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| **[Roma integration in spain and bulgaria]** |
| A comparative study on the National Roma Integration Policies for Europe 2020 in Spain and Bulgaria, represented in analysis on the current situations, future action plans and strategies, comparison on the major aspects and issues, followed by a study on relevant theories on integration and their applicability to the matter. |

**Roma Integration in Spain and Bulgaria**

**A comparative study**



**7th Semester Project in M.Sc. Development and International Relations**

**Aalborg University**

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# Introduction

The Roma people are considered the biggest ethnic minority residing within the borders of not only the European Union, but in Europe as a continent. The approximate number of Roma, spread among the different European Union Member States, is 10 to 12 million people. This minority is often living in poor and difficult conditions as they are not fully socially and economically included in the general society. (ESF, 2012)

Following Fraser Cameron’s notion for the European Union being a role model in integration: “*Since the early 1950s, the EU has been a pioneer in regional integration” [[1]](#footnote-2)*(Cameron, 2010) and at the same time having several million people living in exclusion, can be called a Paradox[[2]](#footnote-3). It is therefore interesting to ask the question why.

On the other hand this Paradox is now well recognized among the Member States and is being dealt with. The European Union aims for a full social inclusion and participation in the economy, labor market, social life and decision-making. This undertaking is considered both moral and political obligation of the European Union because if it is not put in place and running, it can have important economic consequences resulting in direct costs in public budgets as well as being an opportunity cost in terms of lost economic power and taxation. This inclusion is not a stand-alone action policy, but is aimed to be a mainstream action in all European Member States, which will result in improved education, health care, employment and housing conditions. These areas are considered key into including the Roma minority in the general society and will be supported by the European Union’s financial tools, represented in the European Social Fund, European Regional Development Fund, European Agricultural Fund for Rural Development as well as specific Community funds that support national policies.(ESF, 2012) Furthermore the main goals concerning the four improvement areas can be defined as reached when all Roma children complete primary school, when there is a visible cut in the employment gap between Roma and the general population, when the gap in health status is also reduced and last but not least when the gap in access to housing and public utilities, such as water and electricity, is closed. Despite aiming for or being a mainstream action in all Member States, these undertakings solely depend on the different Member States regional and local authorities as they have to allocate properly the available funds and implement the specific integration projects.(EuropaFAQ, 2011)

## Background Description

After reviewing the policies for “National Roma integration Strategy 2012-2020” (ECJustice, 2012) in Spain and in Bulgaria and the current situation of Roma in the two countries a serious mismatch of the situation is visible. While in Spain “Many Roma people enjoy medium to high socio-economic levels and are fully integrated in the society” (Roma Spain Strategy 2012, p.4), in Bulgaria “A serious problem facing the Roma is the increased spatial isolation of their community”. (Roma Bulgaria Strategy 2012, p.5) Furthermore in Spain “… a substantial amount of Roma have seen progress in the last decade…” (Roma Strategy Spain, p. 4) compared to “The concentration of Roma in isolated neighborhoods has increased during the last fifteen years both in the urban and rural areas” in Bulgaria. (Roma Bulgaria Strategy, 2012, p.5). These matters, in a mainstream action plan covering all European Union Member States, elicit interest in explorative work based on these two member states.

A further research leads to the report by the European Commission “Advancing Roma Integration –First report to the European Commission”, which states that there is no visible progress in the Roma integration.(First Report, 2011, p.1) This brings an interest to possibly review the actual and specific ways Roma can be integrated in the two countries.

## Problem Formulation

Since Spain is already more advanced in the Roma integration than Bulgaria, the research question to ask is **why Bulgaria and Spain’s National Roma Integration processes are different, with Bulgaria falling behind Spain?** This will be done through a set of analysis on the advancement of Roma Integration Strategies in both Spain and Bulgaria, the action plans’ targets, the states’ properties and national macroeconomic factors affecting the process.

## Methodology

This report contains a comparative analysis of Spain and Bulgaria’s Roma Integration policies and action plans for the European 2020 Strategy. Going through these National Policies is needed in order to present and collect sufficient information on what the current situation is, what the main present issues are, what the action strategies are, how the states are implementing them. This is done mainly descriptively as it is solely based on the existing policies. This part is a pure comparison without criticism towards the policies and the facts described are taken as they are. The time frame in both National Policies is a little vague, but mainly the focus is on the past two decades.

Next there is a comparative analysis following on the two policies which allows to draw somewhat comparisons on the different integration processes. In this part already there are suggestions forming the problematic essence of the report. Conflicting results and properties are put together in order to show either contrasts or common problems. This part is made theory-free in order to show the situation purely as it is and in the next section the theories take place.

In order to theoretically analyze the differences in the two countries’ standpoints in their Integration Strategies today, the integration theories for Assimilation, Pluralism and Segregation are firstly described and afterwards analyzed in the report’s problematic context. Secondary theories on Segmented Labour Market, Human Capital and Game Theory in housing are used as supplements to the main theories. At this point an overlap of theory and practice is applied. The theories for Assimilation, Pluralism and Segregation were chosen as a consequence of their broad applicability and relevance to the context of this report. The supporting theories were found as relevant to the main theories during the theory research and hence included with the vision for more aspects of the problems considered.

A general macroeconomic analysis is also used, in order to analyze the welfare states’ properties and moreover the ability to handle the workload and resources required for fulfilling the mainstream objectives. This analysis will be done on the basis of Bulgaria and Spain’s National Banks’ macroeconomic indicators for the current and previous year, represented in Gross Domestic Product, Average salary, unemployment rates and New Business interest rates. These indicators allow a comparison on both economies and their relative financial strengths.

Another basis for comparison are the National Roma Integration Targets set in both countries, their essence, clarity and vision. It appears that Bulgaria’s experience within integration is lower than Spain’s, so an analysis of the targets and important matters is considered to be a reliable tool to outline the integration abilities.

The sources chosen to provide data and information for this report were found according to their relevance and reliability. Mainly online sources were researched because of the fast and convenient access. The relevant sources were then qualified according to their reliability, meaning their origin, the quality of information and more importantly to be referenced. First of all the two policies, The National Roma Integration Plans for Bulgaria and Spain, were used to provide the information for the current and future Roma situation and action plans. These were sourced from the European Commission’s website. Furthermore other relevant European and national sources, from the internet, were used in order to answer the questions about Bulgaria and Spain’s current situations. For the theoretical aspects of this report, data was collected from relevant books and reliable internet sources, written, analyzed and referenced in a trustworthy way and showing a constructive criticism over the given theories.

Another detail is the brief country description for Spain and Bulgaria, which is seen important because it shows how different the countries are in basic geographical, cultural, religion and language terms as well as how diverse the countries’ populations are.

## Methods:

The data selection is mainly sourced from national and European Union sources. The main type of research is chosen to be qualitative, as the national policies, strategies and action plans are descriptive. Therefore the overall point of view is interpretive analyses. However the part with the macroeconomic indicators and national targets is represented in quantitative figures and is therefore analyzed purely objectively, in a positivist manner. The overall plan is to outline strengths and weaknesses in the qualitative analysis and look for the causes or answers in the quantitative data. In this way it is believed that the bias of the project is minimized as the credibility and validity are substantial.

