic minorities in the local government is legally determined, or enforced.

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<sup>348</sup> Case study Zemun, conducted in May–June 2006, researcher Natasa Kocić Rakočević.



**Table A3. Zemun Case Study – Zemun district population figures**

Ethnic group	Population	Proportion (per cent)
Serbs	132,263	86.48
Roma	4,030	2.64
“Yugoslavs”	3,315	2.17
Croats	1,970	1.29
Montenegrins	1,725	1.13
Other	9,647	6.29
<b>Total</b>	<b>152,950</b>	<b>100</b>

Source: 2002 census

### A2.3.2 Roma and the Community

The number of Roma living in the Zemun area or in the greater Belgrade area is not known. The local Roma representatives say that there are 152 Roma settlements in Belgrade, but only one settlement is registered. There are 310 registered Roma households in Zemun.<sup>349</sup> However, the Roma representatives estimate that only around 20 per cent of the Roma households in Zemun are legally registered.<sup>350</sup> Thus, although according to the census there are only 4,000 Roma in Zemun, taking into consideration the fact that an average Roma household consists of five or six members, the number of Roma residents in Zemun may be between 7,500 and 9,000, or about 5 per cent of the Zemun population. The majority of Roma displaced from Kosovo and Metohia, as well as failed asylum seekers returning from Western European countries, live in Zemun, accounting for many of the unregistered households.<sup>351</sup>

The problem of most Roma-populated districts in the Belgrade area, including Zemun, is the fact that they do not comply with even the minimum legislative requirements for legalisation, primarily with regard to the ownership of the land on which the settlements are situated, the poor quality of housing and infrastructure, and missing required building licences. Usually, Roma settlements have no electricity, water, sewage system, or other essential amenities. These claims are corroborated by the data from the *Poverty Reduction Strategy*, which state that 80 per cent of Roma live in poor areas and settlements, around 600 Roma settlements in Serbia have no water, about 65 per cent

<sup>349</sup> Interview with Mr. Ešref Ramadanović, representative of the local Roma community, Zemun, 3 July 2006.

<sup>350</sup> Interview with Ms. Milica Simić, coordinator of the Roma Children’s Centre, Belgrade, 10 July 2006.

<sup>351</sup> Interview with Mr. Ešref Ramadanović, representative of the local Roma community, Zemun, 3 July 2006.

have no sewage system, and about 45 per cent do not have paved streets.<sup>352</sup> Many Roma districts in the greater Belgrade area, Zemun included, are situated on the outskirts of the city, where there is no connection to schools, health centres, and other important institutions. If children go to school at all, they have to first walk to the city transport stop to get to the school. Furthermore, a considerable number of Roma children are not registered at birth or declared as Roma at the census, so the size of the pre-school- and school-age Roma population is not known.

Only an estimated 3–6 per cent of Roma in greater Belgrade, including Zemun, are formally employed. Most Roma work in the “grey” economy: collecting and selling recyclables; working in construction and as handymen, with the majority having only seasonal jobs. Obtaining work as handymen (i.e. doing repair works from house to house, for a small fee) is considered a great success in the Roma community. It can bring monthly earnings of 6,000–10,000 dinars (€76–127), which is the average budget for an average five- or six-member household, provided that at least three family members work.<sup>353</sup>

There are no data on the social structure of the Roma community in Zemun, but the Roma representatives assess that only 3–5 per cent of the Roma families can be considered well-to-do or middle-class, while up to 95 per cent are poor or extremely poor.

Although there are individual cases when Roma are well integrated, living and socialising among their non-Roma neighbours, generally there is little contact and exchange between the Roma and non-Roma communities. Allegedly, there are also instances when some Roma parents do not wish to enrol their children in schools where there is a high percentage of Roma, or when they withdraw them from such schools and transfer them to schools with few or no Roma pupils. But there are no records of how many Roma pupils have switched schools due to this.<sup>354</sup>

### A2.3.3 Education

#### *Enrolment and completion data*

There is no official information on the enrolment rates referring to pre-school, primary or secondary school education or drop-out rates of Roma pupils in Zemun. According to the interviewed representatives and their experience in the field, the percentages are similar to those on the national level, meaning that only around 20 per cent of the

<sup>352</sup> Government of the Republic of Serbia, *Poverty Reduction Strategy*, Belgrade, 2003, p. 32.

