

Country Assessment
and the Roma Education Fund's
Strategic Directions

Advancing Education of Roma in Bulgaria



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Preface

*T*his document is part of a series of REF Country Studies. It seeks to provide an analysis of the education systems and the ongoing education reforms – from the perspective of the inclusion of Roma children – in the countries taking part in the Decade of Roma Inclusion. The document also reviews the different programmes and activities the Roma Education Fund (REF) has carried out since its establishment in 2005, and highlights the thematic and programme areas REF is planning to concentrate on during the coming three years. The REF hopes that this document will offer a useful instrument for:

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- ⇒ Policy-makers seeking to improve education policies that address the education outcome gap between Roma and non-Roma.
- ⇒ Civil society representatives who wish to improve the effectiveness of their educational programmes by making them more relevant to the overall education reform of their country.
- ⇒ The overall development and donor community, who needs to better understand the situation that Roma children are facing, so they can identify niche areas where support and contributions would be most needed and valuable.
- ⇒ REF, which needs to define the areas of policy change upon which it will focus.

The information presented in the document has been discussed with representatives of governments and civil society, through various consultative meetings, in order to ensure that the document realistically reflects the actual situation and the recommendations made are viable. This document reflects a situation at the time when the document was produced. Many countries are experiencing relatively fast changes and REF plans to update these assessments on a regular basis.

Acknowledgements

The editors of the series are Tünde Kovács-Cerović, Roger Grawe, and Alexandre Marc. They have developed the model for the studies, provided oversight during the process of preparation and ensured coherence throughout the documents in the series.

8 The main author of this document is Elena Marushiakova and Veselin Popov, Ethnographical Institute and Museum at Bulgarian Academy of Sciences, and Tünde Kovács-Cerović. They received contributions from Rumyan Russinov, Roger Grawe, Vivien Gyuris, Dragica Pavlović and Alexandre Marc.

Tom Popper did the language editing.

1. Executive Summary

Political, Economic, and Social Context

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Bulgaria is a middle-income country, with a gross national income per capita of \$3,450 in 2005 (as measured by the Atlas method). Over the past several years, Bulgaria has made impressive progress toward long-term stability and sustained growth. Bulgaria successfully completed European Union negotiations on June 15, 2004, and the country joined the EU on January 1, 2007.

Despite overall positive performance, Bulgaria continues to be one of the poorest countries in Central and Eastern Europe. The low income per capita reflects significant gaps in investments, the functioning of markets and, despite many recent improvements, the quality of the governance and institutional frameworks.¹

Bulgaria has a population of 7.9 million, including about 750,000 Turks, an estimated 700,000 to 800,000 Roma, and several other ethnic groups with smaller populations. In 2006, 13.4 percent of Bulgaria's total population was living below the poverty line. According to the World Bank, even with dramatic improvements in incomes since the mid 1990s, poverty remains a persistent problem among the country's Roma.²

During the 1990s, Bulgaria made some important progress on Roma inclusion and established a positive overall legal framework for inclusion of minorities. The basic document that defines government policy toward Roma is the "Framework Program for Equal Integration of Roma into Bulgarian Society," approved in 1999. A whole set of complementary documents has been adopted to help implement the Framework Program. Also, as part of its participation in the Decade of Roma Inclusion, Bulgaria developed the "Decade Action Plan 2005-2015." On a general level, most of these documents are congruent, but differences surface on the level of implementation plans. Bulgaria has been active in the implementation of the Decade, hosting the official launch in February 2005 and serving as the host country during 2006.

The Law on Antidiscrimination³ was passed in 2003 and went into effect on January 1, 2004. During June 2005, just before parliamentary elections, the Antidiscrimination Commission was created, but so far, it has not been active. In 2003, the Bulgarian Parliament passed a special Law on the Ombudsman.

Based on these two legal provisions, some serious actions have been undertaken to address discrimination towards Roma in Bulgaria – including a series of court proceedings against school segregation and against refusals to hire Roma.

¹ Source: *World Bank Bulgaria Country Brief 2006*.

² <http://www.worldbank.bg/WBSITE/EXTERNAL/COUNTRIES/ECAEXT/BULGARIAEXTN/0,menuPK:305448~pagePK:141132~piPK:141107~theSitePK:305439,00.html>.

³ Published in the state newspaper, issue 86 from 2003.

Education

Bulgaria's education system has been in transition for more than a decade. Under this process, structures have changed, with both positive and negative impacts on the Roma population.

The initial access of Roma children to primary education is comparatively high in Bulgaria. Roma students can take advantage of free textbook provision and scholarship assistance. In the policy sphere, several documents and laws tackle the issue of improving Roma education. A fairly high number of Roma work at various levels in the Bulgarian education public administration.

Despite these positive trends, the education outcome of Roma still remains well below that of the majority. Roma access to pre-school is limited. Many indicators highlight the poor quality of education received by Roma children, especially in the crucial first years of school. Segregation is a pervasive problem, and, along with other quality issues, it contributes to high dropout rates and very low enrolment in secondary and university education.

The major obstacles for improved Roma education in Bulgaria include the following:

1. Particular enrolment obstacles:

- ⇒ Access to noncompulsory pre-school education is generally unavailable for Roma children, due to the required attendance fee, which many Roma families cannot afford. Furthermore, there are limited spaces in pre-school education institutions, and they have a policy that gives priority to children of working parents. As a result, many of Roma children are excluded.
- ⇒ Even access to the one year of compulsory pre-school education (kindergarten) is often denied to Roma children, mainly because of classroom space limitations.
- ⇒ The poor quality of education received by Roma students in the lower levels of the education system creates obstacles for their progression to higher levels. There is a general lack of support, including financial support, for students preparing for entrance exams to high schools and universities.

2. Segregated education:

- ⇒ The system of "Gypsy schools," where the students are predominantly or exclusively Roma children, creates a poor educational environment and, consequently, low-quality education. Many Roma children are simply not allowed to enroll in Bulgarian mainstream schools, and they are instead channeled into overcrowded Roma schools.
- ⇒ In cases where students do get transferred from a segregated "Gypsy school" to a mainstream school, further problems often arise. Desegregation can be accompanied by protests of non-Roma parents and exacerbated social divisions if: the process does not involve parents and the community, Roma children are not offered an adequate choice of schools, there is not a broad distribution of Roma children in different schools and classes, there is no preliminary support for families in need, extra lessons for Roma children are not provided, there is no information campaign, etc. Thus, transferring Roma children to mainstream schools requires an overall national desegregation policy and action programme.
- ⇒ Education in special schools: Although the new policy of the Ministry of Education and Science supports the downsizing of special schools, the process is slow, and the majority of the children in special schools are still of Roma origin. Many of these children are enrolled by their parents – not because of any mental handicap but because of benefits like free meals and clothing.

3. Adult education: Adult education and vocational training is currently only available on a project basis, and the experience with the majority of these programmes has not been positive. These projects did not manage to improve the education level or employability of the Roma participants, because they did not reflect the real needs of the labour market or the education system.

The REF's Activities in Bulgaria in 2005-2006

As of February 2007, the Roma Education Fund (REF) has received 72 project proposals from Bulgaria, out of which, it approved 19 projects and committed about €1.5 million.

The REF started its activities in Bulgaria by taking over financing for a number of projects from the Open Society Institute. These projects focused on: desegregating schools; helping children integrate into desegregated schools outside of Roma settlements; providing after-school support for children; and offering outreach components for parents, to help them establish better relations with their children's schools and increase parental motivation. The REF continues to finance these projects for the school year 2006-2007.

In order to increase the involvement of local governments in the process of desegregation, the REF has financed a project with the Consortium of Equal Access Foundation to promote the adoption of education action plans in the six municipalities where desegregation projects are under implementation. This project has been quite successful and produced five action plans, all with financial commitments from the municipal budget.

The REF has also supported a project for improving access of Roma students to university and increasing their involvement in research. The project is managed by the Consortium of Roma Student Organisations and the Student Society for Development of Interethnic Dialogue. The project provides mentoring and scholarships, finances small research projects undertaken by Roma students, and strengthens a centre for Roma studies and career advice.

The REF also supports the institutionalization of multicultural education and pedagogy for teachers, school directors, teachers' assistants, municipal staff and staff of nongovernmental organisations involved in Roma education. In addition, the REF provides support to pilot a model for adult education that could be used to develop adequate policies by the Ministry of Education and Science, and for a research on Roma parents and communities attitude towards education.

Finally REF finances through the European Roma Right Centre a project to improve the political acceptability for an antidiscrimination legislation in Bulgaria. This projects combines lobbying of political parties with the realization of a number of studies to demonstrate the benefit of Roma education to the entire population.

Strategic Directions for Future REF Activities in Bulgaria

Within the overall strategic framework of the REF for improving Roma education outcomes in Bulgaria, the REF's future activities will be grouped around the following project themes:

1. Assistance and support to Roma communities and NGOs through the following potential activities:
 - ⇒ Supporting Roma parents and community leaders to recognise and engage in key education issues:

⇒ Supporting Roma NGOs to be involved in educational activities to cooperate and strengthen their organisational, networking, and capacity building structures. The goal is to make NGOs better able to identify potential policy impacts and mitigate risks, strengthen project implementation, access and use EU and other funds more effectively, and ensure inclusion of smaller, isolated NGOs.

2. Implementation support to education authorities through the following potential activities:

- ⇒ Developing sustainable models for desegregation of all “gypsy” schools.
- ⇒ Increasing the enrolment of Roma children in pre-school education.
- ⇒ Reducing dropouts in grades five through eight and increasing transition to high school and tertiary education.
- ⇒ Identifying and implementing sustainable approaches to second-chance and adult education.
- ⇒ Establishing a comprehensive and trustworthy data collection system.

3. Policy development with government through the following potential activities:

- ⇒ Engaging in the decentralization process to build local government capacities and commitment to Roma education.
- ⇒ Reviewing and strengthening the policy framework for addressing Roma education issues, including desegregation.

The REF’s short term strategic priorities for project support in Bulgaria are as follows:

- ⇒ Accelerate implementation of the desegregation campaign, building on evaluations of current and past projects, with emphasis on an approach that includes parental and community involvement. Promote a similar approach among key partners, especially the EU.
- ⇒ Scale up activities, in order to achieve high pre-school and universal “compulsory” kindergarten enrolment for Roma children.
- ⇒ Provide “support-packages” for Roma children, including mentoring, tutorials, after-school activities, and materials linked to specific grades and needs.
- ⇒ Enhance the capacity of Roma communities to access EU funds and utilize them effectively.
- ⇒ Organise media campaigns and other communication activities, to raise awareness about the need for desegregation and other Roma education support initiatives.

The REF’s policy analysis and research-related strategic objectives in Bulgaria are as follows:

- ⇒ Develop a comparative analysis of education quality in segregated and integrated mainstream schools, using both quantitative indicators and inspector evaluations.
- ⇒ Evaluate desegregation projects, to help identify those positive elements with the greatest potential for scaling up to national level programmes.
- ⇒ Provide policy advice concerning decentralization, including the design and implementation of per-capita financing system.
- ⇒ Conduct a study of fiscal benefits associated with closing the education outcome gap between Roma and non-Roma.
- ⇒ Help identify links between social assistance policies and education objectives.
- ⇒ Promote greater curriculum flexibility and associated examination changes and advise on “user-friendliness” of textbooks and teaching materials.

2. Country Profile

According to the latest population census, taken in March 2001, Bulgaria has a population of 7.9 million, with an ethnic composition of 6.6 million Bulgarians, about 750,000 Turks, 370,000 Roma – and several ethnic groups with smaller populations, ranging from 15,000 to 1,000, including Russians, Armenians, Vlachs, Macedonians, Greeks, etc. In the same census, 327,882 people declared Romanes as their mother tongue. Along with the majority faith of 6.5 million Orthodox Christians, there are almost 1 million Muslims in Bulgaria. The adult literacy rate was found to be 98 percent.

Bulgaria's gross domestic product is \$24.1 billion, and the gross national income per capita is \$2,740. The country has a promising financial stability and has been averaging 4 percent economic growth since 2000.

The United Nations Human Development Index, which compares countries in terms of measures of life expectancy, educational attainment, and adjusted real income, ranks Bulgaria in position 55 out of 177.

Bulgaria is Europe's most rapidly aging country. It has a forecasted change of more than -15% for the 2000-2025 period according to the World Bank Population Projections.

Roma Population in Bulgaria

The number of Roma in Bulgaria reported in the 2001 Census is only an approximation. For different reasons, many Roma choose not to declare their Roma identity, and thus the census does not reflect the actual size of the population. Causes for this underreporting of the population include the hierarchical structure of the Roma ethnic identity, the phenomenon of "preferred ethnic identity," and the inappropriate statistical methods often used in the study of Roma.⁴ The actual number of people of Roma origin in Bulgaria, based on different estimates, is roughly 700,000-800,000, or about 10 percent of the Bulgarian population.

For around one quarter of Bulgaria's Roma families, Romanes is the first language, in other words, the language that the children speak first. For around one third of the Roma families, the first language is Turkish, and for others it is Bulgarian. (For these Bulgarian-speaking Roma, Romanes/Turkish/Romanian are often among the "second" languages, but some of them are only Bulgarian speaking.) In addition to these categories, there are many families where the children start to speak two languages in parallel, e.g. Romanes and Bulgarian or Romanian and Bulgarian. Some families practice trilingualism – for example simultaneously treating Turkish, Romanes, and Bulgarian as first languages.

In general, all available statistical data should be taken only as broad indicators, due to reasonable doubts about their precision. No statistical source gives data about the Roma population in the country as a whole. All data about poverty level, living conditions, health status, educational level, etc., cover only a part of Bulgaria's Roma – probably only the most vulnerable and visible segment of the population, which is concentrated in compact, segregated settlements.

⁴ For comparison of data collected according different methods, see Table 1. in Annex B.

Poverty, Inequality and Discrimination; Poverty Indicators

In 2006, 13.4 percent of Bulgaria's population was living below the poverty line, and in 2003, the unemployment rate was 11.5 percent. The Roma population is seen as the most vulnerable group in both these measures.

According to a national household survey from 2003, households of ethnic minorities, and especially ethnic Roma households, face a significantly higher risk of poverty than ethnic Bulgarian households.⁵ According to a 1999 World Bank report, 25 percent of the poor in Bulgaria belonged to either the Turkish or Roma minorities, and two thirds of these poor were of Roma ethnic origin. The same report noted that the poverty rate among Bulgaria's Roma was 84.3 percent.⁶ (See also the Tables 2, 3, in Annex B.)

