

INTRODUCTION

Branko Socanac:

Mr. Socanac welcomed the participants to the conference and explained its importance to the Decade of Roma Inclusion. He emphasized that this conference should serve as an exchange platform between governments and stakeholders to share experiences of using EU Funds in the previous years and explore possible options for funding for the period 2014-2020.

Paul Vandoren:

Mr. Vandoren stated that there are still many gaps existing in the four priority areas. The initial improvements, he said, have to be transformed into sustainable and sustained efforts. He also mentioned the endangered visa-free travel regime for the Western Balkan countries to the EU as a result of poor living conditions. Anyhow, Mr. Vandoren confirmed that inclusion of Roma will remain a priority of the EU. In addition, the EU will continue to support working on Roma Inclusion policies as part of the EU Accession Process and will strive to produce sustainable changes in the lives of Roma. The EU welcomes the Decade of Roma Inclusion, which is a unique platform that brings together governments, civil society and international organizations together to analyze policies relevant to Roma. Finally, Mr. Vandoren said that the EU would like to support further expansion of shadow reporting in other countries.

Bernard Rorke:

Mr. Rorke started by explaining that there is great danger that the political will of EU Member States to implement the EU National Strategies may fall short in the forthcoming period. He shared the statement of Commissioner Reading who said that most of the strategies lack details in terms of concrete measures and explicit targets. Not all Member States addressed the issues of decent healthcare and housing. Furthermore, the EU on its assessment of EU funds and money spend on Roma integration concluded that they are not being used effectively to create sustainable results. As to the Strategies, it remains unclear on what specific funding will be used to promote inclusion. In terms of monitoring, the Strategies failed to explain how Member States see cooperation between different stakeholders. Member States need to make greater efforts to include local and regional authorities as well as the civil society in the implementation process. Mr. Rorke said that he looks forward to the next period of EU funding, while trying to get rid of the heavy bureaucratic means in accessing these funds. We need to see collaboration and cooperation between established initiatives and the European Commission. Finally, Mr. Rorke emphasized the importance of the Decade in terms of creating an environment of trust, cooperation and dialogue between international organizations, civil society and governments. Hence, he would like to see the same within the EU Framework. He hopes that the Commission will open an ongoing and sustainable dialogue with the civil society.

Veljko Kajtazi:

Mr. Kajtazi explained that as Croatia is about to join the EU, its access to EU funds will enhance, especially to funds that will be used for Roma inclusion and on projects dealing with housing. He hopes that this conference will bring ideas that will make Roma subjects in the inclusion process, not only objects. He said that as a new member of the EU, Croatia will exchange any good practices with other Roma communities from non-EU countries that would facilitate their accession in the EU.

Neven Mimica:

Mr. Mimica affirmed that so far, EU funds have contributed a lot to closing the gap between Roma and non-Roma in the four priority areas of the Decade. Nevertheless, the gap is still wide and we need to critically assess what has been done and what has not. The responsibility of implementation of National Action Plans remains within the Governments. It is of high importance that Roma people feel equal with the rest of the population, as well as their active participation within this process. Croatia has adopted its National Strategy for Roma Integration up to 2020 and is currently working on an Action Plan for the period 2013-2015. Finally, this conference aims to strengthen cooperation between all relevant stakeholders in terms of sharing information that would be relevant to avoid duplicating mistakes on usage of EU Funds for the period 2014-2020.

Linking the Decade and EU Resources

Dominique Be

Mr. Be introduces the EU Report on Roma Inclusion and how it relates to EU Funding. The Commission became active on the issue of Roma and developing Roma inclusion strategies and platforms since 2008, following accessions of countries in Central Europe. The EU is providing a Framework for Member States to develop National Strategies and uses political pressure to implement them. Two reasons for active engagement of the EU in Roma issues: demographic (Europe's population is getting old, hence all people need to get socially included) and economic (full employment). We need to have a targeted approach within an inclusive approach, meaning the EU cannot have measure that target only Roma and leave out other marginalized groups. EU funds cannot solely address the issue of Roma inclusion; Member States need to contribute as well. The EU budget is only 1% of GDP in Europe, compared to 50% of public spending at national level, meaning that whatever is funded by the EU would be marginal compared to the possibilities at the national level. Another fact is that countries that have high level of poverty do not invest enough public sources (national and EU) to address poverty. Countries with large number of Roma population are also facing difficulties in using EU Funds. For example, Bulgaria and Romania don't allocate much of their funds to address poverty, but also they don't use much of the EU Funds for the same purposes. Two reasons for this issue: lack of political will to address poverty and social inclusion as well as lack of capacity at national and local level (including civil society). With regards to EU Funds for 2014-2020, the main one for social inclusion will remain the ESF. The size of the ERDF that will be allocated to social inclusion will be limited. The Commission is proposing to have minimum