<sup>353</sup> Interview with Ms. Milica Simić, coordinator of the Roma Children’s Centre, 10 July 2006.  
Interview with Mr. Ešref Ramadanović, representative of the local Roma community, Zemun, 3 July 2006.

<sup>354</sup> Interview with Ms. Jovanka Stojić, principal of the Branko Pešić School for Adult Primary Education, Belgrade, 15 July 2006.

primary school-age children are included in some type of education.<sup>355</sup> Even though official statistics vary very little in terms of gender enrolment, the drop-out rates for girls of the most vulnerable groups (Roma, children with intellectual disabilities, rural population) are significantly higher, ranging from 20 to as much as 80 per cent.<sup>356</sup> Research by the Belgrade's Roma Children's Centre shows that about 20 per cent of the local Roma women have never attended school, while 28 per cent had started but not finished the primary school. The highest drop-out rate of Roma girls is estimated at 14 per cent. At the same time, the official primary school enrolment rate of all children in the 2000–2001 school year stood at 98 per cent and the drop-out rate at 0.62 per cent.<sup>357</sup>

### *Enrolment procedures*

There are no data on how many Roma children in Zemun could not enrol in pre-school or the first grade of primary school due to lack of the required documents. Although interviewed teachers and Roma parents claim that the lack of personal documents and resident status is not an obstacle for enrolment, it does affect administration services, which do not communicate to parents of unregistered children inviting to enrol their children in school, and do not follow up on children who are out of school. Interviewed Roma representatives as well as school authorities share the view that this issue is serious enough and must be addressed.<sup>358</sup> According to the UNHCR statistics over 50 per cent of the displaced persons from Kosovo do not have any documents.<sup>359</sup> Furthermore, Roma often do not live at the address at which they are registered. Adding to this a high number of Roma children who have returned from Western European countries – the majority of them to Belgrade and the surrounding areas, including Zemun – following repatriation of their families, often without necessary documents, the problem appears to have really grave proportions. In addition, these children very often do not speak Serbian, and if at all accepted in

<sup>355</sup> Interview with Mr. Ešref Ramadanović, representative of the local Roma community, Zemun, 3 July 2006. Interview with Ms. Jovanka Stojić, principal of the Branko Pešić School for Adult Primary Education, Belgrade, 15 July 2006; interviews with teachers at this school, Belgrade, 17 June 2006.

<sup>356</sup> Government of the Republic of Serbia, "Roma and Education" *Poverty Reduction Strategy, Education in Serbia*, Belgrade, 2003.

<sup>357</sup> Government of the Republic of Serbia, *Poverty Reduction Strategy, Education in Serbia*, Belgrade, 2003.

<sup>358</sup> Interview with Ms. Milica Simić, coordinator of the Roma Children's Centre, 10 July 2006. Interview with Mr. Ešref Ramadanović, representative of the local Roma community, Zemun, 3 July 2006; interview with Ms. Jovanka Stojić, principal of the Branko Pešić School for Adult Primary Education, Belgrade, 15 July 2006; interviews with teachers and parents of children attending this school, Belgrade, 17 June 2006.

<sup>359</sup> UNDP, *At Risk: Socially Endangered Roma, Refugees and Internally Displaced Persons in Serbia*, Belgrade: UNDP, 2006 (hereafter, UNDP, *At Risk: Socially Endangered Roma*).

schools are placed into lower grades because of the differences in the education system of Serbia and the country from which they departed.

A further problem is the fact that in Zemun, as elsewhere in Serbia, Roma children often enrol in the primary school at a later age. There has been a trend towards channelling such children into adult, rather than mainstream schools.

Adult education is a formal system of education, financed through the same channels as elementary education. Adult schools exist in all major towns in Serbia, organised either through consultative lessons or through regular daily classes. Such schools were originally meant to equip (adult) pupils merely with basic literacy. Currently, these schools are mostly for those who are late in enrolling, or who gave up schooling at some point but after several years decided to return to school. The curriculum of an adult education primary school normally consists only of two subjects, mathematics and Serbian language, in addition to technical education. Once they finish the school, the graduates' diploma is, in theory, valid for enrolment in any secondary school. But in practice, based on the accelerated schedule (namely, students can complete two grades in one school year), which reflects on the decreased criteria and lack of systematic scholarship, opportunities for secondary education are usually limited to the opportunity to enrol in a trade apprenticeship lasting several months.