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Employment

A significant proportion of the Roma registered by the labour offices are long-term unemployed, listed as jobless for more than one year. Unemployment among the Roma population reached 70 percent in 2001, according to the World Bank.⁷ Other sources give different data: A United Nations Development Programme (UNDP) study, *Avoiding the Dependency Trap*, from 2004, lists Roma unemployment in Bulgaria as 80 percent, according to the self-description of respondents; and 50 percent, according to a wider definition of the International Labour Organization. One year later, the same UNDP team produced *Faces of Poverty, Faces of Hope*, a report that found the unemployment rate for Roma to be 56 percent. In both cases, the studies do not take into account employment in the "shadow" economy or income from labour migration, obtained through illegal or partially legalized employment abroad. Broken down by age group, the Roma unemployment rate is: 15-24 years, 57 percent; 25-54 years, 31 percent; and over 55 years, 26 percent.⁸ (See Table 4 in Annex B.)

The insufficient employment opportunities and lack of market niches for Roma currently cause major problems for the economy. After the regime change of autumn 1989, Bulgaria entered a long period of social and economic transition, accompanied by sweeping changes in the entire economy. The majority of Roma lost their permanent, low-skilled jobs in industry, services, and agriculture, and they were forced to search for new and different earning strategies. Most Roma started to work permanently or seasonally in the "shadow" economy and as contracted workers in agriculture. In recent years, Roma involved in these types of labour activities have found similar work across the border, in neighboring or in distant countries. Many Roma were also negatively impacted after the transition by land restitution and the liquidation of cooperative farms: The rural Roma population that did not possess any land found themselves without the means to make a living.

⁵ National Statistic Institute (NSI), *Multi-Topic Household Survey*, *Multi-Topic Household Survey*, 2003.

⁶ World Bank Report No. 18411, *Bulgaria: Poverty during the Transition*, June 7, 1999.

⁷ World Bank data.

⁸ UNDP, *Faces of Poverty, Faces of Hope*, 2005.

Housing

The living conditions of Roma vary. Some own their own houses, some live in flats, some live in segregated Roma quarters in villages and big cities, and, in the worst cases, some Roma live in temporary illegal shanties in big towns. One of the specific problems for a significant number of Roma in Bulgaria is the unregulated status and lack of infrastructure in separated Roma neighborhoods.

Health

Compared with the average indicators for the country, the indicators of the health status of the Roma population have seriously deteriorated. Data from the representative survey of the Fact Marketing Sociological Agency from December 2001 reveal the most practical problem of Roma in the area of health care: Some 17 percent of Bulgaria's Roma households do not have a general practitioner, which means they are outside of the health care system.

3. Political, Economic and Social Situation

Government Structure, Mandate, and Finance

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Bulgaria is a parliamentary republic. The current Bulgarian government took office in August 2005. It is a coalition between the eight-party Coalition for Bulgaria – which incorporates the Bulgarian Socialist Party, Political Party “Roma,” the Movement for Social Humanism, the Green Party of Bulgaria, the Bulgarian Communist Party, and three other parties – and the National Movement Simeon II and Movement for Rights and Freedoms. The Coalition for Bulgaria, led by the Bulgarian Socialist Party (BSP), is the largest political grouping, holding 82 seats in the Parliament after gaining 30.95 percent of the popular vote in the election. The National Movement Simeon II (NMS) ranks second, having received 19.88 percent of the vote, ahead of the Movement for Rights and Freedoms (MRF), which received 12.81 percent of the vote. These are followed by the “Ataka” Coalition, with 8.14 percent of the vote; the United Democratic Forces (UDF), with 7.68 percent; the Democrats for a Strong Bulgaria (DSB), with 6.44 percent; and the Bulgarian Popular Union (BPU), with 5.19 percent.

The National Assembly consists of 240 members of parliament (MPs). The mandate of the National Assembly lasts for four years. The MPs are elected directly by the voters for a four-year term, on the basis of a proportional system. The National Assembly elects temporary and permanent commissions, in which MPs participate. It adopts laws, decisions, declarations, and statements. Every member of the National Assembly or the Council of Ministers has the right to introduce a draft of a law. The draft law on the state budget is developed and introduced by the Council of Ministers.

The government (the Council of Ministers) is the main body of the executive branch and is headed by the prime minister. The Council of Ministers presides over the internal and foreign policy of the state, secures the public order and national security, and exercises control over the public administration and the military forces.

Sub-National Political Structure

Bulgaria’s territory is divided into 28 regions, but these do not have truly independent administrations.⁹ The regional administration only represents the national government within the territory of the region – and ensures correspondence between national and local interests. The governor of a region is assisted by the regional administration and is appointed by the Council of Ministers.

The municipality is the basic administrative territorial unit in which local self-government is carried out. In Bulgaria, there are 273 municipalities. The body of local self-government in the municipality is the Municipal Council, elected with a mandate of four years. The mayor is the

⁹ The regions (“oblasti”) are the following: Sofia City, Sofia Region, Plovdiv, Haskovo, Varna, Burgas, Ruse, Lovech, Montana, Vidin, Vratsa, Pernik, Kyustendil, Blagoevgrad, Pleven, Pazardzhik, Smolyan, Kurdzhali, Yambol, Gabrovo, Veliko Turnovo, Stara Zagora, Sliven, Turgovishte, Razgrad, Shumen, Dobrich, and Silistra.

executive body of the municipality. The municipality has an independent budget and its own property. The last local elections in Bulgaria were held in the fall of 2003. The next local elections will take place in the fall of 2007.

In the context of the Bulgaria membership to the EU, the political forces are discussing a new decentralization concept, under which the regions would become more autonomous administrative and financial units. However, this discussion has not yet been articulated into clear options or decisions.

Government Finance

Budget planning responsibilities belong to the Ministry of Finance and the National Bank. In the final stage, the state budget is discussed and approved by the Parliament.

Bulgaria is also using European Community finances – from PHARE, SAPARD, and ISPA – for its pre-accession preparations, which were focused on the Accession Partnership priorities.

For the years 2000-2004, total financial assistance to Bulgaria amounted to around EUR 178 million annually from PHARE, EUR 57.6 million from SAPARD, and between EUR 93 and EUR 127 million from ISPA.

The approximate amount of finances flowing annually in Bulgaria for Roma education is about EUR 2-3 million from all donors in the last few years. But it is not easy to raise the question of budget allocations for Roma, or to effect change in the distribution of the state budget to fund the Roma Decade Action Plan, because there is neither an existent mechanism to play this role nor a strong Roma lobby.

Roma Representation in the Government/Parliament

In Bulgaria, there are 26 registered Roma political parties. During the last election, most of them took part in coalitions with various other political powers. Among those few Roma parties that participated in the elections independently, only the Political Movement “Euro-Roma” achieved significant results, with 45,637 votes. This figure represented 1.25 percent of the total popular vote, but the minimum support required for a party to enter Parliament is 4 percent of the total.

The current Bulgarian Parliament has only one ethnic Roma MP, while the previous Parliament had two. Two Roma are now deputy ministers in the cabinet. Roma experts are employed in some other ministries as well: 3 in the Ministry of Education and Science, one in the Ministry of Culture, and one in the Ministry of labour and Social Policy and one in Ministry of Agriculture. Roma are also employed temporarily as professionals in state administration in the framework of various projects of the World Bank and PHARE.

There are more Roma representatives on the local level and in local public administrations. There are currently around 140-160 Roma municipal councilors, elected from the lists of various Roma parties or from mainstream political parties. About 80-100 Roma are appointed to work in local governments, mainly as professionals.

Responsibility for Roma Affairs and the Decade

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Administrative responsibilities for Roma matters are concentrated in the National Council for Cooperation on Ethnic and Demographic Issues (NCCEDI)¹⁰ under the Council of Ministers. The importance of this body increased rapidly in 2001 after Bulgaria started the process of EU accession. The chair of the NCCEDI is the deputy prime minister and minister of disaster management policy. The NCCEDI is a consultative and coordinating body, supporting the Council of Ministers in implementation of state policy involving ethnic and demographic issues. The NCCEDI facilitates cooperation and coordination between the state bodies and civil society organisations that are working in the field of interethnic relations and/or demographic development. The NCCEDI has the right to submit proposals to the Council of Ministers and, after an approval, to monitor, analyze, and coordinate the accepted measures.

Along with the Roma Parliament Civil Association, the NCCEDI has begun to take part in coordination, distribution and control of the pre-accession funds – especially the PHARE programmes – earmarked for Roma integration projects.

During 2005, a special Directorate for Ethnic and Demographic Issues was created within the NCCEDI. Also in 2005, the NCCEDI received new functions. The Directorate of Ethnic and Demographic Issues has a special Roma Integration Section, which only has one Roma appointed. Despite its high profile, it seems that currently the role of the Directorate with respect to Roma issues is predominantly only symbolic. The Directorate organises and coordinates the execution of the decisions of the NCCEDI, as well as coordinating the exchange of information among interested stakeholders.

On the regional level, there are regional councils for cooperation on ethnic and demographic issues, which are chaired by the regional governor.

The basic state document that determines policy toward Roma is the “Framework Program for Equal Integration of Roma into Bulgarian Society,” approved in 1999. A whole set of documents are adopted for the realization of the Framework Program, including: the Action Plan for the Implementation of the Framework Program for Equal Integration of Roma in Bulgarian Society (2003-2004); the 2004 National Plan for Overcoming Poverty and Social Isolation; the National Action Plan on the Implementation of the Strategy for the Equal Educational Integration of Ethnic Minority Children and Students (2004/5-2008/9); the National Plan on Employment for 2004 – as well as reports and forecasts of indicators for the financing of education and programmes for literacy and professional qualification. Also, in the framework of the Decade of Roma Inclusion, Bulgaria developed the “Decade Action Plan 2005-2015.” On the general level, most of these documents are mutually congruent, but differences surface on the level of implementation plans.

On February 2, 2005, Sofia hosted the official launch of the Decade of Roma Inclusion.

Status with Key International and Regional Partners

Bulgaria is a full member of many international organisations, including the Organization for Security and Co-operation in Europe (OSCE), NATO, and the Council of Europe.

The EU and Bulgaria formally concluded accession negotiations in December 2004. The

¹⁰ In 2006, this institution was renamed the National Council on Cooperation on the Ethnical and Demographic Issues, and it currently has representatives of the nongovernmental sector, including 13 Roma NGOs.

Accession Treaty was signed by EU Member States and Bulgaria in Luxembourg on April 25, 2005, and accession was announced on January 1, 2007.

Political Opposition and Its Relationship to Roma Issues

The political opposition in Bulgaria includes the rightist Union of Democratic Forces (UDF), who were led by former first diplomat Nadezhda Mihaylova until former President Petar Stoyanov took over following the 2005 election, and Democrats for Strong Bulgaria (DSB), who split from the UDF following the elections and are led by former Prime Minister Ivan Kostov. Since the 2005 election, the UDF has 20 MPs and DSB has 17 MPs.

In general, the Bulgarian political opposition has no programme for Roma and no interest in Roma issues. The exceptions are the nationalist parties, which often use anti-Roma populist rhetoric. These include the nationalist movement “Attack,” which appeared in the last elections and gained 22 seats in Parliament.

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Anti-Bias and Anti-Discrimination Legislation

The Law on Antidiscrimination¹¹ was passed in 2003 and became active from January 1, 2004. During June 2005, just before the new parliamentary elections, the Antidiscrimination Commission was created, but up to now, it has not undertaken active work.

Also in 2003, the Bulgarian Parliament passed a special Law on the Ombudsman. Like the Law on Antidiscrimination, the Law on the Ombudsman was implemented slowly: The first Bulgarian parliamentary ombudsman and deputy ombudsman were only elected by the National Assembly in April 2005, and further constitutional changes, which make it possible for the institution of ombudsman to start to function, were passed in March 2006.

Based on these two novel provisions, some serious actions have already been undertaken to address discrimination towards Roma in Bulgaria, which can manifest itself in such areas as education and the labour sphere. Examples of these actions include a series of court proceedings – against school segregation and refusals to hire Roma for vacancies – which were initiated by the Romani Baht Foundation, in a joint project with the European Roma Rights Centre. It is expected that, in the future, discrimination against Roma will be monitored and acted upon much more clearly than before. The impact will be especially important in cases of: school segregation, where Roma are put in separate classes or principals of mainstream schools refuse to register Roma children; refusals to hire Roma, the most common kind of cases; or failure to give Roma individual enterprise micro credit, which was widely advertised by the government during the period 2001-2005.

¹¹ Published in state newspaper, issue 86 from 2003.

Civil Society

Traditional, Historical and Linguistic Structure of the Roma Community

The Roma of Bulgaria are classified as an “intergroup ethnic community” (IGEC). Roma in Bulgaria, like Roma around the world, are not a united and homogeneous community. They belong to many internal subdivisions – separate groups, meta-group units and subgroup divisions. The different groups of Roma in Bulgaria can be classified on the basis of various criteria that form their identity, including language or dialect, lifestyle, typical occupations, or borders of endogamy. The distribution of Roma within the territory of the country is comparatively even, as can be seen from the data for the administrative areas.

The most numerous and varied Roma community is the meta-group community of the so-called Jerlii.¹² They have been settled in the country for centuries and speak different dialects of Romanes. Some Roma from this meta-group community speak only Bulgarian, some only Turkish, and some use two languages, Turkish and Romanes. The Jerlii community is divided into two main subdivisions, Dasikane Roma (Bulgarian Roma, i.e. Christians) and Xoraxane Roma (Turkish Roma, i.e. Muslims). Within the framework of these main subdivisions, there are more or less preserved endogamous groups. There are also large Roma communities in which the group divisions have been mostly obliterated, and there is a shift within the borders of the larger communities of the Dasikane or Xoraxane Roma. In general, Dasikane Roma live mostly in Western Bulgaria, while Xoraxane Roma live mostly in Eastern Bulgaria. Another large subdivision of Roma communities is now a part of the Jerlia community. It includes the communities of the so-called Vlaxorja, Vlaxički, or Laxo, who merged in many places with the major group communities of the Dasikane and Xoraxane Roma.

The second main meta-group of the Roma community in Bulgaria is very clearly distinct from the rest. This group, the Kardaraši/Kaldaraši, are former nomads. They are strictly endogamous within their meta-group community and often prefer to differentiate themselves from the other Roma. Near to them is the endogamous group of Thracian Kalajdzii, who linguistically belong to the Vlaxorja community and still live a semi-nomadic existence.

The third main meta-group Roma community in Bulgaria is the Rudari/Ludari. They speak a Romanian dialect, and were mostly nomads in the past. The community has two subdivisions: Lingurari and Ursari.

In most cases, the Jerlii and Rudari live compactly, in separated districts of cities and villages, while the Kardaraši and Kalajdzii mostly lived dispersed among the surrounding population.

Structure of Roma Civil Society

After the end of the communist regime, Roma NGOs began to develop rapidly. Since 1989, about 600 Roma NGO's have been registered, and many of them have implemented projects in various sizes covering different spheres. The funding for these NGOs has come from different donors, directly or through various mediator organisations. The majority of NGO activists come from different subgroups of the Jerlii meta-group. Other subdivisions of Bulgaria's Roma community stay almost entirely apart from development of civic society.

¹² Read as Yerlii.