shares allocated to ESF, which would be about 25% of social cohesion policies. Within the ESF, 20% would be allocated to social inclusion. There will be seven investment priorities. All the three funds (ESF, ERDF and Fund for Development) would address marginalized communities. Nevertheless, the decision on which marginalized community to address with these funds will remain a national decision.

Jakub Horacek:

Mr. Horacek talked about best practices of using and combining ESF and ERDF in the Czech Republic on urban development plans in Roma excluded areas. The OP for employment was financed by the ESF and the OP for the integrated regional programs by the ERDF. They launched pilot projects in urban areas of socially excluded Roma people, in 6 cities. The ERDF was used for restoration of housing apartments (around 500) and public areas and environment, and the ESF for education and social inclusion programs in the urban areas. The main point is that if the project would have launched only social activities without emphasizing the housing conditions of the Roma population (and vice versa), it would have failed. The lesson learned is that communication between national government, local government and the community is of extreme importance. Another important fact is the question of sustainability. Cities are responsible for taking care of the restored complexes. For the next period, they plan to focus on developing rural areas.

Srdjan Sain:

Talks in Romanes.

Mirjana Maksimovic:

Ms. Maksimovic talks about lessons learned of funding and Roma inclusion in the framework of Serbia's accession to the EU. It required enhanced political coordination, allocation of appropriate resources, better coordination between stakeholders and donors, reinforced monitoring and evaluation and strengthened involvement of the Roma civil society in the process (through encouraging institutionalized dialogue). Serbia adopted the National Strategy on Roma inclusion in 2009 and has 5 mechanism on local level related to Roma Inclusion. Priorities for using IPA funds in Serbia where: access to personal documentation, education, employment, social health care and housing. IPA 2012 in Serbia has 5 components – one of them is strengthening the Roma civil society organizations. For IPA 2013, her office is trying to secure 11 Million EUR for housing related projects. She also mentioned the cross-border cooperation programs. Since 2007, only 3 Million EUR has been used for CBC. She suggests that there should be a better promotion and enhanced usage of CBC programs for Roma Inclusion, as well as make use of a multi-beneficiary IPA for the region to attract more funds.

Jaroslav Kling:

Mr. Kling talks about the impact the ESF had on the living conditions of Roma in Slovakia and what where the outcomes of targeted approach of around 300 implemented projects. One finding is that the measures funded by the ESF do not reach the ones most in need. Only 1/5 of the projects where

implemented in the most segregated localities. Moreover, the chances to benefit from the ESF increase with the size of the municipality – the bigger the municipality, the greater the chances for Roma communities to benefit from ESF support. Another finding is that the current managerial setting of the program in Slovakia does not allow a robust evaluation of these projects – there are no benefits analyses. Mr. Kling considers that the whole process of EU Funds administration is somehow difficult, creating limitations for Roma community leaders to manage EU Funds. The monitoring should be more focused on the results rather than on spending the budget – this could be done by using the flat rate possibility of indirect costs. Another recommendation is a better track of the projects and its results, as well as beneficiaries' views on the impact of the project. Mr. Kling also explained that there must be a combination of targeted and mainstreaming approaches to Roma inclusion. He mentioned the use of conditionality and its linkage to using EU Funds for Roma Inclusion. For example, no organization can use public funds if it is increasing segregation, indirectly supporting discrimination etc. Finally, there should be support for complex municipal projects – focus on one locality and do work on multiple thematic projects instead of one thematic project implemented in multiple localities - these kinds of projects are influencing and reinforcing each other.

Q&A:

Nadir Redjepi (MtM) – Roma are still struggling to be part of the EU ambitions, so do you think that Roma are common concern of EU institutions and Member States, or are they still trying to find the optimal mechanisms/approaches on how to deal with the Roma population. Who is the primary beneficiary of EU Funds?