In Belgrade, there are three adult education schools. Two are located near the Belgrade downtown, with satellite classes nearby the Roma settlements. The Branko Pešić School for Adult Primary Education does not have satellites, and is located near the centre of Zemun Municipality, approximately at the same distance from all bigger Roma settlements in Zemun. Not all Roma children in Belgrade attending adult schools. However, over 90 per cent of the Branko Pešić School for Adult Primary Education's student body are Roma children aged 9–17.

The Law on Primary Schools (Article 90) states that if a child over 8.5 years has not enrolled in the first grade due to illness or some other reason, that child can enrol in the appropriate grade based on the knowledge and skills test and according to the age. In practice, the Roma children who come to enrol in the Branko Pešić School for Adult Primary Education at the age of ten or older, reportedly have knowledge level matching that of the first-graders, because they live in an educationally deprived environment, where the parents are mostly illiterate. Such children then should still be able to enrol in the first grade of mainstream primary schools, because in accordance with the Law, children can enrol in the adult school only upon reaching the age of 15. Clearly, the enrolment policy at the Branko Pešić School for Adult Primary Education was not in accordance with the Law.

Faced with the problem that the adult education curriculum is ill-suited to the increasingly younger population of pupils (aged ten to 15), the school board in 2003 requested, and was granted, the approval of the Ministry of Education and Sports to make the curriculum more comprehensive, so that the pupils in the first grade could have the same subjects as in mainstream primary schools, rather than only two subjects

taught according to the existing curriculum in the adult education schools. The Ministry also allowed the enrolment of children under 15. However, in 2006, the Ministry revoked the approval (allegedly, the new Minister and staff disagree with certain decisions made by the previous Ministry staff). The Branko Pešić School for Adult Primary Education authorities continue using the modified curriculum, however, because they believe that it would be unfair to their students to deprive them of education, and that the Branko Pešić School for Adult Primary Education may be for many Roma children their last chance to enter the education system and potentially continue with secondary education.<sup>360</sup> Nevertheless, educational and job prospects for Roma children educated in adult education institutions are grim.

The school has the usual administrative requirements for enrolment: a birth certificate and proof of a health examination, as well as evidence of all relevant vaccinations. Enrolment of children in the primary school was once conditioned on the permanent address within the municipality in which the school was located, which was often an obstacle for the enrolment of Roma children, because Roma families were forced to move from one place to another in search of work, with no permanent place of residence. This rule was allegedly abused by principals of some primary schools, refusing enrolment of Roma children and directing them to other schools in their districts which did not have such discriminatory practice. The regulation has since changed, but still the children registered in the particular district are given priority. Once all of these children are enrolled, other children have the right to apply, and are accepted if places are available. Allegedly, some principals are still refusing to enrol Roma children under the pretext of having no more free places at their school.<sup>361</sup> All this also can lead to Roma children enrolling in the first grade not at the age of seven years, as prescribed by law, but much later, usually at nine or ten. These children are then late finishing primary school and cannot continue their education, because they have outgrown the legal age boundaries for the enrolment in the secondary school. The result is the fact that many Roma 17 or 18 years of age cannot either find work or continue their education. There are alternatives, such as fee-based secondary education, but they are very expensive and out of reach for most Roma people.<sup>362</sup>

### *Special schools*

Aleksandra Kopanja, a psychologist engaged part-time at the Branko Pešić School for Adult Primary Education, as well as at several other mainstream primary schools in Belgrade, stated that the basic precondition for success in mainstream schools is

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<sup>360</sup> Interview with Ms. Jovanka Stojić, principal of the Branko Pešić School for Adult Primary Education, Belgrade, 15 July 2006.

<sup>361</sup> Interview with Ms. Milica Simić, coordinator of the Roma Children's Centre, 10 July 2006; interview with Ms. Jovanka Stojić, principal of the Branko Pešić School for Adult Primary Education, Belgrade, 15 July 2006.

