



Roma Civil Monitor pilot project

Guidelines for NGOs on preparing civil society monitoring reports (second cycle, 2018)

Assessing the progress in four key policy areas of the strategy

version 3

Prepared by:
Center for Policy Studies
Central European University
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The Roma Civil Monitor pilot project – Capacity-building for Roma civil society and strengthening its involvement in the monitoring of National Roma Integration Strategies, JUST/2014/RPPI/PR/EQUA/0150 – is carried out for the European Commission, DG Justice and Consumers. It is coordinated by the Center for Policy Studies of Central European University (CEU CPS), in partnership with the European Roma Grassroots Organisations Network (ERGO Network), the European Roma Rights Centre (ERRC), the Fundación Secretariado Gitano (FSG) and the Roma Education Fund (REF).

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The guideline has been completed by specific considerations concerning perspectives of:

- antigypsyism, by Jelena Jovanović;
- gender, by Nina Trollvige.

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INTRODUCTION

The Roma Civil Monitor project – ‘Capacity building for Roma civil society and strengthening its involvement in the monitoring of national Roma integration strategies’ (JUST/2014/RPPI/PR/EQUA/0150) – is carried out for the European Commission, Directorate-General for Justice and Consumers. It is coordinated by the Central European University (CEU), in partnership with the European Roma Grassroots Organisations Network (ERGO Network), the European Roma Rights Centre (ERRC), the Fundación Secretariado Gitano (FSG) and the Roma Education Fund (REF) and is implemented with the active participation of around 90 diverse NGOs from up to 27 EU member states.¹

In 2011 the European Commission and then the Council adopted the EU Framework for National Roma Integration Strategies up to 2020, and the member states developed national Roma integration strategies (or integrated set of policy measures). Monitoring of the implementation of the national Roma integration strategies includes the following elements:

- Since 2012 the [European Commission reports annually on the implementation of NRIS](#). In even years (2012, 2014, 2016) the report included also details by member state.
- The Fundamental Rights Agency prepares surveys regularly to measure progress on the ground (2011, 2016).
- Since 2016 also member states report to the Commission annually on the implementation of NRIS. Reports of member states are not public (unless a given member state makes its report public).
- In past years various NGOs and NGO coalitions prepared civil society monitoring reports – or ‘shadow reports’ – with their information and assessment.

The objective of the project is to contribute to strengthening the monitoring of the implementation of the national Roma integration strategies through systematic civil society monitoring. The project aims to enhance civil society monitoring in two key ways: by developing the policy monitoring capacities of civil society actors, and by supporting the preparation of high quality, comprehensive civil society monitoring reports. The value of civil society monitoring reports comes from the independent assessment and the evidence from the ground, provided by participating NGOs. The reports are meant to feed in to the Commission’s annual assessment.

The aim of the guidelines is to help both the development of the policy monitoring capacities of civil society actors and the preparation of high quality, comprehensive civil society monitoring reports.

Within the Roma Civil Monitor project, NGOs will prepare three civil society monitoring reports.

The first reports in 2017 focused on the structural and horizontal preconditions for successful implementation of national Roma integration strategies: governance and overall policy framework, fighting discrimination, addressing antigypsyism, and – in countries with the largest Roma communities and facing the most acute challenges – the impact of mainstream policies on Roma (especially in education).

The second reports in 2018 focus on key sectors – education, employment, health and housing (including essential public services).

The focus of the third report in 2019 is currently being negotiated with the EC.

In addition, in countries with the largest Roma communities and facing the most acute challenges (Cluster 1), each year 1-2 comprehensive local case studies will illustrate the implementation of measures at local level. The current version of the guidelines contains guidance for the second reports, which will be developed in 2018.

¹ In one member state, Malta, there is no Roma community, therefore Malta is not part of the pilot project.

METHODOLOGY

Focus and content of the report

The analysis in the civil society monitoring reports can cover any legislation, policy, programme with significant impact on Roma (either formally part of the national Roma integration strategies or not). Civil society monitoring should analyse the **current situation and recent changes in the past 2-3 years**. However, in certain cases where the current situation is the result of a longer process, the analysis may cover a longer period (e.g. from the adoption of the NRIS, etc.).

Civil society monitoring reports should provide alternative information and assessment to governmental reports by an independent analysis of the current situation and recent changes, rather than by a review of governmental reports. You should therefore highlight **both positive and negative trends**, as well as **unaddressed challenges**.

The reports should be comprehensive, while focusing on key challenges. This can be ensured by analysing core questions, relevant optional questions, and further questions based on prior discussion between the NGOs, CEU and its partners. The authors of the reports should express whether the challenges indicated in the questions/considerations are relevant and how important they are in the given country.

As the civil monitoring is aimed at making the governments accountable, the reports should primarily **focus on the governmental policies**, programmes and initiatives (we include here all governance levels and structures, which are part of the "State" – central government, regional and local government or self-government, public agencies and authorities etc.). However, the reports can also include information **on non-state initiatives** (non-governmental organisations, charities, Churches, private enterprises etc.), if:

- a. these non-state initiatives are systematically supported by the State (i. e. the government deliberately² regulates or finances such initiatives), or
- b. the government reacts to the non-state initiative by mainstreaming or scaling it up, or
- c. no public initiative in the given policy field exists (so without the non-state initiative, the problem would not be addressed at all).

In each thematic chapter, authors will provide information, whether the government has a **mechanism for monitoring and evaluation** of the performance and impact of the public policies in the given field.

Under each of the policy areas it would be important to systematically highlight, where relevant, the **gender dimension** and any issues concerning the specific situation of **Roma children and youth**, as well as **EU-mobile Roma/third country nationals/non-sedentary Roma**, or any other specific **groups with increased risk of vulnerability or suffering multiple discrimination**, where relevant.

Under each policy area it should be indicated whether the measures are connected with measures in other policy areas to indicate possible **integrated approach** (which can be matter of more detailed reporting in the 3rd monitoring cycle – in 2019).

Each policy area (thematic chapter) includes a specific question regarding the **discrimination and antigypsyism**. Please, discuss these problems only in relation to the policy development in given field and **avoid repetitions** from the first year (you can refer to the first-year report, if there is no newly developed points).

The **introduction** should include an overall picture of Roma inclusion policies in the country (e.g. a paragraph on what change the EU framework and the national Roma integration strategy or integrated set of policy measures brought compared to previous setting), and a description of the methodology of the report (how consultation was organised, what main options of gathering evidence was used).

The **executive summary** should include a general assessment and the key conclusions of each thematic chapters. Please, note, that some readers will read only the Executive Summary – therefore, the reader

² For example, if the government intentionally adjust the granting schemes to ensure funding of such service, this is meant as deliberate funding; if the initiative is funded from public resources, but this is only a "random" funding (the project received funding because it was better than other project proposals aimed at other activities, not related to the initiative in question). Or, if laws or other regulations were adjusted to enable or regulate the initiative.

should find the most important points and conclusions here. If the Executive Summary is well-written, the chances that the reader will actually read the thematic chapter increase.

The report should include identification of several **promising practices** – ideally at least one promising practice illustrating each of the four policy fields. Please, include the examples of promising practices into each thematic chapter in a text box, and try to provide the following information on the identified promising practices:

- title of the measure/project (including a link to its internet page),
- identification of the implementing organisation (name, type (such as local government, NGO, etc.) and contact in footnote),
- whether the measure is part of the implementation plan of NRIS, integrated set of policy measures of the State, regional or local action plan,
- description of the measure/project,
- whether it a Roma-targeted or a mainstream measure/project,
- when the project started (and ended – if relevant),
- why the measure/project can be considered promising practice, lessons learned,
- whether the /measure project was scaled-up or mainstreamed,
- source of funding (ESIF, national or other).

If you know a policy/measure/project which was designed and/or is presented as aimed at support inclusion of Roma, but you consider it in reality as controversial, having potential negative impact (side effect, unexpected effect), you can also indicate such **practices to be avoided**. In this case, make sure that you provide strong arguments and evidence that the identified measure has negative effect and therefore should be avoided. Please, try to provide the same information on these practices as in case of promising practices.

The reports should include a limited number of key **recommendations** addressing the relevant public authorities. The recommendations should be concrete, feasible and verifiable. If a recommendation has e.g. significant budgetary consequences, it should be explicit about that. It is important to address public authorities that do have competences regarding the given recommendation (e.g. competences of EU institutions are often overestimated).

Methods of work

The reports should be prepared with broad **consultation** among civil society actors. Consultation should happen at two stages: 1) before the analysis starts, to identify key challenges to be analysed, and 2) before recommendations are finalised, to address key challenges with adequate recommendations.³ Consultation should involve a diverse pool of NGOs and actors (including think tanks, researchers, community leaders) regarding their thematic or geographic focus, and missions and objectives (e.g., including NGOs that focus on provision of services and NGOs that focus on advocacy), etc.⁴

The reports should be **evidence-based**. Where a recent, accessible and competent but not necessarily widely known study has analysed the issue, the report should just briefly present the finding and refer to the study. This will enable the report writers to centre on less known aspects of policy interventions and their results. For gathering additional evidence and providing additional analysis, the NGOs can combine the following options:

- Using (including comparing and reflecting to) existing data, e.g. from census, large-sample standard surveys (e.g., EU-SILC, EU Labour Force Survey, etc.), sectoral databases (e.g., databases on education or health care), specific surveys (e.g., surveys by FRA or research institutions).
- Interviews with stakeholders, such as relevant politicians, civil servants (e.g., the National Roma Contact Point, policy makers and officials of line ministries, equality body, ombudsperson), service providers (e.g., school principals, officials of the employment service, general practitioners), civil society participants of coordinating structures, community leaders, community members, researchers or consultants. (See the description of the example of the UK in the RCM Guidelines 2017, section 'Features of high quality civil society monitoring'.)

³ Consultation can happen either through meetings or through online communication.

⁴ In countries where 10-12 NGOs are involved in the project consultation can address these NGOs. In countries where 1-2 NGOs are involved in the project consultation should address a much broader pool of NGOs and actors.

- **Participant observation:** as many NGOs are intensively involved in different processes and structures (they participate in consultations with public authorities, meetings, workshops, seminars and trainings on the topics directly or indirectly related to the topics of this guidelines), their own experience (dynamics of the events) and collected materials (e. g. input documents provided to participants, or document produced as outputs of these processes and structures, minutes from discussions, etc.) can be very useful in informing the reports.
- Description of **concrete cases from the ground**, especially to explain failures of policies (e.g., often even well-intended policies fail because planning doesn't fully recognise the conditions of marginalised communities or the mechanisms of exclusion, or implementation misses an important element), or to describe promising practices. Direct quotations – e.g. by Romani people experiencing various forms of discrimination – can be especially strong in pointing out why certain policies need to be improved.
- **Testing.** Where there are recent amendments in the legislation (e.g., combating hate speech), and the implementation of the legislation has not been adequately tested yet (e.g., no or few cases of hate speech has been filed to the relevant authority), the NGOs can test it (e.g., identify a case of hate speech, file it to the relevant authority, and see how the case is investigated and sanctioned, how victims are supported, etc.).
- In exceptional cases where quantitative analysis would be needed and there is a lack of data, collection and analysis of **additional data**. As collection of data is highly demanding, this may be a feasible option mainly for smaller target groups, e.g. for a local case study.

The reports should be **balanced**. This can be ensured by deliberating a diversity of views and by describing both challenges and promising practices.⁵ The findings and conclusions of the reports shall be explicit and critical where justified. At the same time, the tone of the reports should strictly avoid being judgmental or offensive, as that would weaken the findings and conclusions. The reports should have solid evidence (facts, details) and sober language.

Research ethics and protection of personal data

The development of the RCM country reports should follow ethical standards, which are safeguards of credibility of the produced reports and the whole RMC project, as well as serve as protection of the reports' authors and their information sources.

The overall **responsibility for ethical standards in research and reporting, and protection of personal data within the RCM project rests with authors of the RCM country reports**, which are subcontracted by the CEU. The CEU provides them with general guidance⁶ and can provide with specific advice upon request.

Authors of the RCM country reports should respect the principles of integrity, honesty and openness and a commitment to intellectual honesty and personal responsibility. Research should also aim to benefit society and minimise social harm, for example by reproducing or strengthening negative stereotypes.