Dominique Be – Mr. Be referred again to the two reasons for inclusion – demographic and economic. It is convincing and logical to invest in working on social inclusion for Roma. The EU is setting the objectives, but the implementation is taking place within the Member States. What the EU can do is only support and help the State or certain regions to advance further.

Lidija Dimova – Is the Commission thinking about some instrument to impose conditionality on Governments so that they would do what they have promised to do? In particular, to make Governments invest money for the National Action Plans and condition this with the IPA Money. How will the decreasing EU Budget have an impact on the current issues we are talking?

Tin Gazivoda – What if there is no need for so many jobs? The third argument for why working on social inclusion of Roma should be securing equality in Europe.

Dominique Be – On the question of decreased EU Budget - the concerned countries (part of the Decade) will have stability over allocations for EU Funds, with preserved sums for social inclusion. On the question of equality principle – agrees with the comment, yet this is also covered by the economic reason, which promotes equality per se. On the question of conditionality – the EC is not in a position to say how many percent should be allocated to Roma from the EU Funds. The principle is targeting disadvantaged communities.

IPA II Regulation

Lidija Dimova:

Ms. Dimova focused her presentation on the relationship between the European Commission, the civil society and the Macedonian government in the period 2007-2013. The first recommendation for improvement in this relationship is transparency. The partnership between the Macedonian Government and the Commission left the impression of being non-transparent thus sending mixed messages to the public. The problems arise from the programming of IPA and this can be improved by actively involving the stakeholders – a bottom up approach. It is the role of the governments to provide stakeholders with capacity-building trainings on the use of IPA. The EC delegations are supposed to be civil society friendly and to ensure that there will be resources available to these organizations. IPA II says less but larger projects. Ms. Dimova considers this a danger because the money won't end up within the civil society sector. The reason, she explains lies in avoiding the use of grant schemes which require too much work. Her recommendations are that grant schemes should be ensured through: demanding national funds for civil society organizations which could be matched with EU funds (IPA II); and conditionality – the EC should use it more.

Aleksandar Krzalovski:

Mr. Krzalovski started with recommendations for improvements in the programming of IPA II. First, the question of timing, given the experience so far, there won't be any open calls for IPA II until 2016 because of programming issues. Second, Roma, especially women, have to be actively involved in the process not only in planning but also in evaluating. The third improvement that has to be made is within the budget, in terms of how it is created and where does it end. Only a small amount of it ends up among local projects, whereas everything else is being directed towards the public administration and other national projects of the government. In terms of implementation, the waiting time for approval of a project is too long for which the project loses its importance. Furthermore, when applying for IPA II, there needs to be a specific category for Roma inclusion. Mr. Krzalovski's final recommendation is that there need to be more open calls with lesser budgets, which should discourage big organizations to apply for funds and leave an open space for smaller, local organizations. This also means that grants (preferably small) should dominate over service provisions.

Q&A Session

Sanela Besic representing Kali Sara from Bosnia and Herzegovina mentioned that in Bosnia, during the discussion meetings on the programming process of IPA for this year, none of the Roma civil society organizations were invited by the EC Delegation. We must ensure that EU Funds will reach the local communities and they will be the beneficiaries of the implemented projects.

Joanna Kostka said that it is disappointing that the EC will not target Roma specifically within their funds and called for a common action to change this approach. **Ms. Dimova** proposed the idea to have

national Roma funds in each country, which would consist of national budget allocations as well as EU Funds dedicated solely to Roma. For the IPA II, she proposed to create a horizontal issues fund (which would target Roma indirectly) for which 10% of the total IPA fund has to be allocated. The purpose of this fund would be to hire people that would check each project funded by IPA and whether these projects cover any of the horizontal issues. These people should come from the countries implementing the project but paid by IPA, not the national governments. This would provide a clear understanding on how much Roma are actually benefiting from IPA. **Liane Adler from the EC – DG Enlargement** said that Roma issues will be reflected very strongly in the IPA II, as part of their Accession Process. On the comments on granting funds to local NGOs, the EU Commission has no capacity for that. The only solution for this would be through combining efforts between different organizations and then through an international NGO that has administrative capacity to absorb EU Funds to deal with it.