<sup>362</sup> UNDP, *At Risk: Socially Endangered Roma*.

evaluation of the child's intellectual capabilities.<sup>363</sup> When it appears that a child is not prepared to enrol in the mainstream primary school, the City Secretariat for Education, based on the report of the diagnostic commission, issues a certificate for the child to enrol in the special school.

Kopanja is aware of frequent misdiagnosis of the Roma children, and is of the opinion that the language barrier plays a major role in getting the wrong diagnosis, since Roma children tend to speak Serbian very poorly and often live in a deprived environment. In order to avoid a misdiagnosis, Kopanja believes that it is vital to use non-verbal tests. The parents cannot enrol their child in the mainstream school contrary to the recommendation of the commission, and the only way back from special to normal schools is reassessment by the diagnostic commission.

As a recommendation for the reduction of erroneous diagnosis and referral to special schools of Roma children, Kopanja says that it is necessary to involve the child prior to the start of school, to engage the family through organisation of educational activities, both for the children and for the parents.

A bilingual curriculum can provide another possibility of preventing the viewing of the Romanes language as a handicap, but there has never been bilingual education training for the teachers of the Branko Pešić School for Adult Primary Education, even though the staff underwent training for the functional education of adult Roma for the teachers of the first eight grades, as well as training on the prevention of sexual violence against children held by the Incest Trauma Centre.<sup>364</sup>

### *Costs*

According to the assessments of the teaching staff at the Branko Pešić School for Adult Primary Education, 12,000–13,000 dinars (€152–165) must be set aside each month for the regular school expenses: textbooks, notebooks, pens, excursions, recreational education, theatre, and so on.<sup>365</sup> The textbooks are not free, unless received through donations, as for instance through the projects of the Roma Children's Centre, which frequently provides free books to children whose parents have no means to buy them. Old textbooks from pupils of mainstream schools are collected and then distributed to poor pupils, as was done in the Petar Kocić Primary School in 2005.<sup>366</sup>

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<sup>363</sup> Interview with Ms. Aleksandra Kopanja, psychologist at the Branko Pešić School for Adult Primary Education, Belgrade, 13 July 2006.

<sup>364</sup> Interview with Ms. Jovanka Stojić, principal of the Branko Pešić School for Adult Primary Education, Belgrade, 15 July 2006.

<sup>365</sup> Interviews with teachers of the Branko Pešić School for Adult Primary Education, Belgrade, 17 June 2006.

<sup>366</sup> Interview with Ms. Jovanka Stojić, principal of the Branko Pešić School for Adult Primary Education, Belgrade, 15 July 2006; interviews with teachers at this school, Belgrade, 17 June 2006.

For schoolchildren in special schools, this amount is much lower, standing at approximately 2,000 dinars (€25) a month, because pupils are provided with free transport, lunch, and required school accessories and textbooks. Pupils of special schools do not have recreational education or go on excursions, and one-day field trips are paid directly by the school. Some special schools even have funds for full boarding (free accommodation and three meals a day). These benefits are not provided in mainstream primary schools.

Some, although not all, families that are beneficiaries of financial family support (FFS) get complimentary school books, and some of the needed school material. But bearing in mind that the estimated majority of Roma families are not registered at their actual place of residence, and/or do not have personal documents, only about 20–30 per cent of them are FFS beneficiaries in relation to the actual number of those that should be exercising their right to support based on their low income.<sup>367</sup>

### *School results and curricular standards*

The Branko Pešić School for Adult Primary Education works according to the adult curriculum modified by the school itself, so the pupils in the first grade have music, physical education, art and English, even though according to the existing curriculum for adult education they should only have Serbian and mathematics. The Ministry of Education and Sports in 2003 approved this curriculum modification for this school only, but the staff are not certain whether this approval still stands. The school has in the meantime been instructed to work according to the official curriculum, which the school is refusing to do: according to that curriculum the students only have Serbian and mathematics as subjects from the first to the fourth grade. The members of the school staff feel that they would damage the children's interests in this manner by depriving them of knowledge to which they are entitled. At the moment, the outcome of this matter seems unclear.<sup>368</sup>