Authors of the RCM monitoring reports or NGOs participating in their development can find themselves in situation, which could be interpreted as possible **conflict of interest**. This can occur in at least two typical situations:

1. They report on policies, programmes or initiatives that they themselves have developed, or report on authorities they depend on for funding or other support. In such cases they can be accused of being positively biased.
2. They report on authorities with which they are in legal, political or expert dispute, or which rejected their request for funding. In such case they can be accused of being negatively biased.

To prevent such accusations and contesting the credibility of the whole produced report, it is useful that authors or NGOs engaged in developing said reports openly declare and describe (e. g. in footnote) their relation to the authority or policy (positive or negative), which is the subject of reporting, and make sure that their statements are sustained by unbiased evidence (such as statistical or other publicly available data), proper references to third-party resources (e. g. publicly available studies, information from media)

⁵ The reports should avoid declaring "best practices" or "good practices", because most activities have both positive and negative elements.

⁶ For CEU's ethical research policy, please, see: <https://acro.ceu.edu/ethical-research>; for CEU's personal data protection policy, please, see: <https://acro.ceu.edu/personal-data-protection-policy>.

or third-party opinions (unbiased experts). It is always useful to give authorities, with which the authors may be in conflict, possibility to explain their position (and express your different opinion or demonstrate that the authority's claim is false if you have necessary evidence or arguments).

Research involving individuals must be undertaken to gain knowledge. Prior to, during and following the completion of research activities, researchers are expected to consider the ethical implications of their research and any of its consequences for the participants involved. Prior to contacting individuals and finding respondents, authors and country researchers of RCM must consider that respondents should not be exposed to risks that are greater than or additional to those they encounter in their normal lifestyles. In case of the RCM project the harm to participants may arise from possible negative professional or personal consequences for providing information to the RCM reports (such as punishment for sharing internal information/knowledge or providing personal opinions in case of public authorities; or undue stress, loss of dignity, exclusion from access to services, psychological injury or even physical harm in case of target groups of public policies, programmes or services).

Before conducting research involving people (e. g. interviews, participant observation, description of concrete cases from the field concerning specific identifiable persons, particularly involving direct quotations), respondents must be informed that the interaction is part of the research aimed at development of the RCM country reports, understand the nature of the research and consent to providing information. In case where consent is possible only after the researched situation is over (for example: using information obtained in the past; or at events not organised within the RCM project, which however provided information relevant for developing the RCM country report), the researchers should obtain consent of informants before using the acquired information in the RCM country report. Ideally consent should be obtained in writing but where this is not possible oral consent should be obtained and so documented.

Giving consent is not always a one-off event and participants have the right to change their minds and withdraw consent at any time. However, if the withdrawal of consent occurs at the time when it affects the possibility of the finalisation of the research (for instance, shortly before submission of the draft report), the withdrawal should result only in the deletion of all personally identifiable data of the participant (If such identifiable data was previously consented to) in submitted reports and in stored and processed research data. If a researcher doubts whether a person participating in research still consents to participating s/he must clarify this with the person in question.

Authors must be committed to protecting and respecting the privacy of individuals and safeguarding their personal information, particularly personal data, i. e. any information relating to an identified or identifiable natural person – such as name, or other indirect identifiers (for example the professional position, which would enable identifying the person). Personal data revealing racial or ethnic origin, political opinions, religious or philosophical beliefs, or trade-union membership, as well as data concerning health or data concerning a natural person's sex life or sexual orientation are considered **special categories of personal data**, can be collected and used only for legitimate purpose and request explicit written consent for collecting, storing and using such special personal data. The written consent is not necessary if the information concerning the special personal data are quoted from publicly available sources, which are properly referenced in the RCM country reports (e. g. quote from a press article where a person reveals his/her political opinion or ethnic origin).

The collection, storage, disclosure and use of personal data by researchers must comply with all legislation relating to data protection and arrangements must be put in place by researchers to carefully protect the confidentiality of participants and their data. Details that would allow individuals to be identified must not be published or made available to anybody not involved in the research unless explicit consent is given by the individuals concerned. The consent should be ideally written (e. g. by e-mail) and the authors should keep the proof of consent for case of possible disputes.

The RCM country report should guarantee **confidentiality and anonymity** if a participant requests them. Guarantee of anonymity can help the RCM country report authors in accessing important information, for example, about the decision-making of authorities. Even in such cases the authors should properly reference the source of information with respecting the anonymity (e. g. by indicating "representative of X [authority]").

Use of the report

The main **target audience** of the monitoring reports are persons and bodies who can directly or indirectly improve planning and implementation of national Roma integration strategies and the EU framework. They include on the one hand leaders and professionals of public authorities responsible for the development of relevant policies at national and European level, and on the other hand a broader circle of stakeholders

such as civil society actors, academia, media who take part in the process of the development of these policies.

The reports should be **used actively**, e.g. presenting them and especially the recommendations to politicians, leaders and professionals of public authorities, media, etc. This may happen e.g. with a visible launch event with participation of politicians and leaders of public authorities, followed-up on the one hand by bilateral meetings with professionals of public authorities and on the other hand by media coverage. For this reason, development of a brief communication or advocacy strategy is expected, addressing public authorities responsible for the development of relevant policies especially at national level. The strategy should select priorities, specify target audience, develop messages, and identify messengers and opportunities to deliver messages.

DELIVERABLES AND TIMELINE IN THE SECOND YEAR

For each country, deliverables include:

- a **work plan** (including relevance of each question and internal or external capacities for answering relevant questions; template will be provided by CEU);
- a **draft monitoring report**, in English;
- a **final monitoring report**, in English and the national language.

The work plan is expected to be prepared in one month after the workshop in Budapest.

Preparation of the monitoring reports should include the following steps:

| Steps | Date (indicative) |
|---|-------------------|
| Workshop for NGOs at the CEU | 23-25 April 2018 |
| Identifying key issues to be analysed – possible consultation with the RCM team | June 2018 |
| NGOs: submission of the work plan (dates of coalition meetings, data collection, submission of drafts) | June 2018 |
| Launch of on-line discussion on monitoring topics (upon NGOs' request) | June 2018 |
| NGOs: submission of thematic outlines of the reports (identification of specific topics/issues that will be discussed in the monitoring reports) | September 2018 |
| Cluster 3 and 4: submission of the first draft reports | September 2018 |
| Clusters 1 and 2: possible submission of one sample chapter ⁷ | October 2018 |
| Cluster 1 and 2: submission of the first draft report | October 2018 |
| Review by and advice from the RCM to the first drafts from the Cluster 3 and 4 | October 2018 |
| Cluster 3 and 4: submission of the revised reports | November 2018 |
| Review by and advice from the RCM to the first drafts from the Cluster 1 and 2 | November 2018 |
| Cluster 1 and 2: submission of the revised reports | December 2018 |

⁷ We suggest the NGOs to submit one **sample chapter** to receive preliminary feedback from the RCM team. The sample chapter's topic can be either the **housing or the health-care**. Information from the sample chapters will be used **for the meeting of European Roma Platform for Roma Inclusion in October 2018**.

THEMATIC CHAPTERS

In the **second year (2018)**, the monitoring reports should focus the analysis:

- in all countries on **key sectors**: education, employment, health care and housing (the analysis of the sectors should include both the impact of mainstream policies on Roma and targeted policies);
- the Cluster 1 countries have reported on *the impact of mainstream education policy on Roma* in the first year of the RCM; in the RCM second year they will focus on the education policies targeting Roma, but cover also the education-related topics/questions/issues from the first year Guidelines, which have not been covered in the first report (please, review, which questions from the chapter *Impact of mainstream education policy on Roma* you have not reported on);
- in Cluster 1 countries also on comprehensive local case studies of another one or two relevant localities.

For the above fields, the thematic chapters of the guidelines suggest questions to be analysed in the monitoring reports. The questions are categorised as follows:

- **Core questions**: should be answered (unless the NGOs justify that these don't reflect key challenges in the given country, and the CEU accepts the justifications⁸).
- **Optional questions**: NGOs should consider if these reflect key challenges in the given country; if yes, should be answered. The NGOs' consideration should be described and briefly justified in a work plan. CEU may ask for reconsideration.

Reflecting on the specific situation of a country, also further questions can be analysed based on prior discussion between the NGOs, CEU and its partners.

The foreseen **length** of the monitoring reports is

- for **Cluster 1: 32-40 pages**, each chapter around 8-10 pages and each case study should have approximately 5 pages (additional to the overall length of the report),
- for **Cluster 2: 24-32 pages**, each chapter around 6-8 pages,
- for **Cluster 3: 12-16 pages**, each chapter around 3-4 pages,
- for **Cluster 4: 6-8 pages**, each chapter around 1.5-2 pages,

Cover page, table of content, internal cover, introduction, executive summary should be additional to the above specified length. Where needed, more details can be added in an annex.

Where certain fields or issues are analysed adequately in recent, publicly available studies or thematic reports, the monitoring reports can quote the main findings and conclusions of these studies and reports and devote more capacities and space for the analysis of other fields or issues.

⁸ E.g. the specific situation of the UK during the negotiations on Brexit may justify specific questions.

Overview of questions and their relevance per clusters

| Chapter/Question | Cluster 1 | Cluster 2 | Cluster 3 | Cluster 4 |
|---|---|--------------------------|-----------|-----------|
| 1. Employment | | | | |
| 1.1. Is access to the labour market efficiently supported by available employment services? | core | core | core | optional |
| 1.2. How is discrimination against Roma in the labour market and other manifestations of antigypsyism in employment prevented, detected and eliminated? | core | core | core | core |
| 1.3. Where primary labour demand is limited, are there viable alternatives available? | optional | optional | optional | optional |
| 1.4. What has been done to identify and address other specific barriers or disincentives of employment? | optional | optional | optional | optional |
| 2. Housing and essential public services | | | | |
| 2.1. Do Roma have access to basic amenities and is the improvement of the access considered in spatial planning? | core | core | optional | optional |
| 2.2. How do government policies and measures promote access to secure and affordable housing? | core | core | core | optional |
| 2.3. Is the system of housing benefits and social assistance inclusive and effective? | core | core | core | optional |
| 2.4. How do government policies and measures prevent and eliminate various forms of housing discrimination, residential segregation and other manifestations of antigypsyism in housing? | core | core | core | core |
| 2.5. How do government programmes support the improvement of housing conditions and regeneration of deprived neighbourhoods? | optional | optional | optional | optional |
| 3. Impact of health care policies on Roma | | | | |
| 3.1. What has been done to ensure that Roma have equal access to public health care services as non-Roma? | core | core | optional | optional |
| 3.2. What has been done to eliminate discrimination against Roma or manifestations of antigypsyism in health care? | core | core | core | core |
| 3.3. What has been done to address specific needs of specific groups with increased risks of vulnerability? | optional | optional | optional | optional |
| 4. Education | | | | |
| 4.1. What has been done to improve access to and quality of early childhood education and care for Roma children? | core | core | optional | optional |
| 4.2. What has been done to improve access to and quality of primary and secondary school for Roma children, until the end of compulsory school age? | core | core | core | core |
| 4.3. What has been done to increase the share of Roma youngsters completing vocational training in professions with high labour market demand, upper secondary school and higher education? | core | core | core | optional |
| 4.4. What has been done to prevent and eliminate various forms of discrimination and antigypsyism in education; in particular to tackle the segregation in education? | core | core | core | core |
| 5. Case studies | comprehensive, total 3-4 (Y1+Y2) | thematic, upon agreement | -- | -- |

1. Employment

The EU Framework requests the member states to cut the employment gap between Roma and the rest of the population; with this aim, the member states should grant Roma people full access in a non-discriminatory way to vocational training, to the job market and to self-employment tools and initiatives. In the public sector, due attention should be given to employment of qualified Roma civil servants. Public Employment Services can reach out to the Roma by providing personalised services and mediation. The 2013 Council Recommendations calls the member states to monitor and fight discrimination, tackle problems on both the supply and the demand sides of the labour market and tackle the gender gap by explicit measures targeting Roma women. Additionally, unemployment of young people is a serious problem.

The labour market integration of Roma requires coordinated action in several policy areas such as local development, education/training, active employment measures and economic policy.