Institutional Capacities

Aleksandar Georgievski:

Mr. Georgievski stated that generally he is satisfied from the usage of IPA Funds on Roma Inclusion in Macedonia, though much more could be gained. If the IPA II becomes more flexible and less restraining, covering more horizontal and cross-linked activities, then we might expect to have better support of EU Funds for the Decade objectives. The switch to a sector wide approach (program based) is a genuine opportunity, but it must be properly structured. Process-ownership is crucial to overcome the negative consequences so far. Training has to be targeted towards methodologies for a long-term strategic thinking and developing a planning culture on all administrative units. Additionally, staff-fluctuations tend to create problems, hence designing sustainable and robust staff-retention policies are vital. The CBC component is underused, although it can create greater opportunities for achieving the Decade objectives. Hence, partnerships between EU Member States and Accession Countries need to be strengthened, especially because of the know-how values and skills of Member States.

Petar Antic:

Mr. Antic shared his experience with Roma Inclusion in Serbia as a NGO activist and later as a Deputy Minister in Serbia. In the future period, he recommends that we need to prioritize the change of the system – strengthen the rule of law and fight corruption; improve the state mechanism for monitoring and evaluation of the implementation of Action Plans and policies on Roma Inclusion; and actively involve the Roma civil society.

Perspectives of EU Roma Platform and Enlargement

Liane Adler:

Ms. Adler mentioned that the second assessment of the National Roma Integration Strategies of the EU Member States will be held in May 2013, focusing on the structural requirements of the Strategies. These requirements are: the dialogue between governments and civil society; as well as with the regional and local authorities; placing monitoring mechanisms; the question on which funds will be allocated at the national and regional level; and very specifically on how the countries are planning to address discrimination. The EU Framework is not directly applicable to the Enlargement countries. Instead, it has been adapted to the context of the Enlargement countries through the Roma Inclusion seminars conducted in 2007. These seminars created concrete recommendations focused on the priority areas and on access to registration/personal documents and (where needed) the question of IDPs. In the EU Member States it is extremely difficult to obtain accurate and detailed data on the situation of Roma. In the Enlargement Countries this is not a challenge. The EU Roma Platform has always been open for the Enlargement Countries. The EU Framework and the Decade have to be compatible and complementary. Moreover, in the 6 EU Member states that are members of the Decade we have to avoid duplications and overlaps of initiatives. Recommendations of the EC for the Decade are: keep the pressure on governments and ensure that civil society organizations and Roma communities fully participate in the entire process. The EC complements the Decade for the shadow reporting, and would like to discuss the expansion of these reporting perhaps beyond the 12 Decade Member States.

Aleksa Dokic:

Mr. Dokic explained that there are still many challenges that Croatia faces in terms of administrative and institutional capacity among stakeholders. The biggest problem when creating their National Strategy was the planning and budgeting for 7 years; a very long time horizon, to which most public servants are not used to. He recognizes that many issues, both on national and local level, would not have been accomplished without the pressure and advices from the European Commission and the Roma civil society. He recommends that there should be also a high level of cooperation with non-Roma organizations on Roma issues. Mr. Dokic also mentioned that a few years ago the Commission tried to assess how much money was spent on Roma Inclusion, which turned out to be an impossible task. Namely, the mechanisms for informing on these issues are inefficient on explaining what exactly has been done. Finally, he hopes that the Decade will continue after 2015 because it serves as an added value to many other Roma initiatives with its sharing information and experiences platform and the coordination of activities among Roma inclusion stakeholders.

Ms. Adler having heard Mr. Rorke's statement that few Enlargement Countries would be interested in voluntarily reporting on the progress of the EU Framework, asked the audience where do they see the benefits of voluntary obliging to this instrument. **Mr. Rorke** pointed that the complexity of reporting and monitoring needs to be changed – we need a robust monitoring system, yet too much reporting to different authorities and on different initiatives creates disadvantages. **Mr. Redjepi** reflected on the

importance of hearing the voice of the civil society, which is mostly appreciated within the Decade. And this is the main point we would like to see being forwarded to the EU Platform. On EU level, the underrepresentation of Roma needs to have an affirmative approach.