## Project Design:

The aim is to make a simple, easy to read and understand flow of this report, which gives sufficient problem exploration. The report consists of a descriptive part, outlining the most important aspects regarding the Roma integration in Bulgaria and Spain. It is followed by a theoretical part which is believed to give credible models for further analyses and application of that is already described. Consequently there is a following part which puts theory and practice in one and aims to theoretically explain the practical matters.

Finally there are findings and conclusions drawn.

## Delimitation

This report takes a main focus on the Bulgarian and Spanish Roma, and not the ones in the European Union as a whole. Additionally, the scope does not cover whether the Roma are Travellers, Gypsies, Sinti or any other type of Roma.

Theories on Anglo-Conformity and Process Theory are left out, due to their irrelevance to the project’s scope and context.

Direct criticism towards the policies is not made as they are compared and analyzed through the suggested theories.

## Process Reflection

In the beginning not much knowledge on the topic was existent and practically everything that was come up with was encountered at some point in the research process. It was a little frustrating that the national documents were having numbers different from the numbers presented from the Council of Europe and this is the reason why in the different sections different figures for Roma population can be seen. Moreover the fact that in Bulgaria an unknown part of the population is not registered as unemployed can be giving a slight bias in the numbers. However the report as a whole was aimed to not have a bias and this is the reason for the long descriptive part which is sourced from only credible and reliable national and European sources. This part’s exhaustiveness is aimed at giving a solid background on what is known about the problem and what is being done about it. It also gives a serious support for the analyses and intends to inform the reader about everything that is necessary for the comprehension of the matter.

Another aspect of this reflection regards the choice to leave out the previously planned cultural approach part, as Roma is generalized in the scope of this report and it would have been hard to generalize the different types of Roma cultures that are being dealt with. Moreover it would have been a long discussion which would have most likely ended up outside of the project’s scope.

The second thing that was chosen to be left out is the welfare states’ analyses because the macroeconomic analysis gave an overview enough to have conclusions drawn for the two countries.

# Introduction to Spain

Spain is covering an area of 505,955 km2, (Geography Spain, 2012) situated in the middle of Europe, with a population of 47 million. (Spain, 2012)

The official language of Spain is Spanish, although they do have other languages in certain regions, which are Catalan in Calicia, Euskera/Basque in the Basque Country, Valencian in the Valencia Region, and a variety of Catalan in the Balearic Islands as well. (Languages & Religion, 2012) The majority of the Spanish population practices Catholic religion (81%-94%) (Spain Religion, 2012), but other religions are also practiced in Spain, including Islam, Judaism, Protestantism, and Hinduism. (Languages & Religion, 2012) The official currency in Spain is the Euro. (Spain Currency, 2012)

Today the Roma population in Spain is approximately 525,000-750,000 people (Spanish Population, 2012). They tend to live in more concentrated areas, 40% of the Spanish Roma live in Andalusia, Catalonia, Valencia and Madrid. The current trend for the Spanish Roma is living in prolonged stable urban areas. The current situation of the Spanish Roma is that they are both heterogeneous and diverse, meaning that there are different Roma with different socio-economic statuses, some of which fully integrated and other still not integrated.(Roma Spain Strategy 2012, pp. 4-7)

There has been a significant improvement within various areas in the integration of Roma in Spain during the last decade, which can clearly be seen in the figures for the Educational, Employment, Housing and Health factors. For the **Education** area, there is a clear increase within Roma boys and girls attending pre-school, as well as reduction in absenteeism for primary school attendants, an increase in completion of compulsory secondary education, and not to forget an increase in academic success of Roma pupils as well as a reduction in illiteracy among the Roma.(Appendix 1)(Roma Strategy Spain 2012, p. 14),. For the **Employment** area there is an increase in the professional qualifications of the Roma, as well as access for the Roma to get normal employment, hence a general increase of working Roma. For the **Healthcare**, there is an improvement within the inequalities of health opportunities, hence the Roma are healthier and also there is a significant increase on the focus on Roma health than ever before. For the **Housing**, the government aims to reduce the Roma houses being overcrowded and provide them with better accommodation quality. It’s interesting to note that 88.1% of the Roma lived in normalized housing in 2007, whereas only 3.9% lived in slums, and 7.8% in deteriorated or sub-standard housing, counting out of more than 90,000 Roma houses. (Roma Spain Strategy, 2012, pp. 12-13)

## The current Roma Situation in Spain

According to the National Action Plan for Spain, the Roma arrived to Spain in the fifteenth century. (Roma Spain Strategy 2012, p. 4) They have always maintained their own culture throughout their life there. The common features of the Roma in Spain are their culture, family structures, value systems and social organization and language. Today there are still some certain worries about discrimination of the Roma in Spain. According to the Non Legislative Motion on the Legal Situation of the Roma Population, the rules that were affecting the Roma negatively were unanimously approved in 1978. (Action Plan Spain 2012, p. 12) In 1985 freedom and equality were promoted into the National Plan for Roma Development in Spain. (Action Plan Spain 2012, p. 12) In 1989 the Spanish Government approved to provide budgetary allocation for implementation of social invention project helping the Roma. (Action Plan Spain 2012, p. 12) All in all Spain is clearly pursuing to do progress within the area of Roma integration, having special attention to the Roma situation, especially the housing conditions throughout adopting an action plan. Spain exercises participation at all levels in the society for providing better rights for Roma, resulting in equality. It is important that in order to integrate the Roma, they should have certain motivating factors, such as having equal rights. This could for example be within the health sector, providing them with equal access to health insurance, dental assistance, housing possibilities, qualified educational training, (Roma Spain Strategy, 2012, pp. 4-9)

Most recent figures show progress within the Roma Strategy Plan. On **Educational** Targets, the data from 2009 shows that 87% of Roma boys/ girls have attended pre-school prior to compulsory schooling, which is an increase from the previous 74%% from year 2001, and 59% from 1994. Furthermore absenteeism in primary education has been reduced from 57% in 1994 to 31% in 1991 to 22.5% in 2009, nonetheless 81.1% of Roma children are in the school year corresponding to their age in 2009, which is a significant increase from 69% in 2001 and 35% in 1994. Additionally, illiteracy has been reduced to 8.7% in 2011, from 13.5% in 2007 and 13.1% in 2005. These figures clearly show a progress, having in mind that every figure on each of the targets shows an upgrade after a specific amount of years. The Roma population in Spain is getting more interested in becoming literate, moreover following the same age group in school, not falling behind the Spanish general population with school attendance. (Roma Spain Strategy, 2012, pp. 14-15)