According to the school principal, there is a very low percentage of functionally illiterate Roma students in the fourth grade; it happens, but these are students with lower IQ. There are no functionally illiterate children in the eighth grade. None of the pupils from the Branko Pešić School for Adult Primary Education has even taken part in academic competitions, and the teachers emphasise the point that it is to be considered as great success when the Roma children even take the placement test and enrol in the secondary school at all. According to the teachers, this school also appears

<sup>367</sup> Interview with Ms. Milica Simić, coordinator of the Roma Children's Centre, Belgrade, 10 July 2006. Interview with Mr. Ešref Ramadanović, representative of the local Roma community, Zemun, 3 July 2006. Interview with Ms. Jovanka Stojić, principal of the Branko Pešić School for Adult Primary Education, Belgrade, 15 July 2006; interviews with teachers and parents of children attending this school, Belgrade, 17 June 2006.

<sup>368</sup> Interview with Ms. Jovanka Stojić, principal of the Branko Pešić School for Adult Primary Education, Belgrade, 15 July 2006; interviews with teachers and parents of children attending this school, Belgrade, 17 June 2006.

to be a way out of the special schools: it happens that pupils of special schools abandon schooling, make a break for a year or two, and then enrol in the adult education school, whose diploma enables them, at least in theory, to enrol in a mainstream secondary school. According to the law, there is no difference between adult education and mainstream schools, and one can continue education transferring from one to another. However, in practice, children never manage to go from an adult education school to a mainstream school, even though they often go from a mainstream to an adult school.

### *Decision-making, financing, infrastructure and human resources*

The principal and teachers of the Branko Pešić School for Adult Primary Education state that the school's administrative body has little influence in terms of the curricula and human resources.<sup>369</sup> The Ministry of Education and Sports adopts a single curriculum according to which all schools must work. The same goes for the human resources policy, and the Ministry in fact determines the number of staff according to the proscribed normative acts. Furthermore, the principals and teachers from the adult school are excluded from communication and cooperation with the mainstream school network, since mainstream and adult schools are supposed to have separate school networks.<sup>370</sup> However, in practice, the mainstream school network exists and is very active, while the adult education school network exists only on paper.

The funds that local schools receive are actually city budget resources, since Zemun is not an independent municipality. In the 2005–2006 school year, the Branko Pešić School for Adult Primary Education school received funds at a monthly level of 20,000 dinars (€254). In addition, each school gets 105,000 dinars (€1,334) for its current and maintenance expenses from the Ministry of Education and Sports in particular. All interviewed teachers as well as the principal say that this does not cover the actual costs, which means that schools have to decide which of the expenses are less urgent, and forgo them (for example, building repairs, and so on).

Over the past few years, thanks to the support of the European Agency for Reconstruction (EAR), funds of the Government of the Republic of Serbia and various donors, a vast number of primary schools in Belgrade have been renovated, and run-down windows, doors, toilets and school inventory have been repaired, and some schools have seen an introduction of central heating and running water. Still, most schools are grappling with the problem of shortage of available space and lack of computers. The situation is not the same in all schools, and schools located on the very outskirts of the cities or in rural areas have as a rule worse infrastructure, and are poorer in technical equipment, than city schools. Primary schools located near Roma districts

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<sup>369</sup> Interview with Ms. Jovanka Stojić, principal of the Branko Pešić School for Adult Primary Education, Belgrade, 15 July 2006.

<sup>370</sup> Interviews with teachers at the Branko Pešić School for Adult Primary Education, Belgrade, 17 June 2006.



are extremely poorly equipped, without adequate space and with very bad infrastructure. Thanks to good management, the Branko Pešić School for Adult Primary Education's infrastructure is good, which is not common. Practically all other adult primary schools in Belgrade, and in Serbia generally, have very bad infrastructure. Yet, like practically all other schools in Serbia, the Branko Pešić School for Adult Primary Education also has a problem with a shortage of available space and equipment (lack of computers).