Demand side measures may include legal protection against discrimination, hiring quotas for public and/or private employers, targeted wage subsidies or awareness raising among employers (EEPO 2014). Supply side actions may include measures to improve the accessibility and quality of public education for Roma children and youth, re-training, targeted outreach activities and employment services, or tightening the job search conditions of accessing particular welfare benefits. In most EU member states, the labour market integration of Roma follows the mainstream procedure, i.e. it is the responsibility of the public employment service (PES) in the case of the insured unemployment and may be delegated to municipalities or jointly managed local agencies in the case of the long-term unemployed (European Commission 2014).

This chapter covers three main areas: (1) employment services, (2) discrimination and other manifestations of antigypsyism at the workplace and (3) remedial measures to overcome limitations of the primary labour market targeting both the potential employees (mobility, self-employment, employment in social economy, public works) and employers.

Though employment is closely linked to education, the issues related to the low skill level of the Roma (which is a major barrier to their labour market participation in most countries) are discussed in the education chapter. However, re-training as part of the active employment measures can be discussed in this chapter.

Initiatives targeting the Roma are often small scale and not systematically linked to mainstream government policies, so that their overall impact on the Roma population is negligible. Accordingly, it is important that in your report you clearly differentiate ineffective (or lacking) efforts, programmes that are highly effective but too small to make a difference, and effective mainstream programmes that are accessible to the Roma.

General sources and potentially relevant data:

- The labour market chapter of the [FRA report of 2016](#)
- The World Bank's webpages on [Roma](#), [poverty](#) and [open data](#).
- OECD's [country level economic surveys](#)
- The national versions of European Union Statistics on Income and Living Conditions ([EU SILC](#)) and EU labour force survey ([LFS](#)) may include information on ethnicity
- Census data and where available, micro-census may also record Roma ethnicity

At the beginning of the chapter, please, assess, what are the most critical issues relating the employment, and how have they developed throughout the past years, for example past decade? Please use the box as a checklist for further guidance. If some of the issues are scored as critical, please investigate whether and how those problems are being addressed and describe them in later parts this chapter. *(You do not have to tick the box, but rather provide few word narrative describing the situation. For example, you can discuss how the situation even worsened (provide evidence), or in case of improvement, specify the scope of the change: only very few improvements, improvements affecting a considerable share but still a minority of Roma, improvements affected the majority of Roma, more improvements happened than for the total population, etc.*

| Problems and conditions | Critical situation (large majority is affected by the problem) | Average situation (a minority is affected, not more than in the general population) | Optimal situation (no improvement needed) | Improvements happened in last 10 years | No information available | Not relevant |
|---|---|--|--|---|---------------------------------|---------------------|
| Low access to or low effectiveness of public employment services | | | | | | |
| Youth not in employment, education or training | | | | | | |
| Low access to (re-) training, lifelong learning and skills development | | | | | | |
| Discrimination in the labour market by employers | | | | | | |
| Risk for Roma women and girls from disadvantaged areas of being subjected to trafficking and forced prostitution | | | | | | |
| Primary labour market opportunities substituted by public works | | | | | | |
| Barriers and disincentives of employment (such as indebtedness, low income from work compared to social income) | | | | | | |

1.1. Is access to the labour market efficiently supported by available employment services?

Relevance:

- **Core** question for **C1, C2 and C3** countries.
- Optional for C4 countries.

Brief context:

If effective and accessible, employment services can do a lot to increase the labour market integration of vulnerable groups by supporting jobseekers in upgrading their skills and job search strategies, and providing incentives to employers to hire vulnerable workers. In most countries, public employment services (PES) are the primary provider of such services for unemployment benefit recipients. In many countries, regional and/or local governments are responsible for activating long term unemployed or inactive people who receive a means-tested social benefit.

Employment services can be provided by other agents as well, such as trade unions, for-profit providers and NGOs. Such providers may operate independently or as subcontractors or partners of PES and municipalities. In your report, please focus primarily on publicly financed services, i.e. those provided or subcontracted by the PES and municipalities, where relevant. Please mention independent non-state initiatives if especially effective and have the potential to be scaled up or mainstreamed.

The effectiveness of PES varies greatly across countries and even where employment services are generally high quality, they may fail to provide tailor made services to multiply disadvantaged subgroups. Access to effective services may be limited e.g. by lack of resources, lack of awareness, or creaming (i.e. when the employment counsellor favours jobseekers with better labour market chances rather than those most in need). Lack of motivation on the part of jobseekers may also be an issue. Municipal services are often less developed or may be uneven across the country.

Considerations:

- 1.1.1. Do the available employment services actively reach out to non-working Roma (and especially Roma youth) to encourage them to use the employment services? Are means-tested social benefits conditional on cooperating with the employment services or municipalities?
 - Access is especially crucial in the case of Roma youth (as the lack of support may lead to long lasting negative effects) and Roma women.
 - In case of different measures, please, indicate by what type of actor are provided (public, non-state), try to identify their source of funding (ESF, national, regional, local budget) as well as whether any evaluations of their effectiveness are performed and available.
- 1.1.2. Are there specific measures to support school to work transitions for disadvantaged groups/Roma (e.g. career guidance, youth mentors or internship programmes)?
- 1.1.3. Are there effective programmes for (re-)training and gaining work experience for disadvantaged groups? Do these programmes target/reach Roma? Are there mechanisms to ensure that the (re-)training reflects both the demand on the labour market and the needs of trainees from disadvantaged groups (e.g. by combining professional training with development of relevant skills)? Are there incentives for the trainers that trainees successfully complete the training and find employment in the labour market?
- 1.1.4. Are programmes for (re-)training and gaining work experience systematically combined with other tools such as counselling or support for geographical mobility as part of personalised service?
- 1.1.5. Are there effective programmes (e.g. transitional jobs that combine paid work with upskilling and mentoring in a sheltered environment) for those who cannot be placed in the primary labour market?
- 1.1.6. Are the available employment services able to provide individualised services to Roma jobseekers?
- 1.1.7. Do the employment services cooperate with public and non-state social service providers or integrate social services (such as social counselling/accompaniment) to be able to tackle the social problems of Roma jobseekers?
- 1.1.8. Are there effective programmes to support geographical mobility, including longer daily or weekly commuting, or moving from a disadvantaged area with lower employment rate to an area with higher employment rate?
- 1.1.9. Are there measures to analyse and address specific barriers for Roma women to accessing employment (e.g. lack of child and elder care)?
- 1.1.10. Have specific sectors with high share of informal employment been identified? Are there incentives and support for employers and employees to formalise employment in these sectors?

Sources of evidence:

- Relevant statistics and public information from past years on programme participation. For example, [Eurostat](#) provides aggregate statistics by country (Imp_particip, Imp_expend).
- Recent studies, academic publications. The [EU PES Knowledge Centre](#) is worth checking.
- Interviews with relevant line ministry, PES headquarters, municipal associations, major non-state providers
- Concrete cases from the experience of NGOs.

1.2. How is discrimination against Roma in the labour market and other manifestations of antigypsyism in employment prevented, detected and eliminated?

Relevance:

- **Core** question for **all** countries.

Brief context:

Despite the generally endorsed legal measures, employer discrimination against the Roma tends to be high in all countries. However, relatively little is known about various anti-discriminatory measures; moreover, there are other manifestations of antigypsyism in employment. One of them can be hate-speech towards Roma at the workplace. The existing information is often sporadic and focuses on single cases, which may or may not be representative of the overall situation. Thus, it is especially useful if you can cite data on the impact and size of the relevant initiatives.

Your answers to this question may overlap with the discrimination and/or antigypsyism chapter section of the previous report: if that is the case, please do not repeat your findings but refer to the relevant parts and focus here on what is new or additional to your first report.

Considerations:

- 1.2.1. Are there regular analyses on the frequency of discrimination against Roma in the labour market (e.g. by asking Roma people about their experience, or by discrimination testing)? Please, try to describe typical patterns of discrimination in access to employment (e.g. is discrimination explicit in job advertisements, is it based on "typical Roma" names or address, does it occur in access to the job or at the workplace, such as mobbing/bossing, lower wage, delayed promotion).
- 1.2.2. Are there any initiatives to raise public awareness of discrimination or antigypsyism in the workplace? (Please provide data especially if they are led or supported by the public authorities; assessment of their impact is particularly important.)
- 1.2.3. How many cases of discrimination against Roma in the labour market have been reported, investigated or sanctioned, e.g. by the equality body or by court? (Please, provide details about the cases brought to the public authorities, even if the outcome did not include sanctions against perpetrator, because of possible (anti-Roma) biased decision of the public authority in charge.) Are advocacy NGOs, trade unions or other non-State entities actively supporting such investigations?
- 1.2.4. Are there effective public model programmes, such as opening-up the public sector at national and subnational level as potential employer of the Roma, or campaigns to promote diversity in staff?
- 1.2.5. Are there private employers with positive diversity policies affecting Roma? Please describe.
- 1.2.6. Are there employment services, that support employers in hiring Roma by sensitising HR staff, co-workers and offer mentoring for newly hired Roma? Do available employment services actively encourage employers to hire Roma on job creation or wage subsidy schemes?
- 1.2.7. Are there measures to incentivise employers to employ disadvantaged/Roma (e.g. social clauses in public procurement, recruitment subsidies, supported job trial or apprenticeship schemes)? If such incentives exist, please, try to critically assess whether they have real impact on improving employment of Roma or can be rather considered as tokenism (this can happen on the level of employers, when they employ Roma only formally to have access to the benefit; but also, on the level of the public policy, for example, when public authorities design conditions of companies' access to EU funds).

Sources of evidence:

- Relevant statistics and public information from past years, e.g. the [FRA report of 2017](#).
- Recent studies, academic publications, reports by Ombudspersons, similar authorities, advocacy organisations.
- Reports and evaluations of projects, programmes or other initiatives.
- Interviews with relevant government officials, advocacy organisations.

1.3. *Where primary labour demand is limited, are there viable alternatives available?*

Relevance:

- Optional question for all countries.

Brief context:

In several countries a large share of the Roma community lives in segregated settlements and/or villages in disadvantaged areas of the country, where employment opportunities are scarce. Often the only public measure available for them is community work organised by the PES or the local government. In some countries such programmes have been expanded on the political motivation to please middle-class voters (reassuring them that social benefits are only available to the deserving poor) and/or shift the burden of dealing with the Roma problem to the local level. However, existing research shows that such programmes are likely to lock participants in a poverty trap, unless they are short term and combined with training and employment services that support return to the primary labour market. Also, it is important to keep in mind that public works may have viable alternatives, at least for young and/or mobile jobseekers.

Considerations:

- 1.3.1. Are such programmes targeted to the localities where they are really needed? Are they effectively targeted to hard-to-employ jobseekers? Are there effective measures to ensure that Roma youth do not end up in such programmes but instead get effective support to continue education or get a job in the primary labour market?
- 1.3.2. Are self-employment initiatives effectively reducing the risks of running an own business (e.g. by providing consultancy services, providing access to loan, sharing financial risks)?
- 1.3.3. Do public works and social economy programmes and initiatives effectively help their employees entering the primary labour market, e.g. by development of skills, incentives for exit to the primary labour market?
- 1.3.4. Are there programmes to address the particular risk for Roma women and girls from disadvantaged areas of being subjected to trafficking and forced prostitution?

Sources of evidence:

- Relevant statistics and public information from past years.
- Recent studies, academic publications.
- Interviews with relevant officials
- Concrete cases from the experience of NGOs.

1.4. What has been done to identify and address other specific barriers or disincentives of employment?

Relevance:

- Optional question for all countries.

Brief context:

There may be further barriers to labour market integration that are specific to your country. In this section you may describe government efforts to explore such barriers and also any measures that are intended to tackle these.

Considerations:

- 1.4.1. Are there regular analyses on specific barriers or disincentives of employment (e.g. by asking Roma people about their experience)? E.g. can indebtedness – and that a part of the salary can be deducted for repaying the debt – be a barrier or disincentive? If yes, are there effective measures to eliminate this barrier or disincentive?
- 1.4.2. How is the transition from social benefits to employment opportunities facilitated?

Sources of evidence:

- Strategic documents and reports
- Recent studies, academic publications.
- Interviews with relevant politicians
- NGOs or social partners involved in consultations with the government

Application of gender aspects in analysis of employment policy

Situation analysis

The relevance of gender aspects is maybe the most obvious/visible in the field of employment (among the main policy fields). Thus, quite a lot of gender disaggregated data are available, both on the level of the EU and on the level of the member states, regarding the related issues: gender employment gap, gender pay gap, the labour market situation of mothers and fathers of young children etc. When gender disaggregated data (or at least estimations on gender proportions) are available regarding the employment situation of the Roma population, it is important to compare these data with the respective data regarding the general/mainstream population; to identify the differences (if there are any) and to consider the possible reasons behind the numbers.