The **Employment** targets show a bit different figures, total employment level of Roma in 2011 was 43.8%, whereas previous figures show 59.7%, where there is almost a 10% decrease of employment of female Roma. Furthermore the unemployment level has risen to a level of 36.4%, from 13.8% in 2005. Salaried occupied Roma show a decrease to 37.6% in 2011, from 51.4% in 2005. Lastly, Roma dedicated in collaborating in family economic activities have risen to 26% in 2011 from 24, 1% in 2005. It is clear to see, that this area of the Roma integration Strategy has not progressed remarkably, might have something to do with the economic crisis that has been going on these years, having in mind there are not so many jobs and money on the market. However the Roma are showing activeness and have a strong labour potential. (Roma Spain Strategy, 2012, pp. 15-16)

The **Housing** targets show a reduction of slums of Roma households to 3.9% in 2007 from 10% in 1991. A reduction has been in Roma homes considered to be a sub-standard housing to 7.8% in 2007 from 21.4% in 1991. Furthermore there has been a reduction of Roma households lacking basic services, such as running water, hot water, bathroom facilities, electricity, as well as household urban facilities, such as rubbish collection, electrical lighting, public transport, and tarmac roads. (Roma Spain Strategy, 2012, pp. 16-17)

The **Healthcare** targets show that the Roma population’s health is good among 65.6% of the male and 51.4% of the female. These figures are deriving from accidents, amount of Roma male smokers above the age of 16, the obesity of female Roma above the age of 16, the female Roma not having had a gynecological consultation, accidents in their own home, no dental assistance. The Health targets of the Spanish Strategy Plan show more or less complex and specified targets, taking individual targets, such as obesity, smoking, dental visits. It is clear to see that there is a need for a progress within this area, due to the high negative percentage figures. (Roma Spain Strategy, 2012, pp. 17-18)

## Vision and Strategy for Roma Integration in Spain

The 2020 National Roma Integration Strategy focus is on six major aspects – greatening working channels, balancing general and specific policies, linkage within the 2020 strategy materialized in Spain, inspiration from common basic principles, greater use of structural funds, and adaption of general principles. (Roma Spain Strategy, 2012, pp. 12-13)

The Action plan for the National Roma Integration Strategy is to include the Roma in the Spanish population as a whole. Within the **Employment** Targets of the 2020 Strategy aims to increase the employment rate to 66% in 2015 and 71% in 2020 for the Roma aged 20-64, and specifically the female Roma to 55.8% in 2015 and 68.5% in 2020. The Spanish government will target the Roma at risk of poverty to be reduced. The Employment Targets shall lead to more participation on the labour market, with the rate of 74%, from the age group 20-64, whereof the females shall be 68.5%. Furthermore, there should be an opportunity of making flexible and part-time jobs, moreover improved capabilities matching market needs and genders should be equally promoted. Within the **Education** Targets of the 2020 Strategy, the bad performance of 15 year old pupils shall be below 15%. Furthermore a minimum of 95% of children shall be enrolled in pre-school. It is planned to reduce the early leavers from school to 23% in 2015 and 15% in 2020. Additionally, there will be an increase in the tertiary education for those at the age of 30-34 to 41% in 2015 and 44% in 2020. The strategic plan for the future action is to support Roma families in order to enroll their children into pre-schooling activities. Encouraging Roma to attend primary and secondary schooling, to have the will to learn, become professionals and interest in attending post-obligatory education with grant programmes. Moreover promoting learning among the Roma population with flexibility and specific courses in order to reduce illiteracy. The Employment Targets are a connected to the education, due to the fact that there is a need for training and qualifying, in order to get employment. These will be achieved through specific programmes, in order for Roma to become professionals at specific areas and get employment in at specific jobs. This will be provided by new technology training, providing certificates as a motivational aspect. Access and informative actions will be provided in order to support the Roma in obtaining a normalized job. Within the **Housing** Targets, there will be a renewal of sub-standard living of the Roma houses together with training in maintenance of housing and solutions for homeless/evicted families. Furthermore the support to the Roma should provide access to quality housing/accommodation. Finally within the **Healthcare** targets is a need for information systems, equality, support plans helping the plan for having a more healthy Roma population in Spain. These will be reached through better accessibility and working more efficiently, reducing the health inequalities that the Roma have suffered, represented in treating diseases, health care assistance, gender, children and other population groups. This will be done in cooperation with the Ministry of Health, Social Services and communities of Equality and autonomous areas. Lastly, intercultural training activities will be passed on in the health arena. (Roma Spain Strategy, 2012, pp. 18-29)

# Introduction to Bulgaria

Bulgaria is a relatively small country, with a total area of 111 910km2, situated in South Eastern Europe. The total population is at the count of 7.6 million people, with 85% Christian Orthodox and 13% Muslims, around 10% of the total population is of Turkish origin and 3% are Roma. Bulgaria was made a Member State of the European Union in 2007, but is not yet a Schengen member.(Bulgaria, 2012) The official currency in Bulgaria is the Bulgarian Lev (BGN)[[3]](#footnote-4).(BNB, 2012)

In 2012 Bulgaria entered the 2020 European Strategy and prepared a policy framework document which lays down the guidelines for the implementation of the social integration policy for the Roma people. It is a generalized document considering Roma to be all the disadvantaged and in vulnerable socio-economic situation people who identify themselves as Roma as well as people in a similar situation who are regarded as Roma by the society, regardless of their self-identification. This 2020 policy framework overlaps with the National Reform Programme of the Republic of Bulgaria (2011-2015) as well as the National Action Plan for the Decade of Roma Inclusion (2005-2015). The main actors in the implementation of these programmes, in raising the quality of life and equal opportunities, are the Ministry of Education, Youth and Science, Ministry of Health, Ministry of Regional Development and Public Works, Ministry of Labour and Social Policy, Ministry of Culture, Ministry of Home affairs as well as the Commission for Protection from Discrimination. (Roma Bulgaria Strategy, 2012, p.1)

The National Roma Integration Strategy meets the international standards for human rights and persons belonging to minorities as well as the principles of the European Union political framework for the protection of human rights, of ensuring equal opportunities for all citizens and prevention of discrimination of all kinds. Moreover this Strategy fits into the context of development of the European Union’s policies for Roma Integration communicated by the European Commission. The Action Plan for Roma Inclusion in Bulgaria in the period 2012-2020 is planned to be carried out in two stages, firstly to close the initiative Decade for Roma Inclusion in the period 2012-2014 and afterwards to apply the European Union’s Operational Programmes for Roma Inclusion in the period 2014-2020. Nevertheless a planned revision and update on the process is scheduled for the year 2017 with the aim for optimal efficiency and sustainability of the measures. (Roma Bulgaria Strategy, 2012, pp. 2-4)

## The current Roma situation in Bulgaria

In a research from the National Statistical Institute in Bulgaria carried out in 2011, a result of 4.9% of the national population was of Bulgarians who identify themselves as Roma and this result puts the Roma ethnos in the third place, preceded by the Turkish minority, for largest ethnic group in Bulgaria. The result numbers displayed here are different as the ones noted above because of various reasons, such as accuracy and focus of the research, time of the research and most importantly the variable for self-identification as there is a tendency for people identified by the general population as Roma to identify themselves as Bulgarians, Turks and Romanians. (Roma Bulgaria Strategy, 2012, p.4)