After starting the process of EU accession for Bulgaria, the majority of the donors started to withdraw from Bulgaria and the Bulgarian NGO sector entered a period of transition towards new circumstances and new means of financing. For a long time, the key actor in civil society and in relations with Roma was the Open Society Fund – Bulgaria, which mainly had an impact through its Roma and civil society programmes. Nowadays, because of the changes in funding and in the policy of the Open Society Institute – Sofia, this role has nearly disappeared. The Open Society Institute – Budapest, through its different programmes, and predominantly through the Roma Participation Program, was a powerful instrument for supporting the Roma civil society movement, but its role is decreasing too. In the past, extensive support for the Roma movement has also come from such important donors as United Netherlands Foundations, the Matra Kapp Program, the Charles Mott Foundation, USAID, the Democracy Commission of the US Embassy, etc.

Recently the key actors have changed. Apart from the Roma Education Fund (REF), the EU started to play a significant role in Bulgaria, mainly through its PHARE programmes.¹³ Nonetheless, these changes resulted in the majority of Roma NGOs remaining without funding. Now, no more than 20 of these organisations seem to have become sustainable.

Political Structure of the Roma Community

The attempts of Roma NGOs to enter the political stage have been without significant success, despite efforts aimed at political training and various forms of political internship.

Roma participation in political life is happening through two interconnected means: in the framework of mainstream political parties and within designated Roma parties, which are often in coalition with other parties. The relatively popular Roma political parties are: the Roma Party, Euro-Roma Political Movement, the Free Bulgaria Party, Party “Drom”, as well as the Union for Democratic Development, the Democratic Congress Party, the Rodolyubie Party, the Rodolyubie 2000 Party, the Future Party and the Eighth of April Party.

Other Key Actors in Civil Society and Their Relations to Roma

The development of the nongovernmental sector in Bulgaria started in the beginning of the '90s and peaked around the middle of that decade. From the start of civil society's existence, the problems of minorities, especially Roma, have been among the main priorities. A reference book published in 1995, called *Non-governmental Organisations in Bulgaria*, includes a total of 467 organisations, with more than a quarter of them listing minority rights as their priority. According to information provided by the Association of Bulgarian Foundations and Societies in 1997, at that time, more than 1,200 organisations intended to work with minorities, which mainly meant Roma.

In this period, projects of the nongovernmental sector addressed, in greater or lesser degree, various problems of Roma education, such as distribution of aid for pupils, training of assistant-teachers, and various courses in intercultural and multicultural education for teachers. Several organisations had projects in this field, including the Bulgarian Helsinki Committee, the Interethnic Initiative for Human Rights Foundation, The International Center for Minority Studies and Intercultural Relations, and the Intercultural Dialogue Foundation. But most of these projects were only small activities of different organisations.

¹³ See details in Chapter 4.

Among the projects in the field of Roma the Network of the Open Society Foundation financed two programmes: A Center for Open Education was established in the mid-90s. The Center organised pre-qualification training for teachers on the subject of intercultural and multicultural education in regional subdivisions around the country. The other programme called Step by step was developed with a similar country-wide network, which was oriented towards kindergartens and elementary schools. It realized a significant number of projects, but only one foundation from the network, Step by step–Bulgaria, survived, offering a limited scope of activities.

4. Education System

Governance Structure

The Ministry of Education and Science is responsible for administration and co-ordination of the entire education system, from pre-school to the university level, both for general and vocational education and training. In the Ministry of Education and Science, there are four deputy ministers responsible for different sections of education. In the current governmental mandate, the representative from the Movement for Rights and Freedoms Party is responsible for “educational milieu, educational integration of minorities and social dialogue.” Two Roma are employed in the Ministry of Education and Science. A new Center for Educational Integration of Minority Children is currently being established. The staffing of the Center began in summer 2006, but the real work of the Center is still forthcoming. In addition to this, a Consultative Council on the Education of Children and Pupils from Ethnic Minorities,¹⁴ within the Ministry of Education and Science, is operating as a think-tank in the field of education of ethnic minorities. As a permanent consultative body, it is in charge of advising the Minister of Education in such key matters as development and implementation of national educational policy for integration of ethnic minority children and the elaboration of relevant strategies and measures. Among its main activities it is supposed to plan the process of desegregation

Currently, the Bulgarian education system is still centralised. The main role of the Ministry of Education and Science is to determine the national priorities in education and oversee the fulfillment of the state educational criteria – which are set up by laws and the other acts – in all schools, state, communal, and private. The state’s criteria (which are focusing mainly on educational content) cover levels of education, school plans, and curriculum. Furthermore, acts adopted at the national level by the Ministry of Education and Science determine the system of evaluation, school-books, appliances, training aids, in-door and out-door school activities, qualification of teachers, working conditions and salaries of the teachers, material and the technical base of the schools, health care in the schools, scientific and informational services, and school inspection.

The state educational criteria serve as the basis for the work of the Regional Educational Inspectorates, which are administrative subdivisions of the Ministry of Education and Science. The inspectorates, located within each of the 28 regions in Bulgaria, control and guide the school network.

On the municipal level, depending on the number of inhabitants in the municipality, there is either a department for education or a senior advisor on education within the Department on Humanitarian Activities. These local authorities control and implement the budget and the Regional Educational Centres have a consultative role.

There are three types of schools in Bulgaria (according their financing and not according their activities), state, municipal, and private. The majority of the schools are municipal. Private schools cater to less than 0.7 percent of the total number of pupils, according to data for the 2004-2005 school year.

The state schools (mostly the Gymnasias and special schools) and kindergartens are managed by the Ministry of Education and Science. The municipal schools and kindergartens are opened

¹⁴ It was established in June 2003 by Ordinance No. D 09-528 of the Minister of Education and Science.

or closed by ordinance of the Minister of Education and Science, based on proposals from the municipal council. The director of the state schools is appointed by the Minister of Education and Science, and the director of the municipal schools is appointed by the Chair of the Regional Educational Inspectorate.

The schools are free to create their own board of trustees, which include teachers and parents' representatives. The role of the school board of trustees is not governance of the school or advising on the educational process, but instead they organise and look for financial support for additional educational or free time activities for students and improve school facilities through collecting or donating funds.

In some schools there are also student councils and student parliaments, but these do not have a real role in governance of the school. Most of the student councils and parliaments are created in the framework of different projects. The status of the student councils and parliaments is not yet regulated by law. However, the National Program for the Development of School Education and Pre-school Upbringing and Preparation (2006-2015) foresees the creation of such student organisations in all educational establishments in the country.

The schools in Bulgaria have only limited autonomy with regard to curriculum. The majority of the curriculum is obligatory and is determined by state educational criteria. From these requirements only a couple of hours of weekly instruction time is open for student choice. This is the so-called Free Elected Preparation and it is implemented only where the Municipality approves additional funds for it. Students can select from among a small number of compulsory elective subjects. Extracurricular activities based on the needs of the pupils require an extra payment and are offered only if the school has available resources. The limited autonomy of teachers includes the possibility to select from about three or four available schoolbooks that are approved by the ministry.

In spring 2006, the Bulgarian Parliament approved a National Program for Development of School Education and Pre-school Upbringing and Preparation (2006-2015). This programme foresees major restructuring of the regional and municipal authorities in the area of decentralization, but, in the existing texts, the type, extent and process of decentralization is not yet developed in detail. It also plans for finalisation of basic education in 7th grade, (i.e. one year earlier than before). Additionally, the programme foresees the introduction of examinations after 1st, 4th, 7th, 10th and after 12th grade (the so-called National Matura).

Financing

According to the Constitution, education in Bulgaria is free of charge – with the exception of noncompulsory pre-school education – and its financing is the obligation of the state.

The proportion of education expenditures as part of GDP in 2005 was 4.33 percent.¹⁵ The percentage of GDP allocated to education has been increasing slightly during the last five years: 4 percent in 2001, 4.2 percent in 2002, 4.4 percent in 2003, 4.3 percent in 2004.¹⁶ Still, the expenditure share of GDP did not reach the levels of spending achieved in 1990. (see Table 1 below)

Table 1: Data on Public Expenditure on Education¹⁷

¹⁵ Data from: http://www-wds.worldbank.org/external/default/WDSPContentServer/WDSP/IB/2006/02/28/000090341_20060228103723/Rendered/PDF/352030BU0NARreport.pdf (For past years, see Table 16).

¹⁶ Data from: http://www.minfin.government.bg/docs/EDUpercent20reportper_cent2020041.pdf.

¹⁷ Source: Human Developments Reports 2005, <http://hdr.undp.org/statistics/data/countries.cfm?c=BGR>.

Public expenditure on education (as % of GDP), 1990	5.2
Public expenditure on education (as % of GDP), 2000-2002	3.5
Public expenditure on education, pre-primary and primary (% of all levels), 1990	70.7
Public expenditure on education, pre-primary and primary (% of all levels), 2000-2002	37.2
Public expenditure on education, secondary (% of all levels), 2000-2002	46.7
Public expenditure on education, tertiary (% of all levels), 1990	13.9
Public expenditure on education, tertiary (% of all levels), 2000-2002	15.8

Overall funding for education comes from the budget allocated to the Ministry of Education and Science and from municipal budgets. State schools are directly financed from the budget of the Ministry of Education and Sciences. In some cases; school trustees also attract private sources to finance individual schools. The schools can attract funds also through applying for grants – a practice which is increasing in Bulgaria.

Until 2007 the state schools were financed directly from the state budget, and they were included in the budget of the ministry that oversees them. Municipal schools were financed from the municipal budget. For most municipal-level education financing, the municipal budget received finances from the state budget to cover “delegated activities.” These state-covered activities include salaries in schools and kindergartens and material and technical maintenance of school buildings and furniture.

On top of state funding, municipalities were obliged to provide funds for material and technical maintenance of schools and kindergartens, as well as part of the salaries of the teachers. These funds, used in addition to state funding, are collected from municipal fees and taxes. Due to regional differences in economic development, the municipalities in Bulgaria differ in their ability to ensure incomes on the local level. Municipalities also differ in the share of educational financing provided by municipal taxes.

The typical ratio between municipal and state financing of the schools is given in the table below:

Table 2: Municipal Financing of the Schools (2001-2005)

Year	Average proportion of municipal financing in the total budget of one school (in %)
2001	54.7
2002	57.8
2003	56.6
2004	58
2005	51.8

Source: Bulgaria Ministry of Finance.

Each municipal council has a department that is responsible for education and that controls distribution of the funds from the budget. Overall, the local budget is controlled by the financial department of the municipal council.

A reform of school financing is currently underway, and it is expected to bring about more financial stability and independence for the schools. The process has been piloted in recent years at several municipalities, with financing from the state's "delegated budget," and it is now moving to its next phase. From 2007, the municipalities will receive funds in a new way, calculated on a per student basis, taking into account the cost of educating a student and the type of education he or she receives. The municipalities will receive unified per student allocation which covers for school maintenance and teacher salaries. There will be four different per student rates for different types of municipalities for 2007 (see table below).

This change will create a big difference in the Bulgarian education system, given also the fact that Bulgaria is a country with a very steep population decrease. The introduction of per student financing and the associated decentralization to the municipalities of allocating resources to schools opens an opportunity for extending enrollment of Roma students, albeit with a caveat. The new system will create a strong incentive for municipalities to raise the number of students in schools, which would benefit the Roma. At the same time, real attendance and outcomes will need to be monitored. In addition, until there is a full roll-out of delegated budgets to schools and a greater reliance on school-based management (foreseen over the next 2-3 years), municipalities will be able to reallocate funds across schools within their jurisdiction which opens the possibility for discriminating against schools with high representation of Roma children. This opens the need and the opportunity for close monitoring by Roma and pro-Roma NGOs at the municipal level.

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Table 3: Financing of Education in Different Municipalities

Group	Definition	Co-efficient
1	Municipalities with population in municipal centre > 70.000	1
2	Municipalities with population density/km ² > 60	1.08
3	Municipalities with population. density/km ² < 60	1.14
4	Municipalities in mountainous area with population in municipal centre < 10.000	1.2

On the pre-school level, parents cofinance non-compulsory kindergarten by paying a participation fee. The amount that should be paid for pre-school education is determined by the municipal council. This fee averages around EUR 20, but it is different in different municipalities and is determined according to the law on local fees and taxes. In some cases, families pay 50 percent of the participation fee when a child is with only one parent or when a family is sending twins to pre-school. The participation fee is also reduced for the second and third child, but regardless of family income. The Ministry of labour and Social Policy is in the process of introducing a programme called "Social Investment in Children", i.e. an overall system for transforming part of social assistance payments into participation fees for kindergarten, textbooks, school aids, etc.

Regular school education, and one year of pre-school education, are free of charge, but parents are expected to pay for additional activities that are not covered by the obligatory state educational criteria. These extra activities may include additional teaching of foreign languages, additional sport activities, improvement of class furniture, etc. This money is collected through the system of school

trustees. Some schools also organise special courses for candidate students who are preparing for entry examinations in secondary and tertiary education. These courses are also not included in the obligatory state educational criteria and are paid for by the parents.

Facilities

The Bulgarian school network consists of a total of 3,680 schools, including 466 Elementary schools (grades 1-4), 1,940 basic schools (grades 1-8), and 580 comprehensive schools (grades 1-12), plus approximately 500 vocational schools and 200 schools for children with special needs.¹⁸

School facilities are public and are owned by the state and the municipality. The quality of school facilities varies from very bad to very good, according to several circumstances, including the financial status of the municipality, the facilities that were inherited from the previous system, the financial well being of the parents, etc. However, the facilities in Bulgarian schools are, in general, in a very bad shape – there is lack of investment into reconstruction, new furniture and modern educational supplies. Only occasionally, a mayor or a school director manages to fundraise for covering refurbishment and equipment.

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Language of Instruction

The language of instruction in Bulgaria is Bulgarian. Unlike most of the other countries in the region, Bulgaria does not organise complete instruction in any other, minority, languages. Persons belonging to ethnic and linguistic minorities have a constitutional right¹⁹ to study their mother tongue, but this study must be in addition to overall instruction provided in Bulgarian. The way in which this constitutional right is implemented has changed several times in recent years.

The Public Education Act specifies that the mother tongue can be studied in municipal schools, under the protection and supervision of the state. But, based on a decree of the Council of Ministers from 1994/1995,²⁰ the study of a separate mother tongue became a “freely selectable subject” within the general basic education curriculum for grades 1-8. This meant that mother tongue studies were not graded, the subject did not contribute to the summative assessment of a student’s completion of basic education, and the instruction was provided in addition to the compulsory curriculum. Five years later, in 1999, with the adoption of the Level of Education, General Education Minimum, and Curriculum Act, the study of a different mother tongue was included among the “compulsory elective subjects.” These subjects are offered in addition to the compulsory curriculum and are chosen by the students and their parents. They complement compulsory training in the subjects required by law, and are subject to a formal evaluation, which is included in the student’s annual summative assessment. The establishment of mother-tongue education as a compulsory elective subject made it possible to study the mother tongue not only in primary and lower secondary schools, but also in upper secondary schools.

