

## PROJECT BRIEF

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### Faces and Causes of Marginalization of the Roma in Local Settings: Hungary – Romania -- Serbia

#### Contextual inquiry to the UNDP/FRA Regional Roma Survey 2011 in CEE and SEE

October 2012 – April 2014

A joint initiative of the **United Nations Development Programme Bratislava Regional Center**, the **Roma Initiatives Office** and the **Making the Most of EU Funds for Roma** program of the Open Society Foundations, and the **Central European University/Center for Policy Studies**.

#### Background

Multilateral discussions by the UNDP BRC office and two OSF programs, as actors closely engaged in shaping European policy debates and knowledge on the Roma, acknowledged that a *contextual inquiry* on the key factors perpetuating Roma marginalization at the *municipal and community level* will enhance the value and the exploratory power of the 2011 household surveys of the United Nations Development Programme (UNDP) and the European Union's Agency for Fundamental Rights (FRA). These discussions were informed by a wider acknowledgement among experts and analysts that without knowledge on and tools to transform the local policy spaces, the European and domestic developmental instruments will fail to deliver the desired inclusion policy results. Backed by experts from Central European University in Budapest, continued discussions resulted in a broader conceptual frame for a contextual inquiry targeting Central European and South-East European regions.

The Regional Roma Survey 2011 was a joint endeavour of the UNDP and FRA with the support of the World Bank (WB) and the European Commission. Two complementary surveys were carried out with the aim of mapping the current socio-economic situation of Roma *households* in select EU and non-EU countries. Both surveys included a common core component addressing key questions of education, employment, housing, health, free movement and migration issues, and discrimination experiences. The UNDP survey focused on social and economic development aspects and the FRA survey on the fulfilment of key fundamental rights. The surveys applied the same sampling methodology in countries of overlap allowing for the development of a common dataset on core indicators. See more on the survey and the results:

<http://europeandcis.undp.org/ourwork/roma/show/D69F01FE-F203-1EE9-B45121B12A557E1B#ROMAexplore>

<http://europeandcis.undp.org/publications/#roma>

[http://fra.europa.eu/sites/default/files/fra\\_uploads/2099-FRA-2012-Roma-at-a-glance\\_EN.pdf](http://fra.europa.eu/sites/default/files/fra_uploads/2099-FRA-2012-Roma-at-a-glance_EN.pdf)

#### The contextual inquiry

The inquiry explores the economic, political, demographic, and social forces at municipal and community level which shape practices and consequences of social exclusion and potential pathways to inclusion. Experts of the UNDP BRC and the Center for Policy Studies at the CEU lead the initiative to which two thematic programs of OSF, the Roma Initiatives Office and the Making the Most of EU Funds for Roma program are providing joint support.

The contextual research consists of three main parts:

- ❖ **Part 1** collects statistical data in 12 countries to provide a detailed mapping of the institutional, political, economic conditions of municipalities that shape the household's access to services in education, labor market participation and opportunities in participating in public life.
- ❖ **Part 2** focuses on a representative sample of municipalities (20-30 per country) in Hungary, Romania, and Serbia to explore basic local social services and infrastructure provisions, conditions of political

participation of the Roma, and local interventions targeting Roma inclusion. The research phase relies on structured field research collecting both quantitative and qualitative data.

- ❖ **Part 3** targets 5-6 municipalities in the three countries to explore the dynamics of inter-ethnic relations at local level in the social, economic, political, and cultural domains explaining the faces of Roma exclusion and the potential pathways to inclusion.

### Objectives

- ❖ To describe varying degrees and faces of marginalization of the Roma within and across select countries and portray the diversity of the observed regions (SEE and CEE);
- ❖ To explore how marginalization is produced by the various forms of institutional discrimination within the local economic, social, and political structures;
- ❖ To investigate patterns of inter-ethnic relations in certain major areas of public life to better understand the limits and potentials of inclusion efforts;
- ❖ To contribute to the development of a methodology for regularly monitoring local-level Roma exclusion/inclusion changes;
- ❖ To experiment on an inclusive research method that involves Roma scholars and civil society leaders in designing and implementing research; and
- ❖ To contribute to developing a self-monitoring methodology for multiethnic local communities on social exclusion and inclusion processes.

### Expected outcomes

- ❖ A comprehensive and comparative dataset on the communities with marginalized Roma neighborhoods in selected countries of CEE and SEE;
- ❖ A comparative report on Roma marginalization in CEE and SEE that relies on both the UNDP/FRA survey and the contextual research results;
- ❖ Reflected experiences of inclusive research practices potentially informing the construction of a local monitoring infrastructure in the region; and
- ❖ Experienced teams of Roma and non-Roma researchers ready to assist self-monitoring exercises of local communities and municipalities on their exclusion problems and inclusion objectives.

### Implementing partners

- ❖ Conceptual design and comparative analysis is carried out by the Center for Policy Studies at Central European University (Budapest). Team members: **Júlia Szalai** (Principal Investigator), **Viola Zentai**
- ❖ *Phase 1* is coordinated by the UNDP BRC (Bratislava). Team members: **Andrey Ivanov**, **Jaroslav Kling**

The *fieldwork in Phase 2 and 3* is carried out in cooperation with three institutions:

- ❖ Research Centre for Economic and Regional Studies, Hungarian Academy of Sciences (Budapest, Hungary), coordinating Phase 2. Team leader: **Katalin Kovács**
- ❖ Desiré Foundation (Cluj, Romania), coordinating Phase 3. Team leader: **Enikő Vincze**
- ❖ Belgrade University (Belgrade, Serbia). Team leader: **Slobodan Cvejić**

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