Further statistics researching the Roma **Housing** scatter over the area of Bulgaria show that 55.4% of the people identifying themselves as Roma reside in urban areas. For example the Roma share of the population in Montana is the highest for the country 12.7%, followed by Sliven 11.8%, Dobrich 8.8%, Yambol 8.5%, compared to the country average 4.9%. Another thing is the fact that for the past two decades Bulgarians, as well as Roma people have clearly moved from the rural life to the urban life with the rate of 5.9% (from 71.6% in 1992 to 77.6% in 2011) for Bulgarians and 3.1% (from 52.3% in 1992 to 55.4% in 2011) for Roma. In this relation urbanization has caused new neighborhoods creation and unfortunately increased spatial isolation as the Roma population seems to be concentrated in certain neighborhoods. Nevertheless this concentration results in the younger generation’s social development, causing deterioration of opportunities, worse living conditions due to overpopulation, problems with infrastructure and maintenance represented in poor water and sewer availability, as well as common illegal electrical connections. On the other hand in the rural living areas the situation is even worse as sewer systems are bad or non-existent at all. The research shows that Roma often live in houses without water supply, where water is sourced from outside wells or street taps as well as having no bathrooms inside the house. (Roma Bulgaria Strategy, 2012, pp. 4-6)

The second aspect of the Roma current situation is the **Employment** disadvantage this ethnicity is struggling with. It is mainly because of the structural changes that have taken place since the fall of the Soviet Union. These changes in Bulgaria’s macroeconomic situation have Roma exclusion from the labor market and persistent high levels of unemployment. However this is not to blame the system but the fact that Roma people are less competitive in terms of qualifications, education, social image of their labor status as well as social capital. A research in 2011 found that only 38.8% of the Roma above the age of 15 are economically active, compared to 53.5% of ethnic Bulgarians. Moreover only 50.2% of the economically active Roma are employed, meaning 19.35% of all Roma aged over 15. (Roma Bulgaria Strategy, 2012, pp. 6-7)

The third aspect of the Roma situation is the **Education** and literacy they have. The figures in this category are also very poor as 21.8% of them are with no primary education and therefore illiterate, 27.9% have a primary education only and 40.8% have a basic education. The secondary education scores only 9.0% and the higher education shows to have only 0.5% attendance among Roma. These numbers are very low compared to the Bulgarian population with only 0.9% illiterate, 3.4% with primary education only, 18% with basic education only, 52.3% with finished secondary education and 25.6% with finished higher education. (Roma Bulgaria Strategy, 2012, p.7) Moreover the illiteracy rate among Roma women is three times higher than among men, which is considered a major set-back in the educational process, as women are the ones raising the children in the Roma ethnicity. On top of this all a part of the children enrolled at school do not speak the official Bulgarian language well enough. Additionally the patriarchal norms of excessive control over girls and women among Roma also force them to leave school early in certain Roma societies. Despite these facts most of the Roma graduating high school, do not identify themselves as of Roma origin anymore. (Roma Bulgaria Strategy, 2012, p.8)

The fourth and final aspect of the Roma current situation is the **Healthcare** issue. It has been researched that the majority of Roma live under a lot of risk factors worsening their health, among which are impoverishment, bad environment and housing conditions, lifestyle, genetic and chronic diseases creating conditions for complications or other diseases. The health status of 10% of the Roma children below the age of 9 is bad as well as 12.6% of the whole Roma population in the country, including children, is suffering from disabilities or heavy chronic diseases. The statistics show that a third of the male Roma and two fifths of the female Roma population in the age gap of 45 to 60 years have lost partially or fully their work capacity due to bad health conditions. Moreover as a consequence of the poor living conditions and lack of infrastructure in the Roma neighborhoods hepatitis, gastro-intestinal diseases and other diseases caused by parasites are common. Furthermore due to overpopulation in the neighborhoods, infectious diseases cannot be isolated and they often result into outbreak epidemics. Last but not least having a health insurance among the Roma is a serious common problem. (Roma Bulgaria Strategy, 2012, p.9)

## Vision and Strategy for Roma Integration in Bulgaria

The implementation of the Strategy is developed in compliance with the 10 basic principles for Roma inclusion by the European Council, which define strategy to be constructive, pragmatic and non-discriminatory, to have explicit but not exclusive targeting, intercultural approach, to aim for the mainstream, to include the gender dimension, to use evidence-based policies, to implement European Union instruments, to involve both the civil society and make Roma actively participate in it. (Roma Bulgaria Strategy, 2012, p.10)

The Operational objectives for the four main areas are prioritized according to the importance seen them for the development process of Roma inclusion. The hierarchy shows that education has the highest priority, followed by healthcare, housing and employment. Moreover the additional areas of rule of law and non-discrimination, together with the culture and media aspects are seen of vital importance for the Roma inclusion. (Roma Bulgaria Strategy, 2012, p.11)

Number one priority in the **Education** aspect is for Roma to enrolled and retained in the educational system with a final objective of cutting down early leavers to 11% (for the whole Bulgarian population) in 2020, compared to 24.6% in 2011 (an average based on Bulgarians, Turks and Roma who have primary education or less). (Roma Bulgaria Strategy, 2012, p.7) This is to be achieved by ensuring equal access to quality education and mixing up the ethnicity with the general population, together with raising the quality of teaching in the schools with large concentration of Roma (both in the urban segregated neighborhoods and rural villages). The importance of promoting education from early kindergarten age is widely recognized and therefore both children and adults will be involved in programmes for involvement as well as teaching for adult illiterate or barely literate Roma. Additionally to the regular schooling there will be established extra-curricular programmes and activities with children with learning difficulties and deficiencies and drop-outs with the aim for reintegrating them. (Roma Bulgaria Strategy, 2012, pp. 12-13)

Number two priority on the list is the **Healthcare** improvement with an operational objective aiming at having equal quality access to healthcare services and preventive programmes for disadvantaged. This objective is planned to be fulfilled through a set of actions represented in establishing preventive care for mothers and children, together with increasing the health awareness and health-insured disadvantaged people through legislation. Moreover in order to cut down the gap between the health specialists and the Roma positions for Roma in the healthcare system will be created. (Roma Bulgaria Strategy, 2012, p.13)

Priority number three is concerning the improvement of the **Housing** and infrastructure conditions in the neighborhoods/areas with higher concentration of Roma residents. This is to be achieved by providing new spaces for building modern housing for Roma and decreasing the concentration and overpopulation, together with designing and building new infrastructure so there is a good access to water and sewer systems. Another thing is the need for social housing provided for Roma people that are move out of illegally occupied houses or the ones that are living in health or security danger. More importantly there will be programmes established for forming an attitude towards responsibility and diligence in the Roma people when being given the right to real estate. (Roma Bulgaria Strategy, 2012, p.14)

Priority number four is dealing with the **Employment** issues and aiming for granting an access for the Roma to the labor market and thus improving the Roma employment rate. This is to be achieved by fulfilling various tasks like qualifying and prequalifying Roma in order to meet the demand for certain job openings, as well as use various instruments to engage Roma into self-employment programmes. Such instruments can be educating unemployed in key competences and promoting entrepreneurship, as well as activating people under durable unemployment while promoting and encouraging the civil and public dialogue to hire people of Roma origin. Moreover legally and economically, through corporate social responsibility and subsidized employment, encourage employers to hire Roma as well as subsidize green employment with the aim of both sustainable environment and employment. (Roma Bulgaria Strategy, 2012, p.15)