¹⁸ EUMC. Analytical Report PHARE RAXEN_CC. Minority Education. Vienna 2004.

¹⁹ The *Constitution* states: “Citizens whose mother tongue is not Bulgarian shall have the right to study and use their own language alongside the compulsory study of the Bulgarian language.”

²⁰ Ordinance No. 183.

Additional sublegal acts regulate the time spent on the study of mother tongue²¹ – three hours per week for first grade, two hours per week for grades two through four, and three hours per week for grades five through eight. Other such measures regulate the minimum number of students necessary for the study of a mother tongue as a compulsory selectable subject²² – 11 students for general education schools and eight students for special schools. The requirement on number of students per study group creates serious obstacles for the study of a mother tongue in schools with only a few ethnic minority students, because they cannot achieve the minimum class size. Education in the Romani mother tongue is currently implemented in only in three schools, in the towns of Russe, Kyustendil, and Shumen.

Education Cycles, Progression Criteria, and Examination System

The Bulgarian education system falls within the continental European tradition. School education is compulsory for children from age 6 or 7 until they are 16-years-old (first through eighth grade). For persons over 16 years of age, there are evening schools.

The idea of one-year of obligatory pre-school education was introduced in 1998, and it was put in force in the school-year 2003-2004. This pre-school education is organised in preparatory classes in kindergartens or preparatory classes in a regular school, and it is free of charge. Besides this provision, Bulgarian language classes, which are based on a special methodology for acquiring competence, are available for children, aged 6 or older, who have a poor command of Bulgarian and have not attended a kindergarten.

Basic education is comprised of two stages: the first stage, elementary education, runs from grades one through four, and the second stage, primary education, runs from grades five through eight. School children who have successfully completed the first stage of basic education are awarded a fourth grade school leaving certificate. Completion of basic education is confirmed with a final certificate at the end of 8th grade.

Secondary education lasts for four or five years, following completion of basic education, and it is provided in three types of schools: general secondary schools; profile-oriented schools; and vocational schools, which include technical and vocational-technical schools. Secondary studies lead to a diploma certifying completed secondary education, and professional schools award a certificate of professional qualification.

For the last few years, there has been discussion in Bulgaria about introducing a national matura, a standardized state exam that all students would have to take before they are awarded their diploma for completion of secondary school. The idea of a matura has proven to be one of the more complex questions for the Bulgarian education system. Several governments have announced the introduction of a matura, only to postpone the proposal. The introduction of an obligatory matura, which would be organised, coordinated and controlled by a national body, is also envisaged in the new National program for Development of School Education and Pre-school Upbringing and Preparation (2006-2015). According to this plan, the first matura will be organised in the academic year of 2013/14. The National Centre for the Matura would be under the authority of the Ministry of Education and Science.

Non-university-level, post-secondary education (so-called college education) generally consists of a three-year programme of study, which is undertaken after completion of secondary education

²¹ Regulation No. 6 of 2001.

²² Regulation No. 7 of 2000.

and leads to a specialist qualification in some fields. This form of education, which culminates in a state-administered final examination, is on the way to being abolished, under the Bologna process.

Universities, institutes and academies provide higher education. Higher education is under the control of the Ministry of Education and Science. In addition to state universities, there are also private universities. Higher education is based on the Law on Higher Education (1995) and the Law on Scientific Degrees and Scientific Titles, which was last amended in 1996. Post-secondary institutions have academic autonomy. Study at higher education institutions (HEIs) lasts for at least four years and leads to a bachelor's degree in many fields. This is a degree created by the Higher Education Act of 1995. Masters study at HEIs lasts for five years after completion of a secondary education or three semesters (one-and-a-half years) after obtaining a bachelor's degree. Students must complete a thesis and pass a state examination to be awarded a master's degree (M.A.). The third degree in the higher education system leads to the Ph.D title. It is obtained on the basis of exams, individual research and the writing and defense of a thesis.

Admission to university-level studies is based on secondary school credentials and university entrance exams. For less demanded study tracks, or for entrance to private universities, candidates may enroll on the basis of document submission, graded according to academic record.

Initial teacher education in Bulgaria is organised in two ways. Primary school teachers are prepared at four universities²³ and at some academies of arts. After four or five years of courses, they can obtain the professional qualification of teacher. Secondary school teachers obtain their professional qualification after four or five years of post-secondary studies of an academic field, at one of several universities or at some academies of arts. During their studies, secondary school teachers also receive special teacher training, which includes theoretical and practical preparation.

Teachers' in-service education, which is for re-qualification or obtaining a higher level of qualification, is provided at universities and also at three teacher training institutes. Teachers' qualification is divided into five levels. In-service training is not obligatory, and the attainment of a higher qualification level depends on the will of the respective headmaster and the capacity of the teacher to secure financial resources for the qualification course. Various courses and special types of training organised by the NGO sector do not lead to a pedagogical license or special qualification. Until now, there are no signs that Bulgaria's education system will accept alternative forms of teacher education and/or allow the incorporation of innovations generated by the NGO and private sector. Even legalization of the diplomas of students who finish private universities is very problematic, and that is why the majority of private universities do not offer pedagogical qualification.

Special Schools

In Bulgaria in 1997, there were 299 so-called "social institutions for education." These included: 11 reform boarding schools; 25 social-pedagogical boarding schools; 85 schools for the mentally disabled; four schools for children with impaired hearing; two schools for children with impaired vision; five schools for children with speech problems; 35 schools for children with health problems; six sanatorium-type schools; three hospital schools; 87 homes for children and young people; two family homes; and several homes for children of pre-school age. In 1997, these schools were attended by 27,148 children. There are no data available about the exact number of

²³ These are: Kliment Ohridski University in Sofia, Saints Cyril and Methodius University of Veliko Târnovo, the University of Shumen, St. Paisii Hilendarski University of Plovdiv.

Roma children in these schools, but it is generally said that they make up around two thirds of the enrolment.

There are various means of enrolment into special schools, depending on the type of school. For example, a medical opinion is needed to send a child to a school for the physically disabled, departments of the Ministry of Interior make decisions about sending a delinquent to reform school, and tests are conducted to determine if a child is mentally disabled. Three institutions are engaged in the process of enrolling children into schools for the mentally disabled: the Central Expert Medical Consultation Commission; the Central Diagnostic Commission at the Ministry of Education and Science, and teams for complex pedagogical evaluation at the Regional Educational Inspectorate. The last one, the teams for evaluation, have the main role in deciding whether a child belongs in a school for the mentally disabled. The system of testing has been criticized several times, by different institutions and organisations,²⁴ but the enrolment procedures have not yet changed substantially.

The means for financing special schools is similar to that for financing state schools: They receive 100 percent support through respective ministries. As an additional support for parents, special schools also provide meals and clothing to pupils.

There is currently a trend toward dramatically decreasing the number of special and boarding schools. It is expected that the majority of these schools will be abolished, as part of Bulgaria's efforts to be in line with EU education systems.

Toward this end, the 1999 Framework Program for Equal Integration of Roma in Bulgarian Society calls for "elimination of the practice of sending normal Roma children to special schools for the mentally retarded." Still, it took a couple of years before reforms began in this area. First, access to special schooling was restricted to cases where "all possibilities for schooling and training in mainstream kindergartens and schools have been exhausted."²⁵ Later, in 2003, amendments were adopted to the Public Education Act Implementing Regulation, in an effort to adjust the system of mainstream schools to the needs of the children with developmental deficiencies, so that these children could be educated together with their peers. The amended Regulation requires kindergartens, schools, and support units, as well as the institutions that finance them, to "create a supportive environment for integrated schooling and training of children and students with special educational needs and/or chronic diseases". The Regulation does not eliminate special schools for children with special needs, but it specifically requires that placement in such institutions is only considered by special commissions when all possibilities for integrated education have been exhausted – and after an explicit written application on behalf of the parents.

According to a Bulgarian Helsinki Committee survey from 2002, at least 51 percent of the children in special schools are of Roma origin.²⁶ According to a more recent survey, by the State Agency for Child Protection, as of December 2004, the number of children with Bulgarian ethnic origin in special schools was 42.5 percent, and the other students are from ethnic minorities, including Roma, Turks, etc.²⁷ In some special schools, the share of Roma pupils reaches 90 to 100 percent.

In 2005, it was reported that the number of special schools and children enrolled in those schools decreased by about one third, and these processes are continuing successfully. Still, there is a concern²⁸

²⁴ See e.g.: Commission of the European Communities. *1999 Regular Report from the Commission on Bulgaria's Progress Towards Accession*. Brussels, October 13, 1999.

²⁵ Regulation No. 6, issued in 2002 by the Ministry of Education and Science.

²⁶ Bulgarian Helsinki Committee (BHC), *Special Schools in Bulgaria*, Sofia, 2002, p. 7.

²⁷ State Agency for Child Protection (SACP), "The Right for Education of Children with Special Educational Needs," *SACP Bulletin*, No 2/2005, p. 81.

²⁸ Including an announcement by the National Agency for Child Protection (2005).

that the process of closing schools for the mentally disabled is progressing slowly, and that the decreasing number of children in these schools could be explained less by state policy and more by demographic changes in Bulgaria: The number of these types of schools decreased from 76 in 2000 to 72 in 2005, and, during that period, the number of children served by them shrank from 9,581 to 7,996.²⁹

Social Support for Students

Scholarship schemes are developed at universities, and financial means for scholarship are part of the state subsidies that a higher education institution receives from the state budget. Scholarships at universities are dependent on available funds at a university and on a combination of two criteria: the income of the parents and the academic performance of the student. The amount of a scholarship varies, between BGN 50 and BGN 120.³⁰ There are also limited numbers of special scholarships with higher amounts – e.g. for students receiving academic awards or for winners of international Olympics, etc. The private universities have their own system of scholarships, but their scholarship programmes are, in general, weak.

At the level of elementary and secondary education, the Ministry of Education and Science provides personal scholarship funds for talented children and gives scholarship funds for children with chronic health problems and special needs.³¹

However, these provisions are not clearly based on social needs, so the majority of Roma students are left without financial support.

As an additional social support mechanism, the Ministry of Education and Science is supplying all of Bulgaria's pupils in grades one through four with textbooks, manuals, and school aids for free.³² These items are paid for by the Ministry of Education and Science and distributed in schools based on orders that the ministry receives. In addition, students in grades one through eight who have a poor economic situation receive textbooks and obligatory manuals free of charge. There is currently a discussion about extending free provision of textbooks for all children to the fifth through eighth grade.

²⁹ Source: National Statistical Institute. *Education in Bulgaria – 2005*, p. 47.

The National Statistical Institute's data on schools for the mentally handicapped shows the trend of decreasing special education schools:

School year	Total number of special schools (schools for the mentally handicapped)	Total number of students enrolled in these schools
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

³⁰ EUR 1 equals approximately BGN 1.95.

³¹ Law for Public Education, Article 44 (2).

³² This provision came into force with the changes of Decree No. 104 2003 of Council of Ministers.

In accordance to the programme “Social Investment in Children” and the last amendment in the Regulations for Implementation of the Law for Social Support in 2006, social support can be granted through:

- Partial or full payment of fees for the institution attended by a child, including payment for expenses for food in school canteens and public canteens.
- Purchasing of foodstuffs, clothes, shoes, school accessories, etc.³³ The guaranteed minimum income (GMI) and child allowance are used for direct payments towards expenditures in the interest of the child, in case the social worker determines that the parents are not using the benefits in the interest of the child.

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Although this programme seems to be effective in the short term, there is a very serious concern that this programme can actually further remove the sense of responsibility from parents classified as “irresponsible” and create a “nanny-state” approach to social policy.

Key Legislation and Other National Documents

The key legislation regarding education is the Law on Public Education and the Law on Higher Education. According to the provisions of the Public Education Act, adopted in 1991, education in the country is secular (Article 5). Article 4 guarantees the right to education and a constant increase of education and qualification. No restrictions or privileges based on race, nationality, gender, ethnic or social origin, faith, or social status are admissible.

At the very end of 2003, the General Assembly adopted the Protection Against Discrimination Act, which states in Article 29:

- ⇒ The Minister of Education and Science, and local government bodies, shall take such measures as are necessary to exclude racial segregation in educational institutions.
- ⇒ A director of an educational institution shall take effective measures to prevent all forms of discrimination in the study place by members of the teaching or administrative staff, or by students.

In recent years, several legislative instruments have been adopted for the development of the private school sector. For example, the Ordinance on Private Schools of the Ministry of Education, Science and Technologies (now the Ministry of Education and Science) requires the creation of necessary conditions and preconditions for the development of the private school system. The ministry’s position is that private schools, within the context of the changing economic, political, social, and cultural realities in the country, have their place in the system of formal education. They present an extra opportunity for ensuring the constitutional right of each citizen to freely choose the type of school they attend and the form of their education.

A new structure for higher education has been in force since the end of 1995. It was enacted by the Higher Education Act, adopted by the National Assembly. In line with Chapter 10 of this Act, a National Agency for Evaluation and Accreditation of Higher Education Establishments should be set up to contribute to the development and application of criteria and norms for the evaluation of different educational establishments. The Law on Academic Autonomy states that all universities and higher education institutions must independently determine all matters relating to their curricula, structure, teaching and research, qualification, and certification. All these changes are within the

³³ Regulations for Implementation of the Law for Social Support, Article 25 (2), amend. SG 54/06.

framework of the Bologna process of higher education reform.

In 1995, an Ordinance on Unified Government Norms for Higher Education of Teachers was adopted.³⁴ The ordinance establishes obligatory forms for practical training of future teachers and guaranteeing the minimum level of their teaching competence, and it regulates pedagogical and methodological elements in the study plans for teacher training.

In spring 2006, the Bulgarian Parliament adopted a National Program for Development of School Education and Pre-school Upbringing and Preparation (2006-2015).

There are not special legislative and administrative provisions for Roma in Bulgaria's laws. All legislative and administrative norms are applied equally with regard to all citizens of Bulgaria.

Status of the Education System: Key Indicators

Table 4: Key Indicators for School Year 2005/2006 Include the Following:

	Pre-school	Elementary (G1-G4)	Primary (G5-G8)	Secondary (G9-G12)	University
Staff	19,254	17,668	26,844	34,372	23,933
Number of students	206,243	273,045	295,160	367,350	243,464
Number of children in one cohort	About 50,000	About 65-70,000	About 70-75,000	About 85-90,000	About 40,000
Number institutions	3,331	Total for all 3 levels (elementary, primary and secondary) – 2,577 schools in variable combinations			53
Pupil-teacher ratio	Average 1-10	Average (G1-G8) 1-8.5		Average (G9-G12) 1-11.5	Average 1-10
Graduation rate		ca. 10%	ca. 75-80%	ca. 90-95%	ca. 10%
Dropout rate		ca. 1%	ca. 15-20%	ca. 5-6%	
Average cost per pupil	No common standard exists	No common ³⁶ standard exists	No common standard exists	No common standard exists	No common standard exists
Gross enrolment ratios (%)		ca. 100% 99.4% ^a in 2001	ca. 90-95 %	ca. 80-85% 89.4% ^a in 1998	

³⁴ Decree No. 12 of the Council of Ministers.