There does not seem to be a problem with qualified human resources: teachers working in all schools generally have higher education.<sup>371</sup> However, despite an overwhelmingly Roma student body, the Branko Pešić School for Adult Primary Education does not have Roma teaching assistants or mediators. All the interviewed school representatives expressed an opinion that it would be a useful measure, acting as a bridge between the families and the school, and possibly reducing drop-out rates. Even though the school's staff or social worker attempt to contact the Roma parents, trying to convince them of the importance of attending classes, a Roma assistant who knows the families would be much more effective.<sup>372</sup>

### *School–community relations*

The management team of the school is composed of the principal, research associates, and teachers who wish to actively participate in the operation of the school. The administrative body can create and execute extracurricular activities independently, but all activities must have the prior approval of the Ministry of Education and Sports (as for example with extending the set adult school curriculum from two to several subjects).

According to the principal, the level the involvement and cooperation of Roma parents with the Branko Pešić School for Adult Primary Education is satisfactory, which is logical since the Roma children make up the majority of the school's pupils. (At other schools where non-Roma pupils are the majority, there is usually no active participation of the Roma parents in the parents' council or other school-level activities).<sup>373</sup>

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<sup>371</sup> Interview with Ms. Jovanka Stojić, principal of the Branko Pešić School for Adult Primary Education, Belgrade, 15 July 2006; interviews with teachers and parents of children attending this school, Belgrade, 17 June 2006.

<sup>372</sup> Interview with Ms. Jovanka Stojić, principal of the Branko Pešić School for Adult Primary Education, Belgrade, 15 July 2006; interviews with teachers at this school, Belgrade, 17 June 2006.

<sup>373</sup> Interview with Ms. Milica Simić, coordinator of the Roma Children's Centre, Belgrade, 10 July 2006; interview with Mr. Ešref Ramadanović, representative of the local Roma community, Zemun, 3 July 2006; interviews with teachers of the Branko Pešić School for Adult Primary Education, Belgrade, 17 June 2006.

At the same time, Milica Simić claims that she has seen a great number of alleged discrimination cases in her work as the director of the Roma Children's Centre. Allegedly, non-Roma pupils constantly tease Roma pupils, taunting and openly expressing negative prejudices about Roma in various contexts (such as in class, during breaks, and so on). Roma children usually have nobody to address in schools, and often they fight with their non-Roma peers, defending themselves in the only way in which they can. However, allegedly, while Roma children get punished by the school authorities, non-Roma children do not. Allegedly, teachers themselves often express their prejudices towards Roma openly, even in front of the class, saying that Roma children are "not intelligent enough", that they "do not need anything else but to learn how to read and write", that Roma girls should get married as soon as possible "because Roma women are made for giving birth", and so on. However, even if parents decided to file a complaint, it would be very hard to prove that discrimination occurs. The Law on Primary Education envisages sanctioning of discrimination on any grounds. But there have been no cases in practice where a teacher or a pupil has been sanctioned for discrimination.

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All references are to the Official Gazette of the Republic of Serbia (hereafter, Official Gazette).

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## ANNEX 5: JOB DESCRIPTION FOR A ROMA TEACHING ASSISTANT (RTA)

Roma Education Initiative (REI) – Serbia: “Equal Chances – Integration of Roma Children and Youth into the Education System”

### Definition

A teaching assistant is a person who acts as a link between the local minority community and system institutions in order to assist in the process of schooling of children from minority and/or marginalised groups. Assistants are from the Roma minority, or some other minority, depending on the demographic makeup in a certain region.

### Job Description

#### *a) Activities in the Roma Community*

##### 1. Developing a database on children:

- who are supposed to enrol in school
  - assistance in taking the school preparedness test/attendance at the testing and translation to/from the Romani language should the need arise;
- who discontinued schooling for whatever reason and wish to continue it;
- who cannot continue their schooling due to the language barrier (e.g. those deported from Western Europe, refugees from Kosovo, and so on).

##### 2. Visiting families and working with parents:

- establishing contacts with families in order to increase and support their motivation for schooling of their children, reporting on the child’s school achievements and possible problems;
- collecting basic socio-economic information about families;
- screening of pedagogical competences of parents and their need to acquire knowledge and skills concerning upbringing, children’s development, health, hygiene, and so on.

##### 3. Cooperating with Roma NGO

- cooperation with the parent body Roma NGO, attending their training course, inclusion in their activities related to his/her tasks to assist the schooling of Roma children.