The other two areas – rule of law and non-discrimination together with culture and media are seen as vitally supportive to the implementation of the above four aspects of inclusion as these will guarantee the equality of rights, with an emphasis of the women and children’s rights, protecting public order as well as combating any hatred. Moreover these will help Roma preserve their culture and creativity together with opening up access to the mainstream culture flow. In more detail the actions that need to be taken are going around overcoming cultural and communicational barriers through joint activities and tolerant inter-ethnic relations in all possible ways – using media channels, including Roma in social events and sport activities. In this way of actions Roma women have to be also involved and the creation of a tolerant mindset towards them has to take place, otherwise overcoming the patriarchal influence and more importantly the illiteracy and early school leaving will not be possible. In the same way better childcare has to be implemented through new services supporting vulnerable families and improving parental capacity. Additionally institutions will fight against intolerance as well as enhanced capacity of the law enforcement organs will combat discrimination, crime, human trafficking and raising the legal culture of identity documents preservation.(Roma Bulgaria Strategy, 2012,pp. 16-18)

# Theories on Integration

Integration theories have derived from assumptions supported by empirical studies in order to explain how immigrants have incorporated into the mainstream of the destination country. Since immigration took a big place in the United States of America in the nineteenth century, several assimilation theories have been developed. Such theories, in the sequence they arose, are Anglo-Conformity, Process Theory, Melting Pot, Segmented Labor Market, Multiculturalism (ImmOn, 2011) or in general Assimilation and Pluralism (REGC, 2012, p.43) as well as Segregation (Segregation, 1969, pp.488-493).

Assimilation is the process which involves two distinct groups and their cultural interactions, leading to a common culture and social merging, resulting into decreased differences over time. In contrast to assimilation, pluralism occurs when two distinct groups preserve their genuine identities and their cultural and social differences persist over time. It is also important to note that these theories may be contradictory but they are not mutually exclusive, as a part of the given society may assimilate with the general society, meanwhile the other part may persist as a pluralist minority. (REGC, 2012, p.43)

At this section of the report these theories will be researched in order to provide a theoretical framework for the current Roma situation in both Bulgaria and Spain, as well as for the planned strategy for Europe 2020. Since this is a project aimed at working on Roma inclusion, a starting point will be the assimilation approach which will be afterwards criticized with the possible contrary approaches.

Assimilation is used as a general term as it can take place in difference forms, one of which is the concept called “melting pot”, coming from the year 1908 and the play by Israel Zangwill on interracial marriages.(ImmOn, 2011) It is represented in having different cultures put together and reaching an outcome of cultural and social exchange, in which the different groups contribute more or less equally, so a new society with a common culture is present. However in the case of having minorities, they are expected to adapt to the host culture and society in order to get an access to better jobs, education and other opportunities. In this case the minority is giving up its genuine culture, traditions and heritage. (REGC, 2012, pp.44-46) Other more comprehensive ways of explaining the matter are to be found in the so-called Traditional Perspectives of Assimilation. They date back to the 1920s in their development as many theories are based on the work of Robert Park. (REGC, 2012, p.46) He suggests that when different groups come into contact first, their relations are conflictual and competitive. However with time the groups are moving towards assimilation or how Robert Park calls it “interpenetration and fusion”. He argues that assimilation is inevitable in democratic political systems, as people are equal and are to be judged by their abilities and actions, but not their race or ethnicity. Moreover he suggested that with the modernization a society is undergoing, the importance of ethnicity and race will be diminished. Despite the complexity and comprehension of Park’s viewpoint there are general criticisms regarding the fact that the process of assimilation is not described, in the sense of certain stages to be undergone, as well as the lack of a clear time frame for the “inevitable”. (REGC, 2012, p.46)

Milton Gordon on the other hand, as a follower of Robert Park, worked on clarifying the “missing pieces” of Park’s theories in 1964 in his book Assimilation in American Life. Gordon made a more systematic approach towards the process of assimilation as he broke it down into seven stages or as he calls them sub-processes.(REGC, 2012, p.46) These are, in a timely sequence, Cultural Assimilation (Acculturation), Structural Assimilation, Marital Assimilation (Amalgamation), Identification Assimilation (One Identity), Attitude-Reception (Absence of Prejudice), Behavioral-Reception (Absence of Discrimination), Civic Assimilation (Absence of Political Conflicts).(Inequality, 2011) It is important to note that Gordon makes a distinction between culture and structure in the society. Culture is represented in the group’s language, religion, customs, etiquette, values and ideas which are used in organizing people’s lives and as a basis for interpreting experiences. Social structure on the other hand is represented in the forms of families, groups, communities, organizations and social relationships. It organizes the life and work in the society and connects individuals to the broader society.(REGC, 2012, p.46) In this sense Gordon has a hypothesis of how assimilation takes place, expressed in that cultural assimilation is necessary for the rest of the process, while structural assimilation will lead to the rest of the process and the process will be complete by reaching marital assimilation.(Inequality, 2011) These sub-processes can be clarified as acculturation means that the group learns the common group’s culture, language, customs and values. The second step is structural assimilation, when the group enters both public/formal institutions and informal groups (clubs, societies, friendships…) of the dominant society. Gordon sees that once informal integration has taken place, the door opens for amalgamation. Moreover he believes that acculturation is a prerequisite for integration and once this step is completed the rest of the sub-processes are inevitable, although possibly slow. (REGC, 2012, pp. 47-48)

Despite the aim for a clear process, this framework has been questioned in 1985 by John Milton Yinger, in the sense that a group may integrate before acculturating or undergo the sub-processes in another sequence. Furthermore Andrew Greeley in 1974 expressed his view on that assimilation is not a linear process or one-way as certain groups may take a “reverse direction” and become less assimilated over time. (REGC, 2012, p.48)

On the opposing theoretical side of assimilation theories is Pluralism to be researched. The most often used proponent in this area is Horas Kallen who in 1915 in the Nation magazine argued that people do not need to surrender their cultures, values and traditions in order to become full participants in a society. In Gordon’s terms Kallen believed that diverse groups can get around the extensive acculturation and exist in a harmonious interdependence. The pluralists stand behind bilingual and multicultural societies, such as in Canada, India, The Middle East and Africa, and have been stimulated to develop with the developments around the Globe. (REGC, 2012, pp. 49-51)

The different kinds of pluralism can be described in assimilation terms to be cultural and structural. Consequently cultural pluralism means that the different groups may not share the same religion, language, customs and value systems. However they live in the same society, even neighborhoods but in a sense they live in different worlds. In the case of structural pluralism, the groups may practice the same culture, values, language but in different organizational systems, such as schools, churches, clubs as well as neighbourhoods. Furthermore, another type of pluralism is considered the reverse order – integration without acculturation, meaning that there is small group which found a niche to material success but has not yet assimilated with the general population. The key behind this success relies on strong inter-group bonds and support which may not have necessarily worked out if acculturation took a primary place in the process. In fact this third type of pluralism can be also considered as a type of assimilation (as stated before that assimilation and pluralism are not mutually exclusive) in the case that acculturation is isolated and integration is prime. (REGC, 2012, pp. 51-53)