³⁵ Although per student costs are not the usual way of expressing education finances in Bulgaria, some data exist. According to Decree No. 21 of January 19, 2006, of Ministry of Education, the cost for one pupil is BGN 146.50. To this amount, BGN 14 is added if the schools is heating with petrol, and for the schools with less than 100 pupils, the amount is BGN 1,820 annually. The standard for the obligatory one-year pre-school for maintenance of the facilities is BGN 169.40 per pupil. Similar standards are indicated for different types of special schools, as well as for other activities delegated from the state to municipalities.

Net enrolment ratios (%)	73.7	99.5	84.9	78.0	26.4
Percent of public expenditure on education for 2000-2002	37.2			46.7	15.8

^a Source: EFA Global Monitoring Report 2005.

Source: National Statistical Institute – Information on Educational Institutions, Teachers and Students according International Standard Classification. (ISCED-97) – <http://www.nsi.bg/SocialActivities/Edu05.htm>.

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Based on these data, the most serious problem of the Bulgarian education system seems to be the incredibly high dropout rate between grades five and eight, which is only partly due to important migration of families, mainly abroad. Grown-up children of “labour age” migrate together with their parents, or to meet parents who have migrated earlier, which seems to be a common tendency for all Bulgarian. Roma are also part of this processes.

Student Performance Based on International Assessments

Bulgaria has participated both in the Programme for International Student Assessment (PISA) and the Trends in International Mathematics and Science Studies (TIMSS)³⁶, the two most comprehensive international programmes to assess performance of students approaching the end of compulsory schooling. The PISA assessment was given only in 2000 (PISA+), and the TIMSS assessment was conducted in 1995, 1999, and 2003.

The Bulgarian students' performance is summarized in the two tables below (tables 5 and 6):

Table 5: PISA 2000 + Results

Area	Bulgaria		OECD		Diff. Bulgaria – OECD
	Mean ³⁸	Mean stand. error	Mean	Mean stand. error	
Mathematics	430	5.7	500	0.6	- 70
Reading	430	4.9	500	0.6	- 70
Science	448	4.6	500	0.6	- 52

³⁶ See: www.pisa.oecd.org.

Mullis, I.V.S., Martin, M.O., Gonzales, E.J. and Chrostowski, S.J. (2004): *TIMSS 2003 International Mathematics Report*, Boston: Lynch School of Education, Boston College (<http://timss.bc.edu>).

Martin, M.O., Mullis, I.V.S., Gonzales, E.J. and Chrostowski, S.J. (2004): *TIMSS 2003 International Science Report*, Boston: Lynch School of Education, Boston College (<http://timss.bc.edu>).

³⁷ The way results are reported in both the PISA and TIMSS is as follows: In each assessment area, each student is awarded a score based on the difficulty of the tasks that she or he could perform reliably. The scales are constructed so that the average student score is 500 points and about two-thirds of the students score between 400 and 600 points – so there is a standard deviation of 100 points.

Table 6: Trends in Performance Over Eight Years: TIMSS 1995, 1999 and 2003

Area	1995		1999		2003		Diff. 2003-1999
	Mean	Mean stand. error	Mean	Mean stand. error	Mean	Mean stand. error	
Mathematics	527	5.8	511	5.8	476	4.3	- 35
Science	545	5.2	518	5.4	479	5.2	- 39

As in many countries, students in Bulgaria perform better on the TIMSS than on the PISA.³⁸ Performance on the most recent TIMSS in mathematics is slightly, but statistically significant above the international average. Performance in science is at the average level of all participating countries. Bulgaria showed steep decrease both in mathematics and science achievement over the eight-year period covered by the TIMSS assessment. According to these data, educational reform efforts on improving student achievement, implemented in last decade, seem to have been less successful. There is clear evidence that students' socio-economic background factors³⁹ have a significant impact on performance. As in almost all countries higher levels of parents' education are associated with higher student achievement. Additionally, there is a correlation between the achievement on the test and possession of cultural and educational resources at home. Students with more than 200 books in the home have performances 61 points higher on average than students without books in the home, while possession of computer adds about 20 points in Math.

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Education Indicators of Roma

Available data show that the literacy rate of Roma is about 15-20 percent lower than that of the majority population, not only among the elderly, but also among youths.

Table 7: Literacy Rate by Age Groups (%)

	15-24	25-34	35-44	≥ 45
Roma	82	87	88	71
Majority	100	100	100	99

Source: UNDP 2005

Furthermore, gender disparities in literacy can be detected among Roma over 50, but also in the youngest age group.

³⁸ The lower international mean on TIMSS than on PISA is partially a wider range of less developed countries participate in the TIMSS. Another reason for the lower mean of TIMSS is that the sampling for the two studies is different: TIMSS targets students at the end of primary school, usually when they are preparing for their final exams, while PISA targets 15 year olds, who are often already in the first grade of secondary school, and are somewhat detached from the curriculum areas assessed.

³⁹ In TIMSS, home backgrounds' factors on achievement are not combined in one index of socio-economic status. Their impact on performance is estimated separately.

Table 8: Educational Structure of Roma by Gender and Age (age 10+):

AGE GROUPS															
	10 – 19				20 – 29				30 – 49			20 +			
	M	W	T		M	W	T		M	W	T		M	W	T
Total	42,533														
Total (percent)	100.00	100.00	100.00		100.00	100.00	100.00		100.00	100.00	100.00		100.00	100.00	100.00
Higher					0.08%	0.12%	0.10%		0.17%	0.09%	0.13%		0.10%	0.02%	0.06%
College					0.04%	0.18%	0.11%		0.15%	0.16%	0.15%		0.20%	0.10%	0.15%
Secondary special	1.06%	0.67%	0.87%		6.75%	3.25%	5.03%		9.22%	3.78%	6.54%		2.39%	0.66%	1.44%
Secondary	0.35%	0.50%	0.42%		2.09%	2.14%	2.12%		1.84%	1.35%	1.60%		0.76%	0.31%	0.51%
Primary	85.14%	83.84%	84.50%		81.61%	81.95%	81.78%		81.06%	82.77%	81.91%		75.42%	58.07%	65.88%
Illiterate	13.45%	14.99%	14.20%		9.43%	12.36%	10.87%		7.56%	11.85%	9.67%		21.13%	40.83%	31.97%

Source: National Statistical Institute, 2001 Population Census (March).

However, the biggest disparity, based on the data, seems to be the difference in Roma participation in secondary education:

Table 9: Difference in Roma Participation in Secondary Education

	Share of people aged 12 or above with at least incomplete secondary education	Share of people aged 12 and above who spent more than 4 years in school
Roma	10	63
Majority	72	96

Source: UNDP 2005.

Displayed on a grade-by-grade basis, the decreasing trend is shown on Table 10.

Table 10: Students, Classes and Dropouts (as of February 9, 2002)

Classes	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII	XIII	Общо за страната
Number of the Students	85,420	88,264	90,310	98,154	96,201	97,404	94,501	91,238	78,189	85,845	67,210	31,143	4,665	10,075,44
Incl. Roma students	17,579	16,816	15,751	14,187	12,267	9,879	8,361	6,584	1,994	1,500	1,257	280	48	10,617,1
Number of Classes	4,426	4,567	4,647	4,927	4,458	4,543	4,436	4,344	3,055	3,714	3,003	1,375	206	47,700
Incl. those with Prevailing number of Roma students	769	730	724	648	482	396	364	290	48	31	29	4		4,515
Number of dropouts	1,247 3.6% ^a	1,108 2.3% ^a	908 1.4% ^a	936	1,349	1,052	919	741	906	560	309	109	14	10,158
Relative share of the Roma students to the total number	20.6	19.1	17.4	14.5	12.8	10.1	8.8	7.2	2.6	1.7	1.9	0.9	1.0	10.5
Number of Dropouts	1.5	1.3	1.0	1.0	1.4	1.1	1.0	0.8	1.2	0.7	0.5	0.3	0.3	1.0

Source: Needs Assessment Study.

^a Dropout rates at primary education start-up in 2000 (Source: EFA Global Monitoring Report 2005).

Extent and Nature of Roma Segregation and Enrolment Barriers

Roma, in general have a lower educational status in comparison to majority of the Bulgarian population as is the case in other European countries. Some of the reasons for this situation include: wide-spread and persistent negative attitudes toward Roma in Bulgarian society, attitudes that are often reflected in the treatment of Roma children in Bulgarian schools; a tendency toward lower self-esteem among Roma children; the country's economic situation, which negatively impacts the social and economic situation of the Roma minority and hinders the access of their children to school; labour migration of Roma parents or whole families to larger Bulgarian cities or abroad; participation of children in the economic activities of their family; and the low educational status of many Roma parents. These factors, and many others, are obstacles to equal access to education for the Roma minority. The impact of these factors on the Roma depends on the specific environment in which they live: the region, town or village as well as the socio cultural specificity of each community.

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But along with these more external problems, there are also specific systemic barriers embedded in Bulgaria's education practices. These barriers to Roma education need to be addressed and they include:

Specific Enrolment Barriers

- ⇒ Access to noncompulsory pre-school education (kindergarten) is limited for Roma (as well as for some non-Roma) children. On one hand this is due to the required participation fee, which is especially high in poorer municipalities. Municipal authorities set the criteria for exemptions to this fee based on their capacities, so that poor municipalities with a substantial Roma population are not in the financial position to offer reductions on the fee for noncompulsory pre-school attendance, even when families clearly need this assistance. On the other hand, due to lack of space in kindergartens, priority is given to the children of official working parents, so the majority of Roma children are excluded.
- ⇒ Regarding the one year of compulsory pre-school, even though it is free of charge and is required for all children, there is still a major barrier for access: lack of space. The law does not provide solutions for this problem, but experience shows that, in some areas where there are large concentrations of Roma, the children cannot receive the obligatory one year of pre-school education because of a lack of classroom space.⁴⁰ Unfortunately, there is no overall data on this problem.
- ⇒ The lack of quality education at lower education levels creates entrance barriers later in a child's school career:
 - Entrance to high-quality secondary schools is competitive, based on grade averages and enrolment exams; hence Roma students most often end up in non-attractive, noncompetitive schools, or they abandon further schooling. There is a lack of mechanisms that could give financial support to students undergoing entrance preparation for gymnasiums and universities.
 - Entrance to universities is also competitive, based on grade averages and enrolment exams. In order to pass exams, the students have to finish elite secondary school and/or attend paid

⁴⁰ E.g. according to the Report of the Roma NGO Romani Baht Foundation, this year, more than 100 children from the "Fakulteta" Roma quarter in Sofia are not included in obligatory one-year pre-school education. The school in the district can only organise four groups each for 20 children, which is not enough.

university preparation courses. University students also pay fees for each semester, so low-income Roma students most often end up in non-attractive, non-competitive universities, or they abandon further schooling.

Segregated Education

- ⇒ For Bulgaria, the most important issue that is specifically related to the quality of education of Roma children is the problem of so-called “Gypsy schools.” These schools have predominantly or only Roma children enrolled, and the learning conditions and quality of education in “Gypsy schools” are considerably poorer than other schools in Bulgaria. The exact number of “Gypsy schools” is unknown, since most studies on the topic use inappropriate methodologies, such as collecting data through correspondence with regional inspectorates. These studies also lack an exact definition of what constitutes a “Roma or Gypsy school”: Village schools with predominantly Roma pupils may not necessarily count as a segregated “Gypsy school” if the majority of village inhabitants are Roma. One of the studies⁴¹ found that there are about 106 “Gypsy schools.” (See the table on the distribution of Bulgarian schools with close to 100 percent Roma enrolment by regions in Annex C)
- ⇒ “Gypsy schools” were built in the ‘40s and ‘50s, and even later in some separate Roma neighborhoods. Back then, they had a positive influence on the education of Roma children. Over the course of time, however, the quality of education in these schools suffered a drastic decline. In the ‘70s and ‘80s, the policy was to gather all Roma children in the Roma schools. Some of these schools were given the special status of primary schools, with specialized labour education taking prominence at the expense of general education. According to a reference by the Ministry of Education and Science, there were 31 such schools with 17,800 children in 1991 and another 77 schools that were euphemistically defined as “schools for children with a lower level of lifestyle and culture.” In 1992, the special status of labour schools was cancelled by the Ministry of Education, and the curriculum became the same as that of regular schools. However, the educational environment, which determines the lower quality of education in these schools, remains unchanged until this day. In the first few years after the changes, state institutions avoided taking a stand on these schools, referring to the then-existing territorial principle of distribution of students into neighborhood schools. This principle is no longer mandatory, but its abolition in the beginning of the ‘90s did not change the existing segregation.
- ⇒ Even today, many Roma children are still not allowed to enroll in Bulgarian schools. In many cases, even if a Bulgarian and a Roma school are next to each other, and the mainstream school is half empty, Roma are sent to the overcrowded Roma schools instead. The main excuses given for not enrolling Roma pupils in mainstream Bulgarian schools are the following:
- There are structural limitations, resulting from the current system of financing the schools based on eligible number of classes and teachers. Directors of mainstream schools keep the number of pupils to the legal minimum, instead of the maximum, and they refuse additional Roma students with the claim that there are no empty places in the school.
 - Schools are interchangeably using the two different criteria for the placement of students: the now-abolished policy of schooling children in their neighborhood, and the new policy providing greater choice of schools. Schools try to refuse Roma students based on either

⁴¹ According to data published in: Nunev, I. (2002), “Analysis of the Current Status of Schools with Roma Enrolment,” in: *Strategies for Policy in Science and Education*, Special issue, pp. 110-144.

of these approaches, according to the circumstances. Roma children can be refused from mainstream schools because they are not from the vicinity, and free spaces are kept for last-minute enrolment of children from nearby. Alternatively, schools can intensify new initiatives, like teaching foreign languages, special sports activities, or arts programmes, in order to attract Bulgarian pupils from distant places. The schools then avoid enrolling local Roma by declaring that can only take children who have attended a specific kindergarten, or who were attending the pre-school preparation organised only in their school, etc.

- Administrative limitations: Roma are often not able to fulfill in due time the requirements for enrolment, because they have more difficulty collecting such necessary documents as birth certificates, health certificates, written requests for enrolment, etc. Hence, they enroll at the last minute, wherever they are accepted.

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Even in cases where students are actually being transferred from a segregated “Gypsy school” to a mainstream school, additional problems often surface. If the process does not involve Roma organisations and is not supported with complementary activities – like offering an adequate choice of schools, providing equal distribution of Roma children in different schools and classes, giving preliminary support to families, giving additional teaching for Roma children, conducting information campaigns, etc. – it can be accompanied by protests of Bulgarian parents. This is what happened in Yambol in the autumn of 1999. Alternatively, poorly executed “integration” may result in segregation of Roma children into separate classes within the same school.⁴² Obviously, a simple process of mechanically transferring children cannot substitute for a serious desegregation process.

The new National Program for Development of School Education and Pre-School Upbringing and Preparation (2006-2015) foresees the closing down of “not completed schools and classes,” which means that instances of merging schools and transferring children will increase significantly. At first, this will happen in village schools, in regions where the number of children is extremely low, and access to the distant schools will be provided by bus. Although exact schedules are not specified, the process has already started in some places. Currently the MES is setting up a programme funded through a guarantee fund to mitigate the impact of school closures, which include enhanced transportation and support to parents as well as adaptation of school buildings. While the details have not been pinned down yet, substantial financing (close to BGN 40 million) have been set aside in the 2007 budget. There are opportunities here for the NGOs who have been involved in successful desegregation projects to provide support and advice to the Government in designing the programme.

Education in Special Schools

The majority of the children in special schools are of minority origin. Most are children from the Roma community,⁴³ though many may list a second ethnic identity. The economic crisis that has

⁴² A recent example occurred in 2006 in the town of Simeonovgrad, where, because of a lack of school-aged children, the two “not completed schools” in the town merged into one, but only mechanically. The two buildings remained, and the segregation of the children remained same as before, only the school management became one and the same and on paper it was a “mixed” desegregated school.

⁴³ According to the Ministry of Education the relative share of Roma children, directed to the “specialized” schools or enrolled in “special” curricula after being certified incapable to cope with the regular curriculum is very high. As stated above, there are no precise data on what part of the children

affected large layers of Roma society often leads to cases where parents temporarily leave their children in a State institution, without giving up their parental rights. These children receive special education. In other cases, normal, healthy Roma children are sent to schools for the mentally disabled because they are provided with free meals and clothing that the parents can not afford.⁴⁴ The majority of Roma children are sent to special schools only on the basis of parental request, and they do not undergo the legally set procedures for admission.

Although the new policy of the Ministry of Education and Science supports a downsizing of special schools, this process is still going very slowly, and several new generations of Roma children face the prospect of education in special schools.

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“Second Chance” Education

Serious enrolment barriers also exist for adult education, due to poor state provisions for such education. Currently, adult education is mostly available as part of externally funded projects. Unfortunately, the experience with the majority of these programmes is not favorable: in several cases they did not increase the education level or employability of Roma participants, mainly because they weren't conceived in accordance with the real needs of either the labour market or the education system. As a result, health mediators, tailors, hairdressers, etc. were trained, but there had been no preliminary surveys about the possibility of their integration in the labour market. A similar oversight took place within the education system, with Roma assistant-teachers. Different NGO projects, including two PHARE projects, prepared about 500 Roma to be assistant teachers. At the moment, only eight of the Roma who graduated from these programmes are working – three paid through a municipal budget, and five by NGO projects. The problem was that the job descriptions addressed by the training were not in accordance with the requirements of the Bulgarian educational system.

Adult literacy programmes are somewhat different. They have the potential to really increase Roma's chances of finding jobs. But programmes for illiterate Roma were only marginal, and they did not help their students reach a competitive ability, equal to that of other unemployed people with a similar level of knowledge and skills. In 2006 the MLSP through the Employment Agency started to operate a literacy programme specifically aimed at Roma adults. 2,500 individuals were supposed to be trained in 2006, with a budget allocation of BGN 1.6m. The results of this programme will need to be carefully monitored.

Qualitative Assessment of the Education System⁴⁵

The education system in Bulgaria has been in constant transformation since 1989, and in recent years efforts to cope with EU requirements are under way. For a detailed qualitative assessment, see Annex A.

in “specialized schools” are Roma, because data on ethnic origin of these pupils is not collected. The estimation is made on the basis of visual inspections, which do not take into account pupils' self-identity. Most special education students are of Roma origin, but they may declare themselves as Turks, Bulgarians or Romanians.

⁴⁴ A phenomenon that also exists in other countries, such as the Czech Republic, Hungary, Serbia, etc.

⁴⁵ For a detailed qualitative assessment see table in Annex A.

School Management

School management and governance is centralized, giving the leading role to the Ministry of Education and Science and regional inspectorates. But some changes in school governance can be seen: Schools were obliged to register as juridical units, the role of municipalities increased and the system of school Board of trustees was established. Many schools also have a student council. In fact the role of parents and students remains mostly symbolic. Roma participation in school management is negligible. The neighborhood schooling principle was abolished, and free choice of schools is now possible. But often, as is the case with Roma, exercising this choice is difficult.

Teachers

A university degree is obligatory for teachers, and their licensing and career advancement is regulated. However, teachers share the same biases towards Roma as other Bulgarians, and there are no systemic efforts to address this problem through teacher training or inspection.

Curriculum

The curriculum is set on the national level. It is content-based, demanding and factual. The curriculum is developed and approved by the Ministry of Education and Science, and limited school flexibility is allowed. Only three schools in Bulgaria offer an elective course in Romanes as a mother tongue. There is no mentoring or extra tutoring for children with lower educational achievement, but the reintroduction of afternoon schooling and the provision of extracurricular activities, which would allow for additional tutoring for children who need it, is under discussion.

Textbooks

All subjects are covered by textbooks approved by the Ministry of Education and Science. Teachers can choose from among several approved schoolbooks in each respective discipline. Textbooks are provided free to students in lower grades. After fifth grade, textbooks are free for low-income families, including Roma.

Assessment and Evaluation

The development of a school leaving examination system, a so-called matura, is under way. Until then, the most typical exams are entry examinations. However, there is no free preparation for the entry exams. Inspection is still the dominant evaluation mechanism; it is handled on the municipal and national level, and its role in detecting and preventing discrimination and segregation is negligible. The Ombudsman's Office handles discrimination cases by acting on individual grievances.

Finances

Education is funded by the national budget, which covers salaries and investment, and municipal budgets. The budgeting mechanism gives schools incentives to avoid children from vulnerable and less affluent groups. Decentralized financing has been piloted, and there are plans to introduce a per-student financing formula.

Summary of Systemic Strengths and Weaknesses with Regard to Roma Education

Strengths

In Bulgaria the access of Roma children to education is comparatively high. There is free textbook provision and also some scholarship assistance that can be used by Roma students. Furthermore, several official documents address priorities of Roma education, there are some structures developed for assistance, and a fairly high number of Roma are employed at various levels in the education public administration.

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Weaknesses

On the other hand, many indicators show that the quality of education provided for Roma children, especially in the beginning stages, is less than adequate and less than would be necessary to ensure their sustained attainment and successful completion of all levels of education. Access is hampered in some key respects – notably through low pre-school enrolment and a disproportionate allocation to special education. Segregation, a high dropout rate and unduly low enrolment in secondary and tertiary education are all part of this picture. Hence, the major issues in Roma education in this respect can be summarized as follows:

- ⇒ The combination of the current type of school financing, school governance mechanisms that don't allow parental and student involvement, and unclear principles on whether choice of schools is free, all work together to limit the access of Roma children to quality education at the compulsory pre-school and basic school level.
- ⇒ The demanding and inflexible school curriculum – which does not have support mechanisms in the form of free extracurricular activities and additional classes, parent involvement, and enthusiastic and motivating teachers – does not create a conducive learning environment for the majority of Roma children, but rather serves as an incentive for dropping out.
- ⇒ The lack of free classes to prepare for entering higher levels of education also jeopardizes the access of Roma children to further quality education.

Bulgaria's education system is in transition, some changes should clearly benefit the Roma. But other changes might hinder Roma educational progress unless they are appropriately modified and implemented. The key areas for vigilance include the following:

- ⇒ The process of the forthcoming financial decentralization and the transition to a new financial mechanism based on per-capita funding. It will be important to ensure that the funding formula takes into account the needs of children from vulnerable groups and includes a realistic equalizing coefficient that could provide a viable incentive for schools to attract Roma children. There must be sufficient funding to provide the needed mentoring support, additional tutoring, and cooperation with parents needed to improve Roma education.
- ⇒ In the process of establishing external exams for students who have completed a course of schooling, it will be essential to create mechanisms that hold schools accountable for the success of their students and to provide free, high-quality preparation for the external exam.

Without such preparation, there is a real danger that a greater number of Roma students will be prevented from continuing their education at a higher level.

- ⇒ Although there are no clear signs as to when to expect reforms in curriculum, inspection, and teacher education in Bulgaria, it is important to ensure that changes in all three areas benefit the quality of education of Roma children. Certainly more flexibility in the curriculum would be welcome. School inspectors should be engaged in whole-school inspection and detection of discrimination and segregation. Improvements in teacher training should include training in multi-cultural environments and anti-discrimination. New university policies should increase intake of Roma students in the whole array of courses for teaching professionals

Knowledge, Data and Capacity Concerns Affecting Roma Education

Reliable data and evaluations of the problems related to Roma education are still missing. It is enough to compare the numerous publications on this topic to see extremely serious discrepancies. These start from the basic terminology used. For example it is not clear what authors of different studies and projects understand by the notion of “segregated schools” and “desegregation.” The result is that different publications do not agree on the number of segregated schools or the number of students affected.

Lack of Overall Strategy on Problems of Roma Education

State and international institutions, and the NGO sector, have various strategies and programmes for addressing Roma education. Too often however these efforts are not correlated and do not reflect a common philosophy. This creates a situation where the results are disappointing and, in the most extreme cases, contradictory. It is possible to point out examples where, in one and the same “Gypsy school,” there are two kinds of projects: one aims at desegregation of the students, transferring them into a mainstream school, while another simultaneously seeks to improve the school and keep the children there. The lack of an overall vision for Roma education allows these projects to be evaluated on too narrow criteria not taking broader educational and social goals into account.

Lack of Effective Implementation of Policy in the Sphere of Roma Education

This problem is predominantly a problem of the Bulgarian state. The Ministry of Education and the Regional Inspectorates often appear to be needlessly slow and inefficient, perhaps even disinterested, in working to address Roma education needs. Nor is there adequate financing from the state budget to support the Action Plan of the Framework Program for Equal Integration of Roma into Bulgarian Society, the Action Plan for the Decade of Roma Inclusion, the Strategy for the Equal Educational Integration of Ethnic Minority Children and Students, and plans for the establishment of the Center for Educational Integration of Minority Children. Consequently policy documents are only very partially implemented.

Lack of an Accepted and Approved Model of Collaboration With and Within the Roma Community

The insufficient, or nonexistent, level of collaboration with the Roma community in implementing state policy and programmes targeting Roma education is usually cited in evaluations as the main problem. Although in recent years, Roma representatives have been present at all levels of state policy formulation and in the teams implementing projects concerning Roma, but this doesn't automatically lead to effective collaboration. There is a clash of interests between various state institutions (e.g. the Ministry of Education and Sciences, the Directorate of Ethnic and Demographic Issues at the Council of Ministers, and the NCCEDI), international institutions, and Roma and non-Roma political parties and NGOs. In meetings between all these parties, Roma are most often represented by "activists". While these activists may have many positive qualities and dedication, they often are very far from having the professional background and experience to provide effective input on the education issues under review.

5. Overview of Government and Partner Activities

Prior to the start-up of the Decade of Roma Inclusion, education of Roma was addressed in Bulgaria through a variety of documents. The basic state document determining the policy towards Roma is the Framework Program for Equal Integration of Roma into Bulgarian Society, approved in 1999. A whole set of documents are adopted for the realization of the Framework Program: the Action Plan for the implementation of the Framework Program for the Equal Integration of Roma in Bulgarian Society (2003-2004); the 2004 National Plan for Overcoming Poverty and Social Isolation; the National Action Plan on the Implementation of the Strategy for the Equal Educational Integration of Ethnic Minority Children and Students (2004/5-2008/9); the National Plan on Employment for 2004, as well as forecasted and reported indicators for financing education and programmes for literacy and professional qualification.

These documents generally recognize that the first priority area of reform for the Bulgarian government is to upgrade the quantity and quality of human capital. The work force's skills must be improved for two reasons: to increase labour productivity and, thereby, wage-income levels; and to continue expanding productive capacity beyond unskilled labour-intensive products. Achieving this improvement requires reform of the education system, including universities and vocational schools, by: (i) strengthening the links between the skills acquired in the education system and those needed in the job market; and (ii) by improving the efficiency and effectiveness of public outlays in education. The effectiveness of education outlays can be improved by shifting resources away from underused facilities and toward modernization of curriculum, textbooks, and teaching materials; by implementing composite per-student resource allocation; and by linking financing to educational results, not just enrolment levels.

Commitment to Roma Decade, Actions/Progress to Date

Bulgaria accepted the Decade of Roma Inclusion as a political commitment to reduce disparities in key economic and human development outcomes for Roma by implementing policy reforms and programmes designed to break the vicious cycle of poverty and exclusion. During 2004, country working groups, including Roma and other stakeholders, developed the Decade Action Plans, which summarize the goals, targets, and indicators that the country plans to achieve during the Decade. A declaration in support of the Decade of Roma Inclusion was adopted by the Bulgarian Parliament, and the Decade Action Plan was adopted by the Council of Ministers in 2005.

Bulgaria took over the presidency of the Decade on July 1, 2006. The country's president of the Decade is the deputy minister of the Ministry of labour and Social Policy.

Yet, up until now, the decade has not been properly resourced and implemented in Bulgaria, and there is no effective state and administrative apparatus for coordination of Decade activities. The National Decade Action Plan is not backed with financial means from the national budget.

Likewise, in the Action Plan for implementing the Framework Program for Equal Integration of Roma into Bulgarian Society for 2006, the amount of funding necessary for activities regarding

education are not specified. The plan only mentions that funding will derive from the national budget, without giving further details.⁴⁶

In government programmes, issues pertinent to Roma children are usually contained in state programmes, which are designed as “mainstream” education programmes, providing free snacks, free school books, etc. The government does finance one programme targeted only at Roma, the education of Romanes mother tongue as a “compulsory elective subject” in Bulgarian schools, but this is currently implemented in only three schools.

The state and local governments also take part, in various ways, in several projects implemented by NGOs. The Ministry of Education and Science in 2006 has collected data on Roma projects in education. According to their information, the projects are distributed in the following way:

The total number of projects addressing Roma education is 81. The projects are implemented in 21 pre-school establishments, 174 schools, and 12 non-school establishments. The projects are regionally distributed in the following way: Razgrad (19), Shumen (8), Kardzhali (7), Vidin (5), Burgas (4), Pleven (3), Sofia-town (3), Targovishte (3), Silistra (3), Haskovo (3), Montana (3), Veliko Tarnovo (3), Sofia-region (2), Russe (2), Sliven (2), Vratsa (2), Pazardzhik (2), Lovech (2), Kyustendil (1), Varna (1), Stara Zagora (1), Gabrovo (1), and Plovdiv (1). There are also five regions where there are no projects being undertaken to achieve educational integration of Roma: Blagoevgrad, Smolyan, Pernik, Yambol, and Dobrich.

