

ROMA POVERTY IN BULGARIA: HOW TO UNDERSTAND IT AND WHAT TO DO ABOUT IT?¹

Andrey Ivanov

The analysis and views contained in this paper do not necessarily reflect the official position of the European Union Agency for Fundamental Rights.

Fundamental Rights Agency

andrey.ivanov@fra.europa.eu

***Abstract.** The article analyzes the issue of Roma poverty and the possible ways for its quantification. In the introductory part, the author presents the basic concepts and approaches to the definition of poverty, then applies them to the Roma using the data on the status of Roma households from surveys conducted by UNDP, the World Bank and the European Commission. The author concludes that multidimensional indicators are more appropriate for tracking the multi-dimensional phenomenon of Roma poverty. In the third part the article tests an indicator that integrates the main aspects of Roma poverty and allows for highlighting the quantitative contribution of each dimension of deprivation to the overall „poverty and social exclusion outcome.“ The author concludes that the proposed method is particularly relevant for the purposes of current policies aimed to tackle poverty among the Roma.*

Key words: Roma inclusion, marginalised groups, poverty monitoring.

INTRODUCTION

In the last two decades, the term “poverty” has become colloquial to the term “Gypsy”, or “Roma”, the accepted name for these communities. The definitional change was an attempt to escape the pejorative connotations of “Gypsy”, which has gained the firm associations with an “underclass”. Almost a decade ago, the decrease of Roma poverty has been put on governments’ political agendas and formulated as an explicit commitment of the countries participating in the Decade of Roma Inclusion. The EC later joined in with its EU Framework of Roma inclusion, putting additional political weight behind the attempts to lift Roma out of poverty.

It is unclear, however, what poverty we are talking about. “What is poverty?” is apparently an easy question, but its simplicity is misleading. This apparent simplicity often drives researchers, activists and policy makers into equally simplistic schemes for addressing the issue.

The current analysis defines the Roma poverty in broader terms.² Using the data from the regional surveys among Roma communities at risk of marginalisation and

¹ This article was translated by Mr. Aleksandar Ivanov.

² This article applies the analytical framework elaborated in the regional study on Roma poverty and its human aspects to the case of Bulgaria. See Ivanov, Andrey; Kagin, Justin. (2014). Roma poverty in a human development perspective. Roma Inclusion Working Papers. Bratislava: UNDP (forthcoming). The author is grateful to Julia Georgieva, Jaroslav Kling and Alexander Ivanov for assistance provided in the preparation of materials and data analysis.

their non-Roma neighbours in Central and Eastern Europe, the analysis tries to go beyond the intuitive understanding of the issue. The adequate definition (similarly to an adequate diagnosis) is a precondition for an adequate intervention. This is particularly important today, in the wake of the new programming period of the European Commission, when the resources devoted for addressing Roma poverty will be larger in an order of magnitude – and thus the potential for possible damage due to misled policies.

SOURCES AND CONSTRAINTS OF THIS RESEARCH

“There are no quantitative data on the situation of Roma households” is a popularly held view, yet untrue as there is plenty of data. What is missing, however, is comparability and methodological consistency – studies rarely use the same (or similar enough) methodology and tools. Data from different „Roma“ surveys is rarely comparable, both across individual surveys and between those and the standardised statistical tools such household budget surveys, or labour force surveys.

A major source of ethnically-disaggregated data is the population census. Despite the fact that Roma tend to underreport their ethnic identity, 325 343 Bulgarian citizens self-identified as “Roma” in the 2011 population census,³ making it the third largest community in Bulgaria, coming right after the Bulgarian and Turkish ones. More than a half of the members of the Roma ethnic community live in urban areas (55.4%).

Still, census data is not sufficient for in-depth analysis of the status of Roma and its determinants. There is no Roma sample in LFS, or HBS, which is why the necessary data on the status of Roma is being generated through custom surveys. Bulgaria is privileged in this respect as it is among the few countries where detailed surveys of Roma households are being periodically conducted and the results, as well as the methodology and questionnaires, are publicly available. A good example in that regard is the surveys of the Open Society Foundation.⁴

The current analysis, however, is based on the data set of the surveys of UNDP (from 2004) and UNDP/WB/EC (2011)⁵ of the Roma households at risk of marginalisation and non-Roma living in close proximity. There are several reasons for that. First, the data are comparable for all countries of Central and Eastern Europe, which allows such an analysis to be made for those countries as well. Second, the analysis refers to a number of in-depth thematic regional studies based on the same data set, which provide extra depth and insights into the sector-specific dimensions.⁶ Third, the

³ NSI, 2011 population census, http://www.nsi.bg/census2011/PDOCS2/Census2011_ethnos.xls

⁴ Open Data, <http://opendata.bg/opendata.php?q=7&s=7>

⁵ The survey of 2004 was prepared and implemented by UNDP. The survey of 2011 was implemented jointly by UNDP, the World Bank and the European Commission, Directorate General “Regional and Urban Policy”.

⁶ The data base is accessible from the UNDP web-site, <http://www.undp.org/content/rbec/en/home/ourwork/povertyreduction/roma-in-central-and-southeast-europe/>