As for the labour market disadvantages of Roma women, ethnicity (and ethnic discrimination) may be just one of the factors that define their situation – given that women in general may face difficulties in the field of employment (in a given country), and the shortcomings of the infrastructure, e.g. the lack of available/accessible day care services for children, may also severely limit women's opportunities for paid work.

Policy analysis

a. Concept of policies

Do the relevant programmes apply essentialist approaches to gender – e.g. by orienting Roma women to “feminine” occupations (in the field of child care services, elderly care, nursing etc.), while orienting Roma men to “manly” jobs (to be drivers, mechanics etc.)?

How do the relevant employment programmes conceptualise the role of Roma women? – E.g. are Roma women perceived as unskilled and unexperienced workforce, available to perform any menial jobs? – Or, are Roma women perceived as possible “bridges” between Roma communities and the mainstream society (or institutions)?

The labour market challenges of Roma women may be addressed within the framework of mainstream national employment programmes (general programmes or programmes aimed at improving women's employment); the question is whether these programmes are accessible for Roma (or disadvantaged) women or not.

b. Implementation of policies

In cases of training or employment programmes, are there any child care services provided for those participants (typically women) who have care responsibilities, but do not have access to crèche/kindergarten or other day care solutions?

2. Housing and essential public services

The EU Framework requests the member states to close the gap between the share of Roma with access to housing and to public utilities and that of the rest of the population. Roma's poor housing conditions include an inadequate access to public utilities such as water, electricity or gas and non-sedentary Roma often have difficulty finding sites with access to water; This has a negative impact on their health and overall integration in society. The EU Framework calls the member states to promote non-discriminatory access to housing, including social housing, and provide non-sedentary Roma with suitable halting sites. Moreover, the 2013 Council Recommendations emphasised on a need of tackling problems of forced evictions of Roma in several member states and of residential segregation and ghettoisation. As the investments into the housing can be supported by the EU funding, the EC issued a [Guidance for Member States on the use of European Structural and Investment Funds in tackling educational and spatial segregation](#), which clearly says that the member states cannot use the EU funds for initiatives, which would maintain or reproduce residential segregation.

This chapter covers a series of questions on housing and related public utilities, focusing (1) on the extent to how they are accessible for Roma communities, (2) on public policies supporting accessing housing, (3) on social benefits that help maintain housing, (4) policies and actions that address discrimination and other forms of antigypsyism, and (5) on programmes and policies that aim improving housing conditions foremost in segregated neighbourhoods.

While discussing these topics, please also describe if there is a lack of such policies and actions, or, on the contrary, there are actions in place which worsen the situation of Roma communities. For example please describe in subchapter (1) difficulties that prevent Roma communities from accessing adequate housing conditions, in subchapter (2) existence of public policies that specifically hinder access to housing, in (3) regulations and allocation techniques of social benefits that put Roma communities in a disadvantaged position, in subchapter (4) policies that do not address or rather encourage discrimination or other forms of antigypsyism, and last (5) how for example segregated neighbourhoods are put into a worse position.

At the same time, please stay balanced and collect evidence for local/regional/national or other policies and initiatives that tackle the above housing related problems. For example, in subchapter (1) discuss policies and programmes that have proved to be successful in developing access to basic amenities and infrastructure, in (2), focus on proactive local initiatives to help access social housing, in (3) summarise programmes and regulations that have improved access to social or housing benefits for needy Roma households, in (4) existing anti-discrimination actions and work of state institutions or NGOs on addressing antigypsyism, and in (5) describe any programmes that have targeted segregated neighbourhoods which directly or indirectly improve the situation, like legalisation, upgrading and desegregation in housing.

In some countries, a large share of housing inhabited by Roma is of lower quality, and at the same time it is also concentrated in distinct neighbourhoods. In your reports, please make sure to use the term "segregation" for a spatial separation of Roma communities from non-Roma communities. For pointing to other social differences without a spatial concentration and separation, like income inequalities and less access to job markets, lower levels of education, etc. please use the term "marginalisation". In countries with non-sedentary or traveller communities, access to permanent halting sites should also specifically be addressed while discussing local regulatory frameworks.

In many countries, housing policy, social housing policy and social benefits relating to housing are decentralised, that is, most decisions are made at the local community/municipality level. Therefore, if you refer to single/local cases, please name the specific cases, and do not generalise for the whole country. Please also make sure to make a reference to evidence and data and all information resources you use, and be as explicit as possible.

At the beginning of the chapter, please, assess, what are the most critical issues relating housing conditions, and how have they developed throughout the past years, for example past decade? Please use the box as a checklist for further guidance. If some of the issues are scored as critical, please investigate whether and how those problems are being addressed and describe them in later parts this chapter. *(You do not have to tick the box, but rather provide few word narrative describing the situation. For example, you can discuss how the situation even worsened (provide evidence), or in case of improvement, specify the scope of the change: only very few improvements, improvements affecting a considerable share but still a minority of Roma, improvements affected the majority of Roma, more improvements happened than for the total population, etc. Challenges of non-sedentary Roma or traveller communities, access to permanent halting sites should also specifically be addressed.)*

| Problems and conditions | Critical situation (large majority is affected by the problem) | Average situation (a minority is affected, not more than in the general population) | Optimal situation (no improvement needed) | Improvements happened in last 10 years | No information available | Not relevant |
|--|--|--|--|---|--------------------------|--------------|
| Physical security of housing (no ruined or slum housing) | | | | | | |
| Access to drinking water | | | | | | |
| Access to sanitation (public or private solutions) | | | | | | |
| Access to garbage collection (public collection) | | | | | | |
| Secure access to electricity | | | | | | |
| Restricted heating (families unable to heat all rooms/all times when necessary) | | | | | | |
| Security of tenure (legal titles are clear and secure) | | | | | | |
| Access to social housing | | | | | | |
| Overcrowding (available space/rooms for families) | | | | | | |
| Indebtedness (outstanding payments of utilities or housing loans) at levels which may cause eviction | | | | | | |
| Housing in segregated neighbourhoods | | | | | | |
| Housing in informal or illegal neighbourhoods | | | | | | |
| Access to housing loans | | | | | | |
| Other country specific issues not listed above (please extend the table with new rows) | | | | | | |

2.1. Do Roma have access to basic amenities and is the improvement of the access considered in spatial planning?

Relevance:

- **Core** question for **C1 and C2** countries.
- Optional for other countries

Brief context:

In many countries, the housing conditions of Roma, especially in case of segregated Roma communities are worse than that of the general population. In this subchapter, please describe the main gaps based on data and also highlight those legal and policy issues that maintain or even deepen this gap. In Y1, the chapter Anti-Discrimination included an optional question "Access to clean water and sanitation". If you

delivered a description in that chapter, please either quote it here, or make a reference to the findings you have already shared.

Considerations:

- 2.1.1. Are the spatial planning contexts and public policy contexts beneficial for providing access to public amenities like water, sanitation, electricity, gas, communication, garbage collection etc. for all local inhabitants? For example, is there a legal obligation for the local level to serve all parts of the settlements, also in outskirts or informal neighbourhoods? What are the incentives or disincentives to serve poor neighbourhoods with such services?
- 2.1.2. Please discuss issues faced by non-sedentary Roma or Traveller communities, if relevant for your country – for example access to permanent halting sites if relevant.

Sources of evidence:

- Relevant statistics and public information from past years.
- Recent studies, academic publications. Please use as a reference these studies, among others:
 - Perić, Tatjana. (2012). [The Housing Situation of Roma Communities: Regional Roma Survey 2011](#). Roma Inclusion Working Papers. Bratislava: United Nations Development Programme.
 - FRA. (2017). Second European Union Minorities and Discrimination Survey (EU-MIDIS II) [Roma – Selected findings](#). Also available in other languages
- Interviews with relevant decision-makers (officers or politicians, and their consultants).
- For some basic information on national Roma inclusion strategies and on issues that should be tackled by the member states you may visit: https://ec.europa.eu/info/strategy/justice-and-fundamental-rights/discrimination/roma-and-eu/roma-integration-eu-country_en
- Concrete cases from the experience of NGOs.
- Some projects have been described in World Bank. (2014). [Handbook for improving the living conditions of Roma \(English\)](#). Washington, DC: World Bank Group.

2.2. *How do government policies and measures promote access to secure and affordable housing?*

Relevance:

- **Core** question for **C1, C2 and C3** countries.
- Optional for C4 countries.

Brief context:

In many countries, public housing policies have been specifically developed to address the housing needs of poor households, and also of poor Roma communities. Some of these policies aim at facilitating access to housing, that is, offering access to social housing for the neediest ones, making sure that rent levels are affordable for poor families. Other policies ground on building new social housing for these groups, providing for affordable construction sites, or help municipalities and NGOs create programmes or develop funding schemes for rental housing solutions, etc. Also, some countries apply rules for new investments that serve social mix, through which low income families can move into integrated / mixed neighbourhoods. In this subchapter, please describe the policies and measures that have proved to be effective in promoting access to legally secure (transparent contractual relations) and affordable rental and private ownership housing specifically for and non-specifically but actually also for Roma communities. Please also discuss policies and measures addressing access to halting sites in the case of non-sedentary Roma and Traveller communities if relevant.

In this sub-chapter, please review which policies are available in your country, and to what extent they effectively address disadvantaged Roma families' needs.

Considerations:

- 2.2.1. Are there many disadvantaged Roma families renting municipal flats? Is there national legislation to ensure that tenants in municipal flats have an adequate level of security? Is there national legislation or funding to ensure that tenants in municipal flats must pay a realistic fee? Have there been effective measures at central or local level to increase the supply of municipal flats for disadvantaged families? Do Roma have equal access to municipal flats, including social housing, as non-Roma?

- 2.2.2. What has been done to promote ethnic mix in social housing? Is social housing available for Roma provided in ethnically and socially mixed neighbourhoods? Are there any programmes helping Roma to integrate in the mixed neighbourhoods and prevent conflicts?

Sources of evidence:

- Relevant statistics and public information from past years.
- Recent studies, academic publications.
 - Perić, Tatjana. (2012). [The Housing Situation of Roma Communities: Regional Roma Survey 2011](#). Roma Inclusion Working Papers. Bratislava: United Nations Development Programme.
 - FRA. (2017). Second European Union Minorities and Discrimination Survey (EU-MIDIS II) [Roma – Selected findings](#). Also available in other languages.
- Interviews with relevant decision-makers (officers or politicians, and their consultants).
- Concrete cases from the experience of municipalities and NGOs.
- Some projects have been described in World Bank. (2014). [Handbook for improving the living conditions of Roma \(English\)](#). Washington, DC: World Bank Group.

2.3. *Is the system of housing benefits and social assistance inclusive and effective?*

Relevance:

- **Core** question for **C1, C2 and C3** countries.
- Optional for C4 countries.

Brief context:

In many countries, housing benefits and social assistance which should help people pay their housing bills and make sure that they can live in adequate housing. Nevertheless, many times they are not available for every poor household, and many times for disadvantaged Roma families.

In this sub-chapter, please describe the scale of the problem, by focusing on what benefits are potentially available at national/regional/local to help cover housing costs or housing debts to avoid e.g. evictions, and how these work in practice. Please also describe to what extent these benefits are designed in a way that they contain a disincentive for families to look for paid and formal jobs (e.g. families would not look for a job because the benefits are not available above a certain income ceiling). Please describe if there have been any programmes and initiatives to tackle issues of insufficient benefit design and related legislation. If possible, describe whether also the needy households have access to these benefits (vertical effectiveness), and whether and why any sub-groups among the needy families, for example Roma households living in informal housing, are excluded from the programmes (horizontal effectiveness).

Considerations:

- 2.3.1. Are housing benefit and social assistance programmes accessible for all disadvantaged families, or are there conditions that exclude disadvantaged Roma families? Please describe some “typical” situations when a Roma family may not get a benefit whereas a non-Roma, similarly needy family would get it (e.g. because of the tenancy status, location of living, etc.).
- 2.3.2. Is the amount of housing benefits and social assistance enough for avoiding extreme poverty?
- 2.3.3. Do housing benefits and social assistance help breaking the vicious circle: people and families without financial reserves must search for cheap housing; they often find cheap housing only in areas with lower labour market demand; they lose their chance to generate financial reserves? E.g. are there effective measures to increase the supply of low cost rental flats or workers’ rooms specifically in regions with higher labour market demand? Do housing benefits help mobility towards regions with higher labour market demand, or do they push beneficiaries towards disadvantaged regions?
- 2.3.4. Have there been effective measures at central or local level to provide financial assistance and social work for families struggling with indebtedness?
- 2.3.5. Are there any initiatives to address discriminatory practices against Roma women who live in poverty and consequently in fear of having their children forcibly taken into public custody?

Sources of evidence:

- Relevant statistics and public information from past years.
- Interviews with relevant decision-makers (officers or politicians, and their consultants).
- Concrete cases from the experience of municipalities (social workers, officials working with social benefit claimants) and NGOs.

2.4. *How do government policies and measures prevent and eliminate various forms of housing discrimination, residential segregation and other manifestations of anti-gypsyism in housing?*

Relevance:

- **Core** question for **all** countries.

Brief context:

In some countries, governments have invested efforts to understand the scale of housing discrimination and segregation. Some have taken effective action to prevent and eliminate housing discrimination, like making sure that Roma families do not have to move to segregated areas but are encouraged to choose to live in social housing and access housing in integrated neighbourhoods. Some other countries have focused more on legalising informal settlements to pave the way to eliminate segregated neighbourhoods, and to enable upgrading dilapidated housing for Roma and non-Roma families. Other countries have focused on ensuring safeguards that grant equal access to private rental or social housing for all families irrespective of their nationality or ethnicity. In the case of non-sedentary Roma and Traveller communities, actions ensuring access to decent services and adequate halting sites have paved the way for more effective inclusion.

In many cases, marginalised populations, particularly Roma, face environmental discrimination (or violence): they live in environmentally hazardous areas – in close proximity of factories, railways, former mines and other sources of pollution (including water, air and noise pollution), hazardous waste or toxins and consequences on their health are strong; or they live in areas of high risk of accidents (highways, landslips, floods). But public authorities do not use available means to prevent such dangers and risks, by – ideally – relocating Roma to safer areas.

In this sub-chapter, please summarise the situation in your country based on available evidence (some of which you may have already described for the Y1 report on discrimination). Please also describe relevant actions taken to tackle the situation, and the effectiveness of guarantees that are potentially available based on the legal regulations in your country (for example sanctions for discriminative actions). Actual upgrading actions should be discussed in the next sub-chapter.

Considerations:

- 2.4.1. Is there a national map or database of segregated neighbourhoods with concentration of Roma, including segregated neighbourhoods grown as a direct or indirect result of exclusion or camps built by public authorities? Is there effective national legislation, policy and funding to eliminate residential segregation, starting with its worst forms? Are there any programmes supporting inhabitants of segregated Roma settlements/neighbourhoods to move out? Are there safeguards against concentrating municipal flats, especially social housing, in deprived neighbourhoods? Could you describe 1 or 2 good examples of local policies and measures eliminating residential segregation? Are there effective mechanisms to block local plans for policies and measures increasing residential segregation?
- 2.4.2. Are there longstanding informal settlements with concentration of Roma? Have there been effective measures at central or local level to legalise such informal settlements?
- 2.4.3. Are there regular analyses on the frequency of discrimination against Roma in the rental housing market (e.g. by asking Roma people about their experience, or by discrimination testing)? How many cases of discrimination against Roma in the rental housing market have been reported, investigated and sanctioned, e.g. by the equality body or by court?
- 2.4.4. Have there been effective measures to remove or prevent erection of walls around Roma settlements and anti-gypsyist mobilisations at neighbourhood level?
- 2.4.5. Are there initiatives to environmental discrimination (violence), such as relocate camps or communities placed in environmentally hazardous areas (proximity of sources of pollution or in

areas with high risk of accidents) or to decrease negative effects or risks? Are there any governmental initiatives to prevent such environmental discrimination?

- 2.4.6. What has been done to prevent forced evictions, particularly concerning the most vulnerable groups such as families with children? If the forced evictions happens, is substitute accommodation provided?

Sources of evidence:

- Relevant statistics/public information and legal documents from past years.
- Interviews with relevant decision-makers (officers or politicians, and their consultants).
- Concrete cases from the experience of municipalities (social workers) and NGOs.
- FRA. (2017). Second European Union Minorities and Discrimination Survey (EU-MIDIS II) [Roma – Selected findings](#). Also available in other languages
- Some projects have been described in World Bank. (2014). [Handbook for improving the living conditions of Roma \(English\)](#). Washington, DC: World Bank Group.

2.5. *How do government programmes support the improvement of housing conditions and regeneration of deprived neighbourhoods?*

Relevance:

- Optional question for all countries.

Brief context:

In some countries, governments, local municipalities and NGOs have launched actions to effectively reduce and eliminate segregated neighbourhoods, and in parallel to start upgrading dilapidated housing for poor Roma and non-Roma families irrespective of their location. In this sub-chapter, please describe the situation in your country based on available information of such interventions. Please specify which groups have access or do not have access to such upgrading programmes, and whether some groups may end up in worse situation in terms of discrimination and segregation caused by such actions (e.g. they are paid off with minor sums so that they move out from their dwellings, but can find housing only in more remote/segregated areas for this money). Please also describe how such programmes are designed based on two typical examples.

Considerations:

- 2.5.1. Are largest national programmes for improvement of housing conditions accessible for disadvantaged families, or are there specific conditions (such as strict conditions for significant income from employment) that exclude many disadvantaged families, including disadvantaged Roma families?
- 2.5.2. Are there targeted national or local programmes for improvement of housing conditions, with a focus on improvement of poorest conditions (e.g. to have tap water in the flats, to have safe heating, etc.)? How effective are these programmes?
- 2.5.3. Are there targeted national or local programmes for regeneration of deprived neighbourhoods with concentration of Roma (e.g. by decreasing density, developing infrastructure and services, upgrading public spaces, etc.)? How effective are these programmes? Do they include guarantees to reduce segregation? How?
- 2.5.4. Are these programmes planned and carried out in an integrated manner, that is they are implemented together with employment, training education, social and health programmes?

Sources of evidence:

- Interviews with relevant decision-makers (officers or politicians, and their consultants).
- Concrete cases from the experience of municipalities (social workers) and NGOs.
- Some projects have been described in World Bank. (2014). [Handbook for improving the living conditions of Roma \(English\)](#). Washington, DC: World Bank Group.

*Application of gender aspects in analysis of the housing policy***Situation analysis**

Housing may seem to be a "gender-neutral" policy field. However, gender considerations may be really relevant on the level of situation analysis - for example because poor housing conditions and the lack of adequate infrastructure may have specific negative effects on the lives and opportunities of women/girls, and may put extra burdens on women/girls, given their traditional roles in the family and in the household.

Policy analysisa. Concept of policies

In typical cases, the situation needs to be improved anyway - because of the common interests of the affected families/communities (not to mention the broader society).

Thus, typically, when it comes to address poor housing conditions, usually there is no need for programmes that are targeting women as a special group.

Under specific circumstances, certain groups of women may need, however, special housing solutions/support: e.g. victims of domestic violence (most of them women, with or without children) and victims of sexual exploitation trafficking (most of them girls/women, sometimes with children). But these situations should be addressed rather by national (mainstream) victim support strategies, and not by national Roma inclusion strategies. The question is whether these services, if there are any, are accessible for Roma women or not.

b. Implementation of policies

Gender sensitivity is essential during the implementation of housing programmes. A few examples: Whether those programmes, where the family is supposed to participate in the (re)construction of their home, are accessible for single mothers with child care responsibilities or not? And what about women with special health conditions (e.g. pregnant women), given the hazards of certain construction tasks?

3. Impact of health care policies on Roma

The EU Framework calls member states to reduce the gap in the health status between the Roma and the rest of the population, which manifests in shorter life expectancy at birth and higher infant mortality among Roma. This difference is linked to their poor living situations, lack of targeted information campaign, low use of prevention services (including vaccination), limited access to quality healthcare (due also to discrimination) and exposure to higher health risks. The EU Framework therefore calls to provide access to quality healthcare especially for children and women as well as preventive care and social services at a similar level and under the same conditions to the Roma as to the rest of the population and the 2013 Council Recommendations to improve the health insurance coverage, improving access to high-quality services, including free vaccination and medical check-ups for Roma children and their families. The Council Recommendations also identify as challenges the mental and physical health problems, teenage pregnancies and need for more Roma professionals.

Health is largely influenced by factors that are not within the sphere of the health sector. The social determinants of health have a great effect on health outcomes. Membership of the Roma ethnicity can have direct (e.g. discrimination in access or even diseases genetically more prevalent among Roma groups), as well as indirect (by way of social determinants) effects on health outcomes. The two, health and policy experts agree (despite the patchiness of hard data), add up to produce, in most EU countries, much worse subjective and objective health outcomes among the Roma than among the majority population.

A comprehensive set of considerations when analysing member states' Roma integration strategies as regards health systems has been proposed by the WHO in a paper which also includes a valuable selection of recent papers on Roma health.⁹

The questions addressed in this part need not be restricted to service delivery (e.g. access to hospitals or the behaviour of GPs), but could concern the workings of the whole health system, defined in the [Tallinn Charter](#) as "the ensemble of all public and private [i. e. non-state] organisations, institutions and resources mandated to improve, maintain or restore health. Health systems encompass both personal and population services, as well as activities to influence the policies and actions of other sectors to address the social, environmental and economic determinants of health." So, e.g. if public health monitoring bodies do not invite Roma NGOs or if emergency contraception is hard to access that should also be included here.

The following is an introductory list of useful supranational resources on Roma Health in Europe:

- WHO Europe's [Roma Health agenda](#) is a convenient starting point for quality Roma health policy related information; their [Social Participation Toolkit](#) lists ways in which Roma groups could participate at different points in health policy – reading it might help you identify what it is that you might be left out of. Their up-to-date [list of academic publications on the topic](#), contains peer-reviewed public health information that might be relevant to your special sub-topics or your country, too.
- [Health and the Roma Community / Analysis of the Situation in Europe](#) (2009), contains by now a bit dated but more in-depth information about the seven member states that participated in the project.
- The [Roma Health Network's database](#) is another great source of scholarly articles and research papers on different aspects of Roma health.
- Finally, the webpage of the Roma Health and Early Childhood Development Campaign of the [European Public Health Alliance](#) is full of digestible information also directly usable for advocacy.

At the beginning of the chapter, please, assess, what are the most critical issues relating health care service provisions, and how have they developed throughout the past years, for example past decade? Please use the box as a checklist for further guidance. If some of the issues are scored as critical, please investigate whether and how those problems are being addressed and describe them in later parts this chapter. *(You do not have to tick the box, but rather provide few word narrative describing the situation. For example, you can discuss how the situation even worsened (provide evidence), or in case of improvement, specify the scope of the change: only very few improvements, improvements affecting a considerable share but still a minority of Roma, improvements affected the majority of Roma, more improvements happened than for the total population, etc.*

⁹ Potential Criteria for the review of the health component of the National Roma Integration Strategies, WHO, 2011, http://www.euro.who.int/__data/assets/pdf_file/0010/169048/Potential-Criteria-for-the-Review-of-the-HEALTH-COMPONENT-of-the-National-Roma-Integration-Strategies.pdf?ua=1

| Problems and conditions | Critical situation (large majority is affected by the problem) | Average situation (a minority is affected, not more than in the general population) | Optimal situation (no improvement needed) | Improvements happened in last 10 years | No information available | Not relevant |
|--|--|--|--|---|--------------------------|--------------|
| Exclusion from public health insurance coverage | | | | | | |
| Low supply/availability of healthcare services (including lack of means to cover out-of-pocket health costs) | | | | | | |
| Access to emergency care | | | | | | |
| Access to primary care | | | | | | |
| Access to ambulatory care | | | | | | |
| Access to perinatal/maternal care | | | | | | |
| Access to health-related information and legal recourse | | | | | | |
| Stakeholder participation in health policy making | | | | | | |
| Discrimination/antigypsims in healthcare (e.g. segregated services, forced sterilisation) | | | | | | |
| Low access to sexual/reproductive healthcare and family planning services | | | | | | |
| Low access to prenatal and postnatal care | | | | | | |
| Low access to vaccination | | | | | | |
| Other country specific issues (extend the table as needed) | | | | | | |

3.1. What has been done to ensure that Roma have equal access to public health care services as non-Roma?

Relevance:

- Core question for **C1 and C2** countries.
- Optional for other countries.

Brief context:

Access to health care services is arranged in different ways in different EU member states. Some make some services available only for persons having public or private health insurance or those ready to make out-of-pocket (co-)payments (e.g. for drugs or seeing a physician) – this might disfavour the Roma. Even where there is *de jure* universal coverage, *de facto* the amount and quality of services could vary with geographical location, social network or information about services and entitlements – to the detriment of the Roma. This could be represented e.g. as differences in time needed for emergency response, the number of specialists available or travel distance to the nearest ambulatory care unit or hospital or health

spending in areas with more than average Roma populations. Health policy makers taking equal access seriously should be actively engaged in reducing such differences.

Considerations:

- 3.1.1. Do Roma have equal health insurance coverage as non-Roma? Do Roma have equal access to private health insurance (if applies), can they afford out-of-pocket expenses (for drugs, fees, gratuity payments)? If not, what has been done by the government to identify the structural reasons for and to eliminate gaps and equalise access? Any efforts of Health Insurance companies to recruit clients from marginalised population – what they offer to attract them?
- 3.1.2. Is the supply of public health care services – especially, but not necessarily exclusively: pre- and postnatal care, preventive care (vaccinations, public health programmes), emergency care (response times by ambulance), access to a general practitioner (including average time/patient) and to ambulatory care - adequate in disadvantaged areas (municipalities, micro-regions, regions) with a higher than average concentration of Roma? If not, what has been done by the government to eliminate gaps?
- 3.1.3. Are there significant initiatives to provide patients, including Roma, with information on their rights regarding public health care services (including access, quality, confidentiality, etc.)? Is there adequate recourse if those rights are violated?
- 3.1.4. What has been done to improve the quality of the healthcare services used mostly by Roma?
- 3.1.5. Are there targeted measures to improve Roma's access to healthcare, such as health assistants, mediators, or information campaigns (particularly in disadvantaged areas with concentration of Roma or in segregated communities)?
- 3.1.6. What are the most critical issues relating health conditions of Roma population, such as diabetes, drug/alcohol abuse, smoking, obesity and others? Please investigate whether and how those problems are being addressed by the public health policy and services?

Sources of evidence:

- Relevant public information from past years, like annual statistics of the ministry in charge;
- Relevant reports and studies, especially from the webpage of the regulator of health insurance providers;
- Interviews with relevant civil servants (e.g. ombudspersons, patient right advocates, service providers);
- Concrete cases from the experience of NGOs.

3.2. What has been done to eliminate discrimination against Roma or manifestations of antigypsyism in health care?

Relevance:

- **Core** question for **all** countries.

Brief context:

Health care professionals (hospital managers, doctors, nurses, etc.) – most of whom are not Roma themselves, a potential issue in itself – are no way immune to stereotyping the Roma. Given the asymmetrical relationship between healthcare provider and patient, this can result in especially harmful behaviour: insufficient or inappropriate care or not informing the patient fully of his/her treatment options or not empowering him/her to make decisions for himself/herself.

Antigypsyism targets particularly against Roma women. They have been victims of state-supported sterilisation, often placed in segregated, sub-standard maternity wards and can face physical abuse and mistreatment by medical staff when attempting to access sexual and reproductive healthcare services. Roma women often do not access mobile health screenings or other health services, which are available for the mainstream population.

Considerations:

- 3.2.1. Are there initiatives to provide health care professionals with training to recognise and avoid discrimination against Roma or manifestations of antigypsyism? Are there processes of compensation launched for Roma women subjected to sterilisation?
- 3.2.2. Are there efficient mechanisms to file, investigate and conclude complaints if rights regarding public health care services are violated, including cases of discrimination or manifestations of antigypsyism? How many cases of discrimination against Roma in access to healthcare have been reported, investigated and sanctioned, e.g. by the equality body or by court?
- 3.2.3. Do false, stereotypical assumptions on Roma prevail amongst health care professionals, in health care policy documents and/or in the policy discourse?

Sources of evidence:

- Relevant public information from past years;
- Relevant reports and studies;
- National polls on antigypsyist stereotypes;
- Curricula of medical schools;
- Interviews with relevant civil servants and health professionals;
- Case descriptions of equal rights authorities;
- Concrete cases from the experience of NGOs.

3.3. *What has been done to address specific needs of specific groups with increased risks of vulnerability?*

Relevance:

- Optional question for all countries.

Brief context:

Gender or age subgroups, especially women and infants, children and youth might be exposed to special public health risks. E.g. given the worse-than-average social status of mothers, more Roma new-borns might need specialised help concerning early childhood development, or in countries where teenage pregnancy is more of an issue amongst the Roma than among the majority, targeted prevention efforts and help with that could be of importance. The presence or absence of public health efforts targeted at these groups, and, if there exist such programmes, their take-up and efficacy could be crucial.

Note that answers to this question may overlap with the section on specific policies for Roma women, children and youth in the governance chapter of the first monitoring report. Please make explicit reference to relevant parts of the first monitoring report. Repetitions should be avoided.

Considerations:

- 3.3.1. Are specific needs of specific groups including or largely overlapping with the Roma identified as a public health priority? Are public resources earmarked for addressing them?
- 3.3.2. Is the supply of specific public health care services for Roma women and children – such as prenatal and postnatal care, health visitor, gynaecologist and paediatrician – adequate in disadvantaged areas with relatively higher concentration of Roma? If not, what has been done by the government to eliminate gaps?
- 3.3.3. Are there significant initiatives to provide girls, including Roma girls, with knowledge on health literacy, including reproductive health? Given the sensitivity of the issues, are civil society actors, including Roma, involved in planning and implementing measures?
- 3.3.4. Are there significant initiatives to help marginalised communities, including marginalised Roma communities, in preventing and combating the use and spreading of drugs, especially inexpensive synthetic drugs?

Sources of evidence:

- Relevant public information from past years, like annual statistics of the ministry in charge;
- Interviews with relevant civil servants, e.g. health ministry officials;
- Interviews with cross-cutting NGO activities and concrete cases from the experience of NGOs.

Application of gender aspects in analysis of the health care policy

Situation analysis

In the field of health care, gender disaggregated data – or data about the situation of men/women – are available regarding many issues: there are obvious issues (e.g. maternity), but there are a lot of issues where gender is considered as significant (e.g. life-expectancy). When we find gender disaggregated data regarding the Roma population, it should be always compared with the corresponding figures of the whole society (or of the majority society), if possible. If the patterns are different, how can we explain it?

Antigypsyism in the society may be manifested in hostility towards the (allegedly high) fertility of Roma women/girls – this is present in some countries at different levels of political/public discourse, i.e. blaming Roma women that they have 'too many' children in order to 'exploit the welfare system' or to 'outnumber the majority'. Are there any signs of this hostility in field of healthcare: are there any discriminatory practices (e.g. segregated wards, verbal harassment) against Roma women in public maternity clinics? Moreover, are there any family support measures that disfavour Roma families who live in poverty?

Policy analysis

a. Concept of policies

Are there any measures addressing reproductive/sexual health issues? If yes, what is the aim of these programmes? E.g. to empower Roma women and men to exercise their reproductive/sexual health rights? Or rather to prevent early pregnancies or to discourage the fertility rates of Roma women/girls? In the case of the latter, is the targeted women's and girls' *right to dignity* (to be treated as a valuable individual) and the *right to respect of private and family life* (to be treated as someone who is entitled to make private life decisions) guaranteed?

In cases of measures targeting Roma girls/women – e.g. aimed at promoting family planning or maternity health –, are Romani boys/men addressed/involved also, in a way?

Are mainstream health measures sensitive, if relevant, to cultural issues (including gender/family roles in traditional Roma communities) – for example in the field of maternity care? E.g. are there any efforts by public maternity clinics to accommodate, if relevant, the needs of Roma families who would come to visit in larger numbers compared to the "average" mainstream families?

b. Implementation of policies

Do we have data about the number of men and women among the beneficiaries of 'gender-neutral' health programmes (i.e. aimed at improving the health situation of the Roma, regardless of gender)? If the proportion of male and female beneficiaries is not balanced, is there a legitimate justification for it? If not, what may be the explanation: structural issues, dynamics within Roma communities, traditional gender roles etc.?

4. Education

The success of the Europe 2020 strategy is determined by inclusion in education. The Framework identifies a clear goal for Roma education that each EU member state should achieve and develop in its own national integration strategies: “Ensure that all Roma children complete at least primary school”. In 2013, the Commission proposed a Council Recommendation to strengthen Roma inclusion efforts; EU member states should ensure that all Roma pupils complete at least compulsory education. This goal reflects the Council of Europe Recommendation on Roma education, which calls on EU member states to guarantee non-discriminatory access to quality education, provide quality early childhood education, reduce the number of early school leavers from secondary education. As the investments into the education are largely supported by the EU funding, the EC issued a [Guidance for Member States on the use of European Structural and Investment Funds in tackling educational and spatial segregation](#), which clearly says that the member states cannot use the EU funds for initiatives, which would maintain or reproduce the segregation in education.

In the most successful European educational systems, quality and equity are equally regarded. There is a consensus among education experts, practitioners and civil activists, that although situation of Roma improved, in all member states the educational outcomes of Roma students is much worse, than among the majority population. In our report, we want to focus on the mainstream education systems and find few critical points in the policies of the countries, which might have significant effect on the education of Roma. We would like to show, that well designed and efficiently implemented government policies, programmes and initiatives can develop results of the Roma children at schools and could support the whole education system and, in this way, the whole society.

The questions listed in this chapter are targeting just a few segments of this very complex service, but we must stay focused and keep the required length of this report. It is important to consider legislation, expenditure, access, participation and quality in the same time. We need to address the problems, but also find the promising approaches. Some of the questions are core and others optional; please report on the optional questions if they are relevant in your country to share. Especially if there is a good solution or practice you can show.

The following is a short list of useful sources on Roma education in Europe:

- FRA’s EU Minorities and Discrimination Survey ([EU MIDIS](#)) or 2011 [Roma Survey’s data](#)
- [Eurydice website](#)
- [OECD Education at a Glance](#) publications
- World Bank’s [Education Statistics](#)
- UNICEF’s webpage on [Education](#)
- [Roma Education Fund](#)’s website

At the beginning of the chapter, please, assess, what are the most critical issues relating education of Roma, and how have they developed throughout the past years, for example past decade? Please use the box as a checklist for further guidance. If some of the issues are scored as critical, please investigate whether and how those problems are being addressed and describe them in later parts this chapter. (*You do not have to tick the box, but rather provide few word narrative describing the situation. For example, you can discuss how the situation even worsened (provide evidence), or in case of improvement, specify the scope of the change: only very few improvements, improvements affecting a considerable share but still a minority of Roma, improvements affected the majority of Roma, more improvements happened than for the total population, etc.*)

| Problems and conditions | Critical situation (large majority is affected by the problem) | Average situation (a minority is affected, not more than in the general population) | Optimal situation (no improvement needed) | Improvements happened in last 10 years | No information available | Not relevant |
|---|--|--|--|---|--------------------------|--------------|
| Lack of available and accessible pre-school | | | | | | |

| | | | | | | |
|--|--|--|--|--|--|--|
| education and ECEC services for Roma | | | | | | |
| Lower quality of the pre-school education and ECEC services for Roma | | | | | | |
| Drop-outs before completion of primary education | | | | | | |
| Drop-outs before completion of compulsory education | | | | | | |
| Higher grade repetitions among Roma pupils in primary education | | | | | | |
| Early leaving from secondary education | | | | | | |
| Secondary education/vocational training disconnected from the labour market's needs | | | | | | |
| Misplacement of Roma pupils in special education | | | | | | |
| Segregation of Roma pupils in schools with only/majority of Roma | | | | | | |
| Segregation of Roma pupils in classes with only/majority of Roma | | | | | | |
| Increased selectivity of the educational system resulting in concentration of Roma or other disadvantaged pupils in educational facilities with lower quality | | | | | | |

4.1 *What has been done to improve access to and quality of early childhood education and care for Roma children?*

Relevance:

- **Core** question for **C1 and C2** countries.
- Optional for other countries.

Brief context:

The potential returns far exceed the costs of investment into early childhood education and care (ECEC). A huge body of literature demonstrates that these returns are significant, particularly when compared to equivalent investments made later in adult age. Investments in children's early years offer a cost-efficient way to produce a well-trained, capable workforce.¹⁰ Early childhood education is an important determinant of future life opportunities. Providing Roma children with an equal start in life compared with their non-Roma peers is essential to break the cycle of intergenerational transmission of poverty.¹¹

In the Roma Decade Action Plans, the target objective was that all children should have a minimum two years of preschool education and care. The EU-MIDIS II results show that only Spain (95%) and Hungary (91%) have participation rates that come close to the ET 2020 target (95%). Elsewhere, apart from Bulgaria (66%), less than half of the children aged (4-6) are participating in early childhood education. It is a great achievement, that an increase in participation rates in all countries, except Portugal and Romania is reported, but these rates are far below the general population rates. Access to early childhood services is arranged in many ways in Europe. In all member states, kindergarten provides education and half or full day care for children three to six years old.¹²

¹⁰ http://jenni.uchicago.edu/papers/Heckman_Masterov_RAE_2007_v29_n3.pdf

¹¹ FRA report 2016

¹² <https://webgate.ec.europa.eu/fpfis/mwikis/eurydice/index.php/Countries> collects information on national education systems.

Considerations:

4.1.1. What has been done to ensure that all Roma children are enrolled to kindergarten at least for two years? Are there enough places also in marginalised areas? What has been done to increase the number of public kindergarten places overall? Are the group sizes in poor neighbourhoods following the standards? Are there alternative/civil/church kindergarten programmes available? Does the civil society provide ECEC programmes for Roma/poor children? What happens with those kids who could not be enrolled because of lack of places in kindergarten?

If kindergarten is not compulsory in your country, describe the different solutions for children age 3-6. Please mind cost, length of service, transportation, group composition and pedagogical approaches.

4.1.2. Teachers are the backbone of education. Are there enough qualified kindergarten teachers in your country? Is their higher education training considering the new demands? Are they prepared to work in multicultural groups? Do they know how to work with kids with different mother tongue? How are language barriers addressed? Does the state provide regular teacher training opportunities for them? Does the state or region maintain inspection in kindergarten? Are the results available for the parents and for the public? Is it ensured that the environment and the equipment is adequate? Are the parents involved in the life of the kindergarten?

4.1.3. Are there explicit costs (e.g. fee) and implicit costs (e.g. paying for extra programmes, buying equipment) in the kindergarten? How are poor families supported if they cannot afford these costs? Is meal provided for the children? Is the cost to be paid by the parents for the meal lowered for disadvantaged families? Are there programmes or policies that address other barriers the family or child might face?

4.1.4. Are there any strategies and measures targeting children's parents and families aimed at involvement of parents in pre-school education, elimination of diverse barriers the family or children might face, addressing the issue of trust towards majority society child care, risks for – and fear of – racist abuse and assimilation strategies by staff? Are there efforts to support Roma mothers, who can be socially stigmatised for leaving their children to public child care? Have Roma women participated in setting up these strategies and measures?

Sources of evidence:

- Relevant public information from past years, like annual statistics of the ministry, or municipality in charge;
- Relevant reports and studies (e.g. [Eurydice country reports](#));
- Interviews with relevant civil servants, local education authorities, including principals, and kindergarten pedagogues;
- Focus group with Roma parents and their children
- Concrete cases from the experience of NGOs
- Studies of the World Bank, UNICEF. RECI report of OSI, REF and UNICEF.

4.2 *What has been done to improve access to and quality of primary and secondary school for Roma children, until the end of compulsory school age?*

Relevance:

- **Core** question for **all** countries.

Brief context:

All children who fall under the age named as “compulsory schooling age” are obliged by law to attend school. There are countries in Europe where almost all Roma children, who should be in education, attend school.¹³ In some other countries the enrolment rate is much lower. However, overall compared with the 2011 Roma survey, now enrolment rates for compulsory schooling in most countries are slightly higher.

¹³ FRA 2016 Report

Nonetheless, the participation rates do not show the complete picture. Apart from 'participating' in compulsory education, it is important that children attend school at the level corresponding to their age. Equally important, that students receive quality education despite their economic situation.

In some countries students' socio-economic status explains a significant share of the variation in their performance in the core subjects assessed in PISA 2015 (for science, 12.9% of the variation in student performance within each country is associated with socio-economic status). While socio-economic status remains a strong predictor of performance in many countries, another consistent finding is that poverty is not a destiny. Many disadvantaged students succeed in school.¹⁴ Ensuring high standards across schools is a challenge for all school systems. Some performance differences between schools may be related to the socio-economic composition of the school's student population, less qualified teacher staff, bigger fluctuation, etc. In some countries high level of residential segregation, based on income or on cultural or ethnic background, often causes inequalities in the quantity and quality of resources. Performance differences among schools can also be related to the design of school systems and system-level education policies, such as differences in the degree of autonomy granted to schools, and to policies emphasising greater competition for students among schools and greater school choice. Disadvantaged students generally have been shown to benefit from sharing school and classrooms with more privileged peers. Research using PISA data from 2009 has proved that a small number of countries maintain effective, socio-economically and ethnically integrated schools, where achievement of disadvantaged students does not affect negatively the outcomes of advantaged students.¹⁵ Education systems with small between-school differences in performance tend to be those that are comprehensive, meaning that they do not sort students by programme or ability. Other systems are trying to meet different needs of students or families by creating different tracks or pathways through education and inviting students to choose among them at an earlier or later age tend to show larger between-school variations and a greater impact of social background on learning outcomes.

Considerations:

- 4.2.1. What has been done to ensure that all Roma children are enrolled to primary school? Are there highly qualified teachers in schools and classes with high share of disadvantaged children? Are there specific programmes to prepare teachers in these schools and to attract and keep best prepared teachers in these schools? There are countries where, according to ERRC (2016), a huge percentage of Roma children are not in school and local authorities are deliberately blocking their enrolment. What is the situation in your locality, country, region?
- 4.2.2. Are there policies or programmes that are targeted to support disadvantaged students overcome structural, social, and economic barriers to educational success? What has been done to reduce the gap in education outcomes besides access to schools and quality of education? Such measure can include Roma mediators, tutoring, mentoring, personalised instruction or other support to Roma pupils.
- 4.2.3. How are grade repetitions avoided? Are there data on grade repetitions of disadvantaged or Roma children, preferably also separately for boys and girls?
- 4.2.4. A significant amount of Roma girls who enrol in school leave for early marriage and household responsibilities. What is being done to stimulate Roma girls (and their families) to complete at least the primary education?
- 4.2.5. Early school leavers are those aged 18-24 with at most lower secondary education and not in further education or training. What has been done to fight early-school leaving among Roma, especially Roma girls?
- 4.2.6. Does the state or region maintain inspection in schools? For low performing schools are development programmes available? Are the results accessible for the parents and for the public?
- 4.2.7. The most effective support for disadvantaged schools is to work with high-quality teachers. Is there a regular, compulsory training system for in-practice training for teachers? Are there opportunities for teachers to learn the use of efficient pedagogy (e. g. competence-based, cooperative, differentiated, activity- and student-centred methods) or specifically on working with marginalised and disadvantaged students? Are there relevant financial and career incentives available to attract and retain high quality teachers in disadvantaged schools?

¹⁴ PISA 2015

¹⁵ Montt, 2016

- 4.2.8. Are schools cooperating with parents and communities? Impoverished parents tend to be less involved in their children's schooling for multiple financial and social reasons. Are disadvantaged schools supported to be able to build links with parents? Are there examples of schools building links to their local communities?

Sources of evidence:

- Relevant public information from past years, like annual statistics of the ministry, municipality in charge;
- Relevant reports and studies (e.g. [PISA reports](#) evaluating students' performance in countries, [OECD Education at a Glance](#), [Eurydice country reports](#));
- Interviews with relevant civil servants, local education authorities, including principals, and teachers;
- Focus group with Roma parents and their children.

4.3 *What has been done to increase the share of Roma youngsters completing vocational training in professions with high labour market demand, upper secondary school and higher education?*

Relevance:

- Core question for **C1, C2 and C3** countries.
- Optional for C4 countries.

Brief context:

The most important mission of education systems is to avoid student failure. Grade repetition is one of the most painful results of the failure of the teacher, of the school and of the children and their families. Grade repetition is costly for the state budget and ineffective from a pedagogical perspective. It is clear, that grade repetition is not a proper tool for improving educational outcomes.¹⁶

Alternative strategies to support students' successfully completion of secondary education include after-school centres, extracurricular learning clubs, scholarships, tutoring, mentoring, peer-learning activities, and addressing learning gaps during the school year or during school breaks. Many countries started career guidance and early linking to practicing opportunities at private or public business. These supporting programmes might be temporary or long lasting, project based, or policy related. In some countries public schools themselves are providing these extra services. In other countries Roma or pro-Roma organisations are active and successful in providing these or similar services.

A systematic response exists in some countries: automatic promotion, limiting repetition to subjects or modules failed that are addressed with targeted support. There is a need for complementary policies to achieve school success and avoid grade repetition, such as changing the school's cultural support for grade repetition and strengthening schools and teachers' capacities to respond appropriately to students' learning needs and provide early, regular and timely support.

The students repeating grades are older than their peers, and they are at greater risk of leaving school early. This is true especially in the case of boys, who face greater risks of repeating grades and leaving school early. But Roma girls are also in high risk of early school leaving; their causes might differ from the boys'. Students with the least opportunities – coming from poverty and compounding disadvantages – are most likely to repeat grades and leave school early. These are the fact in the case of Roma children. This means lost opportunities for children, especially the poorest, as well as unfulfilled investments made by their families and governments.

Considerations:

- 4.3.1. What has been done to avoid early determination of school career (early tracking)? The [EC's 2018 Country Specific Recommendations](#) and related [2018 European Semester Country Reports](#) for several countries pointed out that distribution of disadvantaged pupils between schools is uneven, and Roma children increasingly attend Roma-majority schools and classes in many of the countries. Does segregation exist in your countries? Are Roma segregated? Are other

¹⁶ http://uis.unesco.org/sites/default/files/documents/opportunities-lost-the-impact-of-grade-repetition-and-early-school-leaving-en_0.pdf

minority groups segregated as well? If asylum-seekers or other migrants are arriving in significant numbers in your country, are they facing similar segregation?

- 4.3.3. What tools are there to support the secondary education of youngsters from disadvantaged families (e.g. scholarships, tutorial programmes)? Are these tools effective? Is there any after-school or informal education support provided to Roma pupils/students? What are the additional pedagogical-educational tools used in the schools? List those please, e.g. additional tutorial classes, after school hours programmes, weekend classes, language classes, bridge-classes, mentors, peer learning activities, summer learning camps, etc. Where are the funds coming from (EU, state, private, church, other)?
- 4.3.4. What has been done to promote Roma participation in vocational education? Is the gap between Roma and non-Roma youngsters completing vocational training in professions with high labour market demand, upper secondary school and higher education narrowing? Are data available on the completion of these education levels?
- 4.3.5. Are there additional education services available for Roma students in upper secondary vocational or academic schools? Are there dormitories, or other housing services provided for the students coming from poor families, from small villages? Is there financial support, like free book, free meal, free public transportation available for the disadvantaged students? Are there scholarships opportunities provided for the students?
- 4.3.6. Are there second chance programmes available for the Roma youngsters? Has been anything done to encourage their participation in adult education? Is there a comprehensive strategy existing in your country including targeted measures on language skills, upskilling and training, job counselling and other targeted basic skill development activities for dropped out youngsters and adults? Is there an initial mainstream vocational education and training system, specifically when school based, sufficiently linked to employment opportunities? Do you have affirmative measures for women? Are these programmes available for the Roma groups?
- 4.3.7. If in your country vocational education and training is based on dual concept? In some countries there is a special way of learning a trade: the [Dual vocational training system](#). As part of the dual system, students attend classes at a vocational school and receive on-the-job training at a company. Are places at companies open for Roma students? Was discrimination experienced at the on-the-job opportunities for Roma? Is there affirmative action in place for the Roma students to ensure their practicing places? Is the state/region or the NGO sector involved in this procedure?
- 4.3.8. What has been done to promote Roma participation in upper secondary and higher (university) education (e.g. active recruiting of Roma students, scholarships, tutorial programmes)?

Sources of evidence:

- Relevant public information from past years, like annual statistics of the ministry, employment offices;
- Relevant reports and studies (e.g. WB, [PISA](#), [OECD Education at a Glance](#), [Eurydice country reports](#));
- Interviews with relevant civil servants, national education authorities, trade union leaders, training providers;
- Interviews with non-governmental service providers;
- Focus group with Roma parents and their children

4.4 *What has been done to prevent and eliminate various forms of discrimination and antigypsyism in education; in particular to tackle the segregation in education?*

Relevance:

- **Core** question for **all** countries.

Brief context:

The 2013 Council Recommendation requires the elimination of discrimination and any forms of school segregation. Official statistics on school segregation do not exist, but number of researches and studies target it. Despite the several European and national legal measures educational discrimination against

Roma is high in all countries. We welcomed the decision of the Grand Chamber of the European Court of Human Rights which acknowledged that the enrolment of Roma kids into special schools was contrary to the right to an education coupled with the prohibition on discrimination.

In the last decades we experience different periods of anti-discrimination measures. Some governments start anti-discrimination programmes, and achievements are visible in few years, but a new government modifies the policy; sometimes for the good, sometimes for the worst. But after the Decade it is obvious that patience, enough time is needed for successful anti-discrimination in education. There are several examples of discrimination and segregation in schools in almost all countries and target not just Roma, but other minorities or not welcomed children in schools. Special schools, Roma-only schools, classes, private or religious-run schools, private student status, low level training, etc., are widespread practices and in many countries “norms” for policy makers and practitioners.

The lack of inclusion of Roma history, language, literature and culture into school curricula as well as the lack of initiatives to prevent hate-speech and hate-crime is considered systemic antygypsyism. Therefore, it is very important to look at those and other silences that are relevant in the context of your country; also point out promising practices that could be promoted, further strengthened or multiplied. (Please, avoid repetition from the first-year report – if no new information provided, just refer to the first-year report.)

Considerations:

- 4.4.1. Is there a national map or database of segregated schools? Is data collected by officials, academics or civils on discrimination against Roma in education? Are researches available on educational segregation?
- 4.4.2. Segregated education is sometimes presented by authorities as “temporary solution” to address increased demand for places in education facilities, or to improve access of pupils from segregated communities to education. However, such solutions only worsen their situation and chances for success, as they barely meet their peers from the mainstream society and the quality of education in segregated schools is usually significantly worse. What are the methods of segregation in your country? such Are so called “temporary solutions” in place in your country? If yes, are there any genuine attempts to desegregate education? Are container schools, camp schools, etc. tools for segregation everywhere, or do you have experience of situations where such methods are just temporarily exceptional? Does the church or private school system promote segregation in your country?
- 4.4.3. Providing that parental choice can result in segregating students by social background and alleged ability, we experience that unlimited choice programmes can have negative effects on equity in education in Europe. Are there comprehensive, systemic measures to control parental choice and motivate schools to enrol students from disadvantaged backgrounds? Is the white flight phenomenon existing in your region/locality?
- 4.4.4. Is there effective national legislation, policy and funding to eliminate educational segregation? Are there measures on school and class composition? Has the central, regional or local government right or practical tools to stop local segregation? The school inspection is evaluating class composition? Are they involved in detection of discriminatory cases? Do they report segregation?
- 4.4.5. Are there any initiatives to raise public awareness of discrimination in education? Is the media interested in such cases? Are well-known journalists working on discriminatory cases?
- 4.4.6. Do Roma pupils and students experience discrimination or antigypsyism within schools (by students, teachers, parents, and so on) and within the educational system (by principles, local administrators, local and national decision makers)? Such discriminatory behaviour can include also obtaining lower quality of education compared to non-Roma pupils or students within the same school or other disadvantaging practices. How many cases of discrimination against Roma have been reported, investigated and sanctioned, e.g. by the equality body or by court? Were students or parents actively involved in these cases or their experience from discrimination and racism collected? Are advocacy organisations initiating such investigations? Is a child/student ombudsman position or something similar existing in your country? Does a Student Parliament or something similar exist in your country? Do they have anti-discrimination thematic? Are parental associations/parental school groups involved in anti-discrimination?

- 4.4.7. Are there any measures to analyse and address specific barriers to education for young Roma women, e.g. not being allowed to socialise or travel on their own, responsibilities for children and the elderly and other domestic duties?
- 4.4.8. Do school curricula include Roma history, genocide and resistance, literature and culture? Are there any initiatives to include these in school curricula? Are there any initiatives targeting teachers, parents or/and children (trainings or similar) to prevent racist including antigypsyist acts (hate speech and hate-crimes)?
- 4.4.9. Do school curricula include anti-discrimination, anti-racism, anti-prejudice elements, human rights and active citizenship? Do future teachers do learn about problems of discrimination, segregation and antigypsyism? Are there effective training model programmes for teachers how to change discriminatory attitudes? Can principals learn about discrimination and measures to avoid it? Are there good practices of parental involvement in anti-discriminatory measures in schools?

Sources of evidence:

- Relevant statistics and public information from past years;
- Relevant cases from reliable media;
- Recent researches, academic publications, reports by Ombudspersons, advocacy organisations;
- Interviews with advocacy organisations and their clients;
- Report on concrete cases from the ground, especially failures of local or national policies.
- Direct quotations from Roma experiencing different forms of discrimination in education or good practices.

Application of gender aspects in analysis of the education policy

Situation analysis

Gender disaggregated data (either official statistics or data generated by quantitative social science research) is essential to understand the situation in the field of education. If this kind of data is not available, estimations or observations by experts/NGOs may be also useful.

When we find significant differences between the situation of Roma girls-boys/women-men, it is important to look at the context, and to look for explanations: Are these differences similar to the patterns of the mainstream society? Are the gender differences caused by structural forms of discrimination? What is the role of the internal dynamics and the traditions of different Roma communities?

While the special issues of Roma girls/women affecting their education (e.g. early pregnancy, increased care responsibilities in the family) may be more obvious, Roma boys/men can have special issues as well. Notably, according to traditional gender roles, men are expected to be the breadwinners of the family, thus boys may leave the education system too early – to enter the labour market as soon as possible.

Moreover, nowadays the concept of masculinity is changing in the society, and in the cases of traditional communities, it may be challenging to adapt to these tendencies (e.g. not to limit the training options for boys to traditional men's occupations).

Policy analysis

a. Concept of policies

Besides measures that are aimed at improving the institutional settings of education for the Roma (e.g. desegregation programmes), are there any state-supported education initiatives that are targeting individuals (i.e. pupils/students, families), and if yes, do these take into gender aspects? For example, are there any mentoring projects for Roma/disadvantaged girls?

The (re)integration of girls/women with young children into the education system is a complex task, and should be addressed rather by national (mainstream) public education strategies, and not by Roma integration strategies (even if Roma girls/women are overrepresented in this group). The question is whether these arrangements, if there are any, are accessible for Roma girls/women or not?

b. Implementation of policies

It is important to monitor whether gender-neutral education measures are equally accessible and beneficial for girls and boy (women and men) or not – e.g. to find data about the proportion of girls-boys/women-men who were given scholarships or graduated from certain programmes.

Comprehensive local case studies (Cluster 1 countries)

Civil society monitoring reports of each **Cluster 1 country** should include at least 3-4 comprehensive local case studies. This means at least **1-2 local case study per country each year**.

The aim of the comprehensive local case studies is to improve the understanding of the local level implementation of the national Roma integration strategy or certain mainstream policies with significant impact on Roma. They should be analytical papers, helping to answer questions like which measures are working on the ground more effectively and which less effectively, why these measures work like that, how could these measures work better.

The local case studies should be separate chapters of the reports. The local case study can have a thematic focus; however, its scope should include various policy fields, and the links between them. The length of a local case study should be around 4-5 pages.

Also, the thematic chapters should include evidence from the ground, e.g. through description of several local cases and experiences. The difference between a description of a local case or experience as part of a thematic chapter and a comprehensive local case study as a separate chapter is twofold. First, regarding scope, the description of a local case should be focused on a single issue, while the comprehensive local case study should explore links between various fields. Second, regarding length, the description of a local case can be e.g. one paragraph, while the comprehensive local case study can be around 4-5 pages.

Both the description of several local cases and experiences as part of a thematic chapter and the group of comprehensive local case studies as separate chapters should allow also comparative analysis identifying major differences between local practices, highlighting how the policy environment varies and/or what policy choices are available within a particular country. Lack of major differences in a country may also have a lesson, indicating strong homogenising forces of central policies or structural conditions spread across the country.

Selection of localities

A locality can be e.g. a district of a city, or a town, or a group of neighbouring villages.

Localities should be selected based on the following criteria:

- The locality **offers improved understanding of the local level implementation of the national Roma integration strategy or certain mainstream policies with significant impact on Roma**. This can be e.g. where there are specific measures implemented in the locality, or there are specific measures that would be needed to be implemented in the locality (where measures fail, it is important to go beyond stating that they fail, and analyse why they fail), or there is a specific local strategy adopted and at least partially implemented by the municipality.
- At least one NGO in the coalition has field **experience** in the locality, or at least some **preliminary knowledge** of the locality.
- Selected localities have some diversity, e.g. in terms of size and socio-economic situation (e.g. urban / rural, more developed / less developed) of the locality, size and socio-economic situation (e.g. integrated / segregated) of the local Roma community, relevant policy fields, etc.

Suggested localities should be listed and characterised in the following table:

| Name of the locality | What specific measures are implemented in the locality? Is there a specific local strategy adopted by the municipality? | Which NGO has field experience or some preliminary knowledge of the locality? | Size and socio-economic situation (urban / rural, more developed / less developed) of the locality | Size and socio-economic situation (integrated / segregated) of the local Roma community |
|----------------------|--|---|--|---|
| | | | | |

The coalition should suggest localities for local case studies and justify the proposal. CEU should approve the proposal or ask for modification of case selection.

Methodology

The local case study should analyse especially **how and why the local level implementation of the relevant policies have or have not contributed to the desired changes.**

Where relevant, the analysis should cover both the local level implementation of national policies and the implementation of local policies, and the **relation between national and local policies.** There are significant differences between countries – e.g. education is dominated by national policies in some countries and by local policies in other countries –, the focus of the analysis should be accordingly.

The analysis in the local case study should be based mainly on

- If possible, field experience of NGOs in the coalition;
- Interviews or group discussions with a broad range of stakeholders, including
 - members of the Roma community (e.g. at least 8-10 persons in a locality),
 - other NGOs,
 - service providers (e.g. field social worker, school principal, leader of the relevant employment office, general practitioner and nurse),
 - authorities (e.g. municipal leader, leader of the relevant government office, police officer), etc.
- Secondary analysis of available data, studies, etc. Where part of the local case study has been covered by a recent, relevant study, that part shouldn't be repeated, just the relevant findings of the study should be cited.

Structure of the local case study

The local case study should have a title indicating the name of the locality and where relevant the thematic focus(es), and should include

- A concise **executive summary** (around half page).
- A brief description on the **sources of evidence** used, e.g. what field experience was used, how many and what type of interviews and group discussions were made (1-2 paragraphs).
- A brief **introduction** describing the locality and the Roma community, main changes in the past, explicit explanation of the relevance of the locality for improved understanding of the local level implementation of the national Roma integration strategy or certain mainstream policies with significant impact on Roma (around half page).
- Analysis of **three or four of the following** fields (between around half page and one page per relevant field):
 - local level governance (e.g. Roma participation and empowerment, building trust, openness for learning from failure),
 - fighting local cases of discrimination,
 - addressing local cases of antigypsyism,
 - measures addressing major challenges in education (e.g. access to early childhood education services, de-segregation, quality of education),
 - measures improving access to employment (e.g. 'whitening' informal employment, individualised employment services, public works),
 - measures addressing major challenges of health care (e.g. access to services, specific challenges such as drugs),
 - measures addressing major challenges of housing (e.g. de-segregation, quality of housing, affordability, debt-management or (threats) of forced evictions),
 - targeting of specific groups such as women and children,
 - integrated (interconnected) planning and implementation of policies in diverse fields.
- **Conclusions**, where relevant **recommendations** (around half page).
- Map(s), optionally a few relevant pictures.