According to their content, the projects can be classified as follows:

- ⇒ Ten are desegregation projects in schools, and seven are desegregation projects in pre-schools.
- ⇒ Some 32 projects are in the field of ethno-cultural understanding, limited to celebration of Roma festivals or to folklore activities and sports.
- ⇒ All other projects are in various fields, such as: school reconstruction, dropout prevention, reading-room activities, anti-discrimination measures, civic education, conflict resolution training, drug prevention, etc. Most of these projects are mentioned only very generally in the Ministry of Education and Science information, which lists a title but no description of activities. Thus, it is not possible to understand what is covered under the broad categories.

Donor Funding: In-Country Programmes

In the past, Bulgaria has benefited from a high level of support from various important donors, such as: the Open Society Institute, United Netherlands Foundations, the Matra Kapp Program, the Charles Mott Foundation, USAID, the Democracy Commission of the US Embassy, the World Bank, UNDP, etc. These donors have given extensive support to the Roma movement.

Today, the key actors have changed. Apart from REF, the EU has started to play a significant role in Bulgaria, mainly through its PHARE programmes. Two potentially helpful regional donors, the Balkan Trust for Democracy and the Trust for Civil Society in Central and Eastern Europe, have not targeted Decade of Roma Inclusion objectives. These donor changes have left the majority of Roma NGOs without funding. Currently, no more than 15 Roma NGOs seem to have become financially sustainable.

In recent years, all donors combined have been giving about EUR 2-3 million annually to support Roma education in Bulgaria. However, the country is still not able to absorb all the available funds efficiently. The PHARE programmes are generally delayed, after reworking of the terms of reference for its activities. In accordance with the PHARE guidelines, all investment

⁴⁶ Source: <http://www.ncedi.government.bg/index.htm>.

projects supported by PHARE must receive co-financing from national public funds. The European Community's contribution may amount to up to 75 percent of the total eligible public expenditure. Co-financing for institution-building projects is provided by the beneficiary country, which covers certain infrastructure and operational implementation costs by financing the human and other resources required for effective and efficient absorption of PHARE assistance. The Central Finance and Contracting Unit of the Ministry of Finance will be the implementing agency for all PHARE programmes and subprograms, with a few exceptions. The bulk of external funding for Roma education comes from PHARE programmes.⁴⁷

PHARE projects targeting Roma education are as follows:

- ⇒ Project BG 9907.01 "Promoting the Integration of Roma": This EUR 200,000 project encourages access of Roma to education, as well as training of Roma community representatives for work in the public administration and the police force. It assumes that increasing the educational level of Roma is a key factor in their integration. The implementing organisation, the Step-by-Step Foundation, carried out training of 50 teachers and 50 teacher's assistants, and elaborated a textbook, including elements of Roma culture and history, for Roma pupils in pre-school classes. There was a two-day training of 100 school representatives, preparatory courses for university given to 50 Roma, a three-day training for Roma experts in regional and municipal administrations, and a special course for 90 police officers on working in a multiethnic environment.
- ⇒ Project BG 0102.06 "Social Inclusion": This EUR 3.7 million project aims to encourage the social and economic integration of Roma. The first component includes the establishment of 12 Roma Information and Cultural Centres, and it has a total budget of EUR 966,000. The second component, "Development of Roma Information and Cultural Centres," also involves providing "literacy and numerical training" to Roma. The target group is illiterate Roma beyond the age of 16. Roma Information Centres are expected to develop programmes in cooperation with schools and Regional Inspectorates on Education.
- ⇒ Project BG 0104.04.01 "Integration of the Roma Minority": With a budget of EUR 2,115,000, this project benefits NCEDI. The main objective of the project is to support the integration of Roma schoolchildren into the educational process by stimulating their school attendance and raising the qualifications of teachers and teachers' assistants; supporting cultural events

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47 PHARE Funded Programmes for the Roma in Central and Eastern Europe (in thousands of Euro)*

Year	BG	CZ	HUN	RO	SK	Total
2001	6350	3000	5000	7000	10000	31350
2000	3500	4500	2500	1000	3800	15300
1999	500	500	6900	0	3878	11778
1998	0	900	334	79	784	2097
1997	0	255	471	80	0	806
1996	802	534	313	236	504	2389
1995	382	2	45	169	120	718
1994	381	11	570	28	448	1439
Total	11915	9702	16134	8592	19535	65878

* Table based on EC. 2002. EU Support for Roma Communities in Central and Eastern Europe. May 2002. Brussels: Enlargement Information Unit.

aimed at integration of the Roma community in Bulgaria; and developing antidiscrimination legislation in Bulgaria.

- ⇒ Project BG 0204.01 “Urbanization and social development of regions with a predominantly minority population”: This project is co-financed with EUR 4,500,000 from the EU, another EUR 1,240,000 from the Bulgarian government, and EUR 290,000 from the UNDP, through its programme Job Opportunities through Business Support (JOBS). The project goal is to improve the technical and social infrastructure of regions with a predominantly minority population: Stara Zagora, Pazardzik, Lom, Omurtag, Venets and Dulovo. The project is building a Roma Cultural and Info Centre in Stara Zagora and a kindergarten in Dulovo. It offers vocational training in building for 1,000 unemployed persons from ethnic minorities. It aims to increase employment among minority groups by giving micro-credits.
- ⇒ Project BG 2003/004-937.01.03 “Educational and medical integration of vulnerable minority groups with a special focus on Roma”: This project, with a total budget of EUR 5,440,000, has a EUR 2.8 million educational component and EUR 380,000 for project management, and it receives technical assistance from the UNDP. The goal of the educational component is to carry out qualification courses for 600 teachers, including pre-school teachers, and 60 school inspectors, and to prepare 200 teachers’ assistants to work in a multicultural environment. The project will also support the adoption of school plans and programmes for education within integrated classes. For this purpose, the project will support infrastructure improvement in 20 integrated schools and 10 integrated kindergartens, in five rural and 10 urban regions.
- ⇒ Project BG 2003/004-937.01.04 “Improvement of the life quality for mentally handicapped people”: This project, with financial resources of up to EUR 2.67 million and an implementation period of 2004-2007, seeks to support and improve alternative medical, social, and educational services for mentally disabled children and adults. Among the main expected outcomes with regard to Roma education are: (i) development of methodical instructions for diagnosing the problems of mentally disabled children and adults, and evaluation of their education needs; and (ii) development of individual programmes/curriculum for 50 children, with the goal of facilitating integrated education. In addition to these activities, at least two kindergartens and two schools will be adapted for the integration of mentally disabled children.
- ⇒ Project BG 2004/016-711.01.03 “Improvement of the situation and inclusion of the disadvantaged ethnic minorities with a special focus on Roma”: The overall allocation in this project for the educational integration component is EUR 2,430,000. The aim of the project is to ensure systematic improvement of the situation of disadvantaged ethnic minorities, with a special focus on Roma. The project aims to achieve its goal by implementing specific measures in education, health, and urbanization – and by establishing institutional arrangements at all levels. The project is expected to impact Roma education by: (i) improving access to integrated education; (ii) creating conditions for social integration of young Roma through participation in higher education; and (iii) improving the material base of selected integrated kindergartens and schools with ethnically mixed classes.

The World Bank-supported Child Welfare Project attempts to address Roma education issues by targeting Roma children, and children from other vulnerable ethnic minorities, as part of the government’s broader fight against poverty. Also, the World Bank has addressed Roma education issues also through its policy dialogue under the Programmatic Adjustment Loan (PAL) series, including inter alia the conditionality of child allowance and the creation of the Centre of Education Integration. The World Bank support targeting the education of Roma children, and children from other vulnerable ethnic minorities, will continue in the coming years. For example, the upcoming

Social Inclusion Project of the World Bank will be aimed at promoting school readiness of children at risk of being marginalized because of poverty or special educational needs. It will be rolled out gradually over the next four or five years, and will involve the financing possibilities of the European Social Fund.

Pre-school and kindergarten programmes for poor children have been established and expanded through a \$1 million grant provided by Japan's Social Development Fund. The grant helps to prepare children, mainly Roma, for entry into school; improve their Bulgarian language skills; provide basic health care; and defray school expenses, such as food and school uniforms, for the poorest parents. The project was started in 2001 and closed in 2003, and its positive changes continue. The enrolment rate for the children who attended preparatory classes under the project is 100 percent. The project has also sparked close collaboration among local NGOs, ethnic minorities, community leaders, teachers, and parents. The project has also triggered changes in educational policy: The government has provided an additional \$500,000 from the state budget to keep the project going.

In the context of Bulgaria's commitments to EU membership, the fight against poverty and social exclusion has become one of the main priorities of the Bulgarian Government. The UNDP's support to poverty reduction and social inclusion in Bulgaria falls into two broad categories: employment generation and capacity development. To influence change in Bulgaria, the UNDP works through pilot projects, policy advice, and advocacy.

As the majority of other international and bilateral donors decrease their activities in the country, the EU and REF will likely become the main sources of external support for Roma education programmes.

5. REF Programme in Bulgaria

By February 2007, REF received 72 project proposals from Bulgaria. Of these, REF approved 19 projects and committed about EUR 1.5 million. Implementation of 18 of these projects are under implementation and two are completed

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REF started its activities in Bulgaria by taking over a number of projects transferred from the Open Society Institute. These projects all focused on school desegregation, and some had been under implementation for a number of years. They covered a variety of regions: Silven, Vidin, Pleven, Montana, Stara Zagora, Haskovo, and Plodviv. All of these projects help children to integrate desegregated schools outside of the Roma settlements, provide after-school support for children, and include outreach components to support parents in establishing a better relationship with their children's schools and to increase parental motivation. The REF will continue to finance these projects for the school year 2006-2007. The REF will also add a new such project, due to the very high commitment of the municipality. This model of desegregation implemented by a local Roma NGO in collaboration with the municipality has proven quite successful up to now, but it requires an in-depth evaluation before it can be scaled up. In order to increase the involvement of local governments in the process of desegregation, the REF has financed a project with the Consortium of Equal Access Foundation to promote the adoption of education action plans in the six municipalities where desegregation projects are under implementation. This project has been quite successful and produced five plans, all with some financial commitments from the municipal budget to sustain them.

The REF supports a project for increasing access of Roma students to universities, support of their professional development and strengthens a centre for Romani studies. The project is managed by the Consortium of Roma Student Organisations "Student Society for Development of Interethnic Dialogue" and the Minority Studies Society Studii Romani. It provides mentoring and support for the students, it organises candidate students' campaigns and maintain a career advisory centre, and strengthens Romani studies research and education centre.

The REF supports through an other project the institutionalization of multicultural education and pedagogy for teachers, school directors, teachers' assistants, and municipal and NGO staff involved in Roma education. The training will take place in a new Intercultural Education Center at Sofia University. The REF also supports the piloting of a model for adult education that could be used to develop adequate policies to support adult education by the Ministry of Education and Science.

The REF also supports two projects for the development of policies. The European Roma Rights is reviewing the body of legislation aimed at antidiscrimination in the education system – and implements various activities to build up a consensus in the political sphere for adopting improved legislation. Meanwhile, the REF is supporting research on education by local Roma researchers.

REF projects up to February 2007 typically have partnership arrangements, involving Roma organisations and government structures, in the following combinations:

- ⇒ Roma organisations and national or local educational authorities (10);
- ⇒ Roma organisations, the state, and a university and academic institution (1).

These partnership arrangements impact the sustainability, quality, and transparency of the projects. The partnerships also have an added value in establishing meaningful working cooperation between Bulgaria's Roma and non-Roma community.

Two projects are in consortia, and one consortium has also established wide partnerships. These factors all enhance the significance and impact of the projects.

The REF maintains an active dialogue on policy changes with the highest level of government, in particular the Prime Minister's Office, the Minister of Education and Science and the newly created Center for Minority Education. With the Directorate of Ethnic and Demographic Issues at the Council of Ministers, the target of this dialogue is inclusion of REF projects into the Framework Program for Equal Integration of Roma into Bulgarian Society and into activities for the Decade of Roma Inclusion. With the Ministry of Education and Science, and its subdivision, the Regional Inspectorates on Education, REF cooperation seeks to ensure the necessary legislative and administrative framework for implementing desegregation projects and the preparation of a state strategy for Roma in higher education. With local governments in the counties, where the desegregation projects are realized, REF cooperation aims to ensure logistical and administrative support, changes in public attitudes, solution of specific local problems, etc.

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Overall Strategic Framework and Levels of Engagement

Based on the problems outlined in this document, it is possible to formulate an overall strategic framework for improving Roma education outcomes segmented according to the three relevant levels of engagements: i) Roma parents, community and NGOs; ii) education authorities at national and local levels; and iii) the state and government. Table 11 presents the framework:

Table 11: Levels of Engagement for Improving Roma Education Outcomes in Bulgaria

Assistance and Support to the Roma Community	Implementation Support to Education Authorities	Policy Development with the Government
<p>1. Supporting Roma parents and community leaders to recognize and engage in key education issues:</p> <ul style="list-style-type: none"> ⇒ Motivate parents to participate in comprehensive desegregation process to eliminate “gypsy” schools and de facto Roma segregation in special schools. ⇒ Involve parents in pre-school enrolment and participation ⇒ Build communication channels between Roma parents/community leaders and local government authorities on education issues. 	<p>1. Develop sustainable model for desegregation including all “gypsy” schools:</p> <ul style="list-style-type: none"> ⇒ Review and evaluate existing experience ⇒ Develop parameters for scaling up to national programme. ⇒ Align budget and staffing with desegregation priorities including administrators and inspectors. ⇒ Address overrepresentation of Roma in special schools. <p>2. Increasing the enrolment of Roma children in education:</p> <ul style="list-style-type: none"> ⇒ Increasing pre-school enrolment to cover all Roma children. ⇒ Affirmative action for kindergarten and pre-school to recognise the needs of disadvantaged families. 	<p>1. Engaging in the decentralisation process to build local government capacities and commitment to Roma education:</p> <ul style="list-style-type: none"> ⇒ Evaluate pilot programmes of “delegated budgets” impact on Roma enrolment and quality. ⇒ Focus on municipal/county educational authorities ⇒ Monitor financing inequities and ensure per capita financing formula promotes Roma quality education.

Assistance and Support to the Roma Community	Implementation Support to Education Authorities	Policy Development with the Government
<p>2. Supporting Roma NGOs' involved in educational activities to cooperate and strengthen their organisational, networking and capacity building structures:</p> <ul style="list-style-type: none"> ⇒ Identify policy impacts. ⇒ Strengthen implementation ⇒ Access and use EU funds effectively. ⇒ Ensure inclusion of smaller/isolated NGOs. 	<p>3. Reduce drop outs in grade 5-8, increase transition to high school and tertiary:</p> <ul style="list-style-type: none"> ⇒ Support system for Roma students including preparatory classes, after school activities, etc. ⇒ Scholarship support for secondary and tertiary students. ⇒ Increase school accountability for achievement. <p>4. Identify and implement sustainable approaches to second-chance and adult education:</p> <ul style="list-style-type: none"> ⇒ Involve Roma NGOs and community leaders. ⇒ Ensure transitions to higher levels and labour market. <p>5. Establish comprehensive and trustworthy data collection system:</p> <ul style="list-style-type: none"> ⇒ Collaborate with Roma NGOs and local authorities in collecting and disseminating data. 	<p>2. Review and strengthen policy framework for Roma education including desegregation through broad consensus on overall strategy:</p> <ul style="list-style-type: none"> ⇒ Ensure legal framework for desegregation applicable to decentralised environment.

Strategic Directions for Future REF Activities

The REF uses a range of instruments to promote its program objectives: these include project finance and support, technical assistance, analytic work, and policy dialogue. On the basis of the overall strategic framework for Roma education in Romania and the background analysis of this document, the REF would allocate its resources for Romania in line with the following priorities:

Project Activities

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1. Accelerate implementation of desegregation campaign, building on evaluations of current and past projects, with emphasis on “package” approach including parental and community involvement. Promote similar approach among key partners, especially EU.
2. Scaling up to achieve universal pre-school enrolment.
3. Preparation and roll-out of classroom “support-package” for Roma children with mentoring, tutorials, after-school activities, and materials linked to specific grades and needs.
4. Build capacity in Roma communities to access EU funds and utilize them effectively.
5. Media campaigns and other communication activities to disseminate understanding of desegregation process and other Roma education initiatives.

Analytic and Advisory Activities

1. Comparative analysis of education quality in segregated and integrated mainstream schools, using both quantitative indicators and inspector evaluations.
2. Evaluation of desegregation projects to identify elements having most positive impact leading to proposals for scaling up to national program including the mobilization of budget resources and EU funds.
3. Policy advice linked to decentralization including design and implementation of per-capita financing system linked to decentralization initiatives including review of experience with delegated budgets.
4. Study of fiscal benefits associated with Roma education outcomes that close gap with non-Roma.
5. Policy advice in designing links between social assistance and participation in education.
6. Promote greater curriculum flexibility and associated examination changes and advise on “user-friendliness” of textbooks and teaching materials.

Results Framework Anticipated by REF Activities

Based on the identification of REF strategic priorities and on REF’s current projects and project pipeline, the set of expected results of REF activities should be visible in the next 2-3 years on the following levels:

Legal, financial and administrative changes:

- ⇒ Enforceable legislative framework for national desegregation program consistent with decentralization process.

- ⇒ Appropriate financial mechanisms linked to the decentralization process to ensure incentives for schools to support enrolment and participation of Roma students (through a weighted per student formula or other measures).

Education indicators – results are expected in the mid-term:

- ⇒ Near to universal compulsory pre-school enrolment from poor Roma communities.
- ⇒ Decreased dropout rate in grades 5-8, and increased completion rate in primary education.
- ⇒ Increased number of Roma children attending integrated primary schools.
- ⇒ Increased Roma enrolment in high school and tertiary with commensurate increase in volume and amount of scholarship support.

Improved social cohesion:

- ⇒ Increased acceptance of integrated schooling by non-Roma parents.
- ⇒ Improved cooperation between schools and Roma community/NGOs in the education activities of schools – to be monitored through project reporting.

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Country Monitoring Framework

Monitoring of these expected results will need to be conducted through a matrix of organisations providing a variety of data sources. These entail:

1. Roma NGO Network engaged in education.
2. State Statistical Office.
3. Databases of Ministry of Education, other Government agencies, and other donor's data collection routines.
4. The evaluation and monitoring designed and funded by each REF project.

Specific arrangement will be articulated in cooperation with all partners.

Given knowledge and data gaps, and in order to develop a well functioning and efficient monitoring system REF may also consider contracting a professional agency for data collection in missing areas, and to convene all actors listed to develop a joint comprehensive monitoring system.

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Annex A

AREAS OF EDUCATION POLICY and basic facts		BASIC DIMENSIONS OF EDUCATION POLICY IN BULGARIA				
		Openness	Measurability	Equity	Efficiency	Regulation
SCHOOL MANAGEMENT School management consists of a director and director's council. A school board of trustees, whose composition is free for schools to decide, is optional. Free choice of schools exists in principle, but in practice the neighborhood schooling principle dominates.		Management is accountable to the Regional Educational Inspectorate and the Ministry of Education and Science. The ministry appoints school directors. The school board of trustees doesn't really participate in decision making. Student participation, in the form of a students parliament or council, only exists in some secondary schools. In universities, student councils can participate in decision making.	Inspection is conducted by the Regional Educational Inspectorate. School improvement, development, and quality assurance mechanisms – including assessment of the school ethos – is under development. Data on discrimination is not collected.	Equity is generally not seen as an important part of the school ethos. Schools are indirectly prompted to avoid students who would potentially require additional staff time. Roma children are most often left in segregated schools.	Management is partially efficiency-oriented. Sharp population decline prompts school management to compete for students, especially potentially more successful ones.	Regulation is through the education law. Regulation in universities is through the higher education law and Accreditation Commission. School boards of trustees are regulated according to the Law for NGOs.

AREAS OF EDUCATION POLICY and basic facts	BASIC DIMENSIONS OF EDUCATION POLICY IN BULGARIA				
	Openness	Measurability	Equity	Efficiency	Regulation
TEACHERS Teachers must have a university degree and teacher's certificate. Teacher in-service qualification is possible in universities and centers for further teacher qualification, which are funded from the municipal or national budget. There is a system for professional qualification. Teachers' qualification is divided into five levels.	Teachers are still underpaid, but salary increases are envisaged. Implementation of the Bologna process is taking place in higher education. Some multicultural, and diversity issues are taught at the university level, as part of pedagogical, ethnological, and philosophical education. Teacher training provided by NGOs is not accredited.	Teacher training is handled in universities and centers for further teacher qualification. The quality of teacher education and training is evaluated only by the Ministry of Education and Science.	There is a lack of qualified teachers for "Gypsy schools" and for some rural schools. There are Roma teachers. Preparation of Roma teachers continues, mainly in the Veliko Tarnovo University in the Department of Elementary Pedagogy. Future Roma teachers are also supported through projects. In-service teacher training courses on diversity that are developed by NGOs are not accredited.	The level of teachers' efficiency varies. No quality assurance is in place.	Education is regulated through the education law and the higher education law.

AREAS OF EDUCATION POLICY and basic facts	BASIC DIMENSIONS OF EDUCATION POLICY IN BULGARIA				
	Openness	Measurability	Equity	Efficiency	Regulation
CURRICULUM There is a national curriculum, which is content based and developed and approved by the Ministry of Education and Science.	The national curriculum allows a certain amount of flexibility – e.g. schools can select optional subjects approved by the Ministry of Education and Science. The official curriculum is from the majority perspective, but a requirement to include the minority perspective exists, and it is fulfilled at least partially in some subjects.	The curricula are content based. School results are regularly measured, by the Ministry of Education and Science and Regional Inspectorates, through national testing in separate, selected schools and/or classes. A national matura system is under preparation.	Mastering the curriculum for entrance into elite secondary schools, or for preparation for university entrance exams, requires parental engagement and/or private tutoring and/or attendance in additional, paid preparatory courses. This common practice is only available for children with more wealthy parents – and only in larger towns.	The curricula are academic and overburdened with factual data, but there is a trend to change this situation. Results on international assessments are declining and below average.	The curricula are over-regulated by a very specific national curriculum, which spells out a detailed syllabus by grade and by subject.
	Extracurricular activities are rare. Roma language and culture is offered as an “obligatory elective subject” in three schools.				

AREAS OF EDUCATION POLICY and basic facts	BASIC DIMENSIONS OF EDUCATION POLICY IN BULGARIA				
	Openness	Measurability	Equity	Efficiency	Regulation
TEXTBOOKS All subjects are covered by textbooks.	<p>There is liberalized textbook publishing, and selection is made at the school level from several textbooks approved by the Ministry of Education and Science.</p> <p>There is still not enough material on the history and culture of minorities.</p>	<p>There are state standards for textbook quality.</p>	<p>Textbooks are purchased by parents, but a system is available to provide free textbooks for students from low socio-economic-status families.</p>		<p>Textbook provision is regulated.</p>
ASSESSMENT AND EVALUATION No national school leaving examination system is available yet. A national matura system is in preparation.	<p>There is no transparency in assessment (except for entrance exams) and no accountability to parents or the community.</p>	<p>Through the National Center for evaluation the overall test system is being developed. According to the plans, the first maturas should be administered in the 2013-14 school year.</p>	<p>School based assessment allows teacher bias.</p>		<p>Assessment is regulated through the education law and the higher education law.</p>

AREAS OF EDUCATION POLICY and basic facts	BASIC DIMENSIONS OF EDUCATION POLICY IN BULGARIA				
	Openness	Measurability	Equity	Efficiency	Regulation
FINANCES Funding comes from the national level, which pays for salaries and investment, and the municipal budget. Salaries are based on the number of eligible teachers in each school and are calculated based on the number of eligible classes and program requirements.	Finances are uniform, with corrections according to region, specific situation, number of children, etc. A decentralized formula financing system – is being prepared.	There is transparency of finances.	Schools in low-income municipalities are struggling with basic maintenance financing.	Teacher rationalization is ongoing, as a means to ensure higher efficiency.	Finances for eligible schools are calculated and approved yearly.

Annex B

Table 1: Number of Roma in Bulgaria

Regional Direction of MI (Ministry of Interior)	1989 (MI)	1992 (MI)	1992 (Census)	2001 (Census)
Sofia – the city	38,000	n.a.	13,902	17 885
Sofia – district	14,136	17,077	11,684	16 748
Blagoevgrad	16,100	18,000	8,216	12 405
Burgas	37,894	38,453	16,120	19 439
Varna	20,682	35,000	17,077	15 462
Veliko Târnovo	20,880	n.a.	7,236	6 064
Vidin	15,115	12,000	7,965	9 786
Vratsa	22,160	23,715	11,927	14 899
Gabrovo	5,920	114	1,585	1 611
Dobrich (Tolbuhin)	23,665	18 000	18,449	18 649
Kârdzhali	9,024	9,843	1,899	1 264
Kyustendil	8,463	12,762	6,057	8 294
Lovech	17,746	12,490	6 384	6 316
Montana (Mihailovgrad)	28,813	29,480	19,079	22 784
Pazardzhik	47,705	50,000	21,810	23 970
Pernik	38	6,600	2 142	3 035
Pleven	24,870	27,747	7 111	9 777
Plovdiv	45,333	61,585	21,139	30 196
Razgrad	15,213	16,468	7,464	8 733
Russe	16,306	16,306	11 934	9 703
Silistra	12,826	12,826	6 519	6 478
Sliven	46,491	40,590	18 183	26 777
Smolyan	548	1,225	514	686
Stara Zagora	28,289	38,000	24,143	26 804
Târgovishte	17,035	n.a.	9,474	9 686
Haskovo	13,488	26,100	14,014	17 089
Shumen	20,128	15,823	14,727	16 457
Yambol	11,240	12,762	6,669	9 729
Total	576,927	553,466	313,396	370 908

Authors: Elena Marushiakova and Veselin Popov.

Table 2: Employment by Ethnic Groups in 2003 (%)

Labour status	Ethnicity		
	Bulgarian	Turkish	Roma
They work and earn money presently	42,8	29,5	19,5
They do not work, but want to find a job	12,2	38,6	46,3
They do not work and do not want to	5,1	9,8	12,9
Pensioners	39,5	21,2	19,1
Student	0,1		0,5
Disabled	0,1		0,9
No response	0,2	0,8	0,7
Total	100,0	100,0	100,0

Source: ASA Roma'2003.

Table 3: The social assistance in 2003 by ethnic groups (%)

	Bulgarians	Turks	Roma
Social assistance status			
Beneficiaries of social assistance	7,8	19,7	48,3
Former beneficiaries	11,4	25,0	24,8
They have never received benefits, but are in need	41,5	34,8	20,2
They have never received benefits and do not need	37,0	14,4	5,4
To what extent do they rely on social benefits			
Almost fully	18,6	35,6	32,7
Very much	18,6	13,3	24,0
So some extent	21,6	13,3	20,8
Almost not	12,9	15,6	9,8
Not at all	23,2	11,1	11,4
Cannot say	5,2	11,1	1,2

Source: ASA Roma 2003.

Table 4: Unemployment Rate by Major Age Groups: Men (%)

	15-24	25-54	55 >
Roma	57	31	26
Majority	35	11	14

Source: UNDP 2005.

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Table 5: Unemployment Rate by Major Age Groups: Women (%)

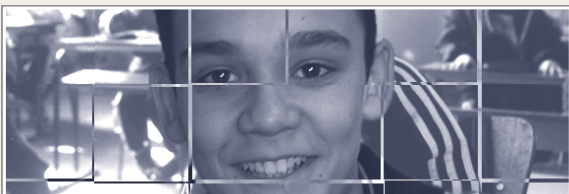
	15-24	25-54	55>
Roma	56	34	41
Majority	32	12	19

Source: UNDP 2005.

Annex C

Distribution of Bulgarian Schools with Close to 100 Percent Roma Enrolment by Regions

	Total number of children in school and pre-school age	Total number of Roma children in school and pre-school age	Total number of schools and kindergartens with 100 percent Roma enrolment
Blagoevgrad	51,604	2,344 (4.5%)	2
Burgas	57,581	6,246 (10.8%)	4
Dobrich	29,968	1,131 (3.7%)	5
Gabrovo	17,274	1,386 (8%)	3
Haskovo	23,628	4,871 (21%)	5
Kurdjali	25,221	1,524 (6%)	4
Kyustendil	21,505	1,606 (7%)	3
Lovech	21,517	1,003 (4.6%)	0
Montana	23,185	6,231 (27%)	6
Pazardjik	36,736	6,930 (19%)	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
Russe	34,147	3,113 (9%)	2
Shumen	29,008	4,063 (14%)	5
Silistra	17,076	1,922 (11.3%)	5
Sliven	29,492	5,645 (19%)	5
Smolian	22,443	231 (1%)	0
Sofia – city	146,526	2,405 (1.7%)	6
Sofia – district	31,290	5,192 (16.6%)	6
Stara Zagora	50,209	7,228 (14.4%)	6
Turgovishte	19,099	3,122 (16%)	6
Varna	59,691	7,259 (12%)	4
Veliko Turnovo	37,620	3,238 (8.6%)	3
Vidin	15,154	2,735 (18%)	2
Vratsa	29,248	4,802 (16.4%)	1
Yambol	20,212	2,972 (15%)	4
TOTAL:	1,007,544	106, 166 (10.5%)	106



ROMA EDUCATION FUND (REF)

*T*he goal of the Roma Education Fund is to contribute to closing the gap in educational outcomes between Roma and non-Roma, through policies and programs to support quality education for Roma including desegregation of educational systems. The Roma Education Fund was created in the framework of the Decade of Roma Inclusion. Therefore, it also shares the goals of the Decade.

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