Implementation

Joanna Maria Kostka:

Ms. Kostka explained lessons learned from the PHARE Program. She stated that this funding program was mostly used for infrastructure projects, and the least for social inclusion and anti-discrimination (except for Bulgaria, which had good results in its education projects). Roma projects started to be created only after 1999, even though the program started much earlier (as a result of the certainty to become part of the EU). At that time there were no comprehensive policies on Roma. Another disappointment was that a lot of money went into projects that could not support themselves after the funding ended. With the arrival of structural funds, projects were created solely for the sake of using the funds and with no attention to the inclusion objectives. For example, a lot of community buildings could not be taken care of after the funding was done. This is mostly a result of EU Funding without co-financing from national budget, which turns out to be just a drop in the water. Participation of the Roma community was missing. Local governments showed little interest in including them into a dialogue process. Delivery was a top-down failure, without horizontal participation. It relied a lot on consultancy agreements with big organizations, without taking into account the local level. However, the biggest positive impact of PHARE was legislation and institutional building. She believes that the multiannual programming of IPA is very useful. The transition from projects to sector approach should be based on quality policies on Roma with strong institutional capacities. Three recommendations for the EC: use the normal programming process to address Roma (Roma should be integrated in the multiannual country strategic papers, replacing a medium-term indicative program); earmark a certain percentage of each countries' IPA Budget for the social integration of the disadvantaged; use the technique of the Connecting Europe Facility from the new Cohesion Policy 2014-2020 – a small allocation of each country should be set aside for Roma and promote social integration into the regional Roma fund.

Milena Babic:

Ms. Babic talked about the IPA assessment for Roma in Croatia. She said that it has been extremely difficult to access information related to the implemented projects. There is no data in terms of the influence the projects had on particular communities, the participation of Roma in the project etc. Croatia has used all five components of IPA, mainly through a decentralized procedure and created strategic documents on the most efficient use of these funds. By the end of 2012, almost 59% of dedicated IPA Funds to Croatia have been used. In the period 2007-2013 four projects that deal with Roma Inclusion have been approved – through the components 1, 2 and 4; total costs being estimated around 3 Million Kuna. The implementers were the Office for Human Rights and Minority Rights and other local agencies, as well as one Roma and one non-Roma organization. The number of beneficiaries from these four projects was around 2.500 Roma, whereas the number of direct beneficiaries only 269

Roma, mostly when solving questions of their status. So far, IPA usage for Roma inclusion is estimated to be around 35%. In particular, IPA participation in education project has been 0%, in employment projects 10%, housing projects (mostly infrastructure issues) 75%, health projects 0%, cultural projects 6%, and 7% on projects related to the status of Roma. In the evaluation process of these projects, there were no Roma included. In terms of Roma being part of the implementation process (as implementers or partners), Ms. Babic believes that their capacities must be strengthened to undertake such tasks.

Aleksandar Krzalovski:

Mr. Krzalovski explained the IPA usage assessment in Macedonia and Serbia. In most projects, Roma were not the direct beneficiaries (target groups). Hence, it was difficult to measure how much percent of funding was dedicated Roma. Some calculations point that Macedonia used less than 1% of IPA Funds on Roma projects and Serbia around 6%. Only two projects funded by IPA in Macedonia were directly target at Roma, and they relate to the implementation of the Action Plan. The main identified problem is that most of the money ended up in consultancy agreements, and only a small portion was transferred to the municipalities. The situation in Serbia is different. Most of the interventions were directed towards refugees from Kosovo, among them Roma, though again it is uncertain how much did Roma benefit from them. In the frame of Cross Border Cooperation, four projects were targeted at Roma (out of 500) with an extremely small budget (less than half a million Euros). Another half a million Euros has been forwarded to South and Southeast Serbia, where 14 Roma communities benefited from the infrastructure projects. His recommendations are better implementation and monitoring of policies. In terms of political representation, there are many improvements, but there must be a better coordination and results. There should be more Roma in IPA Programming. Finally, organizations with smaller annual budget should be given the opportunity to get more projects.

Education and Health

Costel Bercus:

REF has reached out to almost 400.000 beneficiaries in its 7 years of work; including Roma children, parents and teachers. Inclusion of children in mainstream education (access to quality education) is a matter of concern to the non-Roma parents as well, which so far has been proven to be difficult to achieve. More efforts have to be placed in order to make sure that we are not losing time. Finally, Mr. Bercus points to the question of inclusion vs. exclusion costs of Roma in education. We have to convince governments to address education issues of Roma.