A further theory on assimilation and immigrants’ opportunities for development in a foreign society is the Segmented Labor Market theory. It developed in the mid-twentieth century based on immigrants from non-European origin. It sees the labor market segmented in two parts – formal and informal. The formal sector is the one with more decent jobs, higher job security, promotion opportunities which has a well built up structure but has limitations for immigrant entry. The informal sector, on the contrary, is the one with higher immigrant concentration, no matter voluntary or involuntary, which has a lack of structural buildup for security or advancement. This kind can also be referred to the ethnic enclave economies. In general this theory suggests that there are unequal entry opportunities to the labor market for immigrants and therefore poor incorporation with the mainstream. (ImmOn, 2011)

Another interesting variable in the integration process, despite not being an assimilation theory, is the Human Capital theory, offering an explanation on the speed of integration of different immigrants. The basic message that this theory is proposing is that education is the most important variable in the human development. Therefore it is considered that the more educated a person or society is the higher probability of success they have, leaving out the social status/prestige variable for example. Moreover the investment in human capital and the failure are seen as interrelated as the ones that fail have either not tried hard enough or not made the right educational investments in themselves, as well as possibly having values or habits limiting them. (REGC, 2012, p.49)

On the contrary of all the above theories there is the side of separatism or segregation, which means severing all connections with the general society. (REGC, 2012, p.53) In this report’s context the term “segregation” will be used and the Models of Segregation by Thomas C. Schelling. In short the model for segregation defines that societies, or minorities, may prefer isolation from the rest of the population based on different dimensions, such as gender, age, income, language, colour, taste, comparative advantage, historical background, as well as very small personal preferences. Segregation can be organized as well as economically determined (rich and poor urban areas). The housing situation that Schelling works upon is aimed to be simplified but exhaustive. Therefore the units are chosen to be black and white people, which based on different variables for certain levels or determinants for happiness have consequently varying tolerance to living as a minority in the opposite colour’s neighbourhood. The results show that the higher unhappiness, as a consequence of living as a minority, the higher the probability to move out to another area with neighbours that the same colour. In this way segregation is formed. (Segregation, 1969, pp.488-493) There are many computerized versions of how the model works, all based on the tolerance level for living in a mixed neighbourhood, with the possibility of changing the variables and hence getting different outcomes.[[4]](#footnote-5) From this theory for segregated societies, a somewhat understanding can be gained with the result that humans like sticking together with the same kind. However it seems that the variable on marginal tolerance is the one steering towards segregation in less tolerant societies or towards integration in more tolerant societies.

# Comparative analysis of the situation and strategy in Spain and Bulgaria

Having the Problem Formulation aiming for an answer to why there are differences in Spain and Bulgaria’s National Strategy Plans, this part will put the already described situations and plans together in order to contrast them.

First of all, it is important to note that Bulgaria does not show directly accurate figures, whereas Spain has set certain figures to be reached in given timeframes.

The Roma in Bulgaria, according to the external estimation by the Council of Europe, are approximately 750000 people, which is 10.33% of the entire Bulgarian population. (FactBG, 2012, pp. 1-2) In Spain there are approximately 725000 Roma or 1.57% out of the entire population. (FactES, 2012, pp. 1-2) From these numbers can be seen that the fraction of the population is drastically bigger in Bulgaria, than in Spain, which could possibly be the reason for a harder overall situation.

## Housing conditions:

In Bulgaria 55.4% of the Roma reside in urban areas, whereas the Roma population in Spain tends to live in more concentrated areas, 40% of the Spanish Roma live in Andalusia, Catalonia, Valencia and Madrid. In Spain the trend shows that the Roma population tends to live in prolonged stable urban areas. The fact that, in the past two decades, the majority of Bulgarian Roma moved from rural to urban style of living, may explain their neighbourhood segmentation, while in Spain the Roma tend to be concentrated in larger geographical areas than just neighbourhoods.(cf. pp. 5-11)

In Bulgaria the Roma living in segmented or isolated neighbourhood, as well as these living in rural areas have poor infrastructure and supplies, whereas in Spain, despite the Roma concentration in certain areas, the majority is well-integrated and only a minor of 11.1% live in poor conditions. (Roma Spain Strategy, 2012, p.7)

The 2020 vision is unanimously to improve Roma housing conditions in both countries starting both with building up attitude towards maintaining the housing areas but in Spain only renewal is seen as necessary, whereas in Bulgaria building up new accommodations is inevitable. (cf. pp. 5-11)

## Employment:

In both countries Roma employment is an important issue, but in Spain the cause for Roma unemployment is seen mainly in the country’s financial problems, since Roma have shown a development in their professional qualifications over the past decade, whereas in Bulgaria the problem is seen in the lack of qualifications and their exclusion from the labour market since the fall of the Soviet Union. These happenings in Bulgaria have caused an aggregate economic inactiveness and so drastic Roma unemployment and disadvantage in comparison to Spain. (cf. pp. 5-11)

The action plans in both countries is focused on qualification improvements, but in Spain obviously a qualification level is already existent and needs to be improved, whereas in Bulgaria it has to be started from scratch. Moreover in Spain job flexibility is targeted whereas in Bulgaria self-employment and targeting at certain labour branches is planned. No clear answer can be found in what is better but the Spanish targets are very precise and giving a ground for supervision, while in Bulgaria no specific tangible goals are shown and so hard to follow-up. (cf. pp. 5-11)

## Education:

In the educational aspect Spain is clearly ahead of Bulgaria, having almost no illiterate Roma and keeping the majority of teenagers at school. In Bulgaria an influence on the bad figures have the patriarchal norms in the Roma families as well as the illiterate mothers. Having decent results in Spain, the education actions are almost minimal, mainly aiming at mainstream pre-schooling and reducing early school leaving. However in Bulgaria the situation is far more complicated, requiring not only children and younger education but also parent education and promotion of the literacy importance. Moreover in Bulgaria education is put on a primary stand for improvement as it is seen the key to unlocking the overall improvement. (cf. pp. 5-11)

## Healthcare situation:

In both countries the need for improvement in the healthcare system is seen. However in Spain the Roma ethnicity has considerably good health relatively compared to Bulgaria, where the health among Roma is considered very poor with the danger of often epidemics. In Spain the improvement stands behind more efficient system and therefore service, while in Bulgaria the improvement starts from giving equal access to healthcare services, working on the current health insurance policies, preventative measures and healthcare awareness. More to add to the comparison is that Spain is already fighting problems like obesity and smoking among Roma, while in Bulgaria basic healthcare is on the agenda. Furthermore in Bulgaria the statistics on the Roma health are poor since no mainstream registrations are existent, while in Spain detailed information on the healthcare problems in available. (cf. pp. 5-11)

If a general statement on the Roma current situation and plan of action for improving their living conditions is drawn, unanimously Spain is ahead of Bulgaria and moreover in Spain additions and improvements are necessary, while in Bulgaria an overall new undertaking has to take place. To make outcomes more precise, first accurate data collection is necessary and exhaustive planning is needed in order to have concrete targets for improvement, as Spain has. The targets set in Bulgaria can be defined as vague and therefore hard to be followed-up upon. (cf. pp. 5-11)

# The Spanish and Bulgarian Roma situation through a theoretical perspective

This section will try to fit the Roma situation in Spain and Bulgaria in the previously described theoretical framework. The theories will take the order of starting with Assimilation, Pluralism, Segregation, as general theories, together with Segmented Labour Market and Human Capital theory as secondary steps to further causalities.