*b) Activities in school*

## 1. In classes:

- participating in regular classes
  - assisting teachers in the realisation of planned activities, providing direct assistance to children in completing assignments, actively participating in the design and selection of the most adequate teaching contents and aids,
  - assisting children to master the Serbian language and skills necessary for successful schooling,
  - assisting in communication between children and teachers/overcoming language barriers, and
  - monitoring and providing support to children, helping them to form a positive attitude towards the school, increasing their motivation for schooling, identifying needs and planning various activities in accordance with those needs, in cooperation with teachers and research associates;
- participating in planning of classes together with teachers and research associates;
- participating in remedial classes/assisting teachers to deliver planned contents, with a role in the selection of children and ensuring regular attendance of classes;
- assisting in completing school assignments;
- providing necessary information to teachers and research associates/reporting on achievements, problems identified, and the family situation.

## 2. In school activities:

- necessary intervention in the school and the local community in order to ensure regular attendance of classes/facilitating cooperation between the family and the school, inclusion of Roma parents in school activities;
- attendance of teaching staff conferences and homeroom conferences if required and if problems of schooling of Roma children are discussed;
- initiating the work of hobby group/s affirming Roma culture and tradition, multicultural education and other activities meeting the needs of pupils in multiethnic surroundings;
- developing a database on the situation and needs of Roma children attending junior grades of primary school (and possibly those attending senior grades), which necessarily requires direct cooperation of Roma assistants, teachers and the schools' research associates;



- needs for certain classes, knowledge and skills,
- regularity of school attendance,
- social status of a child in a class,
- special interests and affinities, and
- health and hygienic status.

On the basis of information gathered, a database for each child is made and further activities are planned.

### Working hours

The level of engagement of a RTA in one working week is 30 hours: 8 hours working in the Roma Community and 22 hours working in schools.

### Teacher training

Minimum:

*18 hours a year* – one seminar on the “Step-by-Step” methodology and/or pedagogy in general

An asset: *30 hours a year* – one “Step-by-Step” seminar and training on emancipation of Roma, the exercise of the right to education (and other human rights) and their integration in the life of a broader community

### Basic employment criteria

Required:

1. Completed four-year secondary school.
2. Languages: full mastery of Serbian and fluency in speaking the Romani language.
3. Expressed personal readiness to accept professional responsibilities enumerated in the job description and affinity for and ability to work with children.

An asset:

1. Begun/completed university-level education.
2. Work experience.

Persons deciding on the selection of an assistant:

1. School principal;

2. A representative of school teachers;
3. A representative of a partner Roma NGO;
4. A representative of the partner NGO implementing the project (CIP);
5. A donor (such as the Fund for Open Society Serbia).



The Roma are one of Europe's largest and most vulnerable minorities. Throughout Europe, Roma remain excluded from many aspects of society, denied their rights and entrenched in poverty. The "Decade of Roma Inclusion 2005–2015" is an unprecedented international effort to combat discrimination and to close the gap in welfare and living conditions between Roma and non-Roma, in order to break the cycle of poverty and exclusion. The initiative is supported by the Open Society Institute (OSI) and the World Bank, and endorsed by nine Central and Eastern European countries. Education is one of the four main areas of the Decade, and the particular problems faced by Roma in accessing quality educational opportunities have been widely recognised.

This series of EUMAP reports on "Equal Access to Quality Education for Roma" builds on previous EUMAP reports on the situation of Roma in Europe. It has been prepared in collaboration with OSI's Education Support Program (ESP) and Roma Participation Program (RPP). The reports aim to support the Decade goals on education, and to establish a framework for regular monitoring throughout the Decade, as well as to promote consultation with Roma communities on education issues. They provide an assessment of the state of implementation of Government education policies for Roma, data on key education indicators, and case studies on selected communities.

This first volume of reports covers four countries: *Bulgaria*, *Hungary*, *Romania* and *Serbia*. Further volumes in the series will be published later in 2007; these will cover the other countries in the Decade – *Croatia*, the *Czech Republic*, the *Republic of Macedonia*, *Montenegro* and *Slovakia* – plus an overview report resuming the main findings across all the countries.

All EUMAP reports are available at [www.eumap.org](http://www.eumap.org)



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