To start off, the Spanish government has already stated in the 2020 Strategy framework, that the Roma in Spain are a heterogeneous and diverse society, the majority of which is socially integrated and has undergone visible improvements during the past decades.(cf. p.5) With this, previously given, description there is no need to test which theory applies to the situation as it is obvious that pluralist society is the case. Moreover it can be defined as a Cultural Pluralism, since the Roma have preserved their identities, culture and differences from the general Spanish population, but they share the same living areas and conditions with the rest of the Spanish population. Additionally the pro-Roma actions during the past decades are a proof that the Spanish government has not applied strategies for assimilating the Roma ethnicity and, as a minority, melting it in the Spanish culture. This is a proof and a rejection of Park and Gordon’s point of view for a one-way integration process towards assimilation. Despite being irrelevant to the Spanish Roma case at first sight, these theories on Assimilation are providing a good and elaborate basis for looking at the processes that the Roma ethnicity underwent and are still to undergo. Alternatively they can be used as an example of another approach towards the Roma integration in Spain. Consequently as mentioned before, the theories on Assimilation and Pluralism are not self-exclusive, it is just that the overall Spanish case is giving the example of a minority that has undergone a structural integration without acculturation. The reasons for achieving this plural society are firstly investing in the Roma human capital, educating them and equally involving them in the general society and importantly recognizing their labour potential. However there is no clear information whether there is a segmented labour market for the Roma in Spain. (Roma Spain Strategy, 2012, pp.4-11)

On the other hand a small fraction of the Spanish Roma is living in bad conditions and exclusion. This group can be categorized as segregated as a consequence of various factors, but since the poor way of living, it can be classified as economic/based on income segregation, together with comparative advantage segregation, since these Roma are not competitive enough to improve their lifestyle. (Roma Spain Strategy, 2012, p.7) Following Thomas Schelling’s model on housing segregation, these people will not become desegregated unless their living and housing standards are improved and the difference gap is cut down, in order to become more “alike” the rest of the population with normalized living standards. Nevertheless if no improvement is visible only deterioration of their living conditions is to come. (Segregation, 1969, pp.488-493)

Bulgaria, for instance, is having a completely different case, as it is said that the majority of Roma are socio-economically excluded and therefore segregated.(cf. p.9) This societal exclusion can be a consequence of generally – income, language, colour, comparative advantage, historical background, as well as other more personal reasons. The challenge in the Strategy for Roma inclusion comes from overcoming this isolation. However from the Strategy it is unclear whether the goal is assimilation or pluralist society. Some aspects of the plan, mixing the Roma with the general society in both housing and schooling for example, are purely aiming at straight acculturation and integration. On the contrary the programmes aimed at preserving Roma culture and encouraging Roma creativity are having a pluralist approach. The more obvious case that can theoretically succeed in this situation would be the Pluralist approach, as it gives a room for free flow of the process and sub-processes, as it happened in Spain. The important sub-processes in order for the flow to reach the desired goals of the strategy are seen as Structural Assimilation, Attitude-Reception (Absence of Prejudice), Behavioral-Reception (Absence of Discrimination). Together with these an active improvement in the Roma human capital is needed, in order to involve the Roma in the general society, improve their competitiveness in the aspects of education, qualification and employment. Furthermore this aspect of improvement would have a direct influence on the health and housing conditions, since the Roma will be having more knowledge and common sense. These undertakings are directly seen in the planned educational programmes.(cf. pp. 10-11)

On the other hand a segmented labour market can be expected since the majority of Roma are now not well-qualified and thus it is expected that they can start developing from the less demanding and less desirable job sectors. However it is important to note that Roma teenagers that graduate high school stop identifying themselves as Roma, meaning that the current education system is having an acculturation effect and hence comparative advantages. (Roma Bulgaria Strategy, 2012, p.8) Here is the place to make a link back to the Assimilation – Pluralism discourse and argue that actually in this case Structural Integration (being involved in the educational system) leads to Acculturation (different ethnic self-identification), instead of vice-versa. (cf. p.12)

Another thing to consider in these cases with Pluralism or Assimilation is whether there are good sides or bad sides in the theories. For example there must be a reason why in Bulgaria high-school graduates from the Roma ethnicity would stop identifying themselves as Roma.(Roma Bulgaria Strategy, 2012, p.8) Maybe they are uncomfortable being identified as a minority or possibly ashamed of their roots, due to a civil society unacceptability. This kind of assimilation is diminishing the humans’ diversity and freedom and thus assimilation can be considered unfavourable. However in a plural and diverse society, the problem with segregation can be a big issue, since the different ethnic groups may not tolerate sharing living spaces or promote equal rights and treatment. Here is the time to also ask how really the Roma situation can be improved, having Spain and Bulgaria as case scenarios and consider if stand-alone National Roma Integration Policies can actually solve the issues. In the comparison it is evident that the Spanish Roma case has undergone more structural and socio-economic changes, than in Bulgaria, leading to positive Roma situation, meaning that the actions have to be pushed by the government along with participation from the civil society. Nevertheless it is noted that the Spanish civil society is still showing signs of discrimination towards the minority, despite the anti-discriminatory programmes.(Roma Spain Strategy, 2012, p.8) This means that despite the mainstream initiatives, if the majority of the society is unhappy with having minorities, the pitfall for segregated housing or segmented labour market still persists. In order to overcome this, probably time is needed, so the next generations can start accepting the minority and have a normalized non-discriminatory attitude.

# Macroeconomic indexes comparison

Having in mind that both Bulgaria and Spain need to work on improving the Roma situation in their labour markets, housing conditions and healthcare and education systems, an important aspect of research is considered the current countries’ economic conditions. Therefore a few basic macroeconomic indexes will be compared. Relevant indexes are considered to be the Gross Domestic Product (GDP), Gross Domestic Product annual change, unemployment levels, average monthly salary, and New Business interest rates. The figures chosen for comparison date to year 2012 third quarter and year 2011 fourth quarter.(Appendix 2) Since the year 2012 is not finished yet, the GDP, as to third quarter, is normal to be lower than the previous year’s GDP. Putting this fact aside, Spain has immensely larger GDP than Bulgaria – 266 billion Euro compared to 38.48 billion Euro in 2011. The change in GDP, however, looks not well in Spain as it has a negative growth of (-)1.6%, meaning that the Spanish economy for 2012 until the third quarter is slowing down. (BDE, 2012), (BNBMacro, 2012)

The unemployment rate in Bulgaria is calculated at 10.4% level, for 2011 and no official data for 2012 yet, but this number is with a remark representing only officially registered unemployed citizens, meaning that there is an unclear amount of unemployed who are not counted. Compared to Spain this level is low, as in Spain the unemployed for 2011 are at the 22.85% level and for 2012 third quarter at 25.02% level. However the average salary in Spain, for 2011, is calculated at 1291 Euro per month, compared to 361 Euro, for 2011, and 385 Euro, for 2012 third quarter, in Bulgaria, meaning that there is more than three times difference in the average incomes in the two countries. (BDE, 2012), (BNBMacro, 2012)

Another important aspect that regards the Roma inclusion and more specifically the plan for Roma to be entrepreneurial or self-employed is the New Business interest rates. In Spain the interest rate is set as synthetic at the rates of 4.27%, for 2011, and 4.89%, for 2012 third quarter. In Bulgaria the New Business interest rates are divided into short-term and long-term, respectively 7.29%, for 2011, and 7.53%, for 2012 third quarter, as well as 10.72%, for 2011, and 9.81%, for 2012 third quarter.(BNBMacro, 2012), (SalaryES, 2012), (BDE, 2012)

Having put these figures together, it can be stated that the reason, from a macroeconomic point of view, for Roma being better integrated in the Spanish society than in Bulgarian is clearly that the state in Spain is richer and more resourceful. On the one side, paying higher salaries is clearly a better motivation for working, and on the other, the almost twice lower New Business loans, giving better entrepreneurial opportunities.

On the contrary the unemployment rate in Spain is more worrying than in Bulgaria, but these figures cannot be fully compared since the actual unemployment rates in Bulgaria are not accurate. Moreover the raise of unemployment can be a consequence of the fall of Spain’s GDP and it covers the Spanish population as a whole. Having this way of thoughts the overall unemployment rate is somewhat having a diminished importance in the context of this report, but is still seen as an inseparable indicator in the comparison.

# Findings

After reviewing both countries’ national policies on Roma inclusion, the current Roma situation, reviewing the matter theoretically and looking at the macroeconomic situations of the two countries is time to synthesize all the material into an answer to why the Roma situation in Bulgaria is worse than the one in Spain.

For a start the political developments in Bulgaria and Spain during the past couple of decades have been completely different. In Spain the matter with Roma inclusion was taken seriously throughout these years, while in Bulgaria the political and macroeconomic changes only worsened the Roma situation, turning it into socio-economic exclusion. This as a start gives an idea about the learning curve Spain already underwent, whereas Bulgaria is just starting. Moreover the Spanish government has times higher resources in the sense of both pure money capital and human capital. To make the contrast even higher the Roma population, in terms of quantity, is the same but the segment it takes on a basis of the whole nation, it is more than five times higher in Bulgaria than in Spain. Up to here the variables unfavorably against Bulgaria in the comparison are – smaller country, less resources, short learning curve/experience, higher share of Roma. These can be considered reasons enough to answer the problem, but then there is no key to dealing with the matter.

The more important variables here are concerning the ways Roma can be included in the system and not be considered as a cost in the national budgets, but as an investment. In Spain this investment is already realized and the situation requires working on it in order to make it more efficient, whereas in Bulgaria the process is at a stage of shifting the cost to an investment. In both of the countries an equal, non-discriminating and involved Pluralist society is the answer to the problem. In Spain the goals going for concrete results and numbers are a consequence of years of experience and clear vision for the problems. However in Bulgaria such clarity is missing and, as suggested before, a preparation with accurate numbers and defined problems is needed in order to have targets, as the Spanish do, and allow an effective supervision and follow-up of the integration process.

So the bottom line answer to why Bulgaria falls back in the Roma integration process is lack of clear data and vision, definite approach with follow-up and financing.

# Conclusion

To sum up the reasons for a better Roma integration in Spain than in Bulgaria, a short review of the findings will follow. It was found that Spain is more resourceful than Bulgaria and so the social situation is brighter. The Spanish government is already active in including the Roma in the society and labour market, whereas in Bulgaria these processes are on the way. Having the Roma socially involved, brings accurate data available for finding the major issues and get a clear vision for them. On the contrary in Bulgaria the situation is worse because the issues are present but accurate data is not available as well as a clear vision.

Additionally the political and historical development of the two countries in the past decades, explains a lot for the current situation and conditions. It was also found that the most obvious and likely way for Roma to be integrated is by having a pluralist societal approach and more specifically culturally diverse society, although there are small signs for assimilation and acculturation in Bulgaria.

Furthermore to get to an integrated ethnicity, equal rights have to be present and Roma culture needs to be recognized. This was found to be possible through equal access to quality education, decrease in illiteracy and early school leavers, adequate attention on healthcare together with preventative measures, normalized living conditions with a good access to basic water and electrical supplies as well as waste systems and inclusion in the labour market with a vision for Roma qualification and pre-qualification. These prerequisites are the main determinants to whether the Roma ethnicity is socially integrated or not and as the results show most of these variables are in place in Spain but not in Bulgaria.

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# Appendices

## Appendix 1

Education Targets in Spain[[5]](#footnote-6)



## Appendix 2

Macroeconomic figures for Bulgaria and Spain[[6]](#footnote-7)

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Bulgaria | Bulgaria | Spain | Spain |  |
|  | 2011 | 2012 3Q | 2011 | 2012 3Q |  |
| GDP billion EUR | 38.48 | 28.86 | 266 | 263 |  |
| GDP growth % | 1.7 | 1 | 0 | -1.6 |  |
| Unemployed (registered) % | 10.4 |  | 22.85 | 25.02 |  |
| Avg. monthly salary EUR | 361.48 | 385.514 | 1291.67 |  |  |
| Interest rates New Business % |  |  | 4.27 | 4.89 | Synthetic rate for Spain |
| *short-term loans* | 7.29 | 7.53 |  |  |  |
| *long-term loans* | 10.72 | 9.81 |  |  |  |

1. Fraser Cameron, Senior Adviser, European Policy Centre, Adjunct Professor, Hertie School of Governance, Berlin [↑](#footnote-ref-2)
2. Paradox - (logic) a statement that contradicts itself [defined by WordWeb© 6.8] [↑](#footnote-ref-3)
3. fixed exchange rate with the Euro of 1.95583 BGN for 1 Euro, as to date 20 November 2012 [↑](#footnote-ref-4)
4. <http://www.gametheorystrategies.com/2011/10/11/game-theory-and-segregation/> [↑](#footnote-ref-5)
5. Source:

   <http://ec.europa.eu/justice/discrimination/files/roma_spain_strategy_en.pdf> [↑](#footnote-ref-6)
6. Sources:

   <http://www.bde.es/webbde/en/estadis/infoest/indeco.html>

   <http://bnb.bg/Statistics/StMacroeconomicIndicators/index.htm> [↑](#footnote-